



# Oracle Taleo Enterprise Edition

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## Using Scheduling Center

**21B**



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# Preface

This preface introduces information sources that can help you use the application and this guide.

## Oracle Applications Guides

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.oracle.com/>.

## Documentation Accessibility

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# 1 Getting Started

## Overview

### Scheduling Center

The Scheduling Center is a product used with Recruiting to handle automated and high volume scheduling of candidates.

This add-on scheduling functionality allows users to schedule any number of screening functions for candidates, including but not limited to:

- job fair or campus appointments
- mass recruitment events
- interviews

The Scheduling Center facilitates the scheduling of these functions through the creation and management of calendars, which are populated with timeslots, into which candidates can schedule appointments. The Scheduling Center sends follow-up invitations (triggered through the candidate selection workflow) and reminder emails and records status messages in the candidate file each time a candidate performs a scheduling activity. The Scheduling Center displays a calendar view for users showing the resulting timetables of which invites are scheduled for each time slot on each day. The Scheduling Center sends email messages to candidates requesting them to schedule an appointment. It also sends emails confirming appointments and reminding candidates about their scheduled appointments.

The Scheduling Center screening service is available in two types of integration:

- **Self-service:** This integration type is supplied with all applications. In this type, an initial invitation email is sent to the candidate. Emails sent at the different phases of the workflow are controlled through candidate permissions set at the calendar level. The employer (recruiter) is able to manage the appointments of a candidate only if the candidate has logged in to the Scheduling Center at least once.
- **Proctored:** This integration type is optional and must be activated by Oracle Support. In this type, no initial invitation email is sent to the candidate. Emails sent at the different phases of the workflow are controlled through candidate permissions set at the calendar level. The employer (recruiter) can manage the appointments of a candidate even if the candidate has not logged into the Scheduling Center.

Although two types of integrations exist for the Scheduling Center, both types are configured, activated and used the same way.

# Login and Product Access

## Login Procedure

When users open the Oracle Taleo Enterprise Edition solution, the User Sign In page is typically displayed.

On the Sign In page, users can select the language in which they want to use the application. If users change the default language on the Sign In page, the page is displayed in the new language and subsequent Oracle Taleo Enterprise Edition product pages are presented in that language. After selecting a language, users can also instruct the system to "remember" their selection so that the next time they sign in, the User Sign In page will be presented in the language they selected.

If single sign-on (SSO) is not enabled within an organization, users must enter a user name and password on the user Sign In page. The user name and password are provided by system administrators. Users can modify their password. If SSO was configured through a consulting engagement (which requires a statement of work (SOW)), the Sign In page is not displayed and the default language that was configured is used.

Once a user's credentials are accepted, the *Welcome Center* or table of contents page is displayed. The Oracle Taleo Enterprise Edition products available for use are dependent on which products were purchased by the organization and on the user's user type and permissions. If a user has permission to see only one Oracle Taleo Enterprise Edition product and the Display Welcome Center setting is set to "Yes", the product is displayed directly.

## Accessing an Oracle Taleo Enterprise Edition Application

You must have received a user name and password from your system administrator.

1. Select the language in which you want to use the application.
2. Enter your user name and password.
3. Click Sign In.

## Using the Forgot Password Link

You must have a valid username and email address in your user profile.

1. Click Forgot Your Password?.
2. Enter your username and email address.
3. Click OK.

If the request comes from an authorized user, an email is sent to the supplied address with a code to access the application.

You must click the link provided in the email, enter your username and access code, and provide a new password.



## The Welcome Center

The Welcome Center is the page displayed immediately after you sign in.

The Welcome Center is organized in these areas:

- The auxiliary navigation bar provides links to the online help and your personal setup options.
- The core navigation bar contains tabs to Oracle Taleo Enterprise Edition products.
- The Quick Access panel provides a "one-click" access to the same products available in the core navigation bar. It also provides access to specific content such as a requisitions and submissions.
- In the central panel, your organization can put information of interest to all product users.

## Navigation

### Auxiliary Navigation Bar

The auxiliary navigation bar, located at the top right of pages, provides users access to Home, Resources, and Sign Out links.

Auxiliary Navigation Bar Option	Description
Home	If you have access to multiple Oracle Taleo Enterprise Edition products and you click Home, the Welcome Center is displayed.
Resources	May include: <ul style="list-style-type: none"> <li>• My Setup: Access to the Language drop-down menu where you can select the content language for the product.</li> <li>• About: Information about the product such as the version number and the build number that you need to provide to Oracle Support when you need to contact them.</li> </ul>
Sign Out	Terminates the session and you are automatically signed out of all Oracle Taleo Enterprise Edition products.

### Core Navigation Bar

The core navigation bar provides users access to the Scheduling Center, Reports, and Configuration tabs.

Link	Description
Scheduling Center	Gives users access to the Calendars page where they can create calendars and update existing ones.
Reports	Gives users access to a list of reports they can run:

Link	Description
	<ul style="list-style-type: none"> <li>• Roster Schedule</li> <li>• Scheduled Appointments (visible to Administrators only)</li> <li>• Appointment Summary Report (visible to Administrators only)</li> <li>• Arrival Status Report (visible to Administrators only)</li> </ul>
Configuration	<p>Gives Administrators access to the following configuration features:</p> <ul style="list-style-type: none"> <li>• Candidate Portal Messaging</li> <li>• Email Templates</li> <li>• Locations</li> <li>• Create Users</li> <li>• Import Calendars</li> <li>• Display Time Zones</li> <li>• Display Languages</li> <li>• Mass Update</li> <li>• Default Weekdays</li> <li>• Resend Candidate Submissions</li> <li>• Schedule Appointments Email</li> </ul>

## Languages

### Languages

The Scheduling Center is available in many languages.

The Language drop-down menu located in the right-hand side of pages allows users to select the language in which they want to use the product. Languages must be activated by the system administrator before they can be used in the Scheduling Center.

The Display Languages page displays a message that states "Languages that are not editable are in use." However, when a language has been enabled by a Scheduling Center administrator and then assigned to a calendar, it can no longer be disabled. The language will appear grayed out on the Display Languages page. The language must stay enabled in the event the calendar using it is reactivated in the future.

If a language is only used in a calendar location that has never been used by a calendar, then the language can be disabled upon deactivation of the location.

## Supported Languages

The languages supported for Oracle Taleo Enterprise Edition products as well as specific features are listed below. For details regarding language availability for Oracle Learn Cloud and Oracle Taleo Business Edition, see the documentation for those products.

- Scheduling Center: All listed languages are supported except Portuguese (Portugal).
- Assessment: All listed languages are supported except Indonesian (Bahasa).
- OBIEE: All listed languages are supported except Indonesian (Bahasa), Lithuanian, Malaysian (Malay), Serbian, Slovenian.
- Resume Parsing: Resume parsing is delivered using a third party partner service. The functionalities are delivered as is. Customers needing additional or different resume parsing capabilities should explore partner services.

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Bulgarian	bg	Available	Available			
Chinese (China)	zh_CN	Available	Available	Available	Available	
Chinese (Taiwan)	zh_TW	Available	Available	Available	Available	
Croatian	hr	Available	Available			
Czech	cs	Available	Available		Available	
Danish	da	Available	Available			
Dutch	nl	Available	Available	Available	Available	Limited
English	en	Available	Available	Available	Available	Supported
English (U.K.)	en_GB	Available	Available	Available	Available	Supported
Finnish	fi	Available	Available		Available	
French (Canada)	fr	Available	Available	Available		Limited
French (France)	fr_FR	Available	Available	Available	Available	Limited
German	de	Available	Available	Available	Available	Limited
Greek	el	Available	Available			
Hungarian	hu	Available	Available		Available	
Italian	it	Available	Available	Available	Available	Limited
Indonesian (Bahasa)*	in	Available	Available	Available		
Japanese	ja	Available	Available	Available	Available	
Korean	ko	Available	Available	Available	Available	

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Lithuanian*	lt	Available	Available			
Malaysian (Malay)*	ms	Available	Available			
Norwegian	no	Available	Available		Available	
Polish	pl	Available	Available	Available	Available	
Portuguese (Brazil)	pt_BR	Available	Available	Available	Available	Limited
Portuguese (Portugal)*	pt	Available	Available		Available	
Romanian	ro	Available	Available		Available	
Russian	ru	Available	Available	Available	Available	
Serbian*	sr (sh)	Available	Available			
Slovak	sk	Available	Available		Available	
Slovenian*	sl	Available	Available			
Spanish (Worldwide)	es	Available	Available	Available	Available	Limited
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

## 2 Scheduling Center Permissions

### Permissions for Performing Actions in Scheduling Center

Actions that users can perform in the Scheduling Center are determined by a combination of user type permission and their calendar role on each calendar. This includes:

- *SmartOrg user type permissions assigned to the user.*
- *Calendar Role assigned to the user for each calendar.*

Additionally, candidates may be granted permissions for actions on specific calendars based on the *Candidate Self-service Level* set for that calendar.

### Scheduling Center Permissions Overview

User	SmartOrg Permission	Scheduling Center Privilege	Calendar Role Grant
<i>Scheduling Center User</i>	Access Scheduling Center	Access to Scheduling Center Only	Must be granted a <i>Calendar Role</i> to perform actions on calendars.
<i>Scheduling Center User</i>	Create Calendars and access Scheduling Center	<ul style="list-style-type: none"> <li>• Access to Scheduling Center</li> <li>• Create Calendars</li> <li>• Duplicating Self-Created Calendars</li> </ul>	Automatically is granted the Calendar Owner Calendar Role for self-created calendars. Must be granted a <i>Calendar Role</i> to perform actions on other calendars.
<i>Candidate User</i>	None	None	<i>Candidate Self-Service Level</i>

### Scheduling Center User

The Scheduling Center user has access to the Scheduling Center.

Users can be granted one of the following two SmartOrg user type permissions:

User Type Permission	Location
Create calendars and access Scheduling Center	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Scheduling
Access Scheduling Center	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Scheduling

The Access Scheduling Center user type permission gives users access to the Scheduling Center. The functions users will be allowed to perform in the Scheduling Center will depend on the *Calendar Role*.

The Create calendars and access Scheduling Center user type permission allows users to create calendars via the Add New Calendar button in the Scheduling Center. Users granted this permission will automatically be assigned the Calendar Owner role, although the creator does not have to be the owner. Users with this user type permission will still need to be assigned calendar roles for other calendars they do not own or create.

Users granted the Create calendars and access Scheduling Center user type permission can choose another Calendar Owner or remain the Calendar Owner. However, these users will always keep the Calendar Owner role allowing them to go back to the calendar after creation.

The Create calendars and access Scheduling Center user type permission should be used to grant users the ability to create calendars without granting full Scheduling Center configuration rights.

## Calendar Role

A calendar role is the right of a user to perform a task in the Scheduling Center.

Calendar roles are granted to users by a Scheduling Center Administrator or by a user granted the Create calendars and access Scheduling Center user type permission when the calendar is created or by the Calendar Owner or an Administer Calendars user. The role a user is granted is for a specific calendar. Before a role can be granted to a user, the user must first be granted access to the Scheduling Center by a Recruiting Center system administrator. The users must try (but will not succeed) at least once to connect to the Scheduling Center for the to be able to grant them a role. A user will only be able to successfully connect to the Scheduling Center once he/she has been granted a Calendar Role.

A Calendar Owner, an Administer Calendars, and an Administrator can grant the following types of Calendar Roles:

Calendar Role Type	Description
Read-Only	<p>A Read-Only user can only view information in the Scheduling Center. Information available is:</p> <ul style="list-style-type: none"> <li>calendars</li> <li>calendar roles</li> <li>timeslots</li> </ul> <p>The Read-Only user can access the system to track candidate attendance to interviews.</p> <p>A user is granted a Read-Only role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center for a specific calendar.</p> <p>The same user can have different roles for different calendars.</p>
Mark Arrived/No Show	A Mark Arrived/No Show user can only indicate if a candidate has arrived or not for an appointment.

Calendar Role Type	Description
	<p>The Scheduling Center has a level of access which allows a user to read data in the system and to record whether candidates arrived for their appointments or were “no-shows.” These users may be greeters or reception desk workers who are employed by the recruiting company. A user that has been granted a Mark Arrived/No Show role has all the permissions of a read-only user and can also mark in the calendar if a candidate has arrived to an interview or if he/she did not show up.</p> <p>A user is granted a Mark Arrived/No Show role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center.</p> <p>The same user can have different permissions for different calendars.</p>
Schedule Appointments	<p>A Schedule Appointments user can manage appointments and decline invitations on behalf of a candidate.</p> <p>The Scheduling Center has a Schedule Appointments level of access which allows a user to:</p> <ul style="list-style-type: none"> <li>• decline an invitation</li> <li>• schedule an appointment on behalf of a candidate</li> <li>• reschedule an appointment on behalf of a candidate</li> <li>• cancel an appointment on behalf of a candidate</li> </ul> <p>A user that has been granted a Schedule Appointments role has all the permissions of a Read-Only and Mark Arrived/No Show user.</p> <p>A user is granted a Schedule Appointments role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center.</p> <p>To manage appointments on behalf of a candidate, the user granted a Schedule Appointments permission must have access to the Recruiting Center for a specific calendar.</p> <p>For the self-service integration type, to be able to manage appointments on behalf of a candidate, the candidate must first log in to Scheduling Center via the initial invitation email to activate communication between Scheduling Center and Recruiting Center.</p> <p>For the proctored integration type, the user can manage the appointments of the candidate, even if the candidate did not log into a Career Section.</p> <p>The same user can have different permissions for different calendars.</p>
Manage Timeslots	<p>A Manage Timeslots user can manage timeslots, days and the number of appointments available per timeslots.</p> <p>The Scheduling Center has a Manage Timeslots level of access which allows a user to:</p> <ul style="list-style-type: none"> <li>• lock and unlock days</li> <li>• delete timeslots in a calendar</li> <li>• set the number of appointments available per timeslots</li> </ul> <p>A user that has been granted a Manage Timeslots role has all the permissions of a Read-Only, Mark Arrived/No show and Schedule Appointments user.</p> <p>A user is granted a Manage Timeslots role by an Administrator, a Calendar Owner or an Administer Calendars user in the Scheduling Center.</p> <p>The same user can have different permissions for different calendars.</p>
Administer Calendars	<p>An Administer Calendars user has all permissions for a specific calendar.</p> <p>An Administer Calendars user has managing rights for a specific calendar, that is:</p> <ul style="list-style-type: none"> <li>• edit the calendar</li> <li>• manage timeslots</li> </ul>

Calendar Role Type	Description
	<ul style="list-style-type: none"> <li>• manage days</li> <li>• grant and revoke calendar roles to other users</li> </ul> <p>An Administer Calendars user cannot create calendars, revoke the rights of a Calendar Owner or of an Administrator.</p> <p>A user is granted the Administer Calendars role by an Administrator or a Calendar Owner in the Scheduling Center.</p>

Ownership of a calendar can only be granted and revoked by a Scheduling Center Administrator.

Roles are granted for a specific calendar. For example, a user may have a Read-Only calendar role for one calendar and an Administer Calendars role for another calendar.

## Granting Users a Calendar Role

The user being granted a Calendar role must have tried at least once to connect to the Scheduling Center, otherwise the name of the user will not appear in the user drop-down list.

A user type of Access Scheduling Center or Create Calendars and access Scheduling Center and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to a calendar.
3. Click Add/Modify Calendar Permissions.
4. Click Select User to select the desired user.
5. Select a permission for the calendar, that is Read only, Mark Arrived/No Show, Schedule Appointments, Manage Timeslots, Administer Calendars.
6. Click Create Permission.

The page displays the assigned Calendar roles, with the role newly created included in the listing.

## Editing the Permission of a Calendar Role

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to a calendar.
3. Click Add/Modify Calendar Permissions.
4. Click Select User to select the desired user.
5. Select a new permission for the calendar, that is Read only, Mark Arrived/No Show, Schedule Appointments, Manage Timeslots, Administer Calendars.
6. Click Create Permission.

The newly assigned permission appears in the page.



## Removing a Calendar Role

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to a calendar.
3. Click Add/Modify Calendar Permissions.
4. Click Remove next to the user you wish to remove.
5. Click Yes to confirm that you want to remove the calendar role.

The page refreshes and the deleted user is removed from the listing.

## Candidate Self-Service Level

The candidate permission set for the calendar determines what candidates will be able to perform when signing in to the Scheduling Center.

During a requisition process, a candidate can receive an invitation to book an appointment. Candidates can access the Scheduling Center only if they have received an email with an invitation to book an appointment. Depending on the permission set for the calendar, candidates can perform several functions such as book an appointment, schedule later or decide they are no longer interested.

A Scheduling Center Administrator can set for a calendar the access level candidates will have when accessing the Scheduling Center. Permissions are linked to the calendar, not to the candidate. When a candidate signs in to the Scheduling Center, the candidate is granted the permission level set for the calendar being used to manage appointments.

There are three levels of candidate permission an Administrator can set for a calendar:

- Full: When signing into the Scheduling Center, the candidate will be able to fully manage his/her appointments that is, cancel, reschedule, book, decline.
- None: For the self-service integration type, the candidate will only receive an initial invitation. When signing into the Scheduling Center, the candidate will only be able to view his/her pending invitations. Users will be unable to manage appointments. For the proctored integration type, no invitation email is sent to the candidate. The user with a Schedule Appointments, Administer Calendars, Calendar Owner or Administrator role will need to manage candidate appointments. The candidate will receive a reminder email confirming the appointment booked by the user.
- Only Cancel Appointments: When signing into the Scheduling Center, the candidate will only be able to cancel his/her appointments. The user with a Schedule Appointments, Administer Calendars, Calendar Owner, or Administrator role will need to manage candidate appointments.

## Setting Candidate Permissions

To determine if candidates are allowed to manage or not their appointments, the candidate permission must be set for the calendar.

If creating the calendar, the user must be an Administrator or a Create Calendar user type.

If the calendar is already created, the user must have an Administer Calendar role or be the Calendar Owner.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to the name of a calendar.
3. In the Candidate Self Service Level field, select the access level permission for candidates.
4. Click Save.

Depending on the type of permission set for the calendar, reminder emails sent to candidates will include or not an active link to access the Scheduling Center.

# 3 Calendars

## Calendars

### Calendar

A calendar is the graphical representation of time from which candidates can choose a date to book an appointment for an interview that will be carried out either in person or by phone.

Only an Administrator or a user with the Create calendars and Access Scheduling Center user type permission can create a calendar.

When creating a calendar, the user:

- Provides a calendar name that is displayed to candidates when they are scheduling their appointment.
- Specifies a scheduling horizon to indicate how long in advance the candidate may book an appointment on a calendar.
- Selects a calendar owner.
- Chooses if the calendar will be *single location or multiple location*.
- Specifies if the interview will be held in person (default) or on the phone.
- Selects locales for the calendar and enters location details.

Once the calendar is created, the user:

- *Adds a timeslot* for candidates to be able to book appointments.
- *Activates the calendar*. An active calendar can be used in a requisition for candidates to book appointments.
- Adds the calendar to a requisition in the Recruiting Center. The calendar must also be assigned to a phase of the requisition for a candidate to be able to book an appointment. When candidates are invited to schedule an appointment, in the Scheduling Center Candidate Portal, candidates click Schedule Appointment.

**Note:** The Scheduling Center displays all appointments for a calendar regardless of the integration type used. Although the same calendar can be associated to both integration types on a single requisition, this is not recommended.

## Creating a New Calendar

An Administrator or a user with the Create calendars and Access Scheduling Center user type permission can create a calendar.

1. Click Scheduling Center.
2. In the Calendars page, click Create Calendar.

3. In the Calendar Properties section, complete the fields.
4. In the Calendar Location Details section, indicates if the calendar is single location or multiple location.
  - a. If selecting Single Location, type the location of the appointment.
  - b. If selecting Multiple Location, select the desired locations (maximum is five locations).
5. In the Additional Locales section, select locales for the calendar and enter location details for each selected language.
6. Complete each set of field boxes for each selected language.
7. Choose which language will be the primary locale.
8. Click Save.

The new calendar appears in the Calendars page.

## Modifying a Calendar

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to a calendar.
3. Modify fields as necessary.
4. Click Save.

## Modifying Calendar Languages

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendar page, click Modify next to a calendar.
3. In the Additional Locales section, select the languages in which you wish to display the calendar.
4. Complete each set of field boxes for each selected language.
5. Click Save.

## Modifying the Scheduling Horizon

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, select Modify next to the desired calendar.
3. In the Update Calendar page, select a value in the Scheduling Horizon drop-down list.
4. Click Save.

## Changing Calendars

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, use the navigation arrows.

## Notification to Reschedule Appointments

Scheduling Center users can send email notifications to candidates to invite them to reschedule their appointment.

If a candidate's appointment needs to be rescheduled by a Scheduling Center user, the user can send an email notification to the candidate. The candidate can use a link in the email notification to access Scheduling Center and reschedule his or her appointment. Appointments can only be rescheduled for a day or time in the future. Past appointments cannot be rescheduled.

On the calendar appointment page, users will need Calendar Creator, Calendar Owner, Schedule Appointments, Manage Timeslots, or Administer privileges to have access to two reschedule options:

- **Reschedule:** The appointment is removed from the calendar schedule and other candidates may schedule during that time. The candidate who was originally scheduled for that appointment will receive a configurable email that can include a link to reschedule the appointment.
- **Reschedule and Lock:** The appointment is removed from the calendar schedule and the timeslot is locked so that no other candidates can schedule during that time. The candidate who was originally scheduled for that appointment will receive a configurable email that can include a link to reschedule the appointment.

## Reschedule Locking Feature

Users can prevent candidates from rescheduling a confirmed appointment.

The Appointment Change (lock down) is only relative to the time of the actual appointment. If a user sets a lock down of 4 hours then candidates will be able to reschedule their appointment up until 4 hours before the start of their appointment, this is intended to prevent candidates from rescheduling their appointment right before it's about to occur. It is not relative to when their appointment is scheduled in the future. If the user activates this option for a calendar, the user will be requested to create a message that will be displayed to candidates trying to reschedule a confirmed appointment during the locked down period.

The Reschedule Locking feature can be set when the calendar is created or it can be edited later. The reschedule locking feature will be applied to all appointments, even for appointments booked and confirmed before the activation of the feature for a specific calendar.

If the candidate accesses the Scheduling Center during the appointment lock down period, the Reschedule message created by the user will be displayed and the candidate will not be allowed to reschedule.

A calendar permission or user type permissions grant users access to this feature.

## Setting the Appointment Change Period

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select the option Appointment Change (lock down).
4. Click Save.

Candidate will not be allowed to reschedule a confirmed appointment during the period set for the calendar.

## Limit to Reschedule Appointments

Allows Calendar Owners and Scheduling Center Administrators to limit the maximum number of times a candidate is allowed to reschedule an appointment.

If the Reschedule Limit is activated for a calendar and a candidate exceeds the limit, a message configured by the calendar creator is displayed to the candidate.

A calendar creator can activate and define a Reschedule Limit when creating or modifying a calendar. A Reschedule Limit is activated by checking the corresponding check box on the Create Calendar page. The creator can select a limit, from one to ten, from a drop-down list.

When a Reschedule Limit is activated, the Reschedule Limit Reach text field becomes available at the bottom of the Create Calendar page. This field is only visible when the Reschedule Limit is activated and is used to enter a configurable message that displays to the candidate when he or she reaches the configured limit.

## Single Location and Multi-Location Calendar

Users can create calendars with one location or multiple locations.

If selecting Single Location, the user must type the location of the appointment.

If selecting Multiple Location, the user can select up to five locations. The user can search for locations by Location Type (In Person or By Phone), Location Name, or City. Once locations have been selected, they appear in the calendar. Once the calendar is saved, the user can add new locations (up to 5) but cannot remove added locations.

Once the calendar is created, the user must *add a timeslot* for candidates to be able to book appointments. The user must define timeslots for all locations. On a multi-location calendar, the user must first select the location he wants to add timeslots on (locations are displayed across the top of the calendar. A location is selected by clicking on it. A selected location appears with a green highlighted background. When the appropriate location is selected, the user clicks Add Timeslot.

## Active Calendar

An active calendar can be used in a requisition for candidates to book appointments.

A calendar must be Active before any appointments can be entered into the calendar by a candidate. Only an Administrator, an Administer Calendars, or the owner of the calendar can change the status of a calendar.

An inactive calendar cannot be chosen in a requisition process. A calendar in the Inactive status will not be displayed to candidates. However, a recruiter can add or manage timeslots in an inactive calendar.

## Activating a Calendar

Only an Administrator, an Administer Calendars, or a the owner of the calendar can change the status of a calendar. A user type permission grants users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to the desired calendar.
3. In the Update Calendar page, select the Active Calendar check box.
4. Click Save.

The calendar can be used in a requisition for candidates to book appointments.

## Inactivating a Calendar

Only an Administrator, an Administer Calendars, or a the owner of the calendar can change the status of a calendar. A user type permission grants users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click Modify next to the desired calendar.
3. In the Update Calendar page, clear the Active Calendar check box.
4. Click Save.

The Calendar is inactive, therefore unavailable to be used in a requisition.

## Calendar List Filtering

The list of calendars can be filtered to reduce the number of calendars displayed in the list and to display calendars relevant to a user. The calendar list can also be sorted alphabetically.

The Quick Filters panel allows users to filter and search calendars according to the following criteria:

- Status: Used to display *active or inactive calendars*.
- ID: When a calendar is created, an ID number is given to the calendar. You must enter the exact ID number. The Calendar ID search field is case sensitive
- Calendar Name: You can enter the complete calendar name or part of it. The Calendar Name search field is not case sensitive
- Location: You can enter the complete location name or part of it. The Location search field is not case sensitive.
- Calendar Owner: You can enter the complete calendar owner name or part of it. The Calendar Owner search field is not case sensitive.

Search criteria can be used individually, or several criteria can be used together.

Sorting can also be performed on the calendar list by clicking on the column header. The list is sorted alphabetically.

## Displaying Active Calendars

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Quick Filters panel, select Active or Inactive in the Status drop-down list.
3. Click Search.

## Searching for Active Calendars

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Quick Filters panel, enter the ID, calendar name, location, and/or calendar owner.
3. Click Search.

## Multiple Calendars per Requisition

Multiple calendars can be assigned to a requisition.

When a user adds invitation phases in a requisition and assigns a calendar to the phase, it is possible to choose from more than one calendar. Therefore, several invitations can be sent during the requisition process each with a different calendar. Although it is not recommended, calendars can be associated to both integration types on a single requisition.

## Calendar Duplication

Calendars can be duplicated using a button that will duplicate details and permissions into a new calendar. The name of the calendar is also copied and prefaced with the words Copy of.

A Scheduling Center Administrator, or a user with Create Calendar permission, will see a Duplicate link on the calendar list page. When the Duplicate link is clicked, all the Calendar Properties, Calendar Location Details, and Additional Locales information from the original calendar is duplicated into the Update Calendar page for the new calendar. The original calendar name is also copied to the new calendar after the words, Copy of. For example, if the calendar named Interview Calendar was duplicated, the new name of the calendar would be Copy of - Interview Calendar. The user may then change the name of the calendar as appropriate.

When the new calendar is saved, the user is taken to the Assign Users and Permissions to a Calendar page. The information from this page is also prefilled with the existing information from the original calendar. The user can make changes, as necessary and then has two options:

- Return: returns user to the Update Calendar page.
- Done: returns user to the Calendars list page.



## Duplicating a Calendar

An Administrator or a user with the Create calendars and access Scheduling Center user type permission can create a calendar.

### Scheduling Center > Scheduling Center

1. Click Scheduling Center.
2. Click Duplicate next to a calendar..
3. Edit the calendar name to a name distinctly different to the original calendar name.
4. Edit field values as appropriate.
5. Click Save.
6. Assign users a calendar role.
7. Click Done.

## Calendar History Tracking

The Calendar History Tracking allows Scheduling Center users to track changes made to the calendar.

Users with Calendar Creator, Calendar Owner, or Administer Calendar privileges can see View Audit History on the Update Calendar and the Assign Users and Permissions to a Calendar pages. When clicked, View Audit History launches the Audit History page which lists the User Name, Action, and Date of every change made to that calendar.

## Email History

Users can view a copy of emails sent to candidates.

When users are on the Scheduling Center Scheduled Appointment page, they can see a listing of scheduled appointments and the name of candidates. Candidate names are displayed as hyperlinks.

Users can click a candidate name to see invitation details for that candidate. Users can also click the View Email link to see the content of the email that was sent.

## Working with Timeslots

### Timeslot

A timeslot is a period of the day when candidates are able to book appointments.

A timeslot can be locked meaning that candidates are unable to book appointments in that timeslot. Existing appointments already scheduled remain unchanged. Candidates may cancel or reschedule out of them, but no one can schedule an appointment into a locked timeslot. Locked timeslots are identified by a padlock icon.

The owner of a calendar, the Administrator, or a user with a Manage Timeslots role can lock a timeslot.

Timeslots cannot be modified once created. To modify a timeslot, remove the timeslot and add a new one.

Timeslot actions are not available for timeslots that occurred in the past. The check boxes used for timeslot selection are disabled on past days and the Timeslot Action menu is removed. To perform Timeslot Actions, the user must have a calendar role of Manage Timeslots or Administer Calendars.

## Adding Timeslots

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Click Add Timeslot.
4. Complete the fields as required.
5. Click Add Timeslot.

A new timeslot is added in the calendar for the chosen date.

## Removing a Timeslot

The timeslots must be free of any scheduled appointments.

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select a timeslot.
4. In the Timeslot Actions menu, select Delete.

The timeslot is removed from the calendar and is no longer available to candidates to book appointments.

## Removing All Timeslots

The timeslots must be free of any scheduled appointments.

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. In the Timeslot Actions menu, select Delete All Timeslots.

All timeslots are removed from the calendar. Timeslots will no longer be available to candidates to book appointments.

## Locking a Timeslot

A user type permission and a Calendar role grant users access to this feature.

The timeslot must be created and unlocked.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select a timeslot.
4. In the Timeslot Actions menu, select Lock.

A small padlock icon is displayed beside the locked timeslot. Candidates are no longer able to book appointments for that timeslot. However, any appointments that have been previously scheduled for that timeslot will remain.

## Unlocking a Timeslot

A user type permission and a Calendar role grant users access to this feature.

The timeslot must be created and locked.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select a timeslot.
4. In the Timeslot Actions menu, select Unock.

The padlock icon is no longer displayed. Candidates are able to book appointments in that timeslot.

## Selecting a Timeslot Owner

The calendar must have a timeslot.

Calendar permissions apply; users must have the appropriate permission to the calendar and the ability to manage times to have access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select the checkbox next to the desired timeslot.
4. In the Timeslot Actions menu, click Select Owner.
5. Click Select User next to the desired timeslot owner.

The name of the timeslot owner appears next to the desired appointment timeslot.

## Removing a Timeslot Owner

The calendar must have a timeslot.

Calendar permissions apply; users must have the appropriate permission to the calendar and the ability to manage times to have access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select the checkbox next to the desired timeslot.
4. In the Timeslot Actions menu, click Remove Owner.

The name of the timeslot owner no longer appears next to the desired appointment timeslot.

## Modifying a Timeslot Owner

The calendar must have a timeslot.

Calendar permissions apply; users must have the appropriate permission to the calendar and the ability to manage times to have access to this feature.

1. Click Scheduling Center.
2. Select the checkbox next to the desired timeslot.
3. In the Timeslot Actions menu, click Select Owner.
4. Click Select User next to the desired timeslot owner.

The name of the timeslot owner appears next to the desired appointment timeslot.

## Selecting the Allowed Number of Appointments per Timeslot

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click the name of a calendar.
3. Select a timeslot.
4. In the Timeslot Actions menu, select Update Appointments.
5. Indicate the number of appointments that may be scheduled within this timeslot.
6. Click Save.

The selected number of appointments available for the timeslot is displayed.

## Displaying Date Information

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click on a calendar.
3. In the Quick Filters panel, click on a date in the calendar.

## Moving Between Months in a Calendar

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, click on a calendar.
3. In the Quick Filters panel, click the right arrow icon to display the next month. Click the left arrow icon to display the previous month.

## Marking and Tracking Candidate Appointment Attendance

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. Click on the calendar name.
3. Click on a timeslot where a candidate has booked an appointment.
4. In the Candidate Actions menu, select Mark Arrived, Mark No Show, Clear Arrival Status accordingly. You can also use the quick action icons.

The attendance of a candidate is marked in the calendar. The user can view if a candidate has arrived or not for an appointment.

The attendance of the candidate is indicated in the Candidate list in the Recruiting Center, provided the Appointment Status column is configured. The appointment status is also indicated in the candidates profile.

## Locked Day

A locked day is a day during which candidates cannot book appointments.

When opening a calendar, the words Day is Locked are displayed in red. Also, the day is strike through in the calendar. This means that the system will not allow candidates to make appointments. Existing appointments already scheduled remain unchanged. Candidates may cancel or reschedule out of them, but no one can schedule an appointment into a locked day.

The Owner of a calendar, an Administrator or a user with a Manage Timeslots role has the option to lock an entire day, inclusive of all the timeslots within a specific day.

## Locking a Day

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.
2. In the Calendars page, select a calendar name.
3. Click a day in the calendar.
4. In the Timeslot Actions menu, select Lock Day.

The words Day is Locked are displayed in red. Also, the day is strike through in the calendar. Candidates are no longer able to book appointments on that day. However, any appointments that have been scheduled on that day will remain.

## Unlocking a Day

A user type permission and a Calendar role grant users access to this feature.

1. Click Scheduling Center.

2. In the Calendars page, select a calendar name.
3. Click a day in the calendar that is locked.
4. In the Timeslot Actions menu, select Unlock Day.

The day is no longer strike through in the calendar. Candidates are able to book appointments on that day.

# 4 Invitations

## Candidate Invitations

### Appointment Management on Behalf of a Candidate

An appointment can be scheduled, canceled, or rescheduled by a user on behalf of the candidate. An invitation to book an appointment can also be declined on behalf of the candidate.

Schedule Appointments, Administer Calendars users, Owners or Scheduling Center Administrators can book, reschedule or cancel appointments on behalf of a candidate through the candidate user interface of the Scheduling Center.

If using the self-service integration type of the Scheduling Service, the candidate must have logged in to the Careers Section at least once and created a Profile before a user granted with the appropriate role can manage the appointments of the candidate. Once a candidate has been canceled from an appointment, they cannot be rescheduled.

If using the proctored integration type of the Scheduling Service, appointments can be scheduled for candidates that did not log in to the Career site.

User must manage the appointments of candidates granted with the None or Only Cancel Appointments permission.

Users can also manage the appointments of candidates granted the Full permission.

### Accessing the Taleo Scheduling Center on Behalf of a Candidate

A user must first access the Scheduling Center on behalf of a candidate to be able to manage the appointments of a candidate.

A user must first access the Scheduling Center on behalf of a candidate to be able to manage the appointments of a candidate.

A user type permission and a Calendar role grant users access to this feature.

A user must first access the Scheduling Center on behalf of a candidate to be able to manage the appointments of a candidate.

For the self-service integration type, the candidate must first log in to the Scheduling Center via the initial invitation e-mail to activate communication between the Scheduling Center and the Recruiting Center. The candidate must have a profile in a career section.

1. Click Scheduling Center.
2. In the Candidate list, select the name of a candidate.
3. In the Job Submission tab, click Edit.
4. In the Screening Section of the candidate file, click Details next to the Scheduling Center.
5. In the Results section, click More Details.

The Invite History page is displayed.

## Scheduling an Appointment on Behalf of a Candidate

User must first access the Scheduling Center on behalf of the candidate.

A user type permission grants users access to this feature.

1. In the Invite History page of the candidate, click Schedule or Decline Invitation.
2. In the Open Invitations page of the Scheduling Center, click Schedule Appointment next to the appointment to book.

The name of the candidate and the name of the user logging in on behalf of the candidate is displayed in the Open Invitations page.

3. In the Schedule your appointment page, select an appointment.
4. Click Schedule Selected Time.
5. In the Appointment Confirmed page, click continue.
6. Click Done.

An appointment is scheduled and the candidate will receive a reminder e-mail confirming the appointment only if the candidate permission for the calendar is Full.

The Link under the Actions list in the Invite History page in the Recruiting Center will change to Reschedule or Cancel Invitation.

## Rescheduling an Appointment on Behalf of a Candidate

A user can reschedule an invitation to book an appointment on behalf of a candidate.

The user must first access the Scheduling Center on behalf of the candidate.

A user type permission grants users access to this feature.

1. In the Invite History page of the candidate, click Schedule or Decline Invitation.  
The name of the candidate and the name of the user logging in on behalf of the candidate is displayed in the Open Invitations page.
2. In the Open Invitations page of the Scheduling Center, click No longer Interested next to the appointment to book.
3. In the Cancel Appointment confirmation page, click Yes.
4. Click Done.

The appointment is scheduled and the candidate will receive a reminder e-mail confirming the appointment only if the candidate permission for the calendar is Full.

Declined is indicated in the Actions list of the Invite History page of the candidate file in the Recruiting Center.



## Cancelling a Scheduled Appointment on Behalf of a Candidate

A user can cancel, on behalf of a candidate, an appointment scheduled by the candidate or on behalf of the candidate.

The user must first access the Scheduling Center on behalf of the candidate.

A user type permission grants users access to this feature.

1. In the Invite History page of the candidate, click Reschedule or Cancel Invitation.  
The name of the candidate and the name of the user logging in on behalf of the candidate is displayed in the Open Invitations page.
2. In the Open Invitations page of the Scheduling Center, click Cancel Appointment next to the appointment to cancel.
3. In the Cancel Appointment confirmation page, click Yes.
4. Click Done.

The Link under the Actions list in the Invite History page in Recruiting Center will change to Reschedule or Cancel Invitation.

## Declining an Invitation on Behalf of a Candidate

A user can decline an invitation to book an appointment on behalf of a candidate.

A user type permission grants users access to this feature.

Candidate must first log in to the Scheduling Center via the initial invitation e-mail to activate communication between the Scheduling Center and the Recruiting Center.

Candidate must have a profile in the Careers section.

User must first access the Scheduling Center on behalf of the candidate.

1. In the Invite History page of the candidate, click Schedule or Decline Invitation.  
The name of the candidate and the name of the user logging in on behalf of the candidate is displayed in the Open Invitations page.
2. In the Open Invitations page of the Scheduling Center, click No longer Interested next to the appointment to book.
3. In the Decline Invitation confirmation page, click Yes.
4. Click Done.

The scheduling process for this candidate is ended.

Declined is indicated in the Actions list of the Invite History page of the candidate file in the Recruiting Center.

# Invitations

## Invitation Email

An invitation email is an email sent to a candidate during a hiring process.

An Administrator can add invitation phases to the candidate selection workflow in the Recruiting Administration. When a candidate reaches these invitation phases during the hiring process, an email is sent to the candidate with an invitation to book an appointment. The initial interview must be scheduled before any follow-up appointments can be scheduled. An Administrator or a user logged to the Recruiting Center can also send invitation emails manually provided they have been granted the proper user type permissions.

## Reminder Email

A reminder email is sent to a candidate when an appointment is scheduled or rescheduled.

Reminder emails are sent to candidates a few days prior to an appointment booked either by the candidate or on behalf of the candidate. Reminder emails are sent automatically by the system.

Depending on the access level granted to the candidate for the calendar being used for the appointment management, the reminder email will not display the same information.

- Full: reminder email will include information on scheduled appointments and will contain a link to access the Scheduling Center and allow candidates to manage their appointments.
- None: reminder email will only include information on scheduled appointments, but no link to the Scheduling Center will be displayed as the candidate is not allowed to manage his or her appointments.
- Only Cancel Appointments: reminder email will include information on scheduled appointment and a link to the Scheduling Center will be displayed allowing the candidate to cancel scheduled appointments.

## Phase

A phase is a configured parameter for an action performed during the candidate selection workflow.

Phases are available in a candidate selection workflow only if phases are integrated to a service. Therefore, not all services have phases that can be configured in a candidate selection workflow.

If phases are available for a service, the system administrator will be able to create phases and configure them.

The phase allows the system administrator to associate the workflow, step and status that will trigger a follow-up appointment and further configure which appointment invitation will be distributed. A requisition can include up to ten phases. However, to avoid confusion, it is recommended to use only two or three phases per requisition. The appropriate invitation will be automatically sent based on the calendar ID association selected by the user in the requisition file Screening section.

## Sending an Invitation Manually

A user can send an invitation to a candidate by requesting the Scheduling Center screening service for this candidate.

The candidate must be matched to a requisition.

A user type permission grants users access to this feature

A screening service must be requested for this candidate.

The Scheduling Center Screening Service integration type must be enabled for the requisition.

The candidate calendar permission must be Full.

### **Recruiting > Candidates**

1. In the Candidates list, select a candidate (or use Search to find the desired candidate).
2. In the More Actions drop down list, select Request a Screening Service.
3. In the Request Screening Service dialog box, select from the Available Services drop down list the integration type of the Scheduling Center screening service you wish to trigger.  
Only the integration types used in the requisition will be displayed.
4. Add a comment, if necessary.
5. Click Done.

The candidate will receive an email with an invitation to book an appointment.

## Sending an Invitation by Changing the Status of a Candidate

A user can send an invitation to a candidate by changing the status of the candidate in a requisition. When changing manually the status of the candidate to a different phase of the requisition, the candidate will receive an invitation to book an appointment.

A user type permission grants users access to this feature.

Step in which the candidate is must include the Change Status/step action.

Candidate must not be in a RSOffer step.

Phases must be created for this requisition in the Recruiting Administration.

### **Recruiting > Candidates**

1. Select a candidate file.
2. In the More Actions list, select Change status/step.
3. In the New Status list, select a new status.
4. Add a comment.
5. Click Save and Close.

An invitation to book an appointment is sent when the candidate will reach for the chosen phase of the requisition.

## Sending an Invitation Automatically during the Workflow

System administrators can automatically trigger Passport screening services such as Scheduling Center when a candidate reaches a certain step or status within a candidate selection workflow. Triggering automatically an invitation during the workflow process can be used to send an invitation to several candidates at a time, by changing the status of the candidate to a determined step or status triggering the invitation.

The Scheduling Center screening service must be configured.

The Access Administration and Access Screening Services configuration user type permissions are required.

### Configuration > [Recruiting] Administration > Screening Services

1. In the Screening Services List, select the required integration type of the Scheduling Center.
2. Click Create next to CSW Action.
3. In the New Candidate Selection Workflow Action page, select the workflow, step and status combination that will automatically trigger the screening service. The workflows, steps and statuses available are the ones configured in the Taleo zone.
4. In the Action drop-down list, select Send Scheduling Center Invitation or Trigger a follow-up appointment. The Scheduling Center invitation will automatically send the correspondence identified in the Message Template section of the Screening Service settings.
  - o Selecting Send Scheduling Center Invitation will automatically send the correspondence identified in the Message Template section of the Screening Service settings. The message originates from the Correspondence Manager in the Recruiting Center.
  - o Selecting Trigger a follow-up appointment will automatically notify the Scheduling Center to send out the email request. The email sent is controlled by the email configuration located in the Scheduling Center.
5. Click Save.
6. Click Done.

An invitation is automatically sent to the candidate at the selected step of the requisition.

## Cancelling an Invitation

A user can cancel the invitation to book an appointment sent to a candidate.

A user type permission grants users access to this feature.

The candidate must not have scheduled an appointment.

### Recruiting Center > Candidates

1. Open a candidate submission.
2. Click the Screening block.
3. In the Scheduling Center section, click Details.
4. In the Results section, click More Details.
5. Click Schedule or Decline Invitation.
6. In the candidate portal, click the No Longer Interested button.
7. Click the Yes button to cancel this invitation.

The candidate will no longer see the option to schedule this appointment when logged into the candidate portal.

## Blocking an Invitation

A user type permission grants users access to this feature.

The candidate must not have scheduled an appointment for the invitation.

### Recruiting > Candidates

1. Click the name of a candidate.
2. In the Job Submission tab, click Edit.
3. In the Screening section, click Details.
4. In the Results section, click More Details.
5. Click Block.

All invitation phases of the requisition are blocked and will no longer be sent to candidates.

## Assigning a Calendar to a Requisition

A requisition can use different calendars when sending invitations to candidates. Although the same calendar can be associated to both integration types on a single requisition, this is not recommended.

Calendars must be created in the Scheduling Center.

### Recruiting > Requisition

1. Click Create Requisition.
2. Follow the Wizard instructions.
3. In the Screening section, select a Scheduling Center Integration type.
4. For each Calendar ID, select a calendar from the drop-down list.
5. Select the calendar to assign to the requisition.
6. Repeat steps 5 and 6 for each required calendar ID.
7. Click Save.

The pop-up window closes and the Calendar ID field displays the name of the calendar previously selected.



# 5 Scheduling Status

## Taleo Scheduling Center Candidate History Log

The Candidate History Log is the Scheduling Center page where it is possible to view the scheduling status of a candidate.

The Candidate History Log displays a list of the scheduling activities of a candidate.

## Viewing the Scheduling Status of a Candidate in the Candidate File

To view the status of a candidate, the candidate must already be in a candidate selection process.

### **Recruiting > Candidates**

1. Click the name of a candidate.
2. In the job submission tab, click Edit.
3. In the Screening section, click Details under the integration type used to manage the appointments of the candidate.
4. In the Results section, click More Details.
5. Click View History.

The Activity Log of the candidate is displayed.

## Viewing the Scheduling Status of a Candidate in the Candidates List

The Scheduling Status column in the candidate list must have been added to the list format.

### **Recruiting > Candidates**

The Scheduling Status of a candidate is displayed in the Scheduling Status column of the candidates list.

## Adding a Candidate List Column to view Taleo Scheduling Statuses

To view the scheduling status of a candidate in the candidates list, the Scheduling Status column must be added to the candidates list.

The Scheduling Status column must have been added to a list format context by a Recruiting Administrator.

### Recruiting > Candidates

1. In the Candidates list, click the calendar icon.
2. In the List Format Selector page, choose from the List Format drop-down list, a list format including an Appointment Status column.
3. Click Done.

A column displaying the Scheduling Center scheduling status will be displayed in the candidates list.

## Viewing the Scheduling Status of a Candidate in the Tracking History

User must be signed in to the Scheduling Center.

A user type permission grants users access to this feature.

A calendar role grants users access to this feature.

1. Click Scheduling Center.
2. Click the name of a calendar.
3. Click the name of a scheduled candidate.

The Activity Log of the candidate is displayed. The information under the What column is the scheduling status.

## Scheduling Center Statuses

Status	Description
<b>Calendar Statuses</b>	
Active	
Inactive	
<b>Location Statuses</b>	



Status	Description
Active	
Inactive	
<b>Invitation Statuses</b>	
Scheduling	The invitation has been sent to the candidate.
Scheduled	The candidate has a scheduled interview.
Canceled	The screening service or invitation has been canceled.
Expired	Default value is 14 days after which time the candidate will not be able to schedule an interview using that invite.
Declined	The candidate declined the invite.
Scheduled cancel requested	The candidate canceled the scheduled appointment.
Archive	The invitation status is updated to Archive after 180 days have passed.
<b>Arrival Statuses</b>	
Arrived	The candidate was marked Arrived for his/her scheduled appointment.
No show	The candidate was marked No show for his/her their scheduled appointment.
Unspecified	The candidate arrival status was/has not been provided for his/her scheduled appointment.
<b>Passport Communication Statuses</b>	
Success	
Failed	
Pending	The request is waiting to be sent to Passport by the Passport scheduled job (runs in the background at a set interval of time).
<b>Timeslot Statuses</b>	
Open	
Closed	
Deleted	
<b>Calendar Import Statuses</b>	
Success	

Status	Description
Failed	
Pending	

# 6 Finding Candidate Information

## Candidate Search

Candidate Search provides access to a candidate's appointments that occur up to one week in the future and up to one week in the past.

The Candidate Search function provides two different types of searches, a quick search and a specific search. A quick search for candidate appointments can be done by selecting any one of the options for search from the drop-down menu and entering the criteria into the text field. The search options are:

- Last Name (Default)
- First Name
- Full Name
- Email Address
- Candidate ID from the Recruiting Center

A Specific Candidate search can be performed by selecting Specific Candidate Search from the drop-down menu and entering all of the quick search option items for search into the Specific Candidate Search window.

Conducting either a quick Candidate Search or a Specific Candidate Search will display a list of results on the Candidate Search Results Page. The results includes appointments for that candidate dated up to one week prior of the current day and one week after the current day. Each line represents a scheduled appointment.

## Candidate Search Results Page

Column Name	Description
First Name	The candidate's first name that links to the Invitation Details page.
Last Name	The candidate's last name that links to the Invitation Details page.
Requisition	The requisition matched to the candidate.
Calendar Name	The name of the calendar that links to the Calendar page.
Start Date	Start date and time of the appointment.
Calendar Owner	The name of the owner of the calendar for that appointment.
Status	The status of the candidates arrival to the appointment. Possible values are Arrived, No Show, or blank.
Action	Clickable Quick Action Item Icons that update the Status column.

## Invitation Details Page

The Invitation Details Page displays the history of events related to the candidate's selected appointment.

Column Name	Description
Email Sent	The View Email link displays if there was an associated email sent with the activity. Clicking the link opens a copy of the email sent in a new window.
When	The date and time the event occurred.
Who	The requisition matched to the candidate.
What	The action that occurred in the event.
Appointment	The date and time of an appointment if the event resulted in an appointment.

## Configuration

User Type Permission	Location
<ul style="list-style-type: none"> <li>• Create calendars</li> <li>• Access Scheduling Center</li> </ul>	Configuration > [Smart Org] Administration > User Types > Recruiting > Scheduling

## Performing a Candidate Quick Search

1. Click Scheduling Center.
2. Select search criteria type from inline menu.
3. Enter the search value in the text field.
4. Click magnifying glass icon.

## Performing a Specific Candidate Search

1. Click Scheduling Center.
2. Select Specific Candidate Search from inline menu.
3. Enter the search value in desired field.
4. Click Search.

## Access to the Candidate File in the Recruiting Center

The Recruiting Center can be accessed from the Scheduling Center to view the Candidate File.

When a candidate has scheduled an appointment his or her name displays on the Calendar Scheduled Appointment page for that date and time. An inline menu is available next to the name. Clicking the inline menu arrow exposes a hover window displaying:

- Candidate ID
- Candidate Name link
- Candidate Email Address

Clicking the Candidate Name link will launch the Recruiting Center or the Staffing WebTop in a new tab or window. After signing in, the user will land on the General Profile of the Candidate Profile. Recruiters and Hiring Managers who use the Scheduling Center must have appropriate permissions to the Recruiting Center or the Staffing WebTop to view the Candidate Profile. The Candidate Profile cannot be accessed through the Manager WebTop using this link.

## Accessing the Candidate File in Recruiting

Users must have the General Security level for internal candidates (in view mode) or the General Security level for external candidates (in view mode) permission to access the candidate file in the Recruiting Center.

Users must have access to the Recruiting Center or the Staffing WebTop.

The Candidate Profile cannot be accessed through the Manager WebTop.

1. Click Scheduling Center.
2. In the Calendars page, click the inline menu next to the candidate name.
3. Click candidate name link.
4. Log in to the Recruiting Center.

The Recruiting Center is launched in a new tab or window displaying the candidate file.



# 7 Reports

## Calendar Data Report

The Scheduling Center users can run a report on a specific calendar.

Four reports are available. The report contains a listing of upcoming appointments and can be used to track Arrive/No Show metrics.

- Roster Schedule
- Scheduled Appointments
- Appointment Summary Report
- Arrival Status Report

Users can run reports on any calendar for which they have been granted a calendar role.

When the report is created and displayed, the user can choose to print or to export the report to Excel.

Users can create reports for active or inactive calendars.

## Creating a Calendar Report

A calendar role grants users access to this feature.

1. Click Reports.
2. Select a report.
3. Select a date range.
4. Click submit.





# 8 Appendix

## Description of Fields

Fields	Description	Location
Calendar Name	The name of the calendar name that is displayed to candidates when they are scheduling their appointment.	Scheduling Center > Calendars
Active Calendar	Allows the calendar to be used in a requisition for candidates to book appointments.	Scheduling Center > Calendars
Candidate Self-Service Level	Sets the permission level for candidates to control their appointments. A candidate may be granted full scheduling capabilities (that is, scheduling, rescheduling, canceling - this is the highest level of permissions), or may be restricted to only canceling an appointment or have no permissions at all.	Scheduling Center > Calendars
Allow Same Day Scheduling	Allows candidates to schedule an appointment for the same day on which they make the appointment.	Scheduling Center > Calendars
Scheduling Cushion (in minutes)	Applies to same day scheduling. Represents the amount of time prior to an appointment that a candidate can self-schedule. For example, if set to 60 minutes and the candidate is self-scheduling 30 minutes prior to the appointment, that appointment will be unavailable.	Scheduling Center > Calendars
Scheduling Horizon (in days)	Represents how long in advance a candidate may book an appointment on a calendar. The default value is 14 days in advance. The scheduling horizon can be set to 60, 90 or to a maximum interval of 180 days. The scheduling horizon can be edited once appointments have been made on the calendar.	Scheduling Center > Calendars
Appointment Change (lock-down)	Determines for a calendar how close to the time of a confirmed appointment a candidate will be allowed to reschedule.	Scheduling Center > Calendars
Calendar Owner	The person responsible for maintaining the calendar.	Scheduling Center > Calendars
Calendar Display Name	The name of the calendar as the user wants it to display to the candidates. The calendar name that displays internally to users is often different than what is shown to candidates.	Scheduling Center > Calendars

Fields	Description	Location
Select As Primary Locale	Displays the language in which the calendar will be displayed to the administrator and recruiters. Note: If only one language is offered, it will default to the current language and the button will automatically be checked.	Scheduling Center > Calendars
Multiple Location	Indicates that a calendar is created for several locations (maximum of 5 locations).	Scheduling Center > Calendars
Single Location	Indicates that a calendar is created for one location.	Scheduling Center > Calendars
Location Type	Indicates if the interview will be held in person (default) or on the phone	Scheduling Center > Calendars Scheduling Center > Configuration > Locations
Calendar Location Name	The name of the location created by the Administrator as visible within the Scheduling Center.	Scheduling Center > Calendars
Location Display Name	The name of the location as it is displayed to candidates.	Scheduling Center > Calendars
Pre-schedule Information	Instructions such as asking the candidate to bring two types of ID, to dress business casual, etc.	Scheduling Center > Calendars
Interview Directions	The user creating a calendar can input directions to the appointment location.	Scheduling Center > Calendars
Interview Instructions	The user creating a calendar can input instructions for the appointment, for example to tell the candidates to check in at the front desk.	Scheduling Center > Calendars
Timeslot Owner	When a timeslot owner is assigned to a timeslot, the timeslot owner receives an email each time a candidate schedules an appointment for the assigned timeslot. If no timeslot owner is selected, the calendar owner receives the email.	Scheduling Center > Calendars
Schedule up to a maximum	Maximum number of timeslots available for the time selected. A maximum of 999 timeslots can be set.	Scheduling Center > Timeslots
Interval in minutes	How long the appointment will last. The system will automatically create appointments based on start time/end time and interval. For example, a start time of 9:00 am and an end time of 11:00 am for interval of 30 minutes will result in time slots being automatically generated for 9:00; 9:30; 10:00 and 10:30.	Scheduling Center > Timeslots
Roster Report	A roster report is a listing of scheduled appointments for the calendar and date time frame selected. It will list who has been scheduled and if they arrived at their appointed time.	Reports