Oracle Taleo Enterprise Edition

Using Recruiting

21D

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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

For information about Oracle's commitment to accessibility, visit the *Oracle Accessibility Program website*.

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Oracle is fully committed to diversity and inclusion. Oracle respects and values having a diverse workforce that increases thought leadership and innovation. As part of our initiative to build a more inclusive culture that positively impacts our employees, customers, and partners, we're working to remove insensitive terms from our products and documentation. We're also mindful of the necessity to maintain compatibility with our customers' existing technologies and the need to ensure continuity of service as Oracle's offerings and industry standards evolve. Because of these technical constraints, our effort to remove insensitive terms is ongoing and will take time and external cooperation.

Comments and Suggestions

Access to Oracle Support

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1 About Recruiting

Info About Recruiting

Recruiting is an HTML recruiting solution that helps enterprises assess and hire the best talent.

This product replaces the former Flex-based product (now called Legacy Recruiting). On the Welcome Center, the Recruiting link takes you to the new Recruiting product, and the Legacy Recruiting link takes you to the former Flex-based recruiting product.

Recruiting uses the same exact platform and services but offers a simple and modern user interface usable on desktop, laptop, tablet, and smartphone. Recruiting works on the Oracle Taleo Enterprise Edition platform, capitalizing on the same user accounts, user types, user permissions, settings, and other configuration. Recruiting uses concepts, icons, data and behavior similar to the Legacy Recruiting while providing an improved user experience.

> **Note:** Many of the features described in this guide depend on configurations and permissions granted to the user. This guide is written with the assumption that all pertinent permissions are granted and corresponding settings are activated.For optimal performance, we recommend the following:
>
> - Display Resolution = 1920 X 1080
>
> - Font Size = 100%
>
> - Browser Zoom = 100%

Mobile Support

Recruiting is supported on a variety of devices. Whether a desktop or smartphone is used, the display will adjust to render the optimal experience on the device.

For example, viewing and navigating into submission details has been optimized on the smartphone. Instead of displaying all of the submission details (which can result in a lot of scrolling on a phone's small screen), the view initially opens on the submission's summary card and users can flip to view other submissions while always viewing this same level of detail. If necessary, users can click to see the complete submission details. The same applies to the requisition details.

Because of the limited space on smartphones, the information is displayed differently than on a desktop. For example, on smartphones and portrait mode of tablets, the columns displayed in requisitions and submissions lists are limited and lists cannot be sorted. In addition, submission disposition actions are only available in the details page (and not on the list page).

Language Support

Recruiting supports the same set of languages as the Legacy Recruiting. All languages activated in the Legacy Recruiting product are reflected in Recruiting.

There are several concepts around languages.

- Application language: When you sign in, you select the language in which you want to use the product. The product user interface reflects the language you selected. This is what we call the application language.

- Content language: Although the product user interface is displayed in one language, you can still see entities such as requisitions and submissions in other languages. This is what we call the content language. For example, a requisition is created in French and you're using Recruiting in English. The content language is set by the administrator in the user's account. You can change this default content language under My Setup.

- Correspondence language: When you create a correspondence, the language used is the correspondence language. The language is derived from the language the submission was created. The correspondence language is set by the administrator in the user's account. You can change this default correspondence language under My Setup.

  Note: When automatic notifications are sent to Recruiting users that own the related requisition from a CSW, these notifications are sent in the recipient's language.

Help

The Help feature provides communications content about the product.

To access Help, click your name in the upper right section of the page, and select Help from the menu.

The page provides links to different source of information and sites such as Customer Connect, Resource Center, and what's new in the product.

Recruiting Process

Recruiting is a solution that helps organization source, assess, and hire the best talent.

Oracle Taleo Enterprise Edition includes several core products used for the recruiting process.

The Career Section is a website where an organization posts jobs for positions to be filled. An organization can have multiple career sections to meet their unique hiring processes and adapt branding and content to their business needs. These career sections can be used for both external and internal candidates. Candidates interact with a career section when they search for jobs, apply for jobs, create a profile, share job details, refer people for a job.

Once candidates have applied for jobs, Recruiting is used by anyone in a full or partial recruiting role, including recruiters, hiring managers, support staff, HR. Recruiting provides tools to create and manage job requisitions, source and nurture candidates, screen candidates to improve the quality of hires, interview candidates, track the progress of

candidates through the selection process, create and manage job offers. Many functionalities can be configured for users in different roles.

Onboarding provides a unified, automated, and customizable system for transitioning candidates, new hires, and employees. Onboarding helps candidates quickly complete necessary documentation while increasing engagement and time to productivity through access to rich media content and integrated compliance and role based training.

The final piece to the core set of products is the Configuration product. This is where administrators can work with settings, permissions, and tools to configure Recruiting, Career Section, Onboarding, and other products.

The table represents a typical recruiting process, the roles who performed each task, and the products used.

Task	Description	Role	Product
Create a requisition	In typical scenarios, a recruiter and a hiring manager collaborate during the requisition creation process.	Recruiter, Hiring Manager	Recruiting
Add prescreening questions and competencies in the requisition	The recruiter and hiring manager add prescreening questions and competencies in the requisition to find the ideal candidates.	Recruiter, Hiring Manager	Recruiting
Approve the requisition	If the requisition needs to go through an approval process, the recruiter selects users who will approve the requisition. HR users can easily be set up for limited activities such as approving requisitions.	HR	Recruiting
Post and source the requisition	Once the requisition is approved, the recruiter can post the requisition to corporate career sections and job boards.	Recruiter	Recruiting
Candidates apply online	Candidates apply to jobs online by visiting a career section. Employees can also apply to jobs through the Intranet.	Candidates	Career Section
Manage candidates	The recruiter can view candidate submissions and share top candidates with the Hiring Manager.	Recruiter, Hiring Manager	Recruiting
Screen and interview candidates	The recruiter collaborates with the hiring manager to progress the best candidates through the appropriate selection steps.	Recruiter, Hiring Manager	Recruiting
Extend offers to candidates	The recruiter prepares the offer. HR and the hiring manager view and approve the offer. The recruiter extends the offer to the candidate.	Recruiter, HR, Hiring Manager	Recruiting
Candidates can view the offer on line	Candidates can view and respond to offers on line.	Candidates	Career Section
Hire candidates	The recruiters moves the candidate to the hired status. Coordinators can track background and/or reference checks as well as close out final hiring activities.	Recruiter, HR, Recruiter Assistant	Recruiting, Onboarding

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2 Getting Started

How to Sign In

When you first access Oracle Taleo Enterprise Edition, the User Sign In page is displayed.

You can select the language in which you want to use the products. If you change the default language on the Sign In page, the page is displayed in the new language and subsequent Oracle Taleo Enterprise Edition products are presented in that language. After selecting a language, you can also select the option Remember my selection so that the next time you sign in, the User Sign In page will be presented in the language you selected.

If single sign-on (SSO) isn't enabled within your organization, you need to enter your user name and password. In the event you forgot your password, you can ask for a new one. Depending on how the application is configured, you'll either receive an access code by email or you'll have to answer security questions.

Once your credentials are accepted, the Welcome Center is displayed. Oracle Taleo Enterprise Edition products made available to you depends on which products were purchased by your organization and on your user type and permissions. If you only have the permission to access one Oracle Taleo Enterprise Edition product and the display of the Welcome Center is enabled, the product is displayed directly.

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.

Personalize Your Setup

If you have access to the welcome center and My Setup, you can personalize how certain information is displayed or behaves in the application.

You can personalize elements such as personal information, contact information, password, person to delegate your tasks, display preferences. You can also override options that were previously configured by your administrator to fit your personal preferences.

My Setup is available in the welcome center, under the Resources menu. The table presents options and preferences that you can modify in My Setup.

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Option	Description
Personal Information	This is where you can enter personal info such as your name, title, employee ID, address, email, phone.
Account Information	This is where you can enter info such as your user name and password. The Delegate button allows you to delegate tasks to another user.
General Preferences	This is where you can configure how certain info is displayed or behaves in the application. For example, the content language used when you create requisitions and other items, the correspondence language used for emails, the default text size, your frequent approvers and collaborators.

Your Dashboard

Your dashboard is the landing page that you see when you access Recruiting. It summarizes recruiting activities that you own, or for which you're a collaborator.

The dashboard is organized in these areas:

- Candidates
- Job Requisitions
- Offers
- Tasks

For each item in an area, you can see the number of items requiring your attention and the total number of items.

- Number of items requiring your attention: This is the number displayed under the red flag column. It represents the number of items that are new or have been updated by another user since you last viewed them. For example, when a requisition you own is approved by some other user, a new task is added to your Ready for sourcing tasks, the number for the Ready for sourcing task element increases by one, and this tag is displayed on the list with a red flag.

- Total: This is the total number of items including new, previously viewed, and updated items. If you click the number, you're brought to the page where you can see the resulting list of items on which you can take action. For example, if you click the total number of ACE candidates in the Candidates area, you're brought to the Submissions list which displays ACE candidates.

You can use the Refresh All button to update all the items with the latest numbers.

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3 Using Tasks

Your Tasks

A task is an action you need to perform regarding a requisition, submission, offer, or candidate. Tasks are listed under the Tasks menu.

When in the Tasks list, you can view tasks assigned to you. You can filter tasks using different filters such as task type, tasks related to candidates or requisitions. When you're ready to accomplish a task, you click on the task name and you're brought to the page where you can perform the task. A task can only be performed by the owner of the task or their delegate.

You can approve requisitions or offers and their attachments using the Tasks list even though you may not have permission to view or edit those requisitions and offers. Requisition Approval and Offer Approval tasks are created and then assigned to you. These tasks appear on your Tasks List where you're able to take action.

Here's the list of available tasks:

- Approve offer
- Approve requisition
- Check for duplicates
- Complete requisition
- Complete selection process
- Configure requisition sourcing
- Confirm employee presence
- Contribute
- Extend offer
- Extend posting dates
- Fill requisition
- Finalize start date
- Modify approval process

The Tasks list has a column called Relates to, which indicates what the task relates to. For example, the name/title and the type of item is provided. You can click it to display all of its details. Icons also help you identity the type of item.

Tasks related to offers		
Tasks related to submissions		
Tasks related to candidate general profiles		
Tasks related to requisitions		

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Delegate Tasks

If you have the proper permissions, you're able to delegate your tasks to a different user as long as that user has permissions that are equal to or greater than yours. You can select the delegate and the time frame for which you want them to approve your tasks.

1. Select **Delegate my tasks** from the menu below your name.
2. Search for your delegate and click **Select** next to their name.
3. In the **Delegate My Tasks** window, enter the dates for which you want your tasks delegated and click **Apply and Close**.
4. You'll be presented with a warning. Click **Yes** to continue.

   Your tasks will be delegated either until your time frame expires or you manually change the time frame.

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4 Using Requisitions

Requisitions List

The Requisitions list displays requisitions with information shown into different columns.

From the Requisitions list, you can:

- View all requisitions including those in inactive statuses such as Draft, Deleted, and Canceled.
- Filter requisitions using various criteria. Once you have selected criteria, click Apply Filters to refresh the list accordingly. Applied filters are shown in the top of the list. To remove filters, click Clear All to clear the selected filters, or click the remove icon next to each filter to remove each filter individually. The Filters pane is collapsible.
- Sort requisitions according to the information within a column by clicking the triangle in that column's header. Clicking a second time will reverse the sorting sequence.
- Use the List Format tool to configure what content to display in the list.
- Navigate through the Requisitions list pages using the first, previous, next, and last buttons. You can also go directly to a page.
- Hover your mouse over the requisition title to get requisition info such as the recruiter, hired candidates, user group, and activated languages.
- Click the title of a requisition to open it and view all of its details. From there, you can flip to the next or previous requisition. You can also come back to the Requisitions list and see the last viewed requisition highlighted on the list.
- Click the candidate count of a requisition to access the list of candidate submissions for that requisition.
- View an icon in the Candidate Count column indicating new submissions in the candidate selection process for a requisition (those submissions in the initial status of the first step of a candidate selection process).
- Perform actions available in the More Actions menu such as deleting, canceling, and filling a requisition.
- Create requisitions.

Requisition Details

A requisition details the specific requirements of a job for which somebody must be hired.

When you view a requisition, details of the requisition are presented in the following tabs and panel:

- Requisition Info: Contains all the info for the job organized into different sections that you can expand and collapse as needed.
- Prescreen Alerts: You can set the ACE flagging and Request More Information (RMI) criteria.
- Attachments: Contains files attached to the requisition. You can view, preview, delete, upload, and download attachments.
- Approvals: Displays info about the approval process such as the approvers, the decision made, and the date and time of the approval.

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- Sourcing: You can view and configure all the sourcing and posting methods used for your requisition. Posting can be done to internal or external career sites, job boards, or staffing agents. You can even invite candidates that match certain criteria to apply for the job.

- Interviews: You can add evaluation questionnaires, send evaluation feedback requests to evaluators to ask them to evaluate candidates, view feedback provided by evaluators.

- History: You can view tracking details of events that occurred on a requisition. Events are listed in chronological order.

- Summary: The Summary panel highlights important details of the requisition such as the requisition status, structure, hiring team, job information. You also have links to pre-filtered submissions: Active candidates, New candidates, All candidates. The Summary card is collapsible.

Info About Specific Sections and Fields

Owners: Owners are individuals chosen as the recruiter, the hiring manager, the recruiter assistant, and the hiring manager assistant for a specific requisition. Your administrator must activate the recruiter assistant and the hiring manager assistant roles. These two assistant roles can carry out requisition-related activities to help the recruiter or hiring manager. System-assigned tasks are assigned to the assistant (if an assistant was identified) instead of the recruiter. However, the recruiter also has access to these tasks even though they were assigned to the assistant. When you view the Requisitions list, you can use the Show requisitions filter to gain quick access to requisitions you own. You can also use the filters Recruiter, Hiring Manager, Recruiter Assistant, Hiring Manager Assistant to view requisitions owned by a specific user.

Collaborators: Collaborators are individuals chosen by the owner of a requisition to help or take responsibility for various activities pertaining to the requisition or related recruiting process. When you view the Requisitions list, you can use the Show requisitions filter to gain quick access to requisitions that you collaborate on.

User Group: A user group is a group of people who need to have access to the same information for example, a group of people who works on the same requisitions.

Requisition Type

A requisition type is used to determine the type of candidates you want to hire.

These requisition types are available:

- Professional: Requisitions for most professional employees.

- Executive: Requisitions for executives. This type of requisition allows you to secure and protect private executive candidates in the system.

- Hourly: Requisitions for hourly employees.

- Campus: Requisitions for students or campus job fairs.

- Contingent: Requisitions for contractual employees submitted by agencies.

- Pipeline - General

- Pipeline - Executive

When you create a requisition, if your administrator enabled more than one requisition type, you can select the desired requisition type. When a requisition type is no longer available, you can't select it, but requisitions created with that type keep their original requisition type.

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Find Requisitions

You can use the "Look up a requisition" tool to quickly find a specific requisition that you know exists in the database.

Let's say for example that you want to find a requisition for an Analyst position. Enter the term Analyst in the Search field. The system will list all the requisitions titled Analyst, QA Analyst, Technical Analyst, Research Analyst, and so on. You can refine the search by entering the terms Technical Analyst. The system will apply the AND boolean operator by default and display Technical Analyst requisitions in the search results. If the criteria matches a single requisition, you're taken directly to the requisition details page.

Edit a Requisition

You can edit fields in a requisition to modify their values.

When you view a requisition, you can click the Edit icon of a section to modify the fields in that section, or the Edit All button to display the whole requisition in edit mode. When the requisition is in edit mode, sections are highlighted in yellow. Also, the summary panel displays a table of contents of the requisition sections. You can click section titles to quickly navigate to specific content. Editable fields are shown with a white background to be easy to distinguish.

Create a Requisition

An assistant or wizard helps you go through easy to follow steps to create your requisition. Moreover, there are up to three different options on how you can create your requisition.

1. Go to the **Requisitions** menu.
2. Click **Create Requisition**.
3. Select how you want to create the requisition:
   - Specify a position: You can create a requisition by selecting a position to base it upon. When you select a position, fields relevant to the position get pre-filled into the requisition. You can also manually enter details in the requisition.
   - Use a template: You can create a requisition based on a template. Many of the requisition fields are pre-populated based on the selected template.
   - Start from the beginning: You can create a requisition using a blank form.
4. Once you've selected an option for creating your requisition, you're guided through different steps to enter the core information in the most efficient manner.
5. If you want to create a requisition in multiple languages, click Configure in the Language menu and select the desired language. Your preferred languages are activated by default. Note that you're not required to translate non-mandatory fields. A non-mandatory field completed in the base language can be left blank in other languages.
6. In the last step, you're presented with the complete requisition form where you can review and enter any missing information.
7. Click **Done**.

The requisition appears in the Requisitions list and its status is Draft.

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Tips for Writing the Requisition Description

The requisition description provides information about the job as well as the qualifications required. The description is displayed to candidates when they apply for a job.

A requisition can have two descriptions: an internal description for employees within your organization, and an external description for external candidates.

An good job description is compelling, intelligent, and honest. It must attract, intrigue, and persuade top talents. It includes specific information and is focused on the talent. When you write the description of a requisition, consider the following tips.

Info	Tip
Job Title	Provide a clear and meaningful job title. Make sure candidates outside your organization will know what it means.
Headline	Start with a brief marketing statement, "grabber".
Structure	Explain where and how the position fits into the organization.
Type of Environment	Explain what it's like to work for the organization (fast-paced, small or large team, multiple projects, etc.).
Description of the Role	Concentrate on important, positive aspects of the position.
Description of the Person Required	List qualifications, important competencies, relevant experience, personal qualities. Be specific and keep it short.
Salary, Benefits, Training, Opportunities	Highlight key benefits offered by the organization.
Formatting	Format your text using the Rich Text Editor provided in the Description field.

Identify Missing Info in a Requisition

When you create or edit a requisition, you can make sure the requisition is ready and has all the information necessary for the next step.

Two methods are available:

- You can use the Show fields required to option and manually select a milestone. This will identify which fields are missing to be ready for that milestone. It will also validate that all the info is there when you save the requisition.

- You can use the Inspect option. The system will look at all the requirements for the different milestones and list what is missing so that you can easily and quickly fill-in the information for your requisition to be ready for that next step. If your requisition is multilingual, you should first ensure that all the missing information is provided in your base language. Then, you can check for missing translation by changing the language option from "Current only" to "All". Not only will the Inspect method identify fields that are missing translations but it

offers a Translate option where you can see the reference and to be translated text side-by-side such that it can more easily be translated directly off of your screen.

Request Additional Contribution for a Requisition

Before you submit a requisition for approval, you may need help from someone and request their contribution.

1. Go to the **Requisitions** menu.
2. Open a requisition.
3. In the More Actions menu, select **Request for Contribution**.
4. Select one or more users.
5. Click **Request for Contribution**.

The user will use the Return Contribution action to acknowledge the completion of updates on the requisition where they received a request for contribution.

Self Approve a Requisition

You can use the Save as Open action to save a requisition and bypass any approvals that may be required.

The requisition status must be Draft.
1. Go to the **Requisitions** menu.
2. Open a requisition.
3. In the More Actions menu, select **Save as Open**.
4. Enter comments.
5. Click **Done**.

Submit a Requisition for Approval

If your requisition needs to go through an approval process, you can use the Submit for Approval action and select users who will approve the requisition. At least one person must approve the requisition.

1. Go to the **Requisitions** menu.
2. Open a requisition.
3. In the More Actions menu, select **Submit for Approval**.
4. Click **Add Approvers** to select users who will approve the requisition.

   Based on your settings and configurations, the list of approvers may be prepopulated and, in some cases, you might not be able to add or remove approvers.
5. Define the order of approval by assigning a sequence number to each approver. The approval path can be carried out in two ways:
   - Sequential: When the first approver receives an approval request, the approver approves the requisition. Once approved, the approval request goes to the next approver, and so on.
   - Parallel: Multiple approvers receive an approval request and they can all approve the requisition at the same time. Approvers can approve the requisition without having to wait for the others.

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6. Enter comments for the approvers.
7. Select the user to whom the requisition must be sent once it's approved.
8. Click **Submit for Approval**.

The approvers receive an approval request notification in the order set in the approval path. You can see the progress of the approval such as the decision made and the date and time of the approval in the job requisition's Approvals tab.

Approve a Requisition

If you're asked to approve a requisition, there are different ways you can respond depending on your user permissions. You can approve the requisition using the Decide on Approval action, using the task Approval requisition available in the Tasks menu, using the eShare response center.

Let's say you approve the requisition using the Decide on Approval action.
1. Open the requisition.
2. In the More Actions menu, select **Decide on Approval**.
3. In the Task details panel, indicate whether you approve or reject the requisition.
4. Click **Done**.

Remind an Approver to Approve a Requisition

You can send approval reminder requests to approvers of a requisition when the approval process is pending.

1. Open a requisition.
2. From the **More Actions** menu select **Send Approval Request Reminder**.
3. Enter comments.
4. Click **Send Reminder**.

Modify a Requisition Approval Process

You can modify the approval process of a requisition that is currently under approval. You can also add new approvers, remove approvers, or change the order of approvers.

> **Note:** If you don't have the permission to modify the approval process, you can use the Request Approval Process Modification action for someone else to do this for you.

Let's say an approver is on vacation and you need to assign the approval of a requisition to a different approver.
1. Go to the **Requisitions** menu.
2. Open the requisition.
3. In the More Actions menu, select **Modify Approval Process**. You can also use the **Modify Approval Process** button.
4. Remove the approver and add an alternate approver. The newly added approver receives the approval notification as the approval workflow progresses.
5. Enter a reason for modifying the approval process.

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6. Click **Save and Close**.

Ask Someone to Modify an Approval Process

If you don't have the permission to modify the approval process, you can use the Request Approval Process Modification action for someone else to do this for you.

1. Go to the **Requisitions** menu.
2. Open the requisition.
3. Go to the **Approvals** tab.
4. Click **Request Approval Process Modification**.
5. Select a user.
6. Click **Request Approval Process Modification**.

Terminate a Requisition Approval Process

You can terminate a requisition's approval process once the approval has been triggered.

1. Go to the **Requisitions** menu.
2. Open the requisition.
3. In the More Actions menu, select **Terminate Approval Process**.
4. Enter comments.
5. Click **Terminate approval process**.

The approval path is canceled and no other users receive a request to approve the requisition. The requisition goes back to the Draft status.

Perform More Actions on Requisitions

You can perform several actions on requisitions from the Requisitions list or using the More Actions menu in a requisition.

- Duplicate this requisition: You duplicate a requisition to create a new requisition by duplicating the contents of the requisition you're currently viewing. You can subsequently modify only some of the contents as necessary without having to create a brand new requisition from scratch. You can duplicate a requisition regardless of its status.

- Cancel: Use the Cancel action when you no longer need the requisition. You can use the Cancel action when the requisition has one of the following statuses: Approved, Scheduled, Posted, Unposted, Expired, Draft. The Cancel action isn't available when at least one candidate has been hired for the requisition, or an offer was extended.

- Delete: Use the Delete action to remove the requisition from the list. The requisition status must be Draft.

- Put on Hold: Use the Put on Hold action to suspend all the activities associated with a requisition. The Put on Hold action is available when the requisition has one of the following statuses: Sourcing - Unposted, Sourcing - Expired, Draft, Approved, Rejected, To be Approved.

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- Reactivate: Use the Reactivate action to reactivate a requisition that was put on hold. The requisition will go back to its previous status or the Draft status depending on system configuration.

- Reopen: Use the Reopen action to reopen a requisition previously filled or canceled. You have the option to cancel the current hiring or to add new openings.

- Fill Requisition: Use the Fill Requisition action to indicate that the remaining positions on a requisition are no longer available. The requisition can now be considered as "filled". The Fill Requisition action is available when the requisition has the following statuses: Open - Approved, Open - Posted, Open - Expired, Open - Unposted, Open - Scheduled.

Manage Pipeline Requisitions

Pipeline requisitions are used to gather candidates who have the skills, background, and experience your organization is looking for. These candidates can later be added to a job requisition for which they can eventually get hired.

The creation process of a pipeline requisition is similar to a regular requisition. On the Requisitions list, click Create Requisition. Select the type of pipeline requisition you want to create:

- Pipeline - General
- Pipeline - Executive

Complete the fields as for a regular requisition.

5 Posting and Sourcing Requisitions

Post a Requisition to a Career Section

You can post requisitions to internal career sections for your employee, and to external career sections for external candidates.

1. Go to the **Requisitions** menu.
2. Open a requisition.
3. Click the **Sourcing** tab.
4. Expand the Career Sections section.
5. Click the **Add career sections** button. The Career Sections Selector displays a list of career sections.
6. You can remove or add career sections as necessary.
7. Click **Add / update career sections**. The career sections are added to the requisition and you're back on the Sourcing tab. From there, you can:
   - Use the default posting schedule or modify it.
   - Mark the posting as urgent.
   - Set the **Apply Online** option before posting the requisition.
   - Add and remove career sections.
   - Unpost the requisition from a career section.
   - View the list of career section along with their posting status.
8. Click **Save and apply**.

You can come back to the Sourcing tab to view the current status or to modify your postings. For example, you can unpost a selected career section when the posting has not yet expired or you can change the date when it should become posted or unposted.

Post a Requisition to a Job Board

You can post a requisition on job boards through an external job posting distribution supplier.

You must post the requisition on an external career section before you can post it on a job board.
1. Go to the **Requisitions** menu.
2. Open the requisition.
3. Click the **Sourcing** tab.
4. Expand the Job Boards section.
5. Click the **Select job boards for posting** button.
6. Select the supplier, account, and language.
7. Click **Next**. You're then taken to the supplier's site where you can select job boards and provide more details about the posting.

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Use Staffing Agents to Refer Candidates for a Requisition

You can use the services of staffing agents who will refer candidates to a job.

1. Go to the **Requisitions** menu.
2. Open the requisition.
3. Click the **Sourcing** tab.
4. Expand the Staffing Agents section.
5. Click the **Add Agents** button. The Staffing Agents Selector displays a list of staffing agents for posting the requisition. The list of agents available is dependent on the organization, location, and job field selected for the requisition.
6. You can remove or add staffing agents as necessary.
7. Click **Add / update agents**. The staffing agents are added to the requisition and you're back on the Sourcing tab.
8. Set the start and end date of the posting.
9. Click **Save and apply**.

An email is sent to staffing agents inviting them to refer candidates for the job. The staffing agent signs in to the agency portal, locates the requisition, and refers candidates. Candidates being referred receive an email informing them that an agent referred them for a job. Candidates are invited to review the profile information submitted by the agent. When you search candidates in the database, you can easily identify candidates referred by an agent with the **Candidate referred by an agent** option.

Share Jobs Through Social Media

You can share jobs through social media or by email by sharing the link to a specific job description page to your contacts on multiple social networks

1. Go to the **Requisitions** menu.
2. Open a requisition posted on an external career section.
3. Click the **Sourcing** tab.
4. Click the **Share through social network** link.
5. Select social networks.

Invite Candidates Matching Criteria of a Posted Requisition

When a requisition is posted on a career section, you can invite candidates to apply to a requisition when they match criteria defined for the requisition.

1. Go to the **Requisitions** menu.

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2. Open a requisition posted on a career site.

3. Click the **Sourcing** tab.

4. Expand the **Invite Matching Candidates** section.

5. You can modify default matching criteria to find more relevant candidates for a particular requisition. You can modify the list of sources used by candidates to apply for the job. You can also modify default filters using the Edit icon next to Resulting Invite List.

6. When you have found the right candidates, click the **Send Invite** button to send an email to these candidates to invite them to apply for the job. Candidates receiving the invitation to apply can submit their applications using the career section portal.

Send Automatic Job Posting Notifications to Matching Candidates

You can send job posting notifications automatically to matching candidates.

1. Go to the **Requisitions** menu.

2. Open a requisition.

3. Click the **Sourcing** tab.

4. Expand the Career Sections section and select a career section.

5. Click **Modify**.

6. Click the **Automatically invite when posting starts** checkbox.

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6 Prescreening Candidates

Understanding the Prescreening Section in the Requisition

The Prescreening section in the requisition may contain disqualification questions, prescreening questions, and competencies used to find the top candidates for a position. The combination of these three elements is referred to as ACE Prescreening because they help identify ACE or top candidates for a position.

- A disqualification question is a single-answer question that contains the minimum requirements for a candidate to be eligible for a job. For example "Are you entitled to work in the United States?" When candidates apply for a job, it's mandatory to respond to the disqualification questions. Answers to the disqualification questions decide if candidates move forward in the selection process or are automatically disqualified. When you create a requisition, you can't add disqualification questions. It's your administrator who creates and manages disqualification questions and defines the context when the question is used. Disqualification questions are displayed in a requisition if the locations and job fields of the question matches the locations and job fields of the requisition.

- Prescreening questions are used to learn more about a candidate in areas such as their career goal, job preferences, knowledge, and more. For example, you can ask "How good are your Java skills?". If the prescreening question is configured as mandatory, the candidate can't skip it while applying for the job. You can add questions to a requisition and you can create questions specific to a requisition.

- You use competencies to gather proficiency levels and years of experience of a candidate. Competencies are supplied with the system. You can add competencies to a requisition.

Disqualification questions, prescreening questions, and competencies are answered by candidates. The candidates' responses are filtered and presented on the candidates list of the requisition. The Ace Submission icon identifies top candidates, and the amount of requirements and assets that the candidate has achieved with their responses is also displayed. You can then review the candidates list and decide to reset the Required, Asset, and Weight indicators as well as the ACE flag alert to modify the threshold if necessary to obtain a viable pool of top candidates.

Question and Competency Properties

When you define prescreening questions and competencies for a requisition, you need to consider several elements.

Apply Model

When you define competencies and questions for a requisition, you can apply the predefined model of competencies and questions associated with the requisition. When you click Apply Model, competencies and questions that match one location or one job field of the requisition are added to the requisition.

Minimum Proficiency and Experience

When you add competencies to a requisition, you can specify the minimum proficiency level of the competency and the minimum years of experience required.

Your administrator decides if and how you can define that info. These three configurations are possible:

- Simple format: Instead of overwhelming candidates with a list of competencies where different values must be assessed for each, the simple format presents a much simpler and faster experience where candidates simply check off those competencies where they have the required proficiency and experience.

- Detailed format: The detailed format lets candidates assess each competency using 4 different metrics: Proficiency, Experience, Last Used, and Interest.

- Simple or Detailed: You can use the simple format, the detailed format, or even both. When using both formats, candidates first go through a process in simple format and later, they're asked to provide the additional details. If you need to specify requirements that are different from those set by your administrator and used with the simple format, you need to select the option "Modify the minimum requirements of proficiency and experience" before you can select a minimum proficiency level of a competency and the minimum years of experience required.

Required and Asset

When you add questions and competencies to a requisition, you can specify if a certain answer is required or maybe just an asset.

- Required: The candidate must have the competency or the right answer to a question to be considered for the job. It's like the minimum requirement.

- Asset: The candidate doesn't need to have the competency or the answer to a question to be selected for the job, but it would distinguish a candidate compared to others. It's like a strongly preferred or nice to have qualification.

Here are some examples.

Example	Question
This is a single answer question for which the candidate will only select one answer. If a Bachelor's Degree is required, you must mark that answer and all answers greater than that answer as required. Otherwise, a candidate that answers Master's degree won't be recorded as having met the requirement, even though candidates with a Master's degree do meet the minimum requirement.	Indicate the highest level of education you have completed. • High School • Associate's Degree • Bachelor's Degree - Required • Master's Degree - Required • PhD - Required • None of the above
This is a single answer question for which the candidate will only select one answer. If a minimum of 2 years of experience is required, you must mark "1 to 3 years" and all answers greater than that answer as required. Otherwise, a candidate that answers "3 to 6 years" won't be recorded as having met the requirement, even though those candidates have at least 3 years of experience and do meet the minimum requirement.	How many years of experience do you have in Java programming. • No experience • Less than 1 year • 1 to 3 years - Required • 3 to 6 years - Required • 6 to 10 years - Required • More than 10 years - Required

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Weight

Weight is a numerical value added to a given answer to give it more consideration when prescreening candidates. The weight criterion is an optional third level filter. To use the weight feature, you assign a certain number of "points" to the answer you want to weight. Keep it simple, weighting is used to refine requirements and assets, so it should be used selectively.

Weighting can be helpful with a high volume requisition as there will be more questions and you will need to have extensive filtering of the candidates list.

If you decide to use weight, here are some tips to keep in mind to know what to weight:

- First determine what answers need points. Not all questions or answers need weighting.

- Only weight assets not requirements, and only those assets that really need to stand out from the others to sort your ideal candidates to the top of the list.

- One exception to the asset rule is you can put weight on single answer requirements if the questions are minimum or greater like we saw earlier.

- Another exception is if the Prescreening requirement column is strictly used for OFCCP compliance, then typically assets aren't used, and some organizations may want to use weighting in that case to help sort the list.

Example	Question
This is a multiple answer question where you may have several assets. Weight helps you identify preferred, or super assets over other assets listed. Here we see MS Project is the most important asset out of the 4 assets. 3 out of the 4 assets are weighted with extra points. When using a list that includes requirements and assets, never assign weight to requirements. The candidate will either meet the requirement or not, and adding weight to a requirement listed won't help in providing further differentiation from other candidates. The total weight for this question is 100%. You can assume that this is the only question weighted on the whole questionnaire. If a candidate selected all the assets with weighting they would receive 6 asset points or a 100% result.	Indicate which computer applications you have used to perform your job duties in the past. Select all that apply. • MS Access • MS Word - Required • MS Excel - Required • MS Publisher - Asset, Weight: 1 (17%) • MS Project - Asset, Weight: 3 (50%) • Adobe Acrobat - Asset, Weight: 2 (33%) • Adobe Pagemaker - Asset • None of the above • Total for Competencies and Questions - Weight: 6 (100%)
This is a single answer question. The one exception where you would weight requirements is on a question like this one. In this example, we are hiring a junior level HR Generalist, so a preferred level of years experience is indicated even though anyone with one or more years of experience would meet the requirement. Here, we see that 3-5 years is the most desirable out of all the choices. The 5-7 years is a medium level. And the over 7 years gets the least amount of points as they may be overqualified.	How many years of experience do you have as a Human Resources Generalist? • No experience • Less than one year • More than 1 year and less than 3 years - Required • More than 3 years and less than 5 years - Required, Weight: 3 (100%) • More than 5 years and less than 7 years - Required, Weight: 2 (67%) • More than 7 years - Required, Weight: 1 (33%)

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Add Questions to a Requisition

You can add prescreening questions to a requisition.

1. Go to the **Requisitions** menu.
2. Open the requisition.
3. Click the **Requisition Info** tab.
4. Go to the Prescreening section and click the **Edit** icon.
5. Go to the Questions section and click **Add**.
6. Select one or more questions.
7. Click **Add Questions**.

The questions are added to the requisition. If you added several questions, you can reorder them. Select an order number from the list and click the Reorder button. You can also define required and asset criteria, and weight.

Create a Question for a Requisition

You can create questions for a specific requisition. It's recommended to do this only when the question isn't readily available in the Questions Library. Ideally, the content manager should create that question for you and place it in the library such that all users and candidates can benefit from that question. When the question is created, it's not available in the Questions Library and for other requisitions.

1. Go to the **Requisitions** menu.
2. Open the requisition.
3. Click the **Requisition Info** tab.
4. Go to the Prescreening section and click the **Edit** icon.
5. Go to the Questions section and click **Create**.
6. Enter the question in the Question field.
7. Select the type of answer:
   - Single answer: The candidate selects one answer from a list of choices.
   - Multiple answers: The candidate selects as many answers as applicable from a list of choices.
   - Text answer: The candidate types a brief answer in response to a specific question. Use text questions sparingly; use them where they can allow for expansion of information asked in a previous question.
8. For a question with a single or multiple answers, decide if you want to display the answers with radio buttons or using a drop-down menu. Then provide possible answers to the question.
9. For a text answer, indicate the number of lines available for the candidates to provide an answer.
10. Click **Save and Close**.

Create a Question Based on a Library Question

You can copy a question from the Questions Library and use to create a question specific to the requisition.

1. Go to the **Requisitions** tab.
2. Open the requisition.

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3. Go to the Prescreening section and click the **Edit** icon.
4. Go to the Questions section and click **Copy from Library**.
5. Select a question from the list.
6. Click **Add Questions**.
7. Click on the question and modify it to fit the requisition purpose.

Add Competencies to a Requisition

You can add competencies to a requisition to gather proficiency level and years of experience of a candidate to find the best candidate for a job.

1. Go to the **Requisitions** tab.
2. Open the requisition.
3. Go to the Prescreening section and click the **Edit** icon.
4. Go to the Competencies section and click **Add**.
5. Select one or more competencies.
6. Click **Add Competencies**.

The competencies are added to the requisition. If you added several competencies, you can reorder them. Select an order number from the list and click the Reorder button. You can also define properties such as the minimum proficiency and experience levels, required and asset criteria, and weight.

Flag ACE Submissions to Identify Ideal Candidates

With the ACE submission flagging, you can set a threshold to identify the ideal candidates for a job. ACE candidates are identified based on their responses to the competencies and questions in the requisition file.

When you activate this feature, you must set the prescreening outcome that you want to flag a submission as being ACE. You can also choose to notify certain people by email.

1. Go to the **Requisitions** menu.
2. Open a requisition.
3. Click the **Prescreen Alerts** tab.
4. In the ACE Submission Flagging section, click **Activate**.
5. Select options as needed.
   - Result: A submission meeting all the prescreening required criteria and obtaining a result of at least n %: Candidates who meet all the required criteria and the result value will be considered ACE candidates.
   - Asset: A submission meeting all the prescreening required criteria and obtaining n of n assets: Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
   - Both Result and Assets must be met: Use this option to identify ACE candidates using the result and asset conditions.
   - Either Result or Assets must be met: Use this option to identify ACE candidates using the result or asset condition.
6. You can send an email to specific recipients to inform them that ACE submissions were submitted. The email contains a PDF of the candidate files. All recipients receive the same candidate files, regardless of their permissions to view candidate information.

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7. Click **Done**.

When the ACE submission flagging is set on a requisition, the ACE star icon appears on the Requisitions list, next to a requisition and on the requisition summary card. Candidates who apply to the requisition and meet the criteria are marked as ACE candidate on their respective submission. The ACE star icon is displayed.

Filtering ACE Submissions

There are several ways to filter ACE submissions.

Sorting ACE Submissions: The submissions list of a specific requisition contains the ACE Submission column. Submissions with this icon are ACE submissions. You can sort the list by ACE submissions. You can also use the Requirements, Assets Met X/Y and Result columns to sort candidates.

Using the ACE Filters The ACE filter can help you to only display ACE submissions for a requisition. The Meet required criteria is another way to filter the submissions list to show active candidates who meet all the required criteria of the Prescreening section of the requisition. You can also use the Assets Met and Results between (%) features to filter the list.

Adjusting Required and Asset Criteria: If your submissions list shows too many or too few ACE submissions, you can go back to the requisition Prescreening section and adjust the Required and Asset criteria. You may realize that a response you marked as an asset should have been marked as a requirement.

Updating the ACE Alert: If you do adjust the Required and Asset criteria, then you need to review the ACE Alert. You may need to adjust the selections of assets or adjust overall settings based on the modifications you made in the requisition Prescreening section.

Request More Information About Submissions

With the Request More Information feature, you can contact candidates who meet prescreening required criteria for a job and you can request more information from them. Candidates receive an email inviting them to return to their submission and provide additional information.

Here's an example where you might want to use this feature. Instead of creating an application flow that could be too long for most candidates to complete, the Request More Information option allows you to stick to only the most basic information. Candidates who meet your criteria are invited to provide additional information. This results in a much better user experience for candidates as you're showing a special interest for those candidates.

1. Go to the **Requisitions** menu.
2. Open a requisition.
3. Click the **Prescreen Alerts** tab.
4. In the Request More Information section, click **Activate**.
5. Select the options as needed.
   - Result: A submission meeting all the prescreening required criteria and obtaining a result of at least n %: Candidates who meet all the required criteria and the result value will receive an email to provide more information.
   - Asset: A submission meeting all the prescreening required criteria and obtaining n of n assets:Candidates who meet all the required criteria and the minimum number of assets will receive an email to provide more information.

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       ◦ Both Result and Assets must be met: Use this option if you want both result and assets to be met.

       ◦ Either Result or Assets must be met: Use this option if you want either the result or assets to be met.

6. Click **Done**.

When the ACE submission flagging is set on a requisition, the ACE star icon appears on the Requisitions list, next to a requisition and on the requisition summary card. Candidates who apply to the requisition and meet the criteria are marked as ACE candidate on their respective submission. The ACE star icon is displayed.

7 Searching for Candidates

Find Candidates Using the Look Up Tools

You can use the "Look up a candidate", "Look up a candidate (Detailed)", and "Find Submission" search tools to quickly find a specific candidate or submission that you know exists in the database.

Look Up a Candidate

When you use the "Look up a candidate" search tool, you can enter the first name, last name, middle name, email address, user name, or candidate identification number of the candidate you're looking for in the Search field. You can also use the AND and OR operators along with partial names and wildcard. However, a best practice is to enter complete names to obtain better results.

Look Up a Candidate (Detailed)

If you want greater precisions in your search results, you can use the "Look up a candidate (Detailed)" search tool where you can enter a value in more than one of these fields: first name, last name, middle name, email address, and candidate identification number of the candidate you're looking. If there's an exact match, you're taken directly to the candidate's general profile.

Find Submission

This search tool is similar to the "Look up a candidate" feature except that, instead of displaying a resulting list of candidates, it displays a list of submissions.

Find Candidates Using Search

Use Search when you need to find candidates with a specific profile for an existing or upcoming requisition.

The Search tool is available on the core navigation bar. When you click **Search**, the New Search Criteria page appears. This is where you select criteria to find candidates.

When you define your search, the more you add search criteria, the narrower the scope of your search will be, typically resulting in fewer but more pertinent results. By adding multiple occurrences of the same criteria, you broaden the scope of your search, typically resulting in more search results.

A best practice is to start your search with only a few criteria, and to narrow your search down by going back to your search query and entering one or more additional search criteria. Your search results will then contain fewer candidates. It's simpler and more efficient to start with a general search and narrow down the results to a manageable candidate pool than to start with a tightly defined narrow search and then need to broaden the search to obtain a viable candidate pool.

Search criteria are organized into different categories or types.

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Search Criteria Presets

These are criteria set by your administrator. You can't change them, they're shown only for informational purposes. The presets may affect search results.

Required Criteria

These criteria have a red asterisk beside them. They were added to the search form by your administrator. You can't change them.

Required, Excluded, or Desired Criteria

For many search fields, you can specify one of these criteria:

- Required: Only candidates with that criterion are retrieved.
- Desired: Candidates with that criterion are considered more relevant than those without the criterion.
- Excluded: Candidates with that criterion are excluded.

Customize Search Parameters

If you have the required permission, you can add more criteria to the search form. Click the **Customize Parameters** icon and select the desired criteria. Criteria are added to their respective section automatically.

Default Value

You can select a value for a search criterion and make that value the default value when creating a new search query. Let's say that for the External/Internal Candidates criterion, you want the External value to be the default value. Select External, then click **Make Default**.

Keyword Search

You use the Keyword search when you want to search candidates based on specific terms, related terms, or a block of text in the candidate profile. These keyword search types are available:

- Exact Terms: The search engine returns words that match exactly the terms you entered.
- Related Terms: The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system.
- Conceptual: The search engine finds the right concepts to search for based on the text you entered and then broaden its search by searching documents or attachments with relevant ideas and concepts to the text you provided. For example, you could use text from a candidate's resume or job description to search for candidates.

To help you select the proper search type, an information icon provides details about the Related Terms and Conceptual search.

Filter Candidate Search Results

You can use filters to narrow down the list of candidates found after performing a candidate search.

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When you click the Search button to find candidates, candidates meeting the selected search criteria are listed in the Search Results page.

- Click the Filters tab to filter results using keywords or specific criteria.
- Click the Advanced Filters tab to select more criteria to further refine your search results.

> **Note:** Advanced filters must be enabled by your administrator. You also need the permission to access advanced filters.

Save Your Candidate Search Query

You may want to save a candidate search query because you want to use it frequently or to potentially share it with other recruiters.

1. Go to the **Search** menu.
2. In the New Search Criteria tab, enter values in the search criteria.
3. Click the **Customize Parameters** icon to add more search criteria.
4. Click **Save**.
5. In the Save Search Criteria window, enter a name for your search.
6. Select a folder to save your search. Personal search queries are only available to you. Shared queries are available to other recruiters.
7. Click **Done**.

Access Your Candidate Search Queries

You use the Saved Searches tool to quickly access your saved candidate search queries.

1. Go to the **Search** menu.
2. Click the **Saved Searches** tab.
3. Use the Folder menu to display personal searches, shared searches, or both.

Organize Your Candidate Search Queries into Folders

You can organize your candidate search queries into folders.

1. Go to the **Search** menu.
2. Click the **Saved Searches** tab.
3. Select a search query.
4. Click the **Move Saved Search** icon.
5. Decide if you want to copy or move the search query.
6. Select a folder.
7. Click **Done**.

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When you view the folder structure, click the More Actions icon next to a folder to access more actions such creating a new folder, share an existing folder, view folder properties, move and delete the folder.

8 Creating Candidates and Submissions

What's a Candidate Profile

The candidate profile, also known as general profile, represents the candidate as a whole or, if you like, the person. It contains generic information about the candidate such as the name, address, date of birth, overall education and work experience. This information holds true across all submissions. If a candidate visits your organization's career section and applies in an unsolicited manner, that results in a candidate general profile that you can look at or find using search.

You can view a candidate's general profile directly in a search result page for example or, if you're viewing a submission, you can toggle between the general profile and submission of the candidate.

When you view a candidate profile, details of the profile are presented in the following tabs and panel:

- General Profile: Provides information about the candidate such as personal information, work experience, employment preferences.
- Attachments: Displays all of the file attachments (resume or other) relating to the candidate, whether uploaded by the candidate or by a recruiter. If a file was attached for a specific submission, that information and a link to is included. You can view, preview, edit, download, and delete attachments.
- Referral: Displays information about the person who referred this candidate, whether an agent, employee, or candidate.
- History: Displays the history of all the events that occurred concerning the candidate. You can view the history of the general profile only, the general profile and all submissions, or all active submissions. Click the Modify Categories button to select the event categories you want to display. You can also sort events by date and by the person who performed the event.
- Summary: The Summary panel highlights important details about the candidate such as contact information in the information callout, active submissions, most relevant education, work experience.

You can edit the general profile of a candidate. Click the Edit icon next to a section or the Edit All icon. Once you're in edit mode, the Summary panel displays a table of contents of the candidate profile sections. You can click section titles to quickly navigate to that specific content.

What's a Candidate Submission

A candidate submission is a record containing information provided by the candidate when applying for a job. It also contains information about the progression of the candidate submission in the candidate selection process.

When you view a candidate submission, details of the submission are presented in the following tabs and panel:

- Job Submission: Displays all the details of the candidate submission organized into different sections that you can expand and collapse depending on their pertinence.
- Attachments: Displays attachments into different sections. The first section contains the resumes attached to the submission. The second section contains attachments relevant to the submission. The third section contains offer-related attachments. The last section contains attachments that are either relevant to other submissions or to the candidate's general profile. You can preview, download, upload, delete, and even edit the properties of files attached to the submission.

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- Offers: This tab is displayed once an offer is created or once competitive offers of candidate expectations have been captured. It contains information pertaining to offers such as current or previous offers, offer letter, competitive offer, and candidate expectation information or even requisition compensation information. For details, see the Offers chapter.

- Referral: Displays information regarding the agent, employee, or external candidate that referred the candidate.

- Interviews: Presents details about scheduled interviews.

- History: Displays the history of all the events that occurred concerning the submission. You can view the history of the current submission, the general profile and all submissions, or all active submissions. Click the Modify Categories button to select the event categories you want to display. You can also sort events by date and by the person who performed the event.

- Summary: The Summary panel highlights important details about the submission such as candidate identification, work experience, education, prescreening results, submission status. If a resume is attached to the submission, you can click the Resume button to preview the resume. While viewing the resume, you can navigate through the resume if it contains several pages and you can flip through the other candidate submissions and see their resumes. If there are other attachments for that particular submission, you can flip through those as well. You also have direct access to the action toolbar from where you can disposition the candidate. When you close the resume preview, you are right back to where you were previously

You can navigate to the requisition details from a submission by clicking the requisition name. You can also get a quick preview of the requisition details without navigating away from the current screen by clicking the preview icon next to the requisition name.

You can navigate back to the Submissions list using the Back to Submission List button. You're returned to the Submissions list and the most recent requisition you viewed is highlighted.

You can flip through the submission details for each of the submissions displayed on your list by clicking the previous and next buttons.

When to Create Candidate Profiles and Submissions

You can create a general profile for a candidate to quickly capture candidate information. There are various reasons why you may have to create a candidate profile. For example, you received a candidate's resume by email and you want to create a general profile from scratch. You can also create a candidate submission for a requisition.

There are three contexts where you can create a candidate profile and candidate submission.

- After searching for candidates, you can create a candidate profile using the Create New Candidate option in the More Actions menu. You're offered to create just a candidate profile or a candidate profile and submission.

- In the Submissions menu, you can create a candidate profile using the Create New Candidate option in the More Actions menu. You're offered to create just a candidate profile or a candidate profile and submission.

- In the Requisitions menu, when you're viewing submissions for a requisition, you're offered to create just a candidate profile, create a candidate profile and submission for the current requisition, and create a candidate profile and submission for another requisition.

Note: When you creating a candidate profile or submission, the form presented doesn't take into consideration security level permissions in view and edit modes. You will be able to input data into all the fields no matter the security level permissions granted or the security level set for the fields.

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Create a Candidate Profile

Let's say you performed a candidate search and you're viewing the Search Results list.

1. In the More Actions menu, select **Create New Candidate**.
2. Select the **Create a new candidate** option.
3. Click **Next**.
4. Select the language in which you want to create the candidate profile.
5. Select the desired form style, if that option is displayed.
6. Click **Next**.
7. If you have the resume of the candidate, you can upload it. The system will populate as many fields as possible.

   The file must not exceed 100 kilobites and its format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt).
8. Enter basic info about the candidate such as the first name, last name, email. The system will use that info to search for potential duplicates. If duplicates are found, they're listed on the page. You can then:
   - Select a possible duplicate candidate.
   - Create a new candidate.
   - Click Previous to go back to the previous page and enter new info to search for potential duplicates.
9. If you decide to create a new candidate profile, you're taken to the General Profile tab where you need to complete fields.
10. Click **Done**.

Create a Candidate Profile and Submission

You can create a general profile and a submission at the same time.

Let's say you're in the Submissions menu and you want to create a candidate profile and submission.

1. In the More Actions menu, select **Create New Candidate**.
2. Select the **Create a new candidate and submission** option.
3. Click **Next**.
4. Select the language in which you want to create the candidate profile and submission.
5. Select the requisition for which you want to create the submission.
6. Click **Next**.
7. Select the desired form style, if that option is displayed.
8. Click **Next**.
9. If you have the resume of the candidate, you can upload it. The system will populate as many fields as possible.
10. Enter basic info about the candidate such as the first name, last name, email. The system will use that info to search for potential duplicates. If duplicates are found, they're listed on the page. You can then:
    - Select a possible duplicate candidate.
    - Create a new candidate.
    - Click Previous to go back to the previous page and enter new info to search for potential duplicates.

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11. If you decide to create a new candidate profile, you're taken to the Job Submission tab where you need to complete fields.

12. Click **Done**.

Create a Candidate Profile or Submission with Referral Details

You can create a candidate profile or a candidate submission and add details provided by a referrer.

Let's say you receive information from a referrer about a potential candidate for a requisition and you want to create a candidate profile or submission along with referrer details.

1. Go to the **Submissions** menu.

2. In the More Actions menu, select **Create New Candidate**.

3. Select **Create a new candidate** or **Create a new candidate and submission** option.

4. Click **Next**.

5. Select the language in which you want to create the candidate profile.

6. Select the referral form. You will be given the opportunity to identify a referrer for the new candidate.

7. Click **Next**.

8. On the Referrer – Duplicate Check page, enter details about the referrer such as the first name, last name, email. The system will use that info to search for potential referrer duplicates. If duplicates are found, they're listed on the page.

9. Click **Next**.

10. If you have the resume of the candidate, you can upload it. The system will populate as many fields as possible. Complete any missing information and submit the general profile or submission.

11. Click **Done**.

The referrer details are shown in the Referral tab of the general profile or submission.

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9 Moving Submissions Through the Selection Process

Candidate Selection Process

The candidate selection process provides the framework to move candidates through the hiring process to evaluate and find the best candidates for a job. An analogy can be drawn between the candidate selection process and moving candidate resumes from one pile to another as the selection progresses and the number of resumes retained is reduced. For example, a candidate submission is analyzed, the candidate is contacted, interviewed, then hired.

Candidate selection processes are created by your administrator. They typically consist of steps (such as New, Interview, Offer, Background Check, Hire), and each step offers a variety of statuses to mark the progress of candidates. When you create a requisition, the system presents the most appropriate process for your requisition. Candidate submissions must go through the selection process as defined in the requisition.

Change the Step and Status of a Candidate Submission

You can change a submission's current step or status using the Change Step/Status action available in the Submissions list and within a candidate submission. You can change the step/status for one candidate submission or, for several candidate submissions (bulk action). The step and status available for selection are based on the requisition's candidate selection workflow configuration and your permissions.

1. Select one or multiple candidate submissions.
2. In the More Actions menu, select **Change Step/Status**.
3. In the Change Step and Status window, select the desired step and status.
4. Enter comments.
5. If applicable, choose any available action that you would like to perform at the same time (as made available by your administrator).
6. Click **Apply and Close** if you only want to change one step/status. Click **Apply and Continue** to continue changing the step/status of the selected submissions.

Revert a Candidate Submission Step and Status

If you mistakenly change the step/status of a submission, you can use the Revert Latest Change of Step/Status action to return the submission to the step/status it held previously.

1. Select one or multiple candidate submissions.
2. In the More Actions menu, select **Revert Latest Change of Step/Status**.
3. In the Revert Latest Change of Step/Status window, you can see the step and status that the submission will revert to.
4. Enter comments.
5. Click **Revert and Close**. Alternatively, click **Revert and Continue** if you want to revert back another step and status.

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Bypass a Mandatory Selection Step

When you want to move submissions quickly in the selection process, you can use the Bypass Selection Steps action to move the submission to any step and bypass mandatory steps.

1. Select one or multiple candidate submissions.
2. In the More Actions menu, select **Bypass Selection Steps**.
3. Enter comments.
4. Click **Apply and Close**. Alternatively, click **Apply and Continue** if you want to bypass more steps.

Mark Step as Complete With Pending Activities

You can mark a step as completed even if you didn't complete it. Candidate submissions will move forward in the selection process even if certain activities are pending.

Every time you attempt to change the step/status of a submission, you're reminded of those pending activities. To complete the step, you can move it again and give it the same status but no longer with the pending activities option. This can only be done on configured steps.

1. Select a candidate submission.
2. In the More Actions menu, select **Change Step/Status**.
3. Select a step and a status that completes the step (status with an asterisk).
4. Select the **Complete this step even if some activities remain pending** option.
5. Click **Apply and Close**.

Reset a Submission Selection Process

You can use the Reset Selection Process action to restart the selection process of an hourly submission from the beginning.

This can be done for an active hourly requisition (not canceled, filled, or deleted). Also, the submission must no longer be active.

1. Select a candidate submission.
2. In the More Actions menu, select **Reset Selection Process**.
3. In the Reset Selection Process window, you can see to which step and status the submission will be reset.
4. Click **Reset and Close**.

Indicate a Candidate Has Declined

A candidate may decide to decline a job for different reasons such as the salary is insufficient, or the candidate doesn't want relocate for the job or to travel.

1. Go to the **Submissions** menu.

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2. Open a candidate submission.
3. In the More Actions menu, select **Candidate has declined**.
4. In the Candidate has declined window, select a reason why the candidate decided to decline the job, if that option is available.
5. Enter comments.
6. Click **Candidate has declined**.

Reject a Candidate Submission

You may want to reject a candidate for several reasons. For example, the candidate doesn't meet the required criteria for the job or you received the candidate submission too late or were not able to contact the candidate.

1. Go to the **Submissions** menu.
2. Open the submission.
3. In the More Actions menu, select **Reject Submission**.
4. In the Rejecting a Submission window, select a reason why the submission was rejected, if that option is available.
5. Enter comments.
6. Click **Reject Submission**.

Delete and Restore a Candidate Submission

You can delete one or more submissions at a time on a submissions list or within a submission. You can restore the submissions you deleted to their status prior to deletion.

Let's say you deleted a few submissions that were duplicates or inactive and in the process you realize that you should not have deleted them.

1. Select the submissions.
2. In the More Actions menu, select **Delete Submission**.
3. Enter comments, if any.
4. Click **Delete**.

The status of the submissions is changed to Deleted.

If you want to restore the submissions, select the submissions and use the Restore Submission action.

Permanently Delete a Candidate Profile

You can delete one or more candidate profiles permanently.

1. Select a candidate profile.
2. In the More Actions menu, select **Delete Candidate**.
3. If you want to continue with the permanent deletion, click **Yes** in the warning message.

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10 Managing Candidates and Candidate Submissions

Submissions List

You can access the list of all submissions by clicking the Submissions menu. You can also navigate directly to the submissions of a specific requisition by clicking the candidate count of the requisition in the Requisitions list.

From the Submissions list, you can:

- View the list of submissions and see their progress in the selection process.

- Navigate through the Submissions list pages using the first, previous, next, and last buttons. You can also go directly to a page.

- Filter submissions using various criteria. Once you have selected criteria, click Apply Candidate Filters to refresh the list accordingly. Applied filters are shown in the top of the list. To remove filters, click Clear All to clear the selected filters, or click the remove icon next to each filter to remove each filter individually. The Filters pane is collapsible.

- Sort submissions according to the information within a column by clicking the triangle in that column's header. Clicking a second time will reverse the sorting sequence.

- Use the List Format tool to configure what content to display in the list.

- See how many submissions are currently in the various steps and statuses of the selection process.

- Perform actions directly from the list. Select a submission then select the action from the action toolbar. You can also use the More Actions menu displayed directly on each submission's row.

- Perform bulk actions. Select multiple submissions then perform these actions: Change Step/Status, Send Correspondence, Add Comments.

- When you hover your mouse over a candidate name, a pop up appears and provides candidate details such as contact phone, contact email, candidate ID.

- Click the candidate name to open the submission and view all of its details. From there, you can flip to the next or previous submission. You can also come back to the Submissions list and see the last viewed submission highlighted on the list.

- Preview the related requisition for a submission by clicking the title of the requisition. When you're done previewing the requisition, you can go back to the Submissions list.

What's a Completed Submission

You can view and sort candidate submissions based on the date when a submission was completed.

Submissions are considered completed when:

- A candidate completed a job submission and clicked the Submit button.

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- A candidate (usually internal candidate) refers someone when creating or updating a submission.

- An agent refers someone when creating or updating a submission.

- A recruiter matches a candidate to a requisition (when creating a new submission or when a match is done with an incomplete submission).

- An import is done on a submission.

- A candidate is hired on a job.

If you add the column Submission Completed to a requisition-specific submissions list, information in the column appears as follows:

- A blank value means that the submission is not yet completed.

- Ascending sorting (arrow pointing upwards) displays the oldest submissions at the top of the list. If you sort on the Submission Completed Date column, blank values (incomplete submissions) are always displayed at the bottom of the list, whether sorting in an ascending or descending order.

Share a Candidate Submission

You can share one or multiple candidates with selected recipients. For example, other recruiters may be interested in such a profile to fill a position.

Let's say you're on the Submissions list.
1. Select one or more candidates.
2. In the More Actions menu, select **Share Candidate**.
3. Search for people with whom you want to share the candidate.
4. Click **Next**.
5. In the Share Candidate – Share Options window, select the sections of the file you want to share.
6. Click **Share Candidate**.

The recipients receive a notification about the candidate that you just shared. They can view the info you shared.

Link Candidates to a Requisition

You can link one or multiple candidates to a requisition to create submissions for that requisition. You can link multiple candidates at a time to more than one requisition.

Let's say you want to link several candidates to a requisition.
1. In the Submissions menu, select the candidates.
2. In the More Actions menu, select **Link to Requisition**.
3. Select a requisition then click the **Link to Requisition** button.

   Requisitions displayed match the default matching requisition criteria set by your administrator.

4. You can then choose to send an email to the candidate if you need more info about their profile. Emails are sent only for posted requisitions, to avoid inviting candidates to requisitions they can't see on the career section.

When candidates are linked to a requisition, they can complete the application process, if applicable. You will see these submissions displayed with the initial status on the 1st step of the selection process. The event is tracked in the submission's History tab.

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Modify Matching Criteria when Linking a Candidate to a Requisition

When you link one candidate to a requisition, you can modify the criteria used to find more relevant requisitions for a particular candidate.

1. In the Submissions menu, select a candidate.
2. In the More Actions menu, select **Link to Requisition**.
3. In the Filters panel, select the option **View only requisitions that match the selected candidates** button.

   Click **Modify Matching Criteria**.

4. Select the criteria and indicate whether they're required, desired, or not applicable.
5. Click **Update**.

Requisitions that meet all the required criteria and also some desired criteria appear at the top of the requisitions list.

Check for Duplicate Candidates and Merge Duplicate Candidates

You can run a duplicate check to identify potential duplicate candidates. If you find duplicate files, you can merge them into a single master file.

The Check for Duplicates action is available when viewing a list of submissions or general profiles and when viewing the details of a submission and general profile.

Let's say you're in a list of submissions.

1. Select a candidate.
2. In the More Actions menu, select **Check for Duplicates**. The system verifies if the candidate already exists in the database. If applicable, a list of potential duplicate candidates is displayed.
3. If you determine that one or multiple candidates are a duplicate, you can merge them with the reference candidate. Select the reference candidate and the potential duplicates, then click the **Merge selected candidates** button.
4. On the Merge Candidate Files page, select which candidate will be retained. You can also set the merge sequence. It's important to select the candidate and merge sequence with care because files are processed one at a time as per the configured sequence and only information that doesn't already exist is included.
5. If you select the option to send an email notification, an email message is sent to the master candidate or the agent owning the master candidate to inform them that the candidate files were merged and to invite that person to review the new candidate file.
6. Click **Merge Candidates**.

What happens once the merge is done:

- The information in the candidate file that was retained is preserved and enriched by merging in the information from the duplicate candidate files.

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- The candidates that were not retained are deleted.

Use Fill-Out Forms for the Hiring Process

You can use fill-out forms at any point during the hiring process. You can use forms for instance for various new hire paperwork, or to print a candidate submission in a particular format, or during an interview with a candidate to complete a candidate's "Do not disclose" information. You can also print a form, complete it, and have it signed by a candidate.

1. Go to the **Submissions** menu.
2. Select a candidate submission.
3. In the More Actions menu, select **Fill Out Form**. The Fill Out Form page displays the forms associated with the respective submission's step and status (as per the candidate selection workflow configuration).
4. Click on a form. Acrobat® Reader opens, displaying the form. The form is filled automatically using the corresponding fields of the candidate file or requisition file.
5. Validate the information.
6. Click **Print**. A PDF form is automatically generated.

Export Submissions and Candidate Profiles to Excel

You can export submissions and candidate general profiles in a Microsoft Excel spreadsheet.

Let's say you want to export several submissions.
1. Select candidate submissions.
2. In the More Actions menu, select **Download as Excel**.
3. Select where you want to download the file.
4. Click **Save**.

The selected submissions are downloaded to an Excel file with all the relevant information. Columns in the Excel file are determined by the actual columns displayed in the Submissions list.

- If a column is represented by an icon (such as the Item Requiring Attention icon), the column header will display the icon value.

- If a field displays a boolean value, the table cell will display True or False.

- If a field has multiple values, the table cell will display the actual text value.

Send a Correspondence to a Candidate

You can use the Send Correspondence action to create a message and send it to one or multiple candidates.

You can send a correspondence to a maximum is 150 candidates.
1. Select one or more candidates.
2. In the More Actions menu, select **Send Correspondence**.
3. Select how the message is sent, email or printed letter.
4. You can write the message from scratch or using a template:

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    ○ From Scratch: You can create a message from scratch using the text editor. Before sending the message, you can see and print a preview of the message and make final edits if needed. You can also attach files.

    ○ From Template: The list of templates that you can select is displayed. Use filters to find the desired template. If the template is built using several paragraphs, you can select and unselect them. You can see and print a preview of the message before selecting it. If you have the right permission, you can edit the message and attach files. You can also format the text using tools such as bold, italics, font types and sizes, bulleted lists.

5. Click **Next**.
6. Create the message.
7. Click **Send**.

Request Screening Services for a Candidate

You can request screening services for candidates such as background checks, tax credit eligibility, candidate assessments.

When you open a candidate submission, select the **Request a Screening Service** action in the More Actions menu. Screening services configured for the requisition are available for selection. Select the service you want to request.

You can view results of screening services performed on candidates. When you open a candidate submission, go to the Screening Services section. From there, you can view a summary of the results displayed in a table. Click the Show Details link to view a detailed report of the screening services performed on the candidate. If screening services were previously performed on the candidate, you can access historical results.

Add a Referring Agent

You can add a referring agent to a candidate submission and candidate profile.

1. Open a candidate submission or candidate profile.
2. Click the **Referral** tab.
3. Click **Add Referring Agent**.
4. Enter comments.
5. Selected a referring agent.
6. Click **Save**.

The Referral tab displays the name and email address of the agent, and the name of the agency. The status also indicates if the referrer ownership is still effective or not. If it's still effective, you can change the referring agent and the ownership period of the new agent will be reset. You can also remove referral information. This doesn't actually remove the information, it just expires the current ownership period. If the ownership has expired, you can only change the referring agent. When an agent refers a candidate, the ear icon is displayed with the letter A.

Generate a Password for a Candidate

You can generate a password for a candidate from within the candidate's general profile or from the submission.

1. Open a candidate submission or candidate profile.

2. In the Account Information section, click **Generate New Password**.

3. If you want to see the password generated for the candidate, select the option **Show password**.

11 Using Candidate Pools

Candidate Pool

You use candidate pools to organize your candidates into personal or shared folders.

You can use candidate pools to group candidates and manage sourcing activities for either a current job position or a future job position that you will potentially need to fill. With candidate pools, you can refine a list of qualified candidates and nurture those you wish to pursue.

Under the Candidate Pools menu, you can group candidates into personal and shared folders.

- The Personal folder holds folders that you created, whether you have chosen to share them or not.

- The Shared with me folder holds folders created by others and that are shared with me.

When you select any personal or shared folder, the More Actions icon becomes available. Click it to access more actions such as creating a new folder, sharing an existing folder, viewing folder properties, moving and deleting a folder.

When you select any personal folder, you can change the owner for that folder.

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12 Scheduling Candidate Interviews

Candidate Interviews

A candidate interview is a formal meeting to evaluate the qualifications and work experience of candidates and move them through the candidate selection process.

You can schedule, modify, and cancel interviews with candidates directly in Recruiting. Attendees invited to a meeting receive an interview notification by email and they can add the meeting to their calendars. Each time an interview is scheduled, updated, or canceled in Recruiting, an email message is sent to selected attendees.

Let's look at the main steps of a candidate interview.

A recruiter wants to interview a candidate for a job. The recruiter finds the candidate file, opens it, and choose the Schedule an Interview action in the More Actions list. The recruiter enter details about the interview such as the organizer, location, date, time, and duration, and invites the people who will attend the interview (the candidate and the interviewers). An interview invitation is sent to the attendees. The most appropriate invitation message template is selected by the system based on the requisition's Organization, Location, Job Field structure and the application language. You can select another notification if you want. You can send the candidate file and requisition file to the interview attendees but not the candidate.

The candidate, the meeting organizer, and the interviewers receive the interview meeting invitation by email and they can add the invitation directly into their calendars. If the candidate has no email address, the interview organizer can print the invitation and send it to the candidate by fax or regular mail.

After the interview is scheduled, you can view the interview details in the Interviews tab.

Schedule an Interview

You can schedule a candidate interview for a job.

The candidate submission must be at an interview step of the selection process.
1. Open the candidate submission.
2. In the More Actions menu, select **Schedule an Interview**.
3. Enter details about the interview such as the subject, organizer, location, date, time, and duration. You can also set a reminder for the interviewers.
4. Click **Next**.
5. Invite the people who will attend the interview. The hiring manager of the requisition is invited by default. If the meeting organizer is the hiring manager, the recruiter is invited instead.
6. You can also decide to invite or not the candidate.
7. You can attach the candidate file and requisition file to the interview and also to the invitation being sent. Interviewers will see the files, but not the candidate.

    Confidential info isn't displayed and files attached (such as resume) aren't included.
8. An interview invitation is sent to the attendees. The most appropriate invitation message template is selected by the system based on the requisition's Organization, Location, Job Field structure and the application language. You can select another notification.

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9. You can send the candidate file and requisition file to the interview attendees but not the candidate.
10. Click **Preview** to see how the interview request looks like. You can also print it.
11. Click **Next**.
12. Review the details of the interview.
13. Click **Submit**.

The candidate, the meeting organizer, and the attendees receive the interview meeting invitation by email and they can add the invitation directly into their calendars. If the candidate has no email address, you can print the invitation and send it to the candidate by fax or regular mail.

After the interview is scheduled, you can view the interview details in the Interviews tab.

Modify an Interview

You modify the interview meeting by changing the attendees, the schedule, or other information.

1. Open the candidate submission.
2. In the More Actions menu, select **Update an Interview**.
3. Change details about the interview.
4. Click **Submit**.

An email message containing the interview details is sent to existing and new attendees. The message is identical to the original message except that (Updated) appears in the subject of the message. Attendees that have been removed receive a cancellation message. The ics file attachment is now named "Update my calendar.ics".

Cancel an Interview

You cancel a candidate interview when you no longer feels the interview is required.

1. Open the candidate submission.
2. In the More Actions menu, select **Cancel the Interview**.
3. Choose if you want to send a notification to inform the attendees that the interview is canceled.
4. Click **Cancel Interview**.

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13 Candidate Evaluations

Evaluation Management

Evaluation Management allows your organization to electronically capture, review, and analyze an evaluator's input obtained during a candidate interview.

The new HTML-based Recruiting product leverages the same Evaluation Management functionality and user interface as found in the Legacy Recruiting product.

Different people in your organization are involved in the evaluation process. Here's an overview of how the process works:

- The content manager creates, edits, and manages categories to organize evaluation questions, evaluation skills, and evaluation questionnaires.

- The content manager creates, edits, and manages evaluation questions and evaluation skills used in evaluation questionnaires.

- The content manager creates evaluation questionnaires.

- Recruiters add evaluation questionnaires to requisitions.

- Recruiters send evaluation feedback requests to evaluators to ask them to evaluate candidates using evaluation questionnaires.

- Evaluators provide feedback on candidates they interview using the evaluation questionnaires.

- Recruiters view evaluation questionnaires completed by evaluators.

14 Offers

Understanding the Offers List

The Offers list displays offers across multiple requisitions.

From the Offers list, you can:

- View the list of offers and see their progress in the selection process.

- By default, you are shown offers that pertain to requisitions that you own. But you can select various filter options. If you select "All offers", you see all the offers you're entitled to see, regardless of the requisition to which they pertain.

- Filter offers using various criteria. Once you have selected criteria, click Apply Filters to refresh the list accordingly. Applied filters are shown in the top of the list. To remove filters, click Clear All to clear the selected filters, or click the remove icon next to each filter to remove each filter individually. The Filters pane is collapsible.

- Sort offers according to the information within a column by clicking the triangle in that column's header. Clicking a second time will reverse the sorting sequence.

- Use the List Format tool to configure what content to display in the list.

- Navigate through the Offers list pages using the first, previous, next, and last buttons. You can also go directly to a page.

- When you hover your mouse over a candidate name, a pop up appears and provides candidate details.

- Click the title of a requisition to open it and view all of its details.

Create an Offer

You create job offers to include details about the job responsibilities as well as compensation information such as salary and benefits.

When a candidate reaches the Offer step of the selection process, you can create an offer using the Create Offer action. The offer grid appear and this is where all the information is gathered to create an offer. You specify info such as the start date, salary, pay basis, vacation, car allowance. You can also use the option to copy values of the requisition into the offer. Once you completed the preparation of the offer and likely, the corresponding offer letter, you can submit it for approval or extend it to the candidate (depending on your process).

Once an offer is created and moves beyond the draft status, most of the information it contains is secured to prevent uncontrolled change. If you want to change the contents of the offer, you can quickly create a new offer and start with a copy of the previous one. From there, you can make any changes you deem necessary. All these offer versions are kept so that that you can see and compare the evolution using the offer grid. You can use the option Highlight Differences to compare values in each offer. By default, the grid displays 2 columns. You can go up to 3 or 4 depending on your device screen size or orientation. When a new offer is created, it automatically appears in the first column to the left and is labeled Offer (New).

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The offer grid contains not only the information about the current offer to be made to the candidate but it can also be used to collect and maintain information on previous offers, competitive offers, and current candidate expectations. In the offer grid, each offer appears in a column.

Submit an Offer for Approval

When you create an offer for a candidate, you can route the offer for approval by using the Submit Offer for Approval action. This action is used when at least one person must approve an offer before extending it to the candidate.

1. Open a candidate submission.
2. Go to the **Offers** tab.
3. In the More Actions menu, select **Submit Offer for Approval**.
4. Click **Add Approvers** to select users who will approve the offer.

   Based on your settings and configurations, the list of approvers may be prepopulated and, in some cases, you might not be able to add or remove approvers.
5. Define the order of approval by assigning a sequence number to each approver. The approval path can be carried out in two ways:
   - Sequential: When the first approver receives an approval request, the approver approves the offer. Once approved, the approval request goes to the next approver, and so on.
   - Parallel: Multiple approvers receive an approval request and they can all approve the offer at the same time. Approvers can approve the offer without having to wait for the others.
6. Enter comments for the approvers.
7. Select the user to whom the offer must be sent for next steps once it's approved.
8. Click **Submit for Approval**.

The system assigns the task to the first approver in the sequence. The approver receives an Approve Offer task.

Remind an Approver to Approve an Offer

You can send a reminder to the approvers of a job offer when the approval process is pending.

1. Open a candidate submission.
2. Go to the **Offers** tab.
3. In the Approval Process section, click **Send Reminder**.
4. Enter comments.
5. Click **Send Reminder**.

The approval request email is resent to the approvers who it's the turn to render their decision.

Modify an Offer Approval Process

You can modify the approval process of an offer that is currently under approval. You can also add new approvers, remove approvers, or change the order of approvers.

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Let's say an approver is on vacation and you need to assign the approval of an offer to a different approver.

1. Open the candidate submission.
2. In the More Actions menu, select **Modify Approval Process**. You can also use the **Modify Approval Process** button.
3. Remove the approver and add an alternate approver. The newly added approver receives the approval notification as the approval workflow progresses.
4. Enter a reason for modifying the approval process.
5. Click **Save and Close**.

Terminate an Offer Approval Process

You can terminate an offer's approval process once initiated.

1. Open a candidate submission.
2. In the More Actions menu, select **Terminate Approval Process**.

Approve an Offer

If you're asked to approve an offer, there are different ways you can respond depending on your user permissions. You can approve the offer using the Decide on Approval action, using the task Approval offer available in the Tasks menu, using the eShare response center.

Let's say you approve the offer using the Decide on Approval action.

1. Open a candidate submission.
2. In the More Actions menu, select **Decide on Approval**.
3. In the Task details panel, indicate whether you approve or reject the offer. You can also pass.
4. You can enter comments. This is mandatory if you reject the offer.
5. Click **Done**.

Extend an Offer

You extend an offer when you first communicate an offer to a candidate. You can subsequently convey the same offer again using the Send Offer action. For example, you might first want to track that an offer was extended verbally to a candidate and later, a more formal offer letter was sent to that same candidate.

There are several ways you can extend an offer:

- Verbally
- Email
- Printed Letter
- E-offer

When you extend an offer verbally, you can select the option Capture offer response (after extending). Possible answers are:

- The candidate accepted the offer. If you select this option, indicate the date when the offer was accepted and the start date of the candidate.
- The candidate wants to negotiate the offer. If you select this option, indicate the reason.
- The candidate refused the offer. If you select this option, indicate the reason.

When you extend an offer in writing (email, printed letter), you can review, print and edit the content of the message before sending it to the candidate.

When you extend an offer electronically, the candidate can view and respond to the offers on line. Your administrator can configure two types of E-offer:

- Standard: Candidates receive an email notification inviting them to access a secure career section portal to view the offer on line. They can view the offer details and offer letter attachments, if any. They can also print the offer and the offer letter attachments. Candidates then decide to accept or refuse the offer and they must e-sign the offer by providing their full name and unique identifier.
- Advanced: The advanced option is for organizations having more complex requirements such as additional eSignatures, notifications extended to more people, calls to partner services, different tasks for executives.

Send an Offer

You can send an offer to a candidate by email, printed letter, or E-offer once the offer has been extended. This is mostly used when an offer is extended verbally and then mailed to the candidate.

When you use the Send Offer action, you can't edit the contents of the offer letter. You can only change email recipients and add comments for internal use.

Rescind an Offer

You can rescind an offer in situations where you extended an offer to a candidate but later change your mind. This might be useful in situations where you extended an offer but afterwards you received an adverse report on the background check of the candidate.

1. Open a candidate submission.
2. In the More Actions menu, select **Rescind Offer**.
3. Enter comments if needed.
4. Click **Rescind Offer**.

When the offer is rescinded, the corresponding advanced E-offer onboarding process, if applicable, is canceled.

Renege an Offer

You can renege an offer in situations where a candidate accepted an offer but later change their mind.

1. Open a candidate submission.

2. In the More Actions menu, select **Renege Offer**.

3. Enter comments if needed.

4. Click **Renege Offer**.

Cancel an Offer

You can cancel an offer before extending it to the candidate. You can also cancel an offer that was extended but that is now expired (the expiration date is in the past).

1. Open a candidate submission.

2. In the More Actions menu, select **Cancel Offer**.

3. Enter comments if needed.

4. Click **Cancel Offer**.

Capture Candidate Expectations

You capture candidate expectations to gather information and help you decide if you can prepare an offer that is likely to interest that candidate. The information you capture becomes available in the offer grid. You can see it and compare it with an offer you might be preparing.

1. Go to the **Submissions** menu.

2. Open a candidate submission.

3. In the More Actions menu, select **Capture Candidate Expectations**.

4. In the Capture Candidate Expectations window, select the type of expectation:

   o Would accept

   o Would refuse

   o Desires

   o Current job

5. Click **Capture**

6. Complete the fields in the temporary offer section.

7. Click **Save and Close**. The expectations are shown on the page.

Capture Candidate Competitive Offer

You capture a competitive offer to gather information and help you decide if you can prepare an offer that is likely to interest that candidate. The information you capture becomes available in the offer grid. You can see it and compare it with an offer you might be preparing.

1. Go to the **Submissions** menu.

2. Open a candidate submission.

3. In the More Actions menu, select **Capture Competitive Offer**.

4. Complete the fields in the temporary offer section.

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5. Click **Save and Close**. The competitive offer is shown on the page.

Capture the Candidate's Response to an Offer

You can capture the response to an offer on behalf of a candidate. For example, you can capture the response if a candidate contacts you to give a response before responding to the offer online.

1. Open a candidate submission.
2. In the More Actions menu, select **Capture Offer Response**.
3. Select one of these responses:
    ○ The candidate accepted the offer. Indicate the date when the offer was accepted and the start date of the candidate.
    ○ The candidate wants to negotiate. Indicate the reason.
    ○ The candidate refused the offer. Select the reason why the candidate refused the offer and enter comments.
4. Click **Done**.

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15 Onboarding Process

Start an Onboarding Process

You can start a pre-hire or new hire onboarding process when candidates reach a specific step and status in the candidate selection process.

You can perform this action on one candidate or multiple candidates at a time.

1. Go to the **Submissions** tab.
2. Open a candidate file.
3. In the More Actions menu, select **Start Pre-Hire Onboarding Process** or **New Hire Onboarding Process**.
4. Select a process.
5. Enter comments.
6. Click **Start Process**.

Once a submission has an onboarding process initiated, you can cancel it using the Cancel Onboarding Process action.

Start an Onboarding Process While Changing the Step and Status of a Submission

You can start a pre-hire or new hire onboarding process while changing the step and status of a submission.

1. Open a candidate submission.
2. In the More Actions menu, select **Change Step/Status**.
3. In the Change Step and Status window, update the step, the status, or both.
4. In the Select Other Action section, select the **Start Onboarding Process** option and the desired onboarding process.
5. Click **Apply and Close**.

Start and Cancel an Onboarding Process from the Requisition's Submission List

You can start and cancel a pre-hire onboarding process or a new hire onboarding process for one candidate submission or several submissions related to a specific requisition.

Let's say you want to start a new hire onboarding process for 20 candidates and later cancel the process for a 5 hires.

1. Go to the **Requisitions** tab.
2. Click the candidate count for a specific requisition.
3. Select the 20 candidates.
4. In the More Actions menu, select the **Start New Hire Onboarding Process** action.

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5. Click **Start Process**.
6. In the Requisitions list, select the 5 candidates for which you want to cancel the process.
7. In the More Actions menu, select the **Cancel New Hire Onboarding Process** action.
8. Click **Cancel**.

16 Other Tools and Features

List Formats

List formats are used to display candidate and requisition information using different sets of columns depending on context.

You have access to a selection of list formats that have been created by your administrator to best suit the needs of your organization. Also, each specific context where information such as submission lists are displayed offer their own set of list formats. For example, you could have access to 5 list formats well suited for screening candidates in the New step of a selection process, and have access to 10 totally different list formats when looking at submissions in the Interview step.

List formats display information that is sorted based on 1, 2, or even up to 3 columns. When sorted on multiple levels, a number indicates the level of sorting performed by a column. Let's say the Education list format on the Submissions list was configured to sort files by Item Requiring Attention, then by Candidate File Identifier, then by Requisition ID, Title. When you're in the Submissions list and select the Education list format, the submissions are sorted as configured.

Personalize Your List Formats

You can create and edit personal list formats for a list context. You're able to personalize your list view by selecting which columns you'd like to display and the sort order for each.

1. Go to **Requisitions, Submissions, Offers,** or **Quick Search results**.
2. In the List Format menu, select **Create personal list formats**.
3. Select up to 16 columns and the sort order you'd like for each.
4. Click **Save List Format**.
5. Click **Close**.

Filters and Advanced Filters

Use filters to narrow down a list to relevant information.

Quick Filters

Quick filters are displayed and available to be used all the time. Use quick filter criteria to quickly filter a list. When no filter criteria is selected, the list displays all available entries. When you select one or more criteria and click Apply Filters, the list refreshes according to the selection made.

Advanced Filters

In lists where advanced filters are available, you can see an Advanced Filters tab displayed at the top of the filter pane. You can select one or several advanced filter criteria to filter a list. When criteria are selected, they appear at the top of

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the screen with a Remove Filter icon next to the criteria. When you click the Remove Filter icon, the criteria is removed and the list is dynamically updated according to the updated criteria set.

Add Comments to a Candidate Submission

Use the Add Comment action to add comments in a requisition, candidate submission, or candidate profile.

When you add a comment, the comment appears in the History tab.

Attach Files

You can attach files to a requisition, candidate submission, or candidate profile.

1. Open a requisition, candidate submission, or candidate profile.
2. Click the **Attachments** tab.
3. Click **Upload Attachment**.
4. In the Upload Attachment window, click **Browse** to select a file.

   The file must be in the supported file format and not exceed 5 MB.
5. For a candidate submission or candidate profile, indicate if the attachment is a resume, an offer-related file, or any other type of attachment. Also indicate if the attachment is visible to the candidate.
6. Click **Upload**.

Once a file is attached, it appears in the Attachments tab. You can then preview, edit, delete, and download the file.

Preview and Download Attachments

You can preview and download files attached to candidate submissions and candidate profiles.

Let's say you're viewing the Submissions list.

1. Select a list format that displays the Attachments column.
2. Locate a submission that has the paper clip icon. When a submission or candidate profile has at least one file attachment, the paper clip icon is displayed.
3. Click the paper clip icon if you want to view the attachments. The attachments are displayed under each attachment section. For each listed attachment, you see the file name, size, and the preview and download buttons.
4. If you click Preview, you can preview that file. If other files exist, you can flip to them.

Print Files

You can use the print functionality to create a PDF version of a requisition, candidate submission, or candidate profile and then print a PDF of the file.

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Let's say you want to print two requisitions.

1. Go to the **Requisitions** tab.
2. Select the two requisitions.
3. Click the **Print** icon.
4. In the Print Requisitions window, decide how you want to print the files:
   ○ List only: The contents of the list are presented in a PDF format as per the same arrangement as shown in the list format. A maximum of 1000 lines can be printed in the list.
   ○ File details: All sections of the file or only specific sections can be printed. For example, you can choose to print the Description, Prescreening, and Screening sections of the requisition. The sections you select are saved as defaults for the next print action. Also, sections you can select are based on how the file is configured and on your user permissions. For requisitions, a maximum of 15 files can be printed. For candidates, a maximum of 50 files can be printed.
5. Click **Print PDF**.

Deep Links to Access Specific Pages and Tasks

Recruiting supports certain URLs to go directly to specific pages or tasks.

Deep links are useful when you need for instance to send a URL to users in an email, portal, or other environments outside Taleo's application (including eShare) to allow them to navigate directly to a page or task in the application. Users click the URL and they're redirected to a specific requisition, submission, or candidate profile with appropriate instructions to complete the task.

To create a URL that directs users to a page to perform a specific action, certain parameters are required. Here's an example of a URL that directs users to a requisition that needs approval.

http://client.taleo.net/enterprise/publicurl/tasks?type=approveRequisition&requisitionNumber=7317

Parameter	Description	Example
<Product URL>	Taleo product identifier URL.	http://c;lient.taleo.net/enterprise/publicjurl/tasks
<action>	Action available for the product.	approveRequisition
<parameter>	Parameter identifier.	requisitionNumber
<value>	Key value.	7317

Here are examples of URLs to specific pages and actions:

- Requisitions list: http://client.taleo.net/enterprise/publicurl/viewRequisitions
- Tasks list: http://client.taleo.net/enterprise/publicurl/tasks
- Create New Requisition: http://client.taleo.net/enterprise/publicurl/createRequisition
- Approve a requisition: http://client.taleo.net/enterprise/publicurl/tasks?type=approveRequisition&requisitionNumber=7317
- Approve an offer: http://client.taleo.net/enterprise/publicurl/tasks?type=approveOffer&offerNumber=18787
- Extend an offer: http://client.taleo.net/enterprise/publicurl/tasks?type=extendOffer&offerNumber=15066

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- Amend an approval path: http://client.taleo.net/enterprise/publicurl/tasks?type=amendApprovalPath&requisitionNumber=7498

- Finalize start date: http://client.taleo.net/enterprise/publicurl/tasks?type=finalizeStartDate&offerNumber=10437

- Ready for sourcing: http://client.taleo.net/enterprise/publicurl/tasks?type=readyForSourcing&requisitionNumber=5300

- Contribute: http://client.taleo.net/enterprise/publicurl/tasks?type=contribute&requisitionNumber=7517

- To be completed: http://client.taleo.net/enterprise/publicurl/tasks?type=toBeCompleted&requisitionNumber=7483

- Complete selection process: http://client.taleo.net/enterprise/publicurl/tasks?type=completeSelectionProcess&applicationNumber=7347

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17 Embedded Reporting

Using Embedded Reporting

As a recruiter, you can run and schedule reports directly in Recruiting.

You can access Reports from the hamburger menu. In the Reporting page, you can display all the reports that you can run, or display reports that you previously ran.

All Reports

Reports are grouped by categories. Reports that aren't tied to a category are grouped at the bottom of the list under an Unspecified Category group. You can use the Report Name field to filter the list of reports. You can also click on a report to view its content.

Depending on how the report was configured, you can select different parameters in the Customization section. In the Output section, you can select the output format of the report (PDF, XLSX, RTF, HTML, EXCEL, XML, CSV). You can also select the Zip the Report option to have the report available as a zip file. You can decide to send a notification to inform people that the report was ran. You can select the recipients who will receive the notification. If you don't select any recipient, the notification will only be sent to you. Here's some useful info about the size of the report:

- If the size of the report file is smaller than or equal to the allowed attached file size, you and the recipients will receive the notification with the report attached.

- If the size of the report file is greater than the allowed attached file size, you and the recipients will receive the notification with a link to the report.

- If the report generation fails, you will receive a notification with an error message.

Once a report has run, it's available in the Executed Reports list and its status is set to Ready.

Executed Reports

When you click the Executed Reports button, you can see reports that were ran and reports that are scheduled to run. For reports that were ran, you can see the date when the report was requested and the status of the report which can be Running, Ready, or Error. When you select a report, actions become available in the toolbar:

- View a snapshot of the report

- Create a scheduled report

- Edit the scheduled report

- Export the report in XML format

- Rerun the report against the latest data

- Delete the report snapshot (only the instance of the report is deleted, not the report itself)

If you click on a report or click the action to view a snapshot of the report, you can then download the report.

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For scheduled reports, you can see the following info:

- Expiration Date: The date when the report will expire. By default, the expiration date is 3 months from the date the report was scheduled.

- Status: The green icon indicates that the scheduled report is active while the red icon indicates that the scheduled report is inactive.

- Calendar icon: When the scheduled report is being run, a gray calendar icon is displayed next to the report name. When a scheduled report is about to expire, a yellow calendar icon is displayed. When the scheduled report is expired, a red calendar icon is displayed.

When you select a report, actions become available in the toolbar:

- Activate the scheduled report
- Deactivate the scheduled report
- Edit the scheduled report
- Duplicate the scheduled report
- Renew the scheduled report (available only when the report is expired)
- Delete the report snapshot

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18 Using the Library

Requisition Template

A requisition template is a requisition containing information that will likely be reused for a similar job position. It provides a way to facilitate the creation of requisitions by defaulting values in several fields. Requisition templates contain the same fields as requisitions. If a requisition is created from a requisition template, all fields for which a value is set in the template will be defaulted with the template's value.

If you're a content manager, you can create, view, edit, and manage requisition templates in the Library. These templates are then used by recruiters and hiring managers to create requisitions. You can access the Library from the hamburger menu. Select Requisition Templates to view the list of available templates.

When you view the list of requisition templates, you can use filters and the Keyword search to find a specific requisition template. You can click the title of a requisition template to open it and view all of its details. You can also edit its content.

You can also create new templates using the guided process. The creation process is similar to the creation of requisitions. When you create a requisition template, you can select an existing template to base it upon. When you save the newly created requisition template, its status is Draft. You need to activate it to make it available for use. You can activate it by selecting the Active status within the template.

When you view a requisition template, the left pane displays a summary of key highlights about the template. When you create or edit a requisition template, the left pane displays a table of contents of the requisition template sections. You can click section titles to quickly navigate to that specific content.

Library of Prescreening and Disqualification Questions

The Library contains prescreening questions and disqualification questions that can be added to requisitions to find the top candidates for a position.

If you're a content manager, you can create, edit, and manage prescreening questions and disqualification questions in the Library. You can access the Library from the hamburger menu.

When you view the list of questions or disqualification questions, Active questions are displayed by default. You can use filters and search fields to find a specific question. You can also use the Job Field and Location tabs in the filter panel to view questions by job field or location.

You can click the title of a question to open it and view all of its details. You can edit its content. You can also create new questions.

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Create a Question in the Library

If you're a content manager, you can create prescreening questions in the Library. These prescreening questions can then be added to requisitions by recruiters and hiring managers to screen candidates and find the best candidates for a job.

1. In the Library menu, select **Questions**.
2. In the Questions list, click **Create Questions**. The Questions Details page appears.
3. Enter a code for the question.
4. Enter the question in the Question field.
5. Select the type of answer:
    - Single answer: The candidate selects one answer from a list of choices.
    - Multiple answers: The candidate selects as many answers as applicable from a list of choices.
    - Text answer: The candidate types a brief answer in response to a specific question. Use text questions sparingly; use them where they can allow for expansion of information asked in a previous question.
6. For a question with a single or multiple answers, decide if you want to display the answers with radio buttons or using a drop-down menu. Then provide possible answers to the question.
7. For a text answer, indicate the number of lines available for the candidates to provide an answer.
8. You can associate the question to locations and job fields. Click **Add/Modify** and select specific locations and job fields. If you select the option **Associate with Root**, the questions will be available for all locations and all job fields.
9. If you decide to associate the question to locations or job fields, two options are available:
    - In profile: The question will be available to users who create candidate profiles, and to candidates who are entering their profile in a career section. Questions will be sorted to match the location and job field preferences defined by the candidate.
    - In model: The question will be added to requisitions when recruiters select the Apply Model option in the Prescreening section of a requisition. Questions will be grouped in a model based on the location and job field of the requisition.
10. Change the status to Active to make the question available for selection in requisitions.
11. Click **Save and Close**.

Create Disqualification Question in Library

If you're a content manager, you can create disqualification questions in the Library. These disqualification questions are then used in requisitions to screen candidates.

1. In the Library menu, select **Disqualification Questions**.
2. In the Questions list, click **Create Disqualification Questions**. The Questions Details page appears.
3. Enter a code for the question.
4. Enter the question in the Question field.
5. Select the type of answer:
    - Single answer: The candidate selects one answer from a list of choices.
    - Multiple answers: The candidate selects as many answers as applicable from a list of choices.
    - Text answer: The candidate types a brief answer in response to a specific question. Use text questions sparingly; use them where they can allow for expansion of information asked in a previous question.

6. For a question with a single or multiple answers, decide if you want to display the answers with radio buttons or using a drop-down menu. Then provide possible answers to the question.

7. For a text answer, indicate the number of lines available for the candidates to provide an answer.

8. For each answer, you need to indicate the result:
    - The candidate passes
    - The candidate is disqualified.
    - To be verified: the candidate file must be reviewed.

9. For each answer, you can indicate if the candidate is required to provide an explanation for their answer.

10. You can associate the question to locations and job fields. Click **Add/Modify** and select specific locations and job fields. If you select the option **Associate with Root**, the questions will be available for all locations and all job fields.

11. If you decide to associate the question to locations or job fields, two options are available:
    - In profile: The question will be available to users who create candidate profiles, and to candidates who are entering their profile in a career section. Questions will be sorted to match the location and job field preferences defined by the candidate.
    - In model: The question will be added to requisitions when recruiters select the Apply Model option in the Prescreening section of a requisition. Questions will be grouped in a model based on the location and job field of the requisition.

12. Change the status to Active to make the question available for selection in requisitions.

13. Click **Save and Close**.

Deactivate Prescreening and Disqualification Questions

You can quickly deactivate questions that may not be relevant to a particular job.

1. Go to **Library** and select **Questions** or **Disqualification Questions**.
2. Select the question you want to deactivate and click the **Deactivate** toggle.

The question is deactivated, but remains in the library.

Create an Evaluation Category

If you're a content manager, you can use categories to organize evaluation questions, evaluation skills, and evaluation questionnaires. When you create an evaluation category, the category is created in your preferred language. Once a category is created, you can translate it.

1. In the Library menu, select **Evaluation Categories**.
2. Click **Create**.
3. Provide a name for the category.
4. Select the language in which you want to create the category.
5. Activate the category.
6. Click **Save**.

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Create an Evaluation Question

If you're a content manager, you can create evaluation questions used in evaluation questionnaires.

1. In the Library menu, select **Evaluation Questions**.
2. Click **Create**.
3. Select the type of answer:
   - Single: The person can select one answer from a list of choices.
   - Multiple: The person can select as many answers as applicable from a list of choices.
   - Text: The person can type a brief answer in response to a specific question.
   - Date: The person can provide a date to indicate for example, when a certification was obtained.
4. For a question with a single or multiple answers, decide if you want to display the answers with radio buttons or using a drop-down menu.
5. Enter the question.
6. Enter a short label for the question. The Short Label is not required. However, it's recommended to define one if using this functionality with Oracle HCM Cloud Mobile.
7. For a question with a single or multiple answers, enter possible answers.
8. If you select the option **Show Comment**, a text box appears where evaluators will be able to enter justifications to the answers provided.
9. Select a category to classify the question.
10. Select the Active status.
11. Click **Save and Close**.

Create an Evaluation Skill

If you're a content manager, you can create evaluation skills used in evaluation questionnaires.

1. In the Library menu, select **Evaluation Skills**.
2. Click **Create**.
3. When you create a skill, the answer type Skill Rating Scale is displayed by default. The answer is always displayed with radio buttons. You can't modify these values.
4. Enter the skill.
5. Enter a short label for the skill. The Short Label is not required. However, it's recommended to define one if using this functionality with Oracle HCM Cloud Mobile.
6. Select a category to classify the skill.
7. Select the Active status.
8. Click **Save and Close**.

Create an Evaluation Questionnaire

Evaluation questionnaires contain evaluation questions and evaluation skills used to capture an evaluator's info during a candidate interview. If you're a content manager, you can create evaluation questionnaires. Before you do, look at

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the existing questionnaires in the Evaluation Questionnaires library. Use quick filters to refine the list by questionnaire (enter one or multiple words), status, and category. If you don't see the questionnaire you're looking for, create a new one.

1. In the Library menu, select **Evaluation Questionnaires**.
2. Click **Create**.
3. Complete the information in the Properties tab. Enter the name of the questionnaire, a short label, and instructions on how to complete the questionnaire. Indicate if you want to display the Questions tab, Skill Ratings tab, and the Overall Recommendation in the questionnaire. If you decide to include the recommendation, you can select the format of the Recommendation response and indicate if the recommendation is mandatory.
4. Go to the Questions tab to add questions to the questionnaire. You can indicate which questions as required. Evaluators will have to answer the question when completing the evaluation questionnaire. You can also add weight values to question answers. You can also remove questions, reorder questions, and hide or show question details.
5. Go to the Skill Ratings tab to add skills to the questionnaire. Click Select Rating Scale to add a rating scale to apply to the questionnaire. Rating scales are created by your administrator. Once the rating scale is selected, you can define which skills are required when evaluators complete questionnaires. You can add, remove, and reorder skills (which were defined in the Evaluation Skills library). When skills have been added, you select the desired skill level for each skill.
6. Select the Active status.
7. Click **Save and Close**.

19 LinkedIn Recruiter System Connect

LinkedIn Recruiter System Connect Overview

Use LinkedIn Recruiter System Connect (RSC) to integrate LinkedIn Recruiter with Oracle Taleo Enterprise Edition. Your organization can activate and configure LinkedIn Recruiter System Connect using Taleo Recruiting Administration.

To use LinkedIn RSC, you must be using:

- Oracle Taleo Enterprise Edition, with Recruiting deployed to the recruiter population.

- Oracle Human Capital Management (HCM) Cloud for Core HR and Talent.

Key Capabilities in LinkedIn Recruiter

In LinkedIn Recruiter, recruiters who have connected their LinkedIn seat license to their Taleo user account can view the following information from Oracle Taleo Enterprise Edition:

- See the "In ATS Indicator" which indicates that a LinkedIn member has a candidate file in Recruiting.

- View candidate submissions of those members and their progression within the selection workflow, across the user groups the recruiter is a member of.

- View source tracking information of those submissions.

- Choose an open requisition from across the user groups the recruiter is a member of, and create submissions for LinkedIn members, which will appear in Oracle Taleo Enterprise Edition.

- Use the Send InMail feature to interact with prospects. These emails also appear in Recruiting.

- Use the Notes feature to enter comments. These notes also appear in Recruiting.

Key Capabilities in Recruiting

Here are the key capabilities for recruiters in Recruiting.

- See which candidates are LinkedIn members. In the Submissions list, job submissions, and candidate profiles, a blue LinkedIn icon appears for candidates who were automatically matched by LinkedIn Recruiter System Connect.

- View the LinkedIn profile of a candidate from the Submissions list, job submissions, or candidate profiles by clicking the blue LinkedIn icon. Seat holders and non-seat holders have different actions available to them. Your arrangements with LinkedIn will determine whether non-seatholders will be able to see the member's profile in the Profile Widget.

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- Users who have been granted a LinkedIn Recruiter seat license can connect that seat to their Taleo user account.

  - In Recruiting, click the arrow next to your login name and click Connect. A page may appear to request that you authenticate into LinkedIn, if your device is not already authenticated. A window appears where you grant LinkedIn permission to bring information about you from LinkedIn into Taleo.

- After making that connection, these users can:

  - View LinkedIn Notes and InMails in the candidate profile History tab. These new history events have their own category for easy filtering.
  - Manually link a candidate to a LinkedIn member, where the RSC service did not find an automatic match. These candidates are displayed with a grey LinkedIn icon.

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