

# Oracle Taleo Enterprise Edition

---

## **Implementing Scheduling Center**

23D



This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, then the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs) and Oracle computer documentation or other Oracle data delivered to or accessed by U.S. Government end users are "commercial computer software" or "commercial computer software documentation" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, the use, reproduction, duplication, release, display, disclosure, modification, preparation of derivative works, and/or adaptation of i) Oracle programs (including any operating system, integrated software, any programs embedded, installed or activated on delivered hardware, and modifications of such programs), ii) Oracle computer documentation and/or iii) other Oracle data, is subject to the rights and limitations specified in the license contained in the applicable contract. The terms governing the U.S. Government's use of Oracle cloud services are defined by the applicable contract for such services. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications that may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy, and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Inside are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Epyc, and the AMD logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information about content, products, and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services unless otherwise set forth in an applicable agreement between you and Oracle. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services, except as set forth in an applicable agreement between you and Oracle.

# Contents

<b>Preface</b>	<b>i</b>
<hr/>	
<b>1 Getting Started</b>	<b>1</b>
Scheduling Center	1
Login Procedure	1
The Welcome Center	2
Auxiliary Navigation Bar	3
Core Navigation Bar	3
<b>2 Scheduling Center Permissions</b>	<b>5</b>
Permissions for Performing Actions in Scheduling Center	5
<b>3 Scheduling Center Configuration</b>	<b>13</b>
Configuring Scheduling Center in Recruiting Administration	13
Configuring Scheduling Center in Career Section Administration	22
Configuring Phases	24
Calendars	27
Invitations	28
<b>4 Scheduling Center Administrator Functions</b>	<b>31</b>
Candidate Portal Messaging	31
Email Templates	31
Email Template Activation	35
Notify Calendar Owner of Time Slot Unavailability	36
Location Template	37
User Creation	38
Calendar Import	38
Time Zone Configuration	39
Languages	40
Ability to Mass Update Calendar Owners	42

Default Weekdays	43
Resending Candidate Submissions	43
Scheduled Appointment Emails	43
Enable Granular Timeslot Setting	43
Description of Fields	44

# 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](#).

## Diversity and Inclusion

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

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit [My Oracle Support](#) or visit [Oracle Accessibility Learning and Support](#) if you are hearing impaired.

### Comments and Suggestions

Please give us feedback about Oracle Applications Help and guides! You can send an e-mail to:  
[talent\\_acquisition\\_doc\\_feedback\\_ww\\_grp@oracle.com](mailto:talent_acquisition_doc_feedback_ww_grp@oracle.com).



# 1 Getting Started

## Scheduling Center

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

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

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

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

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

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

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

## Login Procedure

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

On the Sign In page, users can select the language in which they want to use the application. If users change the default language on the Sign In page, the page is displayed in the new language and subsequent Oracle Taleo Enterprise

Edition product pages are presented in that language. After selecting a language, users can also instruct the system to "remember" their selection so that the next time they sign in, the User Sign In page will be presented in the language they selected.

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

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

## Accessing an Oracle Taleo Enterprise Edition Application

### Before you start

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

### Here's what to do

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

## Using the Forgot Password Link

### Before you start

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

### Here's what to do

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

### Results:

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

### What to do next

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

## The Welcome Center

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



The Welcome Center is organized in these areas:

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

## Auxiliary Navigation Bar

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

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

## Core Navigation Bar

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

Link	Description
Scheduling Center	Gives users access to the Calendars page where they can create calendars and update existing ones.
Reports	Gives users access to a list of reports they can run: <ul style="list-style-type: none"> <li>• Roster Schedule</li> <li>• Scheduled Appointments (visible to Administrators only)</li> <li>• Appointment Summary Report (visible to Administrators only)</li> <li>• Arrival Status Report (visible to Administrators only)</li> </ul>
Configuration	Gives Administrators access to the following configuration features: <ul style="list-style-type: none"> <li>• Candidate Portal Messaging</li> </ul>

Link	Description
	<ul style="list-style-type: none"><li>• Email Templates</li><li>• Locations</li><li>• Create Users</li><li>• Import Calendars</li><li>• Display Time Zones</li><li>• Display Languages</li><li>• Mass Update</li><li>• Default Weekdays</li><li>• Resend Candidate Submissions</li><li>• Schedule Appointments Email</li></ul>

# 2 Scheduling Center Permissions

## Permissions for Performing Actions in Scheduling Center

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

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

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

### User Types and Calendar Roles

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

### Administrator User

The Administrator user has all permissions, for all calendars in the Scheduling Center.

The Administrator can create, manage, and edit all calendars. The Administrator can also assign ownership of a calendar or access to calendars to a user. The Administrator has all the permissions of the following calendar roles:

- Read-Only
- Mark Arrived/No Show

- Manage Timeslots
- Administer Calendars

The Administrator does not necessarily have administrator rights for the Recruiting Center.

The Administrator must be granted the Manage Scheduling Center user type permission in SmartOrg Administration (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Scheduling).

## Scheduling Center User

The Scheduling Center user has access to the Scheduling Center.

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

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

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

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

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

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

## Granting Users Access to the Scheduling Center

### Before you start

The Manage User Types and Access Administration user type permissions are required.

The user being granted access to the Scheduling Center must be active.

The administrator must know the user type assigned to the user.

**Configuration > [SmartOrg] Administration > [Users] User Types**

### Here's what to do

1. Select a user type.

2. In the Recruiting functional domain, click Edit next to Scheduling Center.
3. Select the desired permission: Access Scheduling Center OR Create calendars and access Scheduling Center.
4. Click Save.

**What to do next**

Users must try at least once, unsuccessfully, to sign in to the Scheduling Center. Only then will the Administrator be able to grant the user permissions for the Scheduling Center.

## Calendar Role

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

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

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

Calendar Role Type	Description
Read-Only	<p>A Read-Only user can only view information in the Scheduling Center. Information available is:</p> <ul style="list-style-type: none"> <li>• calendars</li> <li>• calendar roles</li> <li>• timeslots</li> </ul> <p>The Read-Only user can access the system to track candidate attendance to interviews.</p> <p>A user is granted a Read-Only role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center for a specific calendar.</p> <p>The same user can have different roles for different calendars.</p>
Mark Arrived/No Show	<p>A Mark Arrived/No Show user can only indicate if a candidate has arrived or not for an appointment. The Scheduling Center has a level of access which allows a user to read data in the system and to record whether candidates arrived for their appointments or were “no-shows.” These users may be greeters or reception desk workers who are employed by the recruiting company. A user that has been granted a Mark Arrived/No Show role has all the permissions of a read-only user and can also mark in the calendar if a candidate has arrived to an interview or if he/she did not show up.</p> <p>A user is granted a Mark Arrived/No Show role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center.</p> <p>The same user can have different permissions for different calendars.</p>
Schedule Appointments	<p>A Schedule Appointments user can manage appointments and decline invitations on behalf of a candidate.</p> <p>The Scheduling Center has a Schedule Appointments level of access which allows a user to:</p> <ul style="list-style-type: none"> <li>• decline an invitation</li> </ul>

Calendar Role Type	Description
	<ul style="list-style-type: none"> <li>• schedule an appointment on behalf of a candidate</li> <li>• reschedule an appointment on behalf of a candidate</li> <li>• cancel an appointment on behalf of a candidate</li> </ul> <p>A user that has been granted a Schedule Appointments role has all the permissions of a Read-Only and Mark Arrived/No Show user.</p> <p>A user is granted a Schedule Appointments role by an Administrator, a Calendar Owner, or an Administer Calendars user in the Scheduling Center.</p> <p>To manage appointments on behalf of a candidate, the user granted a Schedule Appointments permission must have access to the Recruiting Center for a specific calendar.</p> <p>For the self-service integration type, to be able to manage appointments on behalf of a candidate, the candidate must first log in to Scheduling Center via the initial invitation email to activate communication between Scheduling Center and Recruiting Center.</p> <p>For the proctored integration type, the user can manage the appointments of the candidate, even if the candidate did not log into a Career Section.</p> <p>The same user can have different permissions for different calendars.</p>
<p>Manage Timeslots</p>	<p>A Manage Timeslots user can manage timeslots, days and the number of appointments available per timeslots.</p> <p>The Scheduling Center has a Manage Timeslots level of access which allows a user to:</p> <ul style="list-style-type: none"> <li>• lock and unlock days</li> <li>• delete timeslots in a calendar</li> <li>• set the number of appointments available per timeslots</li> </ul> <p>A user that has been granted a Manage Timeslots role has all the permissions of a Read-Only, Mark Arrived/No show and Schedule Appointments user.</p> <p>A user is granted a Manage Timeslots role by an Administrator, a Calendar Owner or an Administer Calendars user in the Scheduling Center.</p> <p>The same user can have different permissions for different calendars.</p>
<p>Administer Calendars</p>	<p>An Administer Calendars user has all permissions for a specific calendar.</p> <p>An Administer Calendars user has managing rights for a specific calendar, that is:</p> <ul style="list-style-type: none"> <li>• edit the calendar</li> <li>• manage timeslots</li> <li>• manage days</li> <li>• grant and revoke calendar roles to other users</li> </ul> <p>An Administer Calendars user cannot create calendars, revoke the rights of a Calendar Owner or of an Administrator.</p> <p>A user is granted the Administer Calendars role by an Administrator or a Calendar Owner in the Scheduling Center.</p>

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

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

## Granting Users a Calendar Role

### Before you start

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

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

### Here's what to do

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

### Results:

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

## Editing the Permission of a Calendar Role

### Before you start

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

### Here's what to do

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

### Results:

The newly assigned permission appears in the page.

## Removing a Calendar Role

### Before you start

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

### Here's what to do

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

### Results:

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

## Candidate Self-Service Level

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

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

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

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

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

## Setting Candidate Permissions

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

### Before you start



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

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

**Here's what to do**

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

**Results:**

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



# 3 Scheduling Center Configuration

## Configuring Scheduling Center in Recruiting Administration

The following steps are required to configure the Scheduling Center as a service in Recruiting Administration.

Phases must be configured before the Scheduling Center Screening Service can be configured.

All steps must be completed for both the Scheduling Center screening service and the Scheduling Center (Proctored) service.

1. *Activating the Scheduling Center Screening Service.*
2. *Configuring Scheduling Center Screening Service Settings.*
3. *Configuring Scheduling Center Input Fields.*
4. *Configuring Scheduling Center Results Fields.*
5. *Configuring Scheduling Center Screening Service User-defined Forms.*
6. *Previewing a Screening Service User-defined Form.*
7. *Configuring Scheduling Center Screening Service Labels.*
8. *Previewing a Service Label.*
9. *Configuring the Scheduling Center Candidate Selection Workflow.*
10. *Selecting a Message Template for the Scheduling Center Screening Service.*

## Activating the Scheduling Center Screening Service

### Before you start

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

The Scheduling Center and the Scheduling Center (Proctored) services have been created.

The screening service must be inactive.

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

#### Here's what to do

1. Click Scheduling Center service name.
2. Click Activate located next to the name of the service.
3. Click the Scheduling Center (Proctored) service name.
4. Click Activate located next to the name of the service.

#### Results:

The service is available in the Recruiting Center when users request an external service.

#### What to do next

Activating the Scheduling Center (Proctored) screening service.

## Configuring Scheduling Center Screening Service Settings

### Before you start

The Access Administration user type permission is required.

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

### Here's what to do

1. Click Scheduling Center.
2. Click Edit next to Properties.
3. In the Settings section, configure the assessment settings as desired. For details, see *Scheduling Center Screening Service Properties, Settings, and Fields*.
4. Click Save.

### What to do next

Configuring Screening Service Settings for Scheduling Center (Proctored).

## Configuring Scheduling Center Input Fields

### Before you start

The Access Administration user type permission is required.

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

### Here's what to do

1. Click Scheduling Center.
2. Click the name of an Input field.
3. Click Edit next to Properties.
4. Under Name, enter the name of the field if you want to override the default name.
5. Under Default Value, select the calendar that will appear by default in the calendar field located in the requisition Screening block. For details, see *Scheduling Center Screening Service Properties, Settings, and Fields*.
6. Click Save.

### What to do next

Configuring Input Fields for Scheduling Center (Proctored).

## Configuring Scheduling Center Result Fields

### Before you start

The Access Administration user type permission is required.

## Configuration > [Recruiting] Administration > Screening Services

### Here's what to do

1. Click Scheduling Center.
2. Click the name of a Result field.
3. Click Edit next to Properties.
4. Under Name, enter the name of the field if you want to override the default name.
5. Click Save.

### What to do next

Configuring Result Fields for Scheduling Center (Proctored).

# Configuring Scheduling Center Screening Service User-defined Forms

### Before you start

The Access Administration user type permission is required.

## Configuration > [Recruiting] Administration > Screening Services

### Here's what to do

1. Click Scheduling Center.
2. Under User-defined Forms, configure the following elements.
  - Capture of input fields: This is where you define how the Scheduling Center field (input field) will appear in the requisition file in Edit mode. You can define elements such as the field type (drop-down list, radio button) and if the field is mandatory.
  - Display of input fields: This is where you define how the Scheduling Center field (input field) will appear in the requisition file in View mode. You can define elements such as the field type (drop-down list, radio button) and if the field is mandatory.
  - Display of result fields: This is where you define how the Scheduling Center result fields will appear in the candidate submission.
  - Display of result set fields: This is used only for those external partners whose certification includes result set fields. Scheduling Center does not use this kind of fields. Therefore, nothing to configure here.
3. Click Save.

### What to do next

Configuring User-defined Forms for Scheduling Center (Proctored).

# Previewing a Screening Service User-defined Form

### Before you start

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

## Configuration > [Recruiting] Administration > Screening Services

### Here's what to do

1. Click a screening service.
2. Click Preview this form located beside the form you want to preview.

### Results:

The final layout of a user-defined form used in a screening service is displayed to the system administrator.

## Configuring Scheduling Center Screening Service Labels

### Before you start

The Access Administration user type permission is required.

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

### Here's what to do

1. Click Scheduling Center.
2. Click Edit next to Labels.
3. Select the language of the message.
4. Complete the fields as desired. For details, see Scheduling Center Screening Service Properties, Settings, and Fields.
5. Click Save.
6. Click Preview next to Labels to see how the message will appear to candidates.

## Previewing a Service Label

### Before you start

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

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

### Here's what to do

1. Click on the name of the service.
2. Click Preview next to Labels.

### Results:

The labels will be displayed as the candidate will see them.

## Configuring the Scheduling Center Candidate Selection Workflow

### Before you start

The Access Administration user type permission is required.

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

### Here's what to do

1. Click Scheduling Center.
2. Click Create next to CSW Actions.
3. Complete the fields as desired. For details, see *Assessment CSW Actions*.
4. Click Save.

**Results:**

When the candidate selection workflow is used in the Recruiting Center, the execution of the Assessment will be carried out automatically.

**What to do next**

Configuring Candidate Selection Workflow for Scheduling Center (Proctored).

## Selecting Message Templates for the Scheduling Center

**Before you start**

The Access Administration user type permission is required.

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

**Here's what to do**

1. Click Scheduling Center.
2. Click Edit next to Correspondence.
3. Click Select under Message template (internal candidates).
4. Select the message template you want to send to internal candidates.
5. Click Select.
6. Click Select under Message template (external candidates).
7. Select the message template you want to send to external candidates.
8. Click Select.
9. Click Save.

**Results:**

The candidate will receive an e-mail based on these templates, depending on whether the candidate is an internal or external candidate. The e-mail will contain a link to an appointment invitation.

**What to do next**

Configuring Message Templates for Scheduling Center (Proctored).

## Scheduling Center Screening Service Properties, Settings, and Fields

Scheduling Center Screening Service Property	Description	Location
Name	Value: Scheduling Center or Scheduling Center (Proctored)	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Description	Value: The Scheduling Center automatically schedules candidates you designate on calendars you can control.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Provider Name	Taleo	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Provider Description	Taleo	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Type	Scheduling Center	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Status	Possible values are Active, Inactive.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Code	Code given to Scheduling Center.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit

Scheduling Center Screening Service Setting	Description	Location
Validity Period	Value: Always valid	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Candidate must answer email within (in hours)	Value: 0 This setting is not used by Scheduling Center.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
This service is mandatory for new requisitions and for those updated while in "Draft" status	This setting is not used by Scheduling Center.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Access this service through the browser full-screen mode	Provided pop-up calendar delivery is used, this setting directs the browser to ignore the latest defined pop-up size and instead present the Scheduling Center in full-screen mode.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit



Scheduling Center Screening Service Setting	Description	Location
Client Identifier	Client ID is assigned when Scheduling Center is created.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit
Delay to wait before timing out a request (in hours)	When a request times out the system will no longer try to receive a candidate appointment.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > [Properties] > Edit

Scheduling Center Screening Service Input Field Property	Description	Location
AssessmentID	<p>The calendar associated with the initial interview phase of the CSW. The properties of the input field are:</p> <ul style="list-style-type: none"> <li>Code: The internal name of the input field. The code is a read-only property.</li> <li>Name: The label of the field in the requisition file. For example, Calendar ID 1.</li> <li>Domain: The type of field. The domain is a read-only property.</li> <li>Mandatory: If the service definition specifies the field as being mandatory, then the input field will always be mandatory. If the service definition specifies the field as optional, then you can configure the field as being either mandatory or optional. For example, if the input field is mandatory, then in the Recruiting Center, the Assessment Version field in the requisition file Screening block will have a red asterisk to indicate that the field must be completed.</li> <li>Default Value: Calendar displayed by default in the requisition file.</li> </ul>	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Input Fields > Version [Properties] > Edit
AssesmentId2-AssesmentId10	<p>The calendar associated with the interview phases of the CSW, after the initial phase. The properties of the input field are:</p> <ul style="list-style-type: none"> <li>Code: The internal name of the input field. The code is a read-only property.</li> <li>Name: The label of the field in the requisition file. For example, Calendar ID 1.</li> <li>Domain: The type of field. The domain is a read-only property.</li> <li>Mandatory: If the service definition specifies the field as being mandatory, then the input field will always be mandatory. If the service definition specifies the field as optional, then you can configure the field as being either mandatory or optional. For example, if the input field is mandatory, then in the Recruiting Center, the Assessment Version</li> </ul>	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Input Fields > Version [Properties] > Edit

Scheduling Center Screening Service Input Field Property	Description	Location
	<p>field in the requisition file Screening block will have a red asterisk to indicate that the field must be completed.</p> <ul style="list-style-type: none"> <li>• Default Value: Calendar displayed by default in the requisition file.</li> </ul>	

Scheduling Center Screening Service Result Field	Description	Location
Appointment	The status of the first phase appointment. The Recruiting administrator can change the name of the label of the field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > Appointment
AppointmentStatus2-10	The status of an appointment possibly in phase 2 through 10. The Recruiting administrator can change the name of the label of the field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > AppointmentStatus1-10
DetailsUrl	Appears as the More Details link by default. The Recruiting administrator can change the name of the link by editing the Name field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > DetailsUrl
SchedulingError	The value, Scheduling Center returned an error, will appear if there is a communication error between Recruiting and Scheduling Center. If the error pertains to an error within Scheduling Center, a code will follow the text. The Recruiting administrator can change the name of the label of the field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > SchedulingError
SchedulingStatus	The status of scheduling the appointment. The Recruiting administrator can change the name of the label of the field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > SchedulingStatus
SchedulingNoShowStatus	The value of this field is displayed in the Results Summary in the Screening tab of the Job Submission.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > SchedulingNoShowStatus
Summary	The Recruiting administrator can change the name of the label of the field.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Result Fields > Summary

Scheduling Center Screening Service User-Defined Form	Description	Location
Capture of input fields	This is where you define how the Scheduling Center field (input field) will appear in the requisition file in Edit mode. You can define elements such as the field type (drop-down list, radio button) and if the field is mandatory.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > User-defined Forms
Display of input fields	This is where you define how the Scheduling Center field (input field) will appear in the requisition file in View mode. You can define	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > User-defined Forms

Scheduling Center Screening Service User-Defined Form	Description	Location
	elements such as the field type (drop-down list, radio button) and if the field is mandatory.	
Display of result fields	This is where you define how the Scheduling Center result fields will appear in the candidate submission.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > User-defined Forms
Display of result set fields	This is used only for those external partners whose certification includes result set fields. Scheduling Center does not use these kinds of fields. Therefore, nothing to configure here.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > User-defined Forms

Scheduling Center Screening Service Label	Description	Location
Service Name	This is the name of the service. Default value: Select an Interview Schedule	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Label 1	Default value: Our initial review indicates that you may be qualified for this position. Additional information could facilitate your selection. This information will allow us to rank you with regard to other candidates as part of our total assessment process.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Label 2	Default value: Therefore, we invite you to fill out an online assessment questionnaire. This process occurs in another window. You must answer all questions in a page before clicking Next. If you don't know the answer to a question, select the option that makes more sense to you.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Label Before Link to Service	Default value: Do not use the browser's Back or Forward buttons to view previous or following questions. If you do so, you will lose all the information you have entered.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Link to Service	Default value: Schedule an Appointment	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Tooltip for Link to Service	Default value: Access the assessment questionnaire	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels
Label 3	Default value: After completing the questionnaire, you will automatically return to this page.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Labels

Scheduling Center Screening Service CSW Action	Description	Location
Workflow	The action will take place when a candidate uses the specified workflow.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > CSW Actions
Step	The action will take place when the specified step is reached or later if the status criteria are not yet met.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > CSW Actions
Status	The candidate must have this status when he or she reaches the selected step or the action will not take place until this status is reached.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > CSW Actions
Action	Send Online Screening Assessment	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > CSW Actions
Phase	The phase is used with the candidate selection workflow (CSW). If a certain step/status is reached in the CSW, then the system can send out a Phase request to the partner (like perform additional assessment for the candidate after the candidate reached a certain step in the CSW). Phases are not used with Taleo Assessment.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > CSW Actions

Scheduling Center Screening Service Correspondence	Description	Location
Message template (internal candidate)	Message templates are used either when the recruiter manually requests an appointment invitation for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the scheduling service. A message template is selected for internal candidates.	Configuration > [Recruiting] Administration > Screening Services > Taleo Assessment > Correspondence
Message template (external candidate)	Message templates are used either when the recruiter manually requests an appointment invitation for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the scheduling service. A message template is selected for external candidates.	Configuration > [Recruiting] Administration > Screening Services > Taleo Assessment > Correspondence

## Configuring Scheduling Center in Career Section Administration

The configuration of Scheduling Center in Career Section Administration consists of the following steps.

1. *Adding the Screening Block in the Career Section.*
2. *Configuring the Screening Block in the Career Section.*

# Adding the Screening Block in the Career Section Application Flow

## Before you start

The Access the Career Section administration section user type permission is required.

The application flow must be inactive.

**Configuration > [Career Section] Administration > Application Flows**

## Here's what to do

1. Click an application flow.
2. Click Edit.
3. Enter the name of the Screening section in the Add a Page field.
4. Click Create a Page.
5. Select the Screening block in the Available Blocks section and drag it to the Screening section you created.
6. Click Save.

# Configuring the Screening Block in the Career Section Application Flow

## Before you start

The Access the Career Section administration section user type permission is required.

The application flow must be inactive.

**Configuration > [Career Section] Administration > Application Flows**

## Here's what to do

1. Click the application flow containing a Screening block.
2. In the Application Flow Properties page, under Page Ordering, click the Screening link.
3. Click Edit next to Properties.
4. Complete the fields. For details, see [Screening Block Properties](#).
5. Click Save.

# Career Section Screening Block Properties

Screening Block Property	Value	Location
Allow candidates to receive questionnaire information later by email	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit

Screening Block Property	Value	Location
Show this block to the following candidates	<ul style="list-style-type: none"> <li>• ACE Candidates</li> <li>• Those who Meet RMI Criteria</li> <li>• Those who Meet Required Criteria</li> <li>• All Candidates</li> </ul>	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit
Display Mode (The assessment can be delivered in a separate window (pop-up) or in the same window (inline) of the Career Section.)	<ul style="list-style-type: none"> <li>• Pop-up Window</li> <li>• Inline</li> </ul>	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit
This service is mandatory (candidates must click the link to access the questionnaire immediately or choose to receive it by email, if the latter is activated.)	<ul style="list-style-type: none"> <li>• Yes</li> <li>• No</li> </ul>	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit
Service (The services available to the zone.)	No	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit

## Configuring Phases

### Phase

A phase is an Administrator configured point in the hiring process where an invitation to book an appointment is sent to a Candidate.

The Phase allows the Recruiting Center Administrator to associate the Workflow, Step and Status that will Trigger a follow-up appointment and further configure which appointment invitation will be distributed. A requisition can include up to 10 phases. However, to avoid confusion it is recommended to use only 2 or 3 phases per requisition. The appropriate invitation will be automatically distributed based on the Calendar ID association selected by the Recruiter in the Screening tab.

Phases must be configured before the Scheduling Center Screening Service is configured.

## Creating a Phase

### Before you start

The Access Administration user type permission grants users access to this feature.

Phases must be created.

**Configuration > [Recruiting] Administration > Selections > Large Selections**

### Here's what to do

1. In the Custom tab, click the elements link located on the same row as TSC\_Follow-Up-appointments.
2. In the Selection Element Link page, select New.
3. In the Selection Element Editor dialog box, complete the fields.  
The code value used must be a unique integer.
4. Click Done.

**Results:**

A new phase is now available in the CSW Actions section of the screening service.

**What to do next**

Adding an invitation phase to a requisition.

## Editing a Phase

An administrator user can edit the name of an existing phase.

**Before you start**

The Access Administration user type permissions grants users access to this feature.

A phase must be created in the Recruiting Administration.

**Configuration > [Recruiting] Administration > Selections > Large Selections**

**Here's what to do**

1. In the Custom tab, click the Elements link located on the same line as TSC\_Follow-Up-appointments.
2. In the Selection Element List, select an existing appointment phase.
3. In the Selection Element Editor dialog box, complete the fields.
4. Click Done.

**Results:**

The selected phase is now edited and remains available in the CSW Actions section of the screening service.

## Activating a Phase

To add a phase to a workflow, the phase must first be activated in the recruiting.

**Before you start**

The Access Administration user type permissions grants users access to this feature.

**Configuration > [Recruiting] Administration > Selections > Large Selections**

**Here's what to do**

1. In the Custom tab, click the Elements link located on the same row as TSC\_Follow-Up-appointments.
2. In the Selection Element List, click on a phase.
3. In the Selection Element Editor window, choose the radio button to activate the phase.

4. Click Done.

**Results:**

The phase is now activated in the drop down list under phases, in the CSW Action section of the screening service.

## Inactivating a Phase

A phase cannot be added to a workflow if it is inactivated in the Recruiting Center.

**Before you start**

The Access Administration user type permission grants users access to this feature.

**Configuration > [Recruiting] Administration > Selections > Large Selections**

**Here's what to do**

1. In the Custom tab, click the Elements link located on the same row as TSC\_Follow-Up-appointments.
2. In the Selection Element List, click on a phase.
3. In the Selection Element Editor window, choose the radio button to inactivate the phase.
4. Click Done.

**Results:**

The phase is now inactivated in the drop down list under phases, in the CSW Action section of the screening services.

## Adding an Invitation Phase to the CSW

During the requisition process, invitations can be sent to candidates at different points of the hiring process.

**Before you start**

The Access Administration user type permission grants users access to this feature.

To be able to send multiple invitations to a candidate for the same requisition, the requisition must be created and phases must be created and activated.

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

**Here's what to do**

1. In the Screening Services list, select Scheduling Center.
2. Click Create next to CSW Actions.
3. In the Action drop-down list, select Trigger a follow-Up Appointment.
4. From the Phase drop-down list, select the phase previously configured for which you wish to send an invitation.
5. Click Add.
6. Click Done.

**Results:**

An invitation will be sent to the candidate at the selected phase of requisitions using this workflow.



## Removing an Invitation Phase from the CSW

Invitation phases can be removed from the requisition process.

### Before you start

The Access Administration user type permission grants users access to this feature.

To be able to remove an invitation from a requisition, the requisition must be created and phases must be activated.

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

### Here's what to do

1. In the Screening Services list, select a screening service.
2. In the CSW Actions section, click Remove next to the appropriate Candidate selection workflow.

### Results:

The invitation phase is removed from the workflow.

## Calendars

### Calendar

A calendar is the graphical representation of time from which candidates can choose a date to book an appointment.

A calendar is created in Scheduling Center to allow candidates to choose a date to book an appointment for an interview that will be carried out either in person or by phone.

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

## Adding a Calendar to the Calendar List

### Before you start

The user must have administrator rights to the Recruiting Center.

The user must know the calendar ID number given when the calendar is created in the Scheduling Center.

**Configuration > [Recruiting] Selection List**

### Here's what to do

1. Click the Large Selections tab.
2. In the Custom tab, locate the entry Scheduling-Center-Calendar-Id and click on the number located in the Number of Elements column for this row.

3. In the Selection Element List page, click New.
4. In the Selection Element Editor page, complete the fields.  
Calendar ID field must exactly match what is configured in Scheduling Center.
5. Select another language in the language drop-down list and translate the name in the selected language.
6. Repeat the translation process for each language of the list.
7. Click Done.

**Results:**

The selected calendar appears in the calendar list of the Recruiting Center and can be assigned to a requisition.

## Removing a Calendar from the Calendar List

**Before you start**

The user must have administrator rights for the Recruiting Center to perform this task.

**Configuration > [Recruiting] Selection List**

**Here's what to do**

1. Click the Large Selections tab.
2. In the Custom tab, find the entry for Scheduling-Center-Calendar-Id and click on the number of Number of Elements for this row...
3. In the Calendar List, click the check box of the calendar name you wish to delete.
4. Click the trash can icon.

**Results:**

The calendar no longer appears in the calendar list of Recruiting Center and it is not possible to assign the calendar to a requisition.

## Invitations

### Sending an Invitation Automatically during the Workflow

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

**Before you start**

The Scheduling Center screening service must be configured.

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

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

### Here's what to do

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

### Results:

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

## Sending an Invitation Automatically during Candidate Application

A Recruiting system administrator can automatically invite candidates to schedule an appointment by adding a Screening block in the application selection process.

### Before you start

The Access Administration user type permission is required.

### Configuration > [Recruiting] Administration > Candidate Selection Workflow

### Here's what to do

1. Select the Steps tab.
2. Click an existing step or click New to create a new step.
3. On the Statuses Usage page, click Add... to add new statuses.
4. In the Add Status page, select the status you have just added.
5. Click Add.
6. Select a Step Progression Level.
7. Click Add.
8. On the Automatic Progression of Applications page, click Allow candidates to reach this status automatically when the (optional) conditions specified below are met.
9. In the Conditions section, select an existing condition, or click Create Condition.
10. Complete the fields as required.
11. In the Workflows list, select an existing workflow, or click New to create a new one.
12. Complete the fields as required.
13. In Steps Usage, click Add to add a screening step, or click New to create a new one.

**Results:**

An invitation is automatically sent to the candidate applying on a Career Section.

# 4 Scheduling Center Administrator Functions

## Candidate Portal Messaging

Scheduling Center administrators can create custom text in the Candidate Portal Messaging.

The Candidate Portal Messaging uses message templates allowing Scheduling Center administrators to override default text within custom messages. The Candidate Portal Messaging is available via the Configuration page.

The message templates contain default text that can be overridden for each specific locale. Both the header text and the body of the message are configurable.

The available message templates are:

- Closed Invites
- Open Invites
- Pending Invites
- Scheduled Appointments

## Configuring Candidate Portal Messages

### Before you start

The Manage Scheduling Center user type permission is required.

### Scheduling Center > Configuration > Candidate Portal Messaging

### Here's what to do

1. Click a message template.
2. Select a locale if applicable.
3. Update the header text. Apply formatting as appropriate.  
If no updates are made, the default header text is displayed.
4. Update the message text. Apply formatting as appropriate.
5. Click Preview to see how the message will look like.
6. Click Save.

## Email Templates

Emails sent via the Scheduling Center can be configured to reflect an organization communication style, standards, and requirements.

The Administrator can configure system emails with their organization branding rather than having only one email model used by all users. If email templates are not configured, the system default templates are used.

For each email template, the following information is displayed in the Email Template page:

- Title: Name of the email, that is in which instance the email will be used.
- Recipient: The person to whom the email will be sent.
- Service Level: The permission level of the recipient, when the recipient is a candidate. Possible values are: None, Cancel Only, Full, All (All candidates can receive the email, regardless of their permission level.)
- Location Type: The location type associated with the calendar. Possible values are: In Person, By Phone.
- Actions: If the text on an email template has been modified from the default, **Revert to Default** will appear in the Actions column.

The following default types of email templates are supplied with the system:

Message Title	Recipient	Service Level	Location Type
<b>Appointment Canceled</b>			
Appointment Canceled	Calendar Owner		
Appointment Canceled	Candidate	All	
Appointment Canceled by Recruiter	Candidate	All	
<b>Appointment Confirmed</b>			
Appointment Confirmed	Calendar Owner		
Appointment Confirmed	Candidate	Cancel Only	In Person
Appointment Confirmed	Candidate	Full	In Person
Appointment Confirmed	Candidate	None	In Person
Appointment Confirmed	Candidate	Cancel Only	By Phone
Appointment Confirmed	Candidate	Full	By Phone
Appointment Confirmed	Candidate	None	By Phone
<b>Appointment Reminder</b>			
Appointment Reminder	Candidate	Cancel Only	In Person
Appointment Reminder	Candidate	Full	In Person
Appointment Reminder	Candidate	None	In Person
Appointment Reminder	Candidate	Cancel Only	By Phone
Appointment Reminder	Candidate	Full	By Phone
Appointment Reminder	Candidate	None	By Phone
<b>Appointment Request</b>			

Message Title	Recipient	Service Level	Location Type
Appointment Request	Candidate	Full	In Person
Appointment Request	Candidate	None	By Phone
<b>Appointment Reschedule Notification</b>			
Appointment Reschedule Notification	Calendar Owner		
Appointment Reschedule Notification	Candidate	Cancel Only	In Person
Appointment Reschedule Notification	Candidate	Full	In Person
Appointment Reschedule Notification	Candidate	None	In Person
Appointment Reschedule Notification	Candidate	Cancel Only	By Phone
Appointment Reschedule Notification	Candidate	Full	By Phone
Appointment Reschedule Notification	Candidate	None	By Phone
<b>Appointment Reschedule Request</b>			
Appointment Reschedule Request	Candidate	Full	In Person
Appointment Reschedule Request	Candidate	Full	By Phone
<b>Feedback Request</b>			
Feedback Request			
<b>Scheduled Appointments</b>			
Scheduled Appointments	Calendar Owner		
<b>Timeslots Not Feasible</b>			
Timeslots Not Feasible	Calendar Owner		

Templates cannot be manually created, however default templates can be modified to the specific needs of your organization. Only one default template can exist for each type of email.

A template is edited either by typing text or by adding variables. These variables will automatically call information from the application and display it in the template. For example, if the variable [Candidate.LastName] is used in the template then the last name of the candidate will be automatically included in the template by the system. Variables can only be added to templates from the Merge Field selection list available on the Edit Template page and not copied and pasted from other templates.

A user can choose to attach an iCalendar data file (ICS file) to the Appointment Confirmed email templates. If the ICS file is attached to the email template, then the candidate and the Calendar Owner receiving the email confirmation notification will be able to add the confirmation to their calendar.

By default, notifications are not sent automatically by the system, email are sent only if the user has set the Send email field to Yes.

Email templates can be configured for multiple languages.

## Revert to Default Available for Email Templates

Scheduling Center administrators have the ability to overwrite custom text on email templates with the original default text.

Default text is provided for all email templates used in Scheduling Center. This text is configurable and can be edited for specific needs. If the text on an email template has been modified from the default, Revert to Default will appear in the Actions column of the Email Templates page. When you click Revert to Default, a message box will appear to confirm the action before any custom text is replaced with default text. The email template will display only the originally provided default text and all custom text will be deleted.

## Editing an Email Template

### Before you start

The Manage Scheduling Center user type permission is required.

### Scheduling Center > Configuration > Email Templates

#### Here's what to do

1. Click an email template.
2. Modify text as required.
3. Click Update.

## Adding a Variable to an Email Template

### Before you start

The Manage Scheduling Center user type permission is required.

### Scheduling Center > Configuration > Email Templates

#### Here's what to do

1. Click an email template.
2. Place cursor in the email template at the position to add variable.
3. Select variable from Merge Fields.
4. Click Update.

## Adding a Static Hyperlink to an Email Template

### Before you start



The Manage Scheduling Center user type permission is required.

### **Scheduling Center > Configuration > Email Templates**

#### **Here's what to do**

1. Click an email template.
2. Type desired text into the body of the template.
3. Select the typed text.
4. Click Link.
5. Select Link Type, Protocol, and enter URL.
6. Click OK.
7. Click Update.

#### **Results:**

The typed text is a clickable hyperlink. The static hyperlink can be removed by selecting the link and clicking Unlink.

## Email Template Activation

Allows an Administrator to choose if an email will be sent or not by the system.

The Administrator can choose to inactivate an email template meaning that emails using this template will not be sent to the candidate. All email templates are by default set to Active, that is emails based on the template are sent to the candidates by the system.

Activation or inactivation is automatically applied to every locale version of the calendar.

## Activating an Email Template

### **Before you start**

The Manage Scheduling Center user type permission is required.

The email template must be inactive.

### **Scheduling Center > Configuration > Email Templates**

#### **Here's what to do**

1. Click on an email template.
2. In the Edit page, select Yes.
3. Click Update.

#### **Results:**

Emails using this template will be sent by the system.

## Inactivating an Email Template

### Before you start

The Manage Scheduling Center user type permission is required.

The email template must be active.

### Scheduling Center > Configuration > Email Templates

#### Here's what to do

1. Click on an email template.
2. In the Edit page, select No.
3. Click Update.

#### Results:

Emails using this template will no longer be sent by the system.

## Adding an iCalendar Data File to an Email Template

### Before you start

The Manage Scheduling Center user type permission is required.

A Calendar role grants users access to this feature.

### Scheduling Center > Configuration > Email Templates

#### Here's what to do

1. Select an Appointment Confirmed email template.
2. Select Yes for the Send .ics field.
3. Click Update.

#### Results:

When the email is sent, the .ics file is added to the email allowing the recipients to add the appointment to their calendar.

## Notify Calendar Owner of Time Slot Unavailability

Calendar owners receive an automated email notification when candidates cannot find a suitable interview time slot while self-scheduling an interview. With this feature, candidates no longer need to send a manual notification to the recruiter.

While scheduling an appointment, candidates click the No Feasible Timeslots button to notify the calendar owner that they cannot find a suitable interview time. The calendar owner then automatically receives an email notification entitled Timeslots Not Feasible which contains candidate information and the calendar name.

There are not steps necessary to enable this feature. If desired, you can modify the email template Timeslots Not Feasible. If you wish to not trigger the email notification, you can disable the feature. Note however that the No Feasible Timeslots button will still be available to candidates.

To disable the feature:

1. Click Scheduling Center.
2. Click Configuration.
3. Click Email Templates.
4. Click Timeslots Not Feasible.
5. For the Send Email option, select No.
6. Click Save.

## Location Template

Information on how and where an interview will take place can be saved as a template for reuse purposes.

In the Scheduling Center, it is possible to create a template for location information. When creating a calendar, information on where or how an interview will be carried out must be completed. The Administrator must choose the location where the appointment will take place. If templates are created for a specific location, information will be automatically populated into the fields when the calendar is created for a chosen location.

The Administrator can choose to use the location information as is, or to modify it. In this case, the changes will not be saved in the template and will apply only for that specific calendar. To save the changes into the template, the location must be modified and saved in the Location configuration pages.

## Creating a Location Template

### Before you start

The Manage Scheduling Center user type permission is required.

### Scheduling Center > Configuration > Locations

### Here's what to do

1. Click Add New Location.
2. Complete fields regarding the location of the appointment.
3. Select one or several languages for the location.
4. Enter details regarding the appointment in the language selected.
5. Click Save.

### Results:

If this location is selected when creating a calendar, the information will be automatically populated in the fields of the new calendar.

## Editing a Location Template

### Before you start

The Manage Scheduling Center user type permission is required.

### **Scheduling Center > Configuration > Locations**

#### **Here's what to do**

1. Click on a location template.
2. Modify fields as required.
3. Click Save.

#### **Results:**

Changes will reflect in the location template used to create a calendar.

## User Creation

The Create Users functionality allows the Administrator to search and select users who can have access to the Scheduling Center.

Before a role can be granted to a user, the user must first be granted access to the Scheduling Center by a Recruiting Center system administrator. The user must try (but will not succeed) at least once to connect to the Scheduling Center for the administrator to be able to grant them a role.

## Creating a User

### **Before you start**

The Manage Scheduling Center user type permission is required.

### **Scheduling Center > Configuration > Create Users**

#### **Here's what to do**

1. Enter the first name, last name or full name of the user that you want available in the Scheduling Center.
2. Click Search.
3. Select the appropriate user displayed in the list.
4. Click Save.

#### **What to do next**

Access Configuration to assign login rights to the user.

## Calendar Import

The Administrator can import a large number of calendars to have them automatically created by the system.

In cases where a large number of calendars need to be created, the Administrator can have the system automatically create several calendars at a time. The Administrator adds information, such as name and scheduling cushion, in a spreadsheet for each calendar needing to be created. This information is uploaded in the system then calendars are automatically created with the information included in each row of the spreadsheet. Calendars are then downloaded

into the Scheduling Center. Once these calendars are imported in the Scheduling Center, they are available to the Administrator and Calendar Owner, but permissions will need to be granted for any other type of users for them to have access to these calendars. These calendars can be used as is in the Scheduling Center or edited.

## Importing Calendars

### Before you start

The Manage Scheduling Center user type permission is required.

All spreadsheet fields must be completed.

Only one upload can be performed at a time.

Secondary locale information is optional.

### Scheduling Center > Configuration > Import Calendars

#### Here's what to do

1. Click on a template, that is Phone Calendar Template or In Person Calendar Template.
2. Click Open.
3. In the displayed spreadsheet, complete all fields for each calendar to be created.
4. Save the Excel file in a CSV format.
5. Log back in to the Scheduling Center.
6. In the Import Calendars page, click Browse to select the CSV file previously saved.
7. Select a type of calendar from the Select Calendar Type field (same type as for the CSV file).
8. Select if the first row of the spreadsheet contains headers or not.
9. Click Save.

#### Results:

The spreadsheet is validated by the system, uploaded and then calendars are created in the Scheduling Center. Download can take several minutes for large imports.

## Time Zone Configuration

The Administrator has the ability to identify which time zones are visible to users in the Scheduling Center.

The Display Time Zones functionality allows system administrators to select the time zones displayed to users. When implementing a new zone, all time zones available in the Display Time Zones page are selected by default.

When a time zone has been enabled by a Scheduling Center administrator and then assigned to a calendar by a recruiter, it cannot be disabled while the calendar is active. The time zone will appear grayed out on the Display Time Zones page. If the calendar is no longer active, and the time zone is not used in any other active calendar, the time zone can be disabled. The Display Time Zone page displays a message that states "Time Zones that are not editable are in use."

Then, when users are creating calendars, they will only see and be able to select the time zones selected by the administrator.

# Languages

The Scheduling Center is available in many languages.

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

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

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

## Supported Languages

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

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

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Bulgarian	bg	Available	Available			
Simplified Chinese	zh_CN	Available	Available	Available	Available	
Traditional Chinese	zh_TW	Available	Available	Available	Available	
Croatian	hr	Available	Available			
Czech	cs	Available	Available		Available	
Danish	da	Available	Available			
Dutch	nl	Available	Available	Available	Available	Limited
English	en	Available	Available	Available	Available	Supported
English (U.K.)	en_GB	Available	Available	Available	Available	Supported

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Finnish	fi	Available	Available		Available	
French (Canada)	fr	Available	Available	Available		Limited
French (France)	fr_FR	Available	Available	Available	Available	Limited
German	de	Available	Available	Available	Available	Limited
Greek	el	Available	Available			
Hungarian	hu	Available	Available		Available	
Italian	it	Available	Available	Available	Available	Limited
Indonesian (Bahasa)*	in	Available	Available	Available		
Japanese	ja	Available	Available	Available	Available	
Korean	ko	Available	Available	Available	Available	
Lithuanian*	lt	Available	Available			
Malaysian (Malay)*	ms	Available	Available			
Norwegian	no	Available	Available		Available	
Polish	pl	Available	Available	Available	Available	
Portuguese (Brazil)	pt_BR	Available	Available	Available	Available	Limited
Portuguese (Portugal)	pt	Available	Available		Available	
Romanian	ro	Available	Available		Available	
Russian	ru	Available	Available	Available	Available	
Serbian*	sr (sh)	Available	Available			
Slovak	sk	Available	Available		Available	
Slovenian*	sl	Available	Available			
Spanish (Worldwide)	es	Available	Available	Available	Available	Limited
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

## Enabling Languages

### Before you start

**Scheduling Center > Configuration > Display Languages**

### Here's what to do

1. Check the box next to the languages you want to display to users.
2. Click Save.

### Results:

Users will only see and be able to select the languages that were enabled.

## Ability to Mass Update Calendar Owners

Calendars, permissions, and timeslots can be transferred from one Scheduling Center user to another in a single action.

The Mass Update functionality allows all of a recruiter's or other Scheduling Center user's items to be reassigned to another recruiter or Scheduling Center user. This transfer includes all current ownership of calendars and timeslots, as well as permissions the originating recruiter has been granted for other calendars.

A Scheduling Center administrator accesses the originating recruiter or other user's items by selecting them from **Select Owner** on the Mass Update page. Once the owner is selected, the Scheduling Center presents a count of all calendars, permissions, and timeslots for that owner. The new user can then be selected using Select Owner by the Select New User field. Once submitted, all items are transferred to the new owner.

## Mass Updating Calendar Owners

### Before you start

The Manage Scheduling Center user type permission is required.

**Scheduling Center > Configuration**

### Here's what to do

1. Click Mass Update.
2. Click Select Owner.
3. Click Select User.
4. Click Submit.

The Scheduling Center presents a count of all calendars, permissions, and timeslots for that owner.

5. Click Submit.

### Results:

All items are transferred to the new owner.



## Default Weekdays

The Default Weekdays functionality allows the Administrator to select default days for timeslots.

## Resending Candidate Submissions

The Resend Candidate Submissions functionality allows the Administrator to resubmit appointments scheduled by candidates which were not successfully submitted to Recruiting during the appointment scheduling process.

In the Candidate Submissions page, the latest 50 candidate submissions that were not successfully sent to Recruiting are listed. The Resend link is available to resend only the selected candidate submission. A Resend All button is also available to resend all the candidate submissions listed. The list is sortable by candidate name.

## Scheduled Appointment Emails

Calendar owners can receive daily and weekly reminders for scheduled interviews. Sending periodic automated reminders provides an easy way for interviewers to be aware of upcoming interviews and ensures that interviews are not missed.

When administrators enable the feature, calendar owners receive email message listing appointments scheduled for them over the week or the day. The appointment date and time are indicated as well as the candidate name and email address.

## Enable Granular Timeslot Setting

If shorter intervals are enabled, calendar owners can select an interval between 5 and 55 minutes when they add a timeslot to a calendar.

When administrators configure the setting Enable Granular Timeslot Setting, two options are available:

- Yes: Select this option to set 5-minute intervals.
- No: Select this option to set 15-minute intervals.

## Description of Fields

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

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

