Oracle Taleo Enterprise Edition

Implementing Recruiting

25A

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Contents

Preface i

1 Getting Started 1

Login 1
Getting Help 2
Menus and Navigation Tools 4
Basic Concepts 7

2 Central Configuration 21

Operation Modes 21
Release Notes Messages 23
Deletion Tasks 26
Global, Product, Regional Settings 31
Legal Agreements 35
Security 37
Single Sign-On 43
TCC Security 63
Network Data 65
Deep Linking 68
Response Center (eShare) 72
Time Zones 73

3 Foundation Data 81

Contextualization: Organization-Location-Job Field 81
Mapping 83
Structure Management 83
Creating the Organization-Location-Job Field Structure 83
Adding a Level to the Organization-Location-Job Field Structure 84
Editing a Level in the Organization-Location-Job Field Structure 84
Deleting a Level in the Organization-Location-Job Field Structure 85
Element Management 85

Creating an Element 85
Editing an Element 86
Moving an Element 86
Deleting an Element 86
Adding a Location or Job Field Element 87
Element Deactivation for Recruiting 87
Organization-Location-Job Field Behavior of Deactivated Elements 93
Department 99
Creating a Department 99
Deleting a Department 100
Activating a Department 100
Deactivating a Department 101
Associating a Department to an Organization 101
Associating a Department to a Location 101
Dissociating a Department from an Organization 102
Disassociating a Department from a Location 102
Department - Permissions and Settings 102
Position 103
Viewing Information on a Position 105
Using Pay Basis 105
HRMS Worker Information 106

4 Users 109

User Account Management 109
User Type Management 120
User Group Management 127
Configuration Profile 133
Configurable Employee Metrics 138

5 Lists and Filters 143

List Format 143
Configuring List Formats 144
List Format - Other Configuration Tasks 148
List Format - Permissions and Settings 154
Column Width in Lists 157
Maximum Number of Rows Displayed in a List 159
Quick Filter 159

Advanced Filter 167
Show Filter 169

6 Fields and Selection Lists 171

Field 171
Requisition Template Fields 191
Selection 191
Field Layout 198

7 Forms and Files 201

Requisitions and Candidate Files Configuration 201
File 218
Form 227
Candidate and Requisition File Setup 234

8 Candidate Selection Workflow 237

Candidate Selection Workflow Key Concepts 237
Candidate Selection Workflow Configuration 242
Candidate Selection Workflow - Other Configuration Tasks 247
Bulk Move to the Hire Step/Status 262
Step/Status Change in One Click 262
Updating Steps and Statuses for Submissions on Different Requisitions 263
Reverting a Step or Status Change 264
Candidate Progression Status 265
Threshold CSW Step - Candidates Hidden from Search Results 266
Competitive Workflow Restriction 267
Automatic Progression of Candidates 268
Automatic Progression of Candidates using Fields 269
Automatic Progression of Candidates using Submission Medium 273
Candidate Selection Workflow Priority 274

9 Candidate and Requisition Search 277

Candidate Search 277
Requisition Search 311
Search Queries 315
Data Segmentation 317

10 Candidate and Requisition Matching 319
Matching Candidates and Requisitions 319

11 Approval 325
Approval 325
Dynamic Approval Routing 339
Configuring the Dynamic Approval Routing 341
Dynamic Approval Routing - Settings and Permissions 352
Hierarchical Role 352
Functional Role 354
Dynamic Approval Routing Rule 357
Dynamic Approval Routing Categories - Other Configuration Tasks 361

12 Correspondence 365
Message Templates 365
Message Template Configuration 375
Message Template - Other Configuration Tasks 380
Notifications 386
Sensitivity Level of Messages and Notifications 391
Message Center 392
Appendix - List of Variables 395

13 Source Tracking 427
Sources and Events 427
Configuring Source Tracking 427
Source Tracking - Other Configuration Tasks 431
Source Tracking - Permissions and Settings 435
When is the Source Filled for Candidates 437
How is the Source List Content Determined 437
Source Types 439

14 Agency 441
Staffing Agencies 441
Agency Gateways 445
Agency - Permissions and Settings 446
Agency - Other Configuration Tasks 447

15 Job Posting and Job Boards 451
Requisition Posting 451
Requisition Posting Permissions 452
Job Board Account 453
Requisition Posting via Certified Job Posting Distribution Suppliers 456

16 Merge Forms 461
Merge Form 461

17 Contingent Hiring 469
Contingent Hiring 469
Contingent Hiring Configuration 469
Contingent Requisition Ownership Rules 474
Contingent Hiring - Exceptions to Standard Behavior 475
Impacts on Features when Enabling the Contingent Hiring Feature 476
Requisition Fields to be Used for Contingent 477
Candidates Fields to be Used for Contingent 478

18 Pipeline Management 479
Pipeline Management 479
Configuring Pipeline Management 479
Activating Pipeline Requisition Types 479
Creating a CSW Step of Type Pipeline 480
Creating a Candidate Selection Workflow of Type Pipeline 480
Granting Pipeline Management Permissions 481
Configuring the Setting to Collect EEO Information (USA) 481
Pipeline Management - Other Configuration Tasks 482
Adding the Requisition Type Column in Requisitions List 482
Activating the Self-assigned Task Action Inside a Step 482
Adding the Most Advanced Progression Status in Candidates List 483
Making the Most Advanced Progression Status Field Available for the Advanced Search 483
Pipeline Management - Permissions and Settings 484

19 Evaluation Management 485
Evaluation Management 485

Configuring Evaluation Management 485
Configuring Microsoft Office 365 and Azure Active Directory Integration 497

20 Reporting 501
Daily Recruiting Report 501
Custom Report Universe 501
Embedded Reporting 503

21 Recruiting Fundamentals 519
Candidate 519
Requisition 555
Offer 566
Hourly Hiring 584
Questions and Competencies 589
Tasks 594
General Features 601

22 Recruiting Center Layout Configuration 615
General Layout 615
Welcome Center 618
Center Stage 622
Communications Channel 631
Theme and Logo 636
Online Tour and Online Help 640
Other Page Layout Elements 643

23 Onboarding (Transitions) Processes in Recruiting 649
Onboarding (Transitions) Processes in the Recruiting Center 649
Pre-Hire and New Hire Processes 650
E-Offer Processes 651
Offboarding Processes 651

24 Partner Services 653
Screening Services 653
Taleo Assessment 656

Scheduling Center 669
Screening Service - Other Configuration Tasks 680

25 LinkedIn Recruiter System Connect 687
LinkedIn Recruiter System Connect Overview 687
Key Capabilities in LinkedIn Recruiter 687
Key Capabilities in Fluid Recruiting 687
Get a Licence for LinkedIn Recruiter 688
Map Location Levels 688
Enable Email Uniqueness 688
Connect Your Zone to LinkedIn 689
Set the Application Name 689
Define Data Set to Synchronize 689
Activate LinkedIn Recruiter System Connect in LinkedIn 691
Activate Multiple Contracts 692
Activate LinkedIn Recruiter System Connect in Taleo 692
Configure User Type Permissions 693
Configure History Event Categories 694
Configure the Candidate List Column 694
Manage Users with LinkedIn Seats 694
Data Consideration 695

26 Sourcing 697
Sourcing Integration 697

27 Exportable Statuses 699
Integration Service to Export Candidate Submissions 699

28 Data Archiving and Deletion 701
Automated Task Configuration 701

29 Product Resource Configuration 717
Product Resource Identification 717

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

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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*.

1 Getting Started

Login

Login and Product Access

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.

Getting Help

Online Help

The administration module offers an online help that provides comprehensive information about concepts or tasks to perform.

The online help, represented by the Question Mark icon or the Help link, is available in the auxiliary navigation bar located in the top right-hand corner of all pages. When clicking the icon or link, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

Support Link

The Support link gives users access to the My Oracle Support.

The Support link is available in the auxiliary navigation bar of all pages of the application. From the site, you can:

- Search and browse the Knowledge database.

- Obtain product documentation.
- Submit an incident.

Tooltip

A tooltip is a short, explanatory text which appears when "hovering" a mouse over a button, a link, a table cell heading or icon without clicking it.

Tooltips are available throughout the system and they give additional information about an action before performing it. Tooltips are provided for buttons, links, icons, and table header cells. These tooltips are not configurable. However, for screening services, the system administrator can create tooltips for some types of user-defined fields.

Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the product.

The same release notes message is displayed to users regardless of the product.

Once users are logged in, they can turn off the Release Notes message by selecting the *Don't display this message again* option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

Deactivating the Release Notes Message

Before you start

The release notes message must have been enabled.

Here's what to do

1. Log into a product.
2. On the Release Notes page, select the "Don't display this message again" option.

Results:

The release notes message will no longer be displayed until new release information or other important information is available. If you want to see the release note information again before new released information is available, delete your browser cookies.

Menus and Navigation Tools

Configuration Menu

The Configuration menu gives system administrators access to all administration components of Oracle Taleo Enterprise Edition products in one centralized menu.

The Configuration menu is composed of sub-menus divided into two main sections:

- Central Configuration: This is where system administrators manage content, data, settings, and configurations that are used across multiple products.
- Specific Configuration: This is where system administrators manage content, data, settings, and configurations that are targeted to a specific product or product area.

Depending on the products activated within your organization, the Configuration menu content may vary.

Central Configuration	Description
Operations	Operation Modes and Release Notes.
General Configuration	Settings and Welcome Center Content.
Selection Lists	Standard selections used in different products such as Education Levels, Employee Statuses, etc.
Roles	Role definitions of both hierarchical and functional roles. Both role types are used for the Dynamic Approval Routing feature. In addition, functional roles are used in defining onboarding tasks.
Dynamic Approval Routing	Approval workflow definitions for requisitions and offers according to specified business rules.
Security	Security policies, message templates related to access and passwords, and legal agreements presented to users when signing in an application. Note that agreements for career sections are managed under Career Section Administration.
Competencies	Competency tools used in Taleo Performance for Rating Models, Competencies, Guidance Plans, etc.

Specific Configuration
SmartOrg
Recruiting
Career Section
Onboarding (Transitions)

Specific Configuration
Performance
Evaluation Management
Reporting and Analytics

Taleo Recruiting Administration

The Recruiting Administration menu allows system administrators to fully configure the following Recruiting Center features.

Element	Description
List Format	Configuration of candidate and requisition list formats.
Fields	Configuration of candidate, requisition, and offer fields, selections as well as custom fields used in reports. Configuration of department and offer fields layout. Configuration of the candidate file identifier.
File Configuration	Creation and configuration of user-defined forms and user-defined files.
Process	Configuration of candidate selection workflows, search fields, matching candidate filters and criteria as well as matching requisition criteria.
Correspondence	Configuration of message templates and paragraphs.
Embedded Reporting	Configuration of embedded reporting using the Oracle Analytics (OAS) Publisher technology.
General Configuration	Configuration of Recruiting Center settings, agencies, department and position lists, merge forms, notifications, requisition types, duplicate check, and center stage.
Source Tracking	Configuration of sources.
Integration	Configuration of job board accounts, screening services, candidate sourcing services, and exportable statuses.
Automated Tasks	Configuration of automated tasks used to delete and archive information contained in the database.
Product Resources	Display of resource ID of user interface labels.

Auxiliary Navigation Bar

The auxiliary navigation bar is the bar located at the top right of pages. If enabled, the auxiliary navigation bar is available at all times for users to see and access.

The content of the auxiliary navigation bar varies depending on the features enabled and permissions granted to users to access those features.

Element	Description
Home	• If you have access to multiple Oracle Taleo Enterprise Edition products and you click Home, the Welcome Center is displayed. • If you have access to Recruiting only and you click Home, the Recruiting Center front page is displayed.
Resources	May include: • My Setup: Access to personal preferences. • Training: Access to online training materials. • e-Learning: Access to eLearning materials. • Support: Access to Oracle Support. • Help: Access to online help. • 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.
Sign Out	Terminates the session and you are automatically signed out of all products.

Breadcrumb Trail

The breadcrumb trail located at the top of each page allows users to see where they are located within the application and to jump to previously viewed pages. The breadcrumb trail is only available in navigation mode; it disappears in edit mode.

Navigation Icons

When information is spread across multiple pages, navigation icons are available.

Icon	Description
	Displays the previous page.
	Goes to the previous 10 pages.
	Displays the next page.
	Goes to the next 10 pages.

Recently Viewed Items

The Recently Viewed Items pane contains direct links to the last ten pages you most recently accessed (according to your permissions) during the current session or previous ones. They can be pages where you made modifications or simply pages that you accessed without making modifications. To access a recently viewed item, simply click the item.

Basic Concepts

Application Time out

A security feature warns users when the application has not been used for more than thirty minutes even if a user is still signed into the application. When the time-out delay is reached, a message notifies users that the time-out delay for the application is imminent.

Two scenarios are possible:

- User takes action: When the application has been idled for thirty minutes, a message notifies the user that the application requires attention. Clicking "Access the application" directs the user to the application. When the user accesses the application, the user can reset the application and a message indicates the remaining time before the session expires.
- User does not take action: If the user does not reset the application within the defined delay, a message is displayed, indicating that the user has been signed out of the application and has to sign in again to use the application.

The time-out delay is set by default to thirty minutes. The reminder displayed before time-out is set by default to ten minutes before time-out.

System Status

A status indicates the current state of an item in the system. It allows users to create items without making them available right away and to remove an existing item from use without removing it form the database.

Items can have one of the following statuses:

- Draft: A Draft item can be modified. A Draft item cannot be used. It must be Active before it can be used.
- Active: When an item is Active, only the name and description can be modified. It is not possible to update the behavior of the item.
- Inactive: When an item is Inactive, only the status can be modified. The only possibility is to go back to the Active status.

A Draft item can become Active. An Active item can become Inactive. An Inactive item can become Active. However, an Active item cannot "go back" to the Draft status.

History Tracking

The History feature presents useful tracking details on an item.

The three most recent events are displayed in the History section. To view a more complete listing of events, click More Info.

History Item	Description
Date and Time	Date and time when an event occurred.
Event	Event or action performed on an element.
Details	Information regarding the event.
By	The "actor" (person or system) who performed the event.

Information of the user that performed an action on an item can be viewed for better tracking and troubleshooting purposes.

Note: History tracking of items such as settings and user types are not item specific. Tracking is global for all changes made in the area. This means if looking at a specific user type and going to view its history, you will see all of the history for all user type changes, not just the changes that have occurred with that specific user type.

History Events Retention Period Before Deletion

History events are deleted systematically from the system after a certain period of time. This deletion applies to SmartOrg, General Configuration, Recruiting and Performance.

SmartOrg Item	Retention (Months)
User Account (user access)	6
User Defined Selection	12
User	12
Welcome Center Content	12
Seat	12
Coverage Area	12
Message Template	12
Document	12
Paragraph	12

SmartOrg Item	Retention (Months)
Message	12
User Type	12
Group	12
Configuration Profile	12
User File	18
Organization	18
Organization Level	12
Location	18
Location Level	18
Job Field	18
Job Field Level	18
Business Organization	18
Business Organization Level	18
Positions	18
Competency	18
Competency Category	18
Competency Group	18
Competency Context	18
Competency Definition Context	18
Competency Guidance Plan	18
Rating Dimension	18
Rating Model	18
Job Role	18
Job Role Context	18
Job Profile Classification	18
Product Setting	24

General Configuration Item	Retention (Months)
Reminder	12
Custom Selection	24

Recruiting Item	Retention (Months)
Automated Tasks	24

Taleo Performance Item	Retention (Months)
Batch Transaction	0
User-defined Selections	12
Talent Pool Management Center	12
Performance Management Center	12
Chart Configuration	12
Matrix Configuration	12
Competency Goal	14
Pool Item	14
Pool	14
Message Templates	12
Documents	12
Paragraphs	12
Product Setting	12
User Account (user access)	6
Review Text	12
Review Definition	12
Review Cycle	12
Business Goal	14
Business Project	12
Business Theme	12
Business Period	12
Employee Goal	14
Employee Goal Plan	14
Goal Template	12
Succession Plan	14
Development Activity	14
Development Plan	14
Development Plan Template	12

Taleo Performance Item	Retention (Months)
Development Activity	12
Development Activity Category	12
Mentoring Relationship	14
Rating Dimension	12
Rating Model	12
Partners	12

Refine by Filter

The Refine by filter allows users to filter a list of items according to different criteria.

The Refine by filter is available throughout the system. When an item is selected in the Refine by list, users have to enter data in a field or select an item by which the list will be filtered. The Refresh button must then be clicked to refresh the list.

Rich Text Editor

The Rich Text Editor enables users to edit and format text contained in competency definitions, correspondence, requisitions, requisition templates and review forms (definitions, sections and section items). Text formatted with the editor is presented to users in the TE applications with the specific formatting defined in the editor.

The Rich Text Editor contains standard text processing tools such as:

- cut, copy, and paste functions
- font types and sizes
- bold, italics, and underline
- text and background color
- left, right, and center alignment
- numbered and bulleted lists

Image or Link Insertion

Image or link insertion may only be available via the enlarged view of the editor, accessible when you first click the Enlarged View icon.

Internet Explorer 8

Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as another version of Internet Explorer or Firefox.

Copying and Pasting Text

When copying content from MS Word and pasting it in the Rich Text Editor tool, some reformatting may be required due to the complexities of mapping MS Word formatting to the Rich Text Editor. Capabilities supported by the Rich Text Editor tool are presented in the following table.

Item	Description
Bold	Full support for the bold style.
Italic	Full support for the italic style.
Underline	Full support for the underline style.
Heading styles and fonts	Heading styles as well as fonts used in heading styles are preserved. Fonts not used in heading styles are treated as a default normal style.
Font name (font face)	Font names (font faces) are generally preserved, even those that are not part of the Rich Text Editor's natively supported fonts (Arial, Comic Sans MS, Courier New, Tahoma, Times New Roman, Verdana).
Font size	The Rich Text Editor supports seven sizes. A "best guess" font size conversion is done by the system. Conversion of font sizes may not be accurate in some unspecified cases (depending on browser, MS Word version, etc.).
Text color	Full support for text color.
Text background color	Full support for text background color.
Hyperlinks	Full support for hyperlinks.
Bulleted and numbered lists	Lists should be created using the bullets, numbering and multilevel list features in MS Word. List types that do not conform to the recommended practice are not supported. The bullet type is preserved (bullet or number), but the symbol (circle, square, etc.) or notation (number, roman numerals, alphabetical) will be replaced by the browser's defaults. Numbering continuation between two distinct numbered lists is not supported. The color of the bullet is not preserved. Spacing around list blocks is browser-specific. Indentation level is preserved if made using the indent buttons. Custom indentations made using the MS Word ruler is not supported.
Line spacing	No line spacing information is preserved. All custom line spacing is converted to a single line. The only exceptions are: • Headings: the line spacing is browser-specific. • Lists: line spacing is browser-specific.
Images	Images are not supported and will not be included.
Tables	Table row and column dimensions are preserved. The presence or absence of borders is preserved. Colors are not preserved, default is black. Background and border colors are not preserved. Styles are not preserved, default is solid line. Custom widths are not preserved, default is 1px.

Item	Description
	Custom table and cell widths are converted to their pixel / percent equivalent. This conversion runs differently, based on the browser being used. This may result in discrepancies from the original table. Merged cells are preserved.

Recommended Practices for Constructing MS Word Documents to Minimize Reformatting Required When Pasting Content Into the Rich Text Editor

In general, the less complex the MS Word document is, the less reformatting a user will need to do when copying content from MS Word and pasting it in the Rich Text Editor. Below are some recommendations for creating MS Word templates.

Use the more common fonts that come with MS Word, such as:

- Arial
- Times New Roman
- Courier New
- Verdana
- Comic MS Sans

Avoid using images in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using the horizontal ruler to customize indent lines, as this type of formatting is not supported in the Rich Text Editor. Use the standard indent buttons.

Minimize the use of custom line spacing, as this is not supported in the Rich Text Editor.

Avoid using colored bullets in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using custom ruler indentation on bullets, as custom indentation on bullets is not supported in the Rich Text Editor. Use standard indent buttons.

Avoid mixing bullet types in the MS Word template documents, as mixed bullet types are not supported in the Rich Text Editor.

Create lists using the standard bullet types, numbering, multilevel list and indent features available in MS Word.

Disabling Icons in the Rich Text Editor

System administrators can disable icons in the rich text editor to reduce complexity or prevent users from including JavaScript code into requisition descriptions, e-mail notifications or correspondence.

Using the setting Rich Text Editor Disabled Icons (available under General Configuration), system administrators can disable any or all icons except for the Enlarged View icon. They need to enter the icon code name of the icons that they want to disable, separated by a comma.

Icon Name	Icon Code Name
Source	Source

Icon Name	Icon Code Name
Cut	Cut
Copy	Copy
Paste	Paste
Paste as plain text	PasteText
Paste from Word	PasteWord
Print	Print
Find	Find
Replace	Replace
Select All	SelectAll
Remove Format	RemoveFormat
Format	FontFormat
Font	FontName
Size	FontSize
Text Color	TextColor
Background Color	BGColor
Bold	Bold
Italic	Italic
Underline	Underline
Insert or remove ordered list	OrderedList
Insert or remove bulleted list	UnorderedList
Decrease indent	Outdent
Increase indent	Indent
Insert or edit image	Image
Align left	JustifyLeft
Center	JustifyCenter
Align right	JustifyRight
Justify	JustifyFull
Insert or edit link	MyCreateLink
Remove link	Unlink
Insert or edit table	Table

Note: This configuration applies to the rich text editor in Recruiting and Onboarding. It is not supported in Evaluation Management, Performance Management and Sourcing.

Understanding Languages

Oracle Taleo Enterprise Edition products are available in different optional languages.

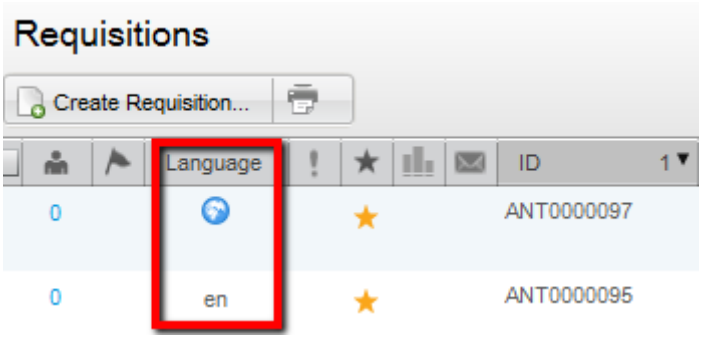
Not all languages are available for all Oracle Taleo Enterprise Edition products. Languages must be activated by the system administrator before they can be used in an application.

There are several concepts around languages:

- The application language is the language used for a product. This is the language selected by the user when signing in the Oracle Taleo Enterprise Edition suite. The language selected defines the language of every UI labels and elements of the product.
- The content language is the language of a specific entity. The content language is selected when creating an entity. For example, it is possible to create a requisition in French even when using the Recruiting Center in English. The content language of a user is set in the user's account by the system administrator. However, a user can change this default content language under My Setup > Preferences > Content Language. The preferred content language is used by the system as the default content language which is the same across all Oracle Taleo Enterprise Edition products. If a product does not support the same set of content languages, it will have its own preference configuration.
- The correspondence language is the language used for email messages. The correspondence language of a user is set in the user's account by the system administrator. However, a user can change this default correspondence language under My Setup > Preferences > Correspondence Language.

In Oracle Taleo Enterprise Edition products, the languages in which an element (for example, a requisition) is available are indicated in the Activated Languages field. When creating or editing an element, the user can choose a base language as well as languages in which the element will be available. The base language of an element is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user's preferred content language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When an element is available in one language, the name of the language is displayed in the list; for example "en". When only one language is used within a company, there is no special indicator. When an element is available in several languages, the Earth icon is displayed. Hovering the mouse over the icon displays the languages in which the element is available.



Selecting the Base Language

Before you start

The item must be in Edit mode and the language must be active before it can be set as the base language.

Here's what to do

1. Open an item.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select the Base option for the desired language.
4. Set the language to Active if that is not already the case.
5. Click Save.

Results:

The word Base appears next to the language in the Language drop-down list of the item.

What to do next

You will need to complete the required fields (usually the Name) in the new base language.

Activating a Language

Before you start

The item must be in Edit mode.

Here's what to do

1. Open the item that you want to make available in another language so its fields are in edit mode.
2. Select Configure next to the Language drop-down list.
3. On the Language Configuration page, select Active from the Status drop-down list for each required language.
4. Click Save.

Results:

Activated languages appear in the Language drop-down list of item.

What to do next

Once a new language has been enabled, values for some related fields (most often Name) will need to be provided.

Deactivating a Language

Before you start

The item must be in Edit mode and the language must not be the base language.

Here's what to do

1. Open an item.
2. Select Configure next to the Language drop-down list.
3. For each language, select Not Used in the Status drop-down list.

   If the language to deactivate is the Base language, you will need to select another active language as the base language.
4. Click Save.

Results:

Selected languages no longer appear in the Language drop-down list of the item.

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).
- 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	

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

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

2 Central Configuration

Operation Modes

Operation Mode

The operation mode can be changed for service, configuration, or implementation purposes.

Three operation modes are available:

- implementation
- maintenance
- production

System administrators have the ability to switch to maintenance mode or production mode for each product individually or for all. Products supported by the operation mode feature are:

- Recruiting
- Career Section
- Onboarding (Transitions)

For the above products, except the New Hire Portal, system administrators know the number of users using both the product as well as the administrative area related to the product. Note that candidates/new hires who are doing their Onboarding (Transitions) processes are logged into the Career Sections, not into the New Hire Portal.

Implementation Mode: The implementation mode is usually only for new customers or new zones (databases). It is used during the initial configuration and implementation stages of the system. Once the implementation is completed, the implementation mode is no longer available to system administrators and a request must be made through Oracle Support. In implementation mode, system administrators can:

- Create, delete and modify the Organization-Location-Job Field structure.
- Create, delete and modify levels in the Organization-Location-Job Field structure.
- Create, delete and modify elements in the Organization-Location-Job Field structure.

If Recruiting is in implementation mode, users cannot connect to the Remote Manager Experience.

f changes need to be made to the structure of the database after implementation, system administrators must contact Oracle Support and request that the system be put back into implementation mode.

Maintenance Mode: The maintenance mode is a special administrative feature used to protect the integrity of the database when editing Organizations, Locations, or Job Fields.

In maintenance mode, the application is inactive. All users, except system administrators, are logged out automatically. The application displays a message to users as well as to candidates in Career Sections, indicating that the application is in maintenance mode. If users are logged in and have not saved data they were entering, this data will be lost.

In maintenance mode, system administrators can:

- Delete departments, both via Integration and SmartOrg.
- Delete positions, both via Integration and SmartOrg.
- Import job positions via Integration.
- Modify the Organization-Location-Job Field structure, both via Integration and SmartOrg.
- Modify levels in the Organization-Location-Job Field structure, both via Integration and SmartOrg.
- Edit Organization, Location, and Job Field elements (Element Management), both via Integration and SmartOrg.

There are no transactions in Onboarding (Transitions) or Performance that require the maintenance mode. If Onboarding (Transitions) is in maintenance mode and a user is performing a Start Onboarding (Transitions) Process or a Cancel Onboarding (Transitions) Process action from Recruiting, the transaction will still be scheduled to process.

If Recruiting is in maintenance mode, users can connect to the Remote Manager Experience.

Production Mode: In production mode, all users as well as guests, agents, and system administrators have access to the application. In production mode, system administrators can:

- View structure elements for Organizations, Locations, and Job Fields.
- Save agencies, both via Integration and SmartOrg.
- Create and edit job templates.
- Select and view positions.
- Create and edit departments.

All tasks listed above can also be performed in maintenance mode and in implementation mode.

To import/export candidates (by Integration) and move candidates in the candidate selection workflow (by Integration), the system must be in production mode.

Modifying the Operation Mode

Before you start

The *Manage Application Mode* user type permission is required.

Configuration > **Operation Modes**

Here's what to do

1. In the Operation Modes page, click Edit.
2. In the Operation Mode Editor page, select the desired mode for each product, that is production or maintenance mode.
3. Click Save.

Results:

The selected operation mode appears beside each product. If the system is put in Maintenance mode, users currently logged will receive a message and will be logged out.

Release Notes Messages

Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the product.

The same release notes message is displayed to users regardless of the product.

Once users are logged in, they can turn off the Release Notes message by selecting the *Don't display this message again* option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

Configuring the Release Notes Message Feature

The configuration of the release notes feature consists of the following steps.

1. *Creating the release notes message content*.
2. *Configuring configuration profiles to display release notes information when users access the application*.

No default release notes message is provided with the product. A blank page is displayed unless the system administrator decides to customize the page to present important information to users.

Creating a Release Notes

Before you start

The *Edit release notes* user type permission is required.

Configuration > **Release Notes**

Here's what to do

1. In the Release Notes page, click Edit.
2. In the Release Notes Editor page, write the message. Apply formatting to the text to organize information, facilitate readability and draw attention to particular passages.
3. Clear the "Do not display release note information" check box.
4. Specify the validity period of the message by indicating the period of time when the message will be displayed.
5. Click Save.

Activating the Release Notes in a Configuration Profile

Before you start

The Release Notes message must be created.

Configuration > **[SmartOrg] Administration** > **Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Release Notes setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Release Notes - Other Configuration Tasks

Editing a Release Notes

Before you start

The *Edit release notes* user type permission is required.

Configuration > **Release Notes**

Here's what to do

1. Click Edit.
2. Modify the fields as required.
3. Click Save.

Setting a Release Notes Validity Period

Before you start

The *Edit release notes* user type permission is required.

Configuration > **Release Notes**

Here's what to do

1. Click Edit.
2. Set the validity period with the Calendar icon.
3. Click Save.

What to do next

The release notes message is displayed to users when they sign in the application only for the determined period provided the *Do not display release note information* is not selected and the *Release Notes* setting has been activated in the user's configuration profile.

Displaying a Release Notes

Before you start

The *Edit release notes* user type permission is required.

Configuration > **Release Notes**

Here's what to do

1. Click Edit.
2. Clear the *Do not display release note information* check box.
3. Click Save.

Hiding a Release Notes

Before you start

The *Edit release notes* user type permission is required.

Configuration > **Release Notes**

Here's what to do

1. Click Edit.
2. Select the *Do not display release note information* check box.
3. Click Save.

Release Notes - Permissions and Settings

The following permissions and settings are used for the release notes functionality.

User Type Permission	Description	Location
Edit release notes	Allows users to edit the release notes message content in the Central Configuration menu.	Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Foundation Data

Setting	Description	Default Value	Location
Release Notes	Displays the release note information when accessing the application. Once the system administrator has created the content of the release notes message, the Release Notes setting must be set to Yes in the user's configuration profile.	No	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Deletion Tasks

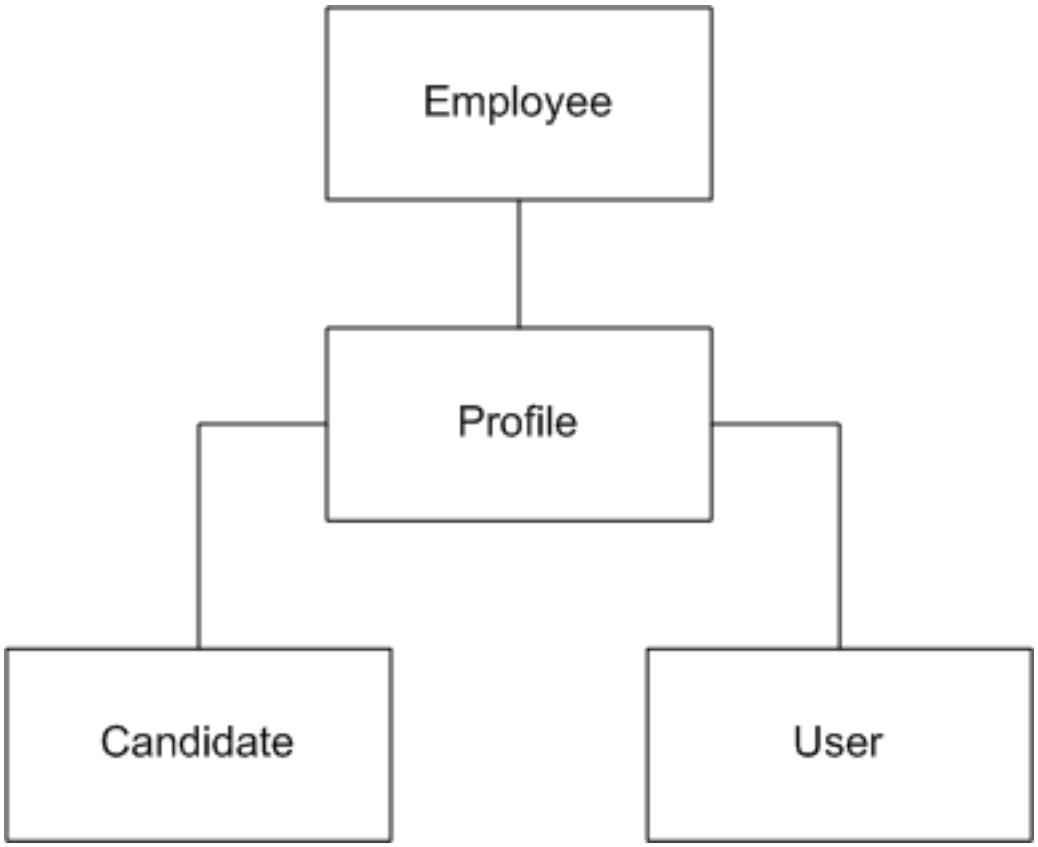
Employee Information Deletion Task

System administrators use the employee information deletion task to permanently delete information related to former employees' employment at the organization (as might be required by law in EMEA and other regions).

The Person Model

The following "objects" are associated with a person:

- User Account – to access the system with granted permissions.
- Candidate Account – to apply for jobs through the career section.
- Profile – to store the common profile. Employee and candidate share the same profile.
- Employee – to store employee-related data.



When candidates are hired, a user account and an employee associated with their profile are created:

- As an employee, the profile is maintained through Performance talent profile.
- As a candidate, the profile is maintained through Recruiting and the career section.

Employee Information Deletion Strategy

Employee information deletion task permanently deletes employee-specific data only. The candidate account and common profile are unaffected. This enables a person to be rehired in the future by the organization. The person can remain in current pools and succession plans. The candidate account can eventually be deleted through a distinct task if Recruiting is available in the system.

Deleted	Not Deleted
Employee Specific Data • Employee Metrics • Pictures • Job History • Matrix Management • Remaining Tasks • Compensation History • Goal Plans, Goals, Tasks (aligned goals will be unlinked) • Performance Reviews & Review History • Career Plans • Development Plans • Received Feedbacks • Sent Feedback Requests	**Other Performance Data** • Business Goals • Projects • Sent Feedbacks • History of actions taken by the employee **Profile and Candidate Data** • General Profile (Education, Experience, Certifications, Preferences, etc) • Job Submissions • Offers **Talent Pools & Succession Plans** • Remains as member (now as an external candidate) **User Specific Data** • Remains in the system but inactive

Employee Information Deletion Rules

Employee-related information can be permanently deleted provided all of the following conditions are met:

- The Employee Status of the user account is Former Employee (this is typically achieved by deleting the user account (status: Deleted)).
- The employee must not be the owner manager of positions. A transfer of ownership is required prior to deletion.
- The employee must not be the owner of talent pools. A transfer of ownership is required prior to deletion.

Employee Information Deletion Process

Employee information deletion is a four step process:

1. User account deletion (see *Deleting a User Account From the User Account Page*, *Deleting the User Account of an Employee Using the Wizard* and *Deleting the User Account of an Employee Manually*).
2. Deletion task creation (see *Creating a Deletion Task*).

3. Preview of employees to be deleted (see *Previewing Employees to be Deleted*).
4. Execution of the deletion task (manually or, more often, automatically according to the date and frequency chosen by the administrator).

Limitations

- No archiving capabilities at this time.
- A user account cannot be permanently deleted from the system.
    - User accounts, once deleted, are no longer displayed but remain in the system.
    - The user accounts do not contain employee-related data.
- Products for which the data will not be automatically deleted by the employee information deletion task:
    - Learn
    - Evaluation Management
    - Assessment
    - Screening Services
    - Analytics
    - Any other external products integrated with Oracle Taleo Enterprise Edition

Deleting a User Account From the User Account Page

Before you start

The Manage user accounts - Including HMRS fields user type permission is required..

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Locate the user in the User Accounts list.
2. Click Delete in the Actions column.
3. The action(s) you perform next vary depending on whether the user account is associated with an employee.
    - If the user account is associated with an employee who owns requisitions, templates or folders, or was assigned yet uncompleted actions, or reports to a manager, or has pending tasks or work items, perform the steps in the wizard.
    - If the user account is associated with someone for whom none of the previous conditions applies, click Yes.

Results:

Once deleted, the user account status is set to Deleted and the user account is deactivated.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Using the Wizard

Before you start

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click the user account you want to disable.
2. In the Employee Information section, click Terminate.
   The wizard is displayed.
3. Perform the steps in the wizard.

Results:

The user account has Deleted status and therefore is no longer displayed on the User Accounts page if Active is selected in the View field. The Employee Status value is changed to Former Employee.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Manually

Before you start

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click user account you want to disable.
2. Edit the Employee Information section as necessary.
3. Set employee status to Former Employee.
4. Provide a termination date.
5. Remove the manager.
6. Transfer direct reports to another manager if applicable.
7. Transfer ownership of talent pools and positions to another user.
8. Transfer pending tasks to another user.
9. Return to the User Accounts page, locate the user account in the list and click the corresponding Delete in the Actions column.
10. Click Yes.

Results:

Once deleted, the user account status is Deleted and the user account is deactivated.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Creating a Deletion Task

Before you start

The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > **Operations** > **Deletion Tasks**

Here's what to do

1. Click Create.
2. Select Employees, click Next.
3. Select Permanently delete, click Next.
4. Click the check box next to each criterion you want to include and click Next.
5. Enter values for the Name, Code, Status, Start Date, Recurrence fields and click Next.
6. Review your selections and click Finish.

Results:

The task is displayed in the Tasks list. If you selected a date and frequency for the task, the task will run automatically on the dates that correspond to your selections.

Previewing Employees to be Deleted

Before you start

The Access Deletion Tasks permission is required (User Types > [Functional Domains] Configuration > Data Lifecycle Management).

Configuration > **Operations** > **Deletion Tasks**

Here's what to do

1. In the Task list, click the task you want to examine.
2. Click Count.
3. Click the *x out of y total items* link to view the list of former employees to be deleted.

Global, Product, Regional Settings

Setting

Settings are used to configure features in Oracle Taleo Enterprise Edition products.

There are two types of settings:

- Global settings: Settings that affect multiple Oracle Taleo Enterprise Edition products.
- Product settings: Settings specific to an Oracle Taleo Enterprise Edition product, for example, Recruiting, Career Section, Onboarding (Transitions), Performance, Reporting and Analytics.

Setting	Location
Global settings	Configuration > [Central Configuration] Settings
SmartOrg settings	Configuration > [SmartOrg] Settings
Recruiting settings	Configuration > [Recruiting] Settings
Career Section settings	Configuration > [Career Section] Settings
Onboarding (Transitions) settings	Configuration > [Onboarding (Transitions)] Settings
Performance settings	Configuration > [Performance] Settings
Reporting and Analytics settings	Configuration > [Reporting and Analytics] Settings

Settings are configured by system administrators. A default value is set prior to product delivery. System administrators can modify the value and the change will be applied throughout the product. Certain setting values can be changed by users. In that case, the value set by the user will override the value set by the system administrator.
A setting has one of the following security levels: Public, Protected, Private.

Security Level	Description
Public	System administrators can view and change the setting.
Protected	System administrators can view the setting, but changes can only be performed by Oracle.
Private	System administrators cannot view or change the setting. Only Oracle can view and change the setting.

Configuring a Setting

Before you start

The security level of the setting must be Public.

The *Manage Settings* user type permission is required.

For global settings:

Configuration > [General Configuration] Settings
For product settings:

Configuration > [Product name] Settings

Here's what to do

1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Edit next to the name of the setting.
4. Make changes.
5. Click Save.

Resetting the Default Value of a Setting

Before you start

The security level of the setting must be Public.

The *Manage Settings* user type permission is required.

For global settings:

Configuration > [General Configuration] Settings
For product settings:

Configuration > [Product name] Settings

Here's what to do

1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Reset next to the name of the setting.

Results:

The default value of the setting is restored and the change is reflected in the product.

Regional Settings

Regional settings are used to configure settings which control the number, date, currency, and language formats for a locale.

In the Regional Settings page, the Identifier list varies according to languages activated in the Oracle Taleo Enterprise Edition products. For example, if an organization only supports English (en) and French (fr), the Identifier list will contain en and fr as well as all specific locale identifiers related to fr and en, that is, fr-FR, fr-CA, en-GB, en-Au, etc.

The regional settings of a locale consist of four elements:

- Number: Defines the decimal symbol, digit grouping, maximum number of decimals, negative number format, etc.
- Currency: Defines the decimal symbol used for currencies, the default currency, the maximum number of decimals for currencies, etc.
- Date: Defines the date format used in the application. A date can be represented by text, number or a combination of both.
- Language: With each locale, comes a set of predefined values that are specific to the specified language, regardless of the country or region.

Configuring the Number Format

Before you start

Configuration > **[SmartOrg] Administration** > **Regional Settings**

Here's what to do

1. Click the name of an identifier.
2. Click Edit next to Number.
3. Select a value for each setting.
4. Click Done.

Configuring the Currency

Before you start

Configuration > **[SmartOrg] Administration** > **Regional Settings**

Here's what to do

1. Click the name of an identifier.
2. Click Edit next to Currency.
3. Select the values for each setting.
4. Click Done.

Configuring the Date Format

Before you start

Configuration > **[SmartOrg] Administration** > **Regional Settings**

Here's what to do

1. Click the name of an identifier.

2. Click Edit next to Date.
3. Select a value for each setting. See *Date Format Properties*.
4. Click Done.

Date Format Properties

Date Format	Description
Full date format	Date represented by the day of the week, month, date and year. Default is EEEE, MMMM D, YYYY. Maximum number of characters: 255.
Long date format	Date represented by month, date and year. Default is MMMM D, YYYY. Maximum number of characters: 255.
Medium date format	Date represented by date, month and/or year. Default is D-MMM-YYYY. Maximum number of characters: 255. In the case of regions that do not use commas, periods or slashes with dates, an additional format is included that is specific to the region. When no date format is selected, the medium format is the default format used by the application.
Short date format	Date represented by date, month and/or year. Default is DD/MM/YY. Short date formats are used for lists and calendars. Numeric values only.
Shortest date format	Date represented by date and month. Default is DMMM. Shortest date format are used in candidate files and other lists that include many columns.

Date Format Details	Description
Text	A date element that always appears in the form of text, such as days of the week, will be displayed in long form if four letters are used for its representation. If less than four letters are used, the date element will appear in an abbreviated form. For example, configuring a date format using "EEE" would produce "Fri" for Friday, while using "EEEE" would produce the long form "Friday".
Numbers	The system adds zeros to single numbers in certain cases. For example, if the date element "DD" is part of the date format, the ninth day of the month will be displayed with a leading zero, thus, "09". If the date element is "D", however, the system will display "9" without a leading zero.
Text and Numbers	When the date format element is composed of one or two characters, a numeric value results. For example, if the date format element is "M" or "MM", the month of February will be depicted as "2" and "02" respectively. On the other hand, a date format element made up of three or more characters will result in a textual representation of the date: in the case of "MMM", February will appear as "FEB", if "MMMM" is used, February will be displayed as "February".

Date Format Syntax	Meaning	Presentation	Example (US locale)
Y	Year	Numeric	2009
M	Month of the year	Alphanumeric	July, Jul. or 07
D	Day of the month	Numeric	10
H	Hour AM/PM (1-12)	Numeric	12
h	Hour of the day (0-23)	Numeric	22

Date Format Syntax	Meaning	Presentation	Example (US locale)
m	Minute of the hour	Numeric	38
s	Seconds	Numeric	59
E	Day of the week	Textual	Tue, Tuesday
a	AM/PM marker	Textual	PM
K	Hour in AM/PM (0-11)	Numeric	0
‘	Escape for text	Delimiter	‘
“	Single quotation mark (twice the escape character)	Literal	

Legal Agreements

Legal Agreement

A legal agreement is a disclaimer text displayed to users when accessing a Oracle Taleo Enterprise Edition product.

A legal agreement can be created so that users must agree to abide by before they can log into Oracle Taleo Enterprise Edition products. The text of such agreement typically reminds all users that the computers they are accessing are government or private industry owned and must be used in accordance with good security practices.

A legal agreement is displayed to users when accessing a Oracle Taleo Enterprise Edition product, except the Career Section. System administrators are responsible of entering the disclaimer text either by typing the text or by pasting it from another source. They can format the text using HTML features such as bold, italic, color, font type and size, images, etc.

There is no limit in the number of legal agreements that can be created. However, only one agreement can be active at a time. It is possible to change the currently active agreement at any time.

If the legal agreement feature is implemented, pages are typically displayed to users in the following order:

- Oracle Taleo Enterprise Edition product list page
- Legal Agreement page
- User Sign In page

If your organization prefers that users be authenticated as the first step, they can request Oracle to change the sequence, in which case the Oracle Taleo Enterprise Edition product list page is "protected" and pages are displayed in the following order:

- Legal Agreement page
- User Sign In page
- Oracle Taleo Enterprise Edition product list page

Creating a Legal Agreement

Before you start

The *Manage legal agreements* user type permission is required.

Configuration > **Legal Agreements**

Here's what to do

1. Click Create.
2. Enter a code and a name.
3. Type the legal agreement text. Apply formatting to the text to organize information, facilitate readability and draw attention to particular passages.
4. Click Save.

Activating a Legal Agreement

Before you start

The *Manage legal agreements* user type permission is required.

Only one legal agreement can be activated at a time.

The legal agreement must be deactivated or draft.

Configuration > **Legal Agreements**

Here's what to do

1. Click the name of a legal agreement.
2. Click Activate next to Properties.

Results:

The activated legal agreement is displayed to users if the *Show the legal agreement to users at login* security policy is set to Yes. See *Showing the Legal Agreement to Users at Login*.

Displaying the Legal Agreement to Users at Login

Before you start

The *Manager security policies* user type permission is required.

Configuration > **Security Policies**

Here's what to do

1. Click Edit next to Sign In.
2. Select Yes for the *Show the legal agreements to users at login* option.
3. Click Save.

Deleting a Legal Agreement

Before you start

The *Manage legal agreements* user type permission is required.

The legal agreement must be active or draft.

Configuration > **Legal Agreements**

Here's what to do

1. Click Delete next to the agreement.
2. Answer Yes to the message that appears.

Results:

The legal agreement is permanently deleted from the database. If the legal agreement was active, it will no longer be displayed to users when signing in a product.

Deactivating a Legal Agreement

Before you start

The *Manage legal agreements* user type permission is required.

The legal agreement must be active.

Configuration > **Legal Agreement**

Here's what to do

1. Click on the name of a legal agreement.
2. Click Deactivate next to Properties.

Results:

The legal agreement becomes inactive. It is no longer displayed when users sign in a product. The legal agreement is still available in the list of legal agreements.

Security

Security Policy

Security policies are settings related to the security of Oracle Taleo Enterprise Edition products.

Security policy settings are organized into four groups:

- Sign in

- User Accounts
- Password
- Forgot Username / Password

The History section provides information on actions performed on security policy settings such as the date and time, the event, details on the event, and the "actor" (person or system) who performed the action.

For details on each setting, see *Security Policy Settings*.

Security Policy Settings

Security Policy - Sign In Setting	Description	Location
Show the legal agreement to users at login.	Yes, No (default).	Configuration > [Security] Security Policies

Security Policy - User Account Setting	Description	Location
Number of incorrect sign-in attempts allowed per user before his/her account is locked	Unlimited, 3 (default), 5, 10, 15, 20, 100. Determines the maximum number of times a user can enter incorrect information during sign-in before the user's account is locked.	Configuration > [Security] Security Policies
Period during which the system prevents access to an account that has been locked	Permanent (default); 2, 5, 10, 15 minutes; 1, 4 hours; 1 day; 1 week; 30 days.	Configuration > [Security] Security Policies
When creating a user account, send an email to user to confirm registration and password.	Yes, No (default).	Configuration > [Security] Security Policies
Maximum age of Access Codes which are accepted for authentication (in hours)	1 to 1440 (default is 720)	Configuration > [Security] Security Policies
When creating a user account, generate automatically a user name.	Yes, No (default).	Configuration > [Security] Security Policies
When creating a user account, generate automatically a password.	Yes, No (default).	Configuration > [Security] Security Policies
User account validation on creation	Yes, No (default). For details, see *Details on the "User account validation on creation" setting*.	Configuration > [Security] Security Policies

Security Policy - Password Setting	Description	Location
Allow a password to be valid for X days (leave the field empty if you want passwords to be always valid)	Number of days before a user must change his/her password. Putting no values means that the password is always valid.	Configuration > [Security] Security Policies
When a password change is required, prevent the reuse of the previous X passwords	Number of password changes required before a user can use a password that he/she has used previously. Putting 0 means that the feature is disabled. 0 (default value).	Configuration > [Security] Security Policies

Security Policy - Password Setting	Description	Location
Require passwords that contain at least X characters	6 to 20.	Configuration > [Security] Security Policies
Require passwords that contain no more than X characters	6 to 50. The system will start counting the number of characters from the maximum number of characters selected in the setting "Require passwords that contain at least x characters". For example, if you selected 10 characters, the system will indicate a possible value between 10 and 50.	Configuration > [Security] Security Policies
Require passwords that contain at least X letters of the Roman alphabet	0 to 20. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that contain at least X lowercase letters of the Roman alphabet	0 to 20. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that contain at least X uppercase letters of the Roman alphabet	0 to 20. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that contain at least X numeric characters	0 to 20. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that contain at least X characters other than letters and numbers (! # $ % & ( ) * + , - . / : ; < = > ? @ [ ] _ `{ | } ~)	0 to 20. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that contain no more than X identical consecutive characters	2, 3, 4, 5. The number of characters cannot exceed the number indicated in the setting "Require passwords that contain at least x characters".	Configuration > [Security] Security Policies
Require passwords that do not contain the user's first name	Yes, No (default).	Configuration > [Security] Security Policies
Require passwords that do not contain the user's last name	Yes, No (default).	Configuration > [Security] Security Policies
Require passwords that do not contain the corresponding user name	Yes (default), No.	Configuration > [Security] Security Policies
Require passwords that do not contain the user's email address	Yes, No (default).	Configuration > [Security] Security Policies

Security Policy - Forgot Password Setting	Description	Location
Use this method to change passwords	There are several options for users to recover their password. It can be via an access code, security questions, or by contacting the system administrator. For details on each of the option,	Configuration > [Security] Security Policies

Security Policy - Forgot Password Setting	Description	Location
	see *Details regarding the "Use this method to change passwords" setting*.	
Require X security questions	Possible values are 1, 2, 3.	Configuration > [Security] Security Policies
Require answers that contain at least X characters (X must be greater than 0)		Configuration > [Security] Security Policies
Number of attempts allowed per user to answer the security question	Possible values are 3, 5.	Configuration > [Security] Security Policies
Lock a user's account when the number of attempts allowed to answer the security question is exceeded	Yes, No.	Configuration > [Security] Security Policies
Mask the security answer values	Yes, No.	Configuration > [Security] Security Policies

Details on the "Use this method to change passwords" setting

The change password procedure contains six options of authentication:

Options of the "Use this method to change passwords" Setting	Description
Access Code	An email containing an access code is sent to the user once the user has confirmed his/her email address.
Security Questions	The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct, the user is invited to enter a new password.
Security Questions and Access Code	The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct, an email containing an access code is sent to the user once the user has confirmed his/her email address.
Security Questions or Access Code	The user is asked to answer the security questions (from 1 to 3) previously entered in his/her profile. If the answer is correct and the user has an email address, an access code is sent to the user once the user has confirmed his/her email address. If the user does not have an email address and the answer to the security question is correct, the access is granted to the application and the user is invited to change his/her password.
Security Questions and/or Access Code	When this option is activated, one of the following situation will happen. See the *Security Questions and/Or Access Code Option section*.
Contact System Administrator	The user is asked to contact the system administrator. Only the system administrator can then generate a new password and communicate it to the user.

Details on the "Security Question and/or Access Code" option

The change password procedure contains six options of authentication:

The user has an email address	Security questions were activated	
Yes	Yes	The user will have to answer the security questions correctly and an access code will be emailed.

The user has an email address	Security questions were activated	
Yes	No	The user will receive an access code by email.
No	Yes	The user will have to answer the security questions correctly to be able to access the application.
No	No	The user will be asked to contact the technical support.

Details on the “User account validation on creation” setting

A two-step validation process is available when creating user accounts.

Step 1: When you create a user account, the system checks if the email address is unique among the user account created in SmartOrg.

- If the email address exists, an error message is displayed.
- If the email address doesn’t exist, the user account is created and is set as Inactive.

Step 2: The user receives an email requesting to activate their account. The email contains a link that the user must use to activate the account. Once the account is activated, the user can to log in in the system.

This process supersedes the option to send a user’s password by email.

Temporary user accounts created through a candidate onboarding process bypasses the email uniqueness criterion but must be activated before the user can log in.

This process also works for user accounts created with TCC. The administrator must enable the setting Allow Integration Sending Email.

Configuring Security Policies

Before you start

The *Manage security policies* user type permission is required.

Configuration > **Security Policies**

Here's what to do

1. In the Security Policies page, click Edit next to a topic.
2. In the Editor page, select a value for each required setting.
3. Click Save.

Security Message Templates

Security message templates are messages relating to the security of Oracle Taleo Enterprise Edition products. They are provided by Oracle.

Security message templates are located in the Configuration menu, under Security. For a list of message templates, see *Message Templates Related to Security*. System administrators can change the languages available and the wording of messages. They cannot create new message templates.

To edit security message templates, the **Manage Message Templates for email correspondence and reminders** permission is required (SmartOrg Administration > User Types > Configuration > Security Management).

Message Templates Related to Security

Message templates related to security are located in the Configuration menu, under Security.

Message Template	Description	Recipient	To Field Content
Forgot Password	Indicates that the password change request was received and provides the user the access code needed to change his/her password.	User account email address (user trying to do a forgot password).	{Other.UserEmail}
Password Change Instructions	Indicates that the password change request was received and provides a step-by-step procedure on how to change the password.	User account email address (user trying to do a forgot password).	{Other.UserEmail}
Password Change Request	Indicates to send a new password to a user that was unable to answer his/her password change questions, or did not remember his/her password and had not yet specified questions.	Not define by default. Define by the customer. (Email probably sent to an administrator).	PLEASE ENTER A VALID EMAIL ADDRESS
Standard Notification for a Successful Network Data Synchronization	Indicates that the synchronization of a specific element with the network database was successfully completed.	Logged user email address (user who requested the synchronization task).	{NdaSynchronizationInfoFields.emailAddress}
Standard Notification for an Unsuccessful Network Data Synchronization	Indicates that the communication with the network database could not be established and that the synchronization of a specific element could not be performed.	Logged user email address (user who requested the synchronization task).	{NdaSynchronizationInfoFields.emailAddress}
Standard notification - User Account Information	Provides information on how to log into the application (user name, access code, URL address).	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}
Standard notification for a candidate account confirmation	Indicates that a candidate account was created and how to log into the	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}

Message Template	Description	Recipient	To Field Content
	application (user name, access code, URL address).		
Standard notification for a Password Reset	Indicates that the user password was reset and how to specify a new password.	User account email address (user on which the action is done).	{PasswordResetInfoFields.EmailAddress}
Standard notification for a registration	Indicates that an account was created and how to access it using a user name and access code.	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}

Single Sign-On

Single Sign-On

Single Sign-On (SSO) enables users to log into Oracle Taleo Enterprise Edition applications using their corporate credentials.

In an SSO environment, users are authenticated by an Identity Provider (e.g. OIF, ADFS) that is maintained by their corporate IT department. Both employees and candidates who have access to internal career sections can use SSO to access Oracle Taleo Enterprise Edition products. SSO cannot be used for external career sections.

Customers who want to use SSO can implement it themselves through the SSO configuration interface. Customers perform easy configuration steps to enable and support one or more identity providers. The feature supports two flows to authenticate users:

- Users are authenticated through their company portal, then they access Oracle Taleo Enterprise Edition products through the portal (Identity Provider initiated flow).
- Users access the Oracle Taleo Enterprise Edition product URL directly and are redirected to their identity provider for authentication (Service Provider initiated flow).

Customers can configure the authentication request flows, and exit and error URLs for seamless integration with their environment.

SSO setup requires:

- An Identity Provider with SAML 2.0 support.
- A user/candidate synchronization feed between the Identity Provider and Oracle Taleo Enterprise Edition. This can be developed using Taleo Connect Client (TCC).
- A corporate portal (optional).

Information technology professionals (system administrators, implementation consultants, etc.) who are planning on integrating Oracle Taleo Enterprise Edition with their corporate Single Sign-On (SSO) system should be familiar with:

- Oracle Taleo Enterprise Edition
- SAML 2.0 based SSO
- SSO Identity Provider (IdP) setup

- Taleo Connect Client (TCC)

SSO is only available for new customers or current customers who do not have an SSO setup in their zone. The SSO configuration screens are unavailable to customers who already have an SSO setup in place.

Single Sign-On Basic Concepts

Identity Provider (IdP) and Service Provider

Single Sign-On (SSO) in Oracle Taleo Enterprise Edition is accomplished through the use of SAML (version 2.0). SAML provides a mechanism to exchange authentication and authorization data between two trusting entities.

In a generic SAML context, the entities are:

- The Asserting party (or SAML authority)
- The Relying party (or SAML requester)

In an SSO context, the Asserting party is the Identity Provider (IdP) and the Relying party is the Service Provider (SP). The Identity Provider is the customer's SAML federation server (OIF, ADFS etc.) and the Service Provider is the Oracle Taleo Enterprise Edition application.

A trust relationship is established between the Identity Provider and the Service Provider. The Service Provider trusts the information received from the Identity Provider. The information sent is called the SAML assertion. It contains the identity of the user that has been authenticated by the IdP. Upon receiving the assertion, Oracle grants the appropriate level of access to resources, based on the identity of the user.

Metadata File

SSO is set up by exchanging metadata files between the Identity Provider (IdP) and the Service Provider (SP).

The SAML 2.0 metadata file format is supported. This metadata file contains information about each SSO entity (URLs, protocols supported, certificates etc.). The IdP's metadata file can be imported into the SSO user interface. If any changes are made to the IdP, the metadata file must be re-imported.

Also, metadata files can be generated for the Oracle Taleo Enterprise Edition Service Providers (SmartOrg and Career Section). These files must be imported into the IdP. A separate metadata file will be generated for each SP-IdP combination. For example, if the customer has 2 IdPs, then up to 4 metadata files will be generated (2 for SmartOrg and 2 for Career section).

For an example of an Identity Provider metadata file, see *Identity Provider Metadata Example*.

For an example of a SmartOrg metadata file, see *SmartOrg Metadata Example*.

For an example of a career section Service Provider metadata file, see *Career Section Metadata Example*.

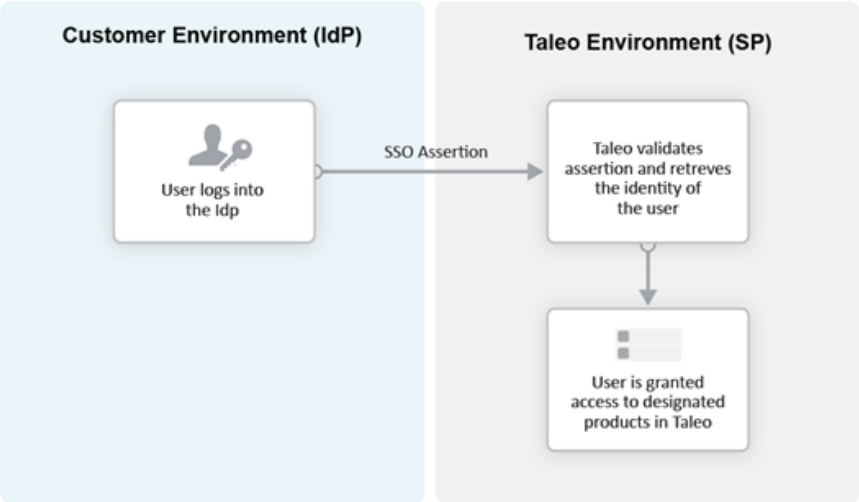
Single Sign-On Flows

There are two types of Single Sign-On flows: Identity Provider (IdP)-initiated and Service Provider (SP)-initiated.

Identity Provider (IdP)-initiated Flow

In the IdP-initiated flow, the user logs in first to the IdP. The person then requests access to the Service Provider (SmartOrg or career section) – often through an SSO Portal. The Identity Provider will initiate an SSO connection to the Oracle Taleo Enterprise Edition product and provide an assertion. The assertion contains the identity, attributes and entitlements of the requesting user. Oracle will grant access to the user based on the assertion information.

The image represents an Identity Provider (IdP)-initiated flow.



The IdP-initiated flow is the most commonly used configuration.

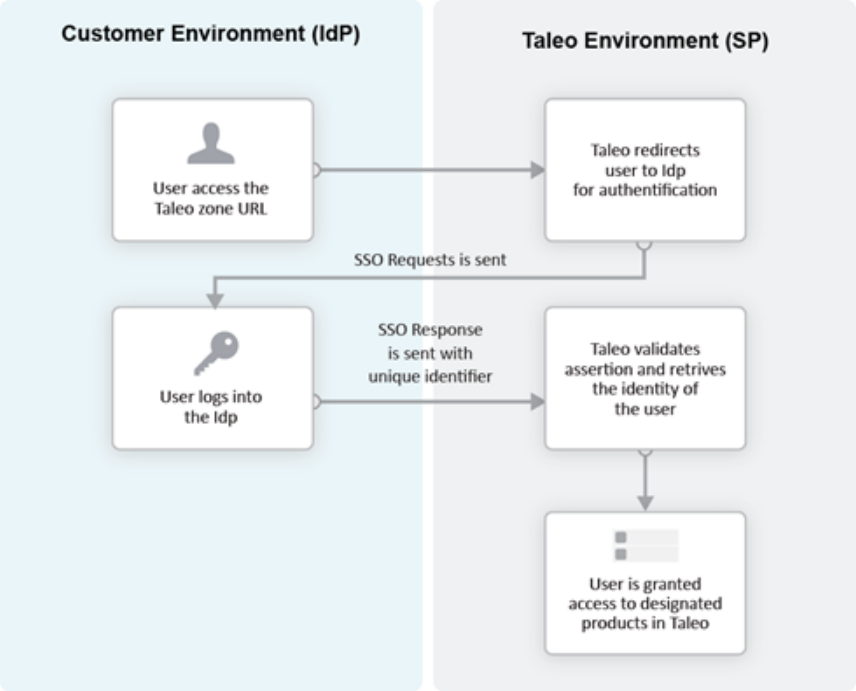
When SSO is configured, the IdP-initiated flow is activated by default.

Multiple IdPs are supported for IdP-initiated flows. Each IdP can redirect users to the Service Provider (SmartOrg and career section). The Service Provider accepts request from each IdP as long as the IdP is properly defined.

Service Provider (SP)-initiated Flow

In the Service Provider-initiated flow, the user accesses the Oracle Taleo Enterprise Edition product (SP) directly. For example, this can be done by typing the URL of the zone in the browser. The Service Provider then redirects the user to the Identity Provider. After authenticating the user, the IdP generates and sends an assertion back to the SP. The assertion contains the identity, attributes and entitlements of the requesting user. Oracle grants access to the user based on the assertion information.

The Challenge URL setting, depicted in the following illustration, is used to set up a Service Provider-initiated flow.

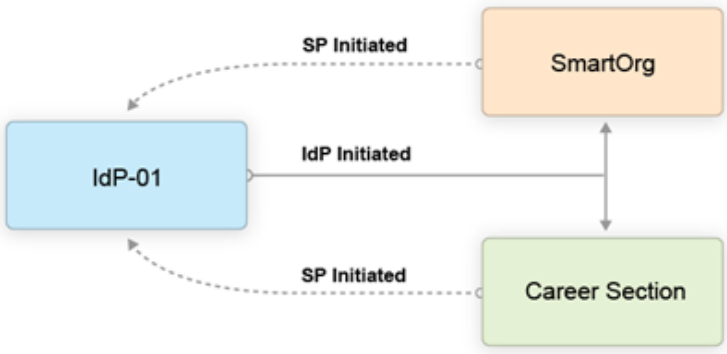


The customer can choose to optionally activate SP-initiated flow as well.

For SP-initiated flow from SmartOrg, only one IdP can be configured. All SP-initiated requests from SmartOrg are redirected to this IdP.

For SP-initiated flow from career sections, by default all requests are redirected to a single default IdP. However, individual career sections can be set up to redirect requests to a different IdP.

The following illustration depicts a single Identity Provider, SmartOrg and single career section:

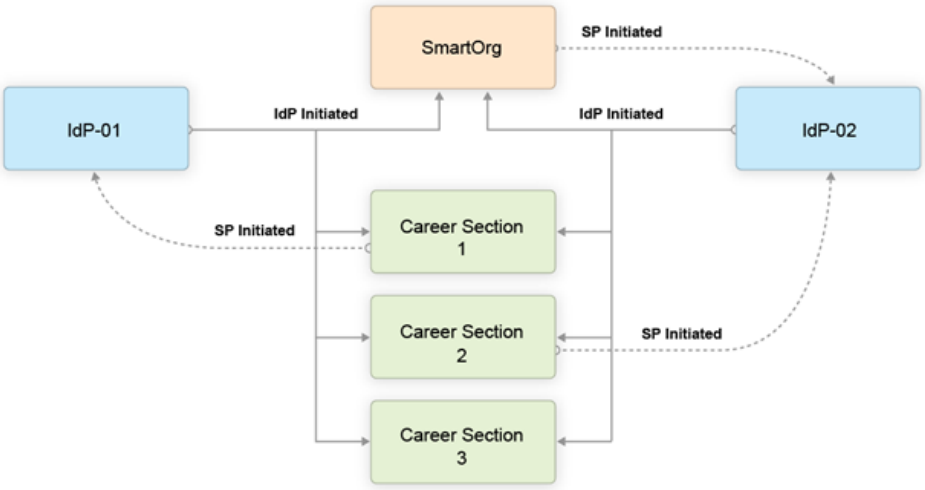


- Users can access both SmartOrg and the career section from the Idp (IdP-initiated flows).
- When users access SmartOrg directly, they are redirected to the IdP for authentication (SP-initiated flows).

- When users access the career section directly, they are redirected to the IdP for authentication (SP-initiated flows).

Note: This is the most commonly used configuration.

The following illustration depicts an SSO setup with two Identity Providers, SmartOrg and three career sections:



- Users can access both SmartOrg and each career section from the Idp-01 (IdP-initiated flows).
- Users can access both SmartOrg and each career section from the Idp-02 (IdP-initiated flows).
- When users access SmartOrg directly, they are redirected to the IdP-02 for authentication (SP-initiated flows).
- When users access career section 1 directly, they are redirected to the IdP-01 for authentication (SP-initiated flows).
- When users access career section 2 directly, they are redirected to the IdP-02 for authentication (SP-initiated flows).
- When users access career section 3 directly, they are not redirected to any IdPs. Instead, they are prompted for their credentials.

Note: This configuration is very rare.

Challenge, Error and Exit URLs

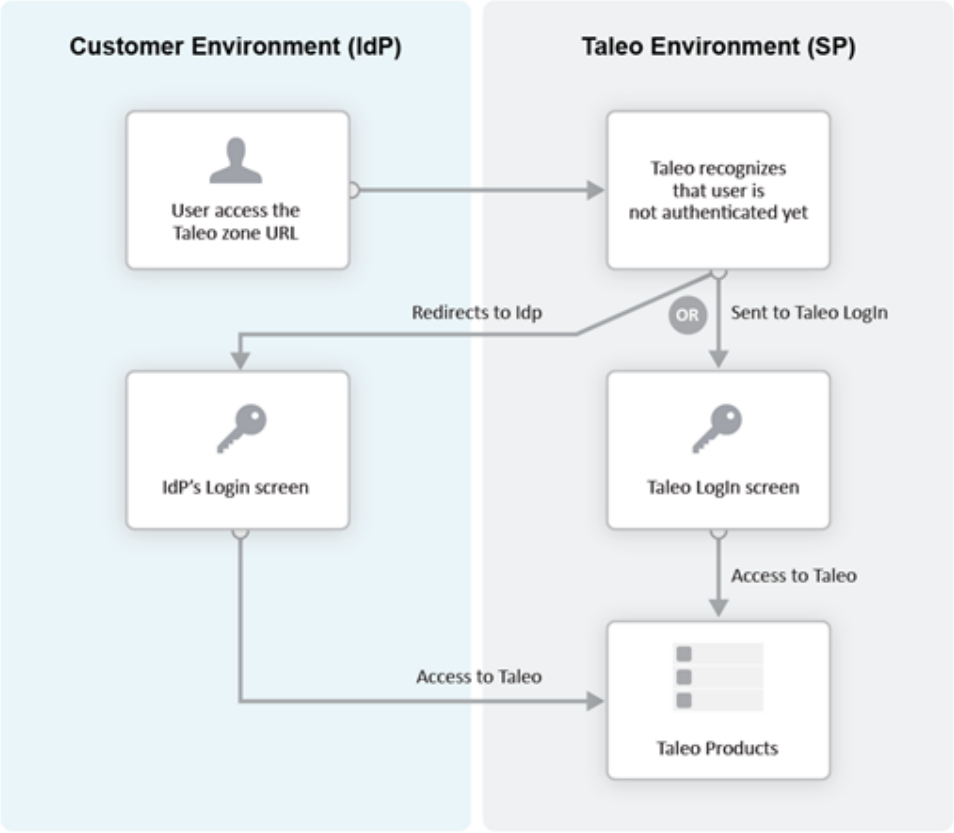
Challenge, Error and Exit URLs can be defined to configure the destination to which the user will be redirected under various conditions.

One set of URLs can be configured for each SP (SmartOrg and career section). In addition, individual career sections can have their own values for these URLs. These values will override the defaults for the career section SP.

Challenge URL

The Challenge URL setting defines the page where the user will be directed to present his credentials. There are two options:

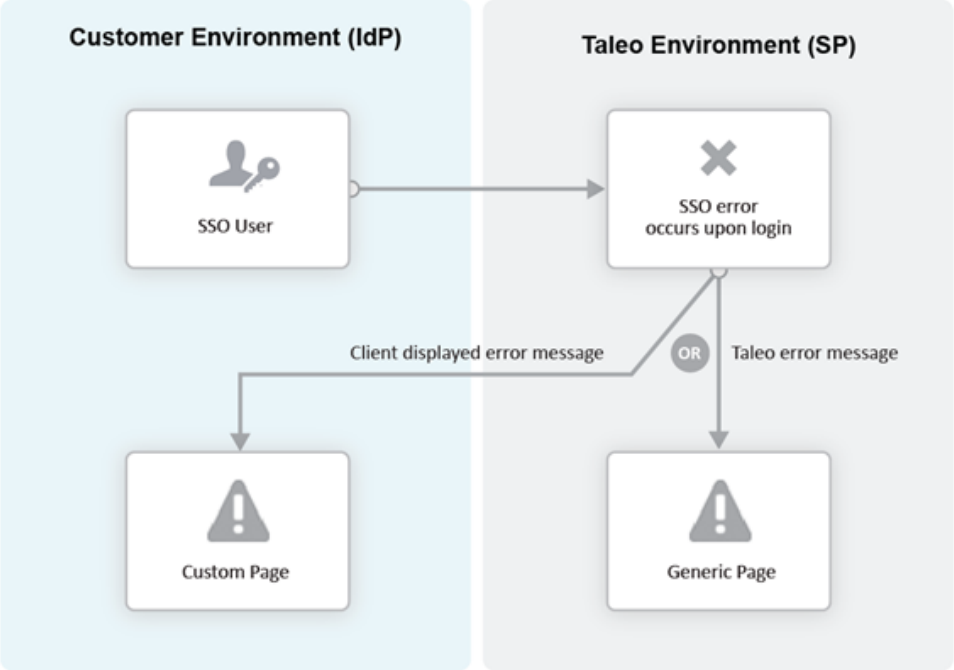
- Default login page: Standard Oracle Taleo Enterprise Edition page. No redirection to the IdP.
- SP Initiated Servlet redirect: The user is redirected to the IdP's login page. This option must be selected to enable SP initiated flows from SmartOrg and career section to the chosen IdP.



Error URL

The Error URL setting defines the page where the user will be directed when an SSO error occurs. It can be the default Oracle Taleo Enterprise Edition error page or a custom page defined by the customer. Typical errors that would generate an SSO error are:

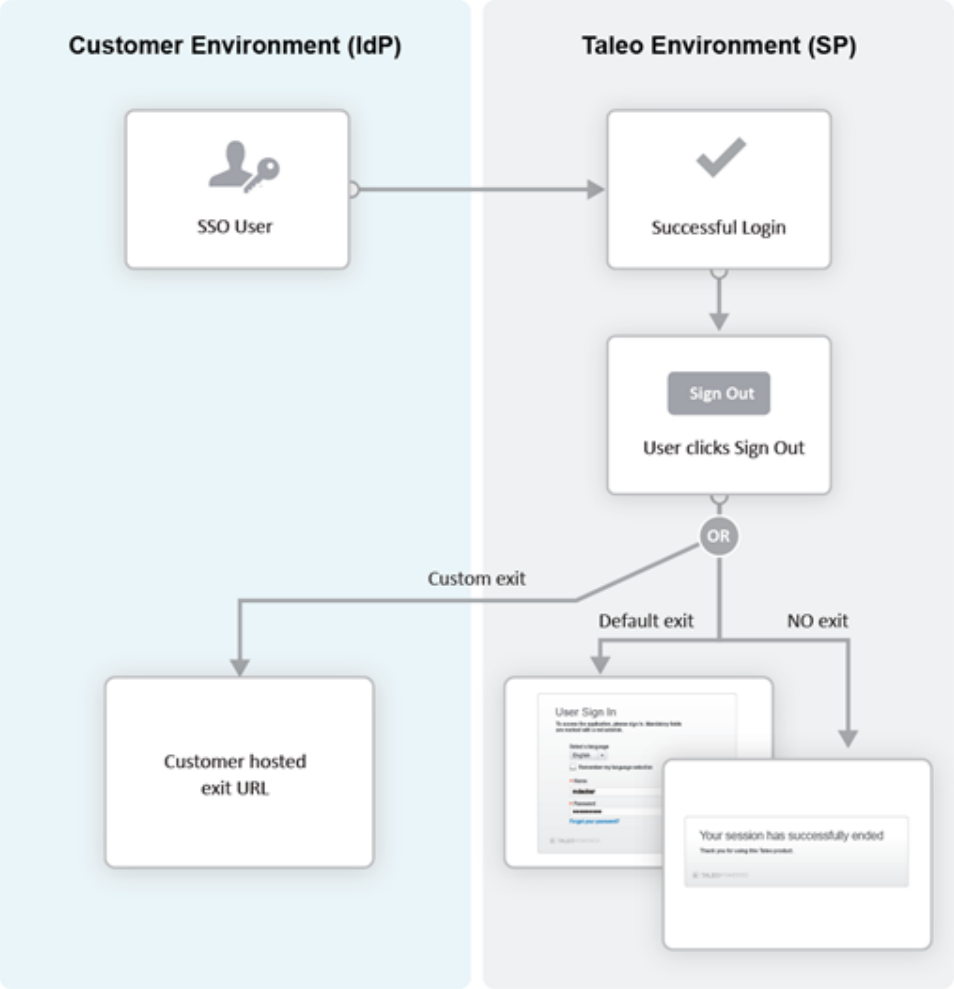
- Locked user account
- Invalid Assertion (generic SSO response issue)



Exit URL

This Exit URL setting defines where the Service Provider sends the user upon exiting the application. Three options are available:

- Default exit page – Display the login screen
- Custom URL – Display a custom page defined by the customer
- No exit page – Display the exit screen



Certificate and Validation

A trust relationship is established between the IdP and the SP when both exchange their respective certificates.

All communications (SAML Request and Response) will be signed by the issuing party. The receiving party will use the certificate to validate the received communication.

IdP Certificates

The IdP's certificate is usually available in its metadata file. The certificate will be automatically imported when the metadata file is imported. After import, this certificate can be viewed and managed in the SSO interface. Certificates can also be manually imported. The certificate can be associated to one or both Service Providers (SmartOrg and career section). Each certificate will have a validity period defined by a start data and an end date.

Multiple certificates can be imported for an IdP. At least one has to be valid for SSO connections to be established.

SP Certificates

The SP certificates are available through SP's metadata file. A separate certificate is generated for each SP-IdP combination.

Validation

Upon receiving an assertion, each Service Provider performs the following validity checks.

- Signature – Validate that the assertion has been signed by the IdP.
- Timeout – Validate that the age of assertion has not exceeded a specified timeout period. The age is calculated as the time difference between the moment the assertion was received (by the SP) and the moment the assertion was issued (by the IdP). A timeout period of up to 30,000 milliseconds can be configured.

User Synchronization

The customer must configure synchronization of users between the Identity Provider(s) and Oracle Taleo Enterprise Edition.

The IdP will identify the user (subject) in the assertion. This user identifier must also be stored in the system. Upon receiving the assertion, Oracle extracts the user identifier from the assertion and then searches for the user in the system. Upon finding a match, the appropriate privileges are granted to this user.

Taleo Connect Client (TCC) can be used to import the user identifier into Oracle Taleo Enterprise Edition. A TCC import file can be created and scheduled for automatic import into Oracle Taleo Enterprise Edition. Both user and candidate information must be updated. The following fields must be updated with the SSO user identifier:

- Employee/Username (for SmartOrg Service Provider)
- Candidate/Credentials/SSOID (for career section Service Provider)

For information about TCC, please refer to the Taleo Connect Client documentation.

Users can also be created manually:

- SmartOrg users: Create the users manually through the SmartOrg interface.
- Internal career sections: Use the career section SSO Configuration Wizard. See *Career Section SSO Configuration Wizard*.

Identity Provider Bindings

Identity provider bindings specify the IdP URLs that can be used to perform various SAML transactions.

These URLs will be used by the Oracle Taleo Enterprise Edition Service Providers. It is expected that some bindings will be identical. The metadata file provides values for these bindings automatically, however, you can edit the values as needed.

Identity Provider Trusted Certificates

Trusted certificates are needed to confirm the identity of Identity Providers. Each assertion received will be validated against these certificates.

IdP certificates included in the metadata file are imported and displayed automatically. Certificates can also be imported manually in the Identity Provider Trusted Certificates section. Certificates can be chosen to confirm the identity of Identity Providers for SmartOrg, career sections or both. Afterward, each assertion received is validated against the certificates.

Configuring Single Sign-On

Recommended SSO Implementation

Before you start

The Manage SSO configuration user type permission is required. (See: *Granting Permission to Manage Single Sign-On (SSO)*).

It is recommended that you enable and test IdP initiated flows *before* enabling SP initiated flows. If both IdP and SP initiated flows are enabled at the same time, you run the risk of completely locking out users due to incorrect SSO configuration.

Here's what to do

1. Obtain the metadata file for the corporate Identity Provider from your IT department.
2. Register the Identity Provider in Oracle Taleo Enterprise Edition.
    a. Decide which Service Providers (SmartOrg, career section or both) must be activated for this IdP.
    b. Initially activate just IdP initiated flows.
    c. Set up the exit and error URLs if necessary.
3. Export the Service Provider metadata files from Oracle Taleo Enterprise Edition.
4. Register the Service Providers in the IdP by importing the metadata files.
5. Synchronize SmartOrg SSO user identity (either using TCC or manually).
6. Test IdP initiated access to SmartOrg.
7. Activate SSO in one or more career sections.
8. Synchronize career section SSO identity (either using TCC or the career section SSO wizard).
9. Test IdP initiated access to these career sections.
10. Activate SP initiated flows for the IdP.
11. Test SP initiated access to SmartOrg.
12. Test SP initiated access to career section.

Granting Permission to Manage Single Sign-On

Before you start

Configuration > **[SmartOrg] Administration** > **User Types** > **(click user type)** > **Configuration** > **[Security Management] Edit**

Here's what to do

1. Click the check box next to Manage SSO Configuration.
2. Click Save.

Results:

Users who have the user type will be able to configure SSO.

Configuring an Identity Provider

Before you start

The Manage SSO configuration user type permission is required.

Configuration > **SSO Configuration**

Here's what to do

1. Next to Identity Provider Configuration, click Show.
2. Click Create.
3. SAML 2.0 is the only possible selection. Click Next.
4. In the Automated Identity Provider Information section, perform one of the following steps:
    a. To upload an IdP metadata file, click Browse..., select the file and then click Upload.
    b. Type a URL to the IdP metadata file in the corresponding field and click Retrieve.

   The Display Name and Entity Id or issuer identity fields are filled automatically.
5. In the Manual Identity Provider Information section, complete the fields as needed.
    - You can change the display name if you wish.
    - In the Entity Id or issuer identity field, you can enter the identity of the user who was authenticated by the IdP.
    - The UserID Type refers to the type of identifying information and currently "Loginname", the login name of the user in the system, is the only type supported so ensure that "Loginname" is the value displayed.
    - The User ID Attribute Name (XPath value) does not require a value.
6. Click Next.
7. In the Bindings section , complete the fields as needed and click Next.

8. You can add certificates manually (in addition to the certificates imported automatically from the metadata file) by clicking Add.
    a. To specify that a certificate be used to confirm the identity of Identity Providers for SmartOrg, career sections, or both, click the corresponding radio button.
    b. Click Browse... and select a certificate file.
    c. Click Save.
    d. Click Next.
9. In the Authentication Settings section, you specify whether SAML requests issued by Oracle will be signed, whether the signature of SAML responses received from the IdP will be validated, and the time period (30,000 milliseconds is recommended) beyond which assertions will no longer be considered valid.

    It is strongly recommended to have assertions validated (ensure that the Default SAML Signature check box is selected).
    a. If you want to change the default values, clear the Default SAML Signature check box and make your selections.
    b. Click Next.
10. In the SmartOrg Configuration section, configure your SmartOrg Service Provider by making your selections. For details regarding these settings, see *SmartOrg Service Provider Settings* and *Challenge, Error and Exit URLs*.

    Note: If Default for SP Initiated Flow is set to Yes, it is important to also select Custom *Exit* Page URL and type a Custom Exit Page URL in the corresponding field or leave the field empty.
11. Click Next.
12. In the Career Section Configuration section, configure your Career Service Provider by making your selections. For details regarding these settings, see *Career Section Service Provider Settings* and *Challenge, Error and Exit URLs*.
13. Click Next.

    The information headings are displayed. You can click Edit next to a heading to edit the corresponding information as needed.
14. Click Finish to generate the metadata and certificates for the Service Providers (SmartOrg and Career Section).

    If the Service Provider-initiated flow was enabled and the challenge URL was configured, the users will be redirected to the IdP. SSO will fail, however, because the IdP is not yet configured. Because this can create a temporary lockout situation, a direct URL is available to bypass SSO as necessary. See *Bypassing Single Sign-On*.

SmartOrg Service Provider Settings

Setting	Description
Default for SP Initiated Flow	• Set this value to Yes if you want to enable Service Provider-initiated flow for the SmartOrg Service Provider. • If the value Yes, this IdP will be the default for Service Provider-initiated flows to SmartOrg. All Service Provider-initiated requests to SmartOrg will be redirected to this IdP. • If the value Yes and a different IdP was configured at a prior time, the IdP will no longer be the default for Service Provider-initiated flows.
Challenge URL	• Select Default Login Page if you want the general login page to be displayed. • Select SP Initiated Servlet redirect if you want to enable Service Provider-initiated flow for the SmartOrg Service Provider. This selection will redirect SmartOrg login requests to the IdP for authentication.

Setting	Description
Error URL	• Your selection will determine whether users are redirected to the default error page or a custom URL whenever an error occurs. • If Custom Error Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.
Exit URL	• You can redirect users who quit the application to the default exit page or to a custom URL. • If Custom Exit Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com. • The Custom Exit Page URL field can also have an "empty value". • Important - If Server Provider-initiated flow is enabled, type a Custom Exit Page URL or leave the field empty. Do not use the default exit page option.
Execute Global Logout	• Set this setting to Yes. When users log out, all open sessions with the Identity Provider will end. This is the safest way to log out because it closes the connection to the IdP.

Career Section Service Provider Settings

Setting	Description
Default for SP Initiated Flow	• Set this value to Yes if you want to enable Service Provider-initiated flow for the Career Section Service Provider. • If the value is Yes, this IdP will be the default for Service Provider-initiated flows to Career Section. All Service Provider-initiated requests to Career Section will be redirected to this IdP. Note: This IdP can be overridden for individual career sections. See *Configuring Career Sections Individually for Service Provider-Initiated Access*. • If the value Yes and a different IdP was configured at a prior time, the IdP will no longer be the default for Service Provider-initiated flows.
Challenge URL	• Select Default Login Page if you want the general Oracle Taleo Enterprise Edition login page to be displayed. • Select SP Initiated Servlet redirect if you want to enable Service Provider-initiated flow for the Career Section Service Provider. This selection will redirect Career Section login requests to the IdP for authentication.
Error URL	• Your selection will determine whether users are redirected to the default error page or a custom URL whenever an error occurs. • If Custom Error Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.
Exit URL	• You can redirect users who quit the application to the default exit page or to a custom URL. • If Custom Exit Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com. • The Custom Exit Page URL field can also have an "empty value". • Important - If Server Provider-initiated flow is enabled, type a Custom Exit Page URL or leave the field empty. Do not use the default exit page option.

Exporting SmartOrg Service Provider Metadata Files

Before you start

Here's what to do

To download the metadata file associated with a SmartOrg Service Provider, go to: https://ZoneName/smartorg/sp/metadata.jss?target=EntityID, replacing ZoneName by your Oracle Taleo Enterprise Edition zone name, and replacing EntityID by the Entity ID value imported from the IdP metadata file.

The Entity ID value is displayed in the Identity Provider Information section for the Identity Provider.

Registering Service Providers (SmartOrg and Career Section) in the IdP

The metadata files exported in previous steps can be imported into your IdP system (OIF, ADFS etc.). You should set up a single Service Provider for SmartOrg and a single, different Service Provider for Career Section.

See *Configuring Oracle Identity Federation* for an example of how to set up Service Providers in Oracle Identity Federation (OIF).

Deleting an Identity Provider

Before you start

The Manage SSO configuration user type permission is required.

Ensure that all SSO flows are disabled before deleting an IdP. The IdP to be deleted should not be the default for any Service Provder-initiated flows.

Configuration > **SSO Configuration**

Here's what to do

1. Next to Identity Provider Configuration, click Show.
2. Click the Delete that corresponds to the Identity Provider you want to delete.
3. Click Yes.

Adding an IdP Trusted Certificate to an Identity Provider

Before you start

The Manage SSO configuration user type permission is required.

Configuration > **SSO Configuration**

Here's what to do

1. Next to Identity Provider Configuration, click Show.

2. Click the IdP to which you want to add a trusted certificate.
3. Next to Identity Provider Trusted Certificates, click Edit.
4. Click Add.
5. To indicate what the certificate will be used for, select the appropriate radio button.
   The certificate is typically used for both SmartOrg and career sections.
6. Click Browse... and select the certificate file.
7. Click Save.

Deleting an IdP Trusted Certificate from an Identity Provider

Before you start

The Manage SSO configuration user type permission is required.

Configuration > **SSO Configuration**

Here's what to do

1. Next to Identity Provider Configuration, click Show.
2. Click the IdP you want to remove a trusted certificate from.
3. Next to Identity Provider Trusted Certificates, click Edit.
4. Locate the trusted certificate you want to delete and click the corresponding Delete.
5. Click Yes.
6. Click Save.

Configuring Career Sections Individually for Service Provider-Initiated Access

Before you start

The Manage SSO configuration user type permission is required.

Configuration > **SSO Configuration**

Here's what to do

1. Next to SP Initiated Access for Career Sections, click Show.
   The screen displays the internal career sections enabled for SSO. For each career section associated with a specific IdP, the latter is displayed. If no IdP is displayed, this indicates that the career section users will be redirected to the default service provider.
2. Locate the career section with which you want to associate an IdP and click the corresponding Configure.
3. Select the IdP to which the career section users will be redirected.
   The Challenge, Error and Exit URL settings are selected automatically based on the IdP selected. For more information on these settings, see *Career Section Service Provider Settings*. You can change these settings as needed.

Displaying SSO-protected URLs

Before you start

The Manage SSO configuration user type permission is required.

Configuration > **SSO Configuration**

Here's what to do

Next to SSO Protected URLs, click Show.
System administrators can embed these URLs within their corporate SSO portals.

Bypassing Single Sign-On

1. Copy the following URL and replace the three occurrences of "ZoneURL" with your zone information (e.g. xyz.taleo.net):
   https://**ZoneURL**/smartorg/iam/accessmanagement/login.jsf?redirectionURI=https%3A%2F%2F**ZoneURL**%2Fsmartorg%2Fsmartorg%2Fcommon%2Ftoc.jsf%3Flang%3Den&TARGET=https%3A%2F%2F**ZoneURL**%2Fsmartorg%2Fsmartorg%2Fcommon%2Ftoc.jsf%3Flang%3Den
2. Paste the edited URL into your Internet browser.
   Direct access to Oracle Taleo Enterprise Edition is typically used by system administrators to diagnose SSO configuration issues.
3. Enter your Oracle Taleo Enterprise Edition user name and password (not the IdP credentials).

Results:

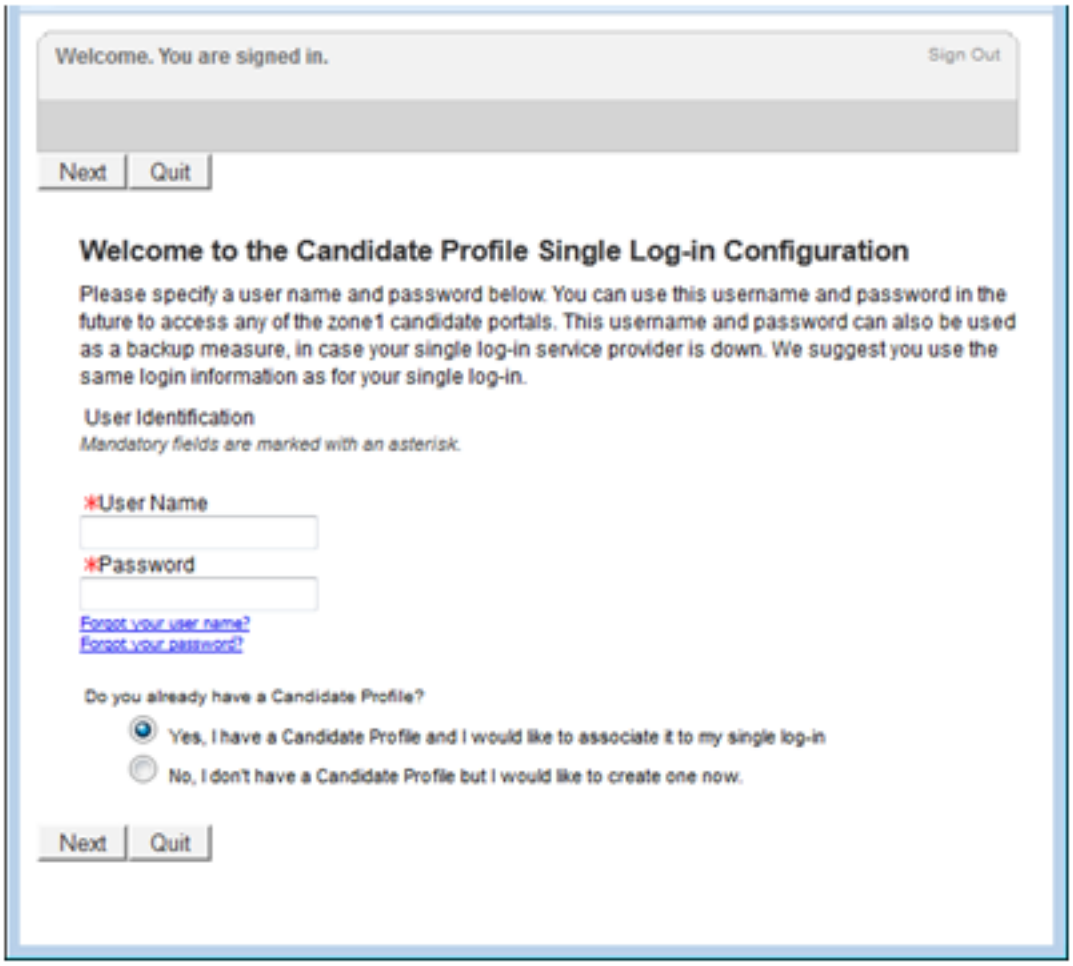
You are logged into Oracle Taleo Enterprise Edition directly, bypassing Single Sign-On.

Career Section SSO Configuration Wizard

The Single Sign-On wizard enables internal candidates to link a candidate account to their SSO user identifier.

This method can be used instead of running a Taleo Connect-based integration feed to populate the SSO user identifier in the candidate account.

If the wizard is enabled, the first time that internal candidates log into an internal career section through their Single Sign-On portal, they are prompted to associate their SSO user identifier (profile) with a candidate account. The users can either create a new candidate account or use an existing account. Upon successfully logging in using the candidate account credentials, the SSO user identifier is associated with this candidate account by the Single Sign-On wizard. This operation has to be performed only once. The user will be automatically authenticated in the internal career section for subsequent logins.



Identity Provider Metadata Example

This is an example of an IdP metadata file.

```
<dsig:X509SubjectName>CN=adc-fap1067-idm.oracledemos.com OIF Encryption
   Certificate</dsig:X509SubjectName>
  </dsig:X509Data>
  </dsig:KeyInfo>
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#rsa-1_5" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes128-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes192-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes256-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#tripledes-cbc" />
  </md:KeyDescriptor>
<md:ArtifactResolutionService Binding="urn:oasis:names:tc:SAML:2.0:bindings:SOAP"
   Location="https://adc-fap1067-idm.oracledemos.com/fed/idp/soap" index="1" isDefault="true" />
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
   Location="https://adc-fap1067-idm.oracledemos.com/fed/idp/samlv20" ResponseLocation="https://adc-
   fap1067-idm.oracledemos.com/fed/idp/samlv20" />
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
   Location="https://adc-fap1067-idm.oracledemos.com/fed/idp/samlv20" ResponseLocation="https://adc-
   fap1067-idm.oracledemos.com/fed/idp/samlv20" />
<md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress</md:NameIDFormat>
<md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
<md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
   Location="https://adc-fap1067-idm.oracledemos.com/fed/idp/samlv20" />
<md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
   Location="https://adc-fap1067-idm.oracledemos.com/fed/idp/samlv20" />
  </md:IDPSSODescriptor>
  </md:EntityDescriptor>
```

SmartOrg Metadata Example

This is an example of a metadata file for SmartOrg.

```
<md:EntityDescriptor entityID="http://z15awlrsv2.hcm.taleocloud.net/smartorg"
    validUntil="2016-05-26T14:54:16.285Z">
<md:SPSSODescriptor AuthnRequestsSigned="true" WantAssertionsSigned="true"
    protocolSupportEnumeration="urn:oasis:names:tc:SAML:1.1:protocol
    urn:oasis:names:tc:SAML:2.0:protocol">
<md:KeyDescriptor use="signing">
<ds:KeyInfo>
 <ds:KeyName>SP SSO Key</ds:KeyName>
<ds:X509Data>
 <ds:X509Certificate>MIICUzCCAbygAwIBAgIIAyVm2cMLSc8wDQYJKoZIhvcNAQELBQAwPDEbMBkGA1UEChMST3
    JhY2xl IENvcnBvcmF0aW9uMQ0wCwYDVQQLEwRQcm9kMQ4wDAYDVQQDEwVUYWxlbzAeFw0xNTA1MjcxNDU0
    MTZaFw0xNjA1MjYxNDU0MTZaMDwxGzAZBgNVBAoTEk9yYWNsZSBDb3Jwb3JhdGlvbjENMAsGA1UE
    CxMEUHJvZDEOzawGA1UEAxMFVGFsZW8wgZ8wDQYJKoZIhvcNAQEBBQADgY0AMIGJAoGBANDPVxH5
    P4+4EiAmhAuaLAdSbdpjnsxTbec1tc4zSI+KAEIBSwm9aJC3s0AKyVLYJZENLC0qUPzQC+LXndYn
    s+U5TgUpQr3H0jf0GLCvLKfG5oEwshUPLwh/nLG6sdOk9kuMBiCuLUuLskGYKIjtq8N+c19hNQ5q
    cTU9Osu1NQU/AgMBAAGjXjBcMFoGCCsGAQUFBwEBBE4wTDBKBma2BgEFBQcwAYY+aHR0cHM6Ly96
    MTVhd2xyc3YyLmhjbS50YWxlb2Nsb3VkLm5ldC9zbWFydG9yZy9vY3NwL3N0YXR1cy5qc3MwDQYJ
    KoZIhvcNAQELBQADgYEAsOMI3SNkrfclmbs80qOeO0M5P55v1WGUSUWsYoWLSKgzfeiJWvpPcfgj
    GnrESeI4wpxp/gf8z2xKuC0IhL+Enqz2Oa1bvZIHARnoXArBukdtVcV999YEBx6TVGLmLPOTegSX
    3PMFdYsfCzCQ7bKxE/d2/0rG6JVA44xrcLsiPlw=</ds:X509Certificate>
<ds:X509IssuerSerial>
 <ds:X509IssuerName>CN=Taleo, OU=Prod, O=Oracle Corporation</ds:X509IssuerName>
 <ds:X509SerialNumber>2267004417183113 75</ds:X509SerialNumber>
   </ds:X509IssuerSerial>
   </ds:X509Data>
   </ds:KeyInfo>
   </md:KeyDescriptor>
 <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss"
    ResponseLocation="https://z15awlrsv2.hcm.taleocloud.net/smartorg/iam/accessmanagement/
    globalLogout.jsf?lang=en"/>
 <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="0" isDefault="true"/>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:1.0:profiles:browser-post"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="1"/>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="2"/>
   </md:SPSSODescriptor>
<md:Organization>
 <md:OrganizationName xml:lang="en">Oracle</md:OrganizationName>
 <md:OrganizationDisplayName xml:lang="en">Oracle</md:OrganizationDisplayName>
 <md:OrganizationURL xml:lang="en">http://www.oracle.com</md:OrganizationURL>
   </md:Organization>
   </md:EntityDescriptor>
```

Career Section Metadata Example

This is an example of a metadata file for Career Section.

```
<md:EntityDescriptor entityID="http://z15awlrsv2.hcm.taleocloud.net/careersection"
    validUntil="2016-05-26T14:54:16.000Z">
<md:SPSSODescriptor AuthnRequestsSigned="true" WantAssertionsSigned="true"
    protocolSupportEnumeration="urn:oasis:names:tc:SAML:1.1:protocol
    urn:oasis:names:tc:SAML:2.0:protocol">
<md:KeyDescriptor use="signing">
<ds:KeyInfo>
 <ds:KeyName>SP SSO Key</ds:KeyName>
<ds:X509Data>
 <ds:X509Certificate>MIICUzCCAbygAwIBAgIITbRCZz28o2wwDQYJKoZIhvcNAQELBQAwPDEbMBkGA1UEChMST3
    JhY2xl IENvcnBvcmF0aW9uMQ0wCwYDVQQLEwRQcm9kMQ4wDAYDVQQDEwVUYWxlbzAeFw0xNTA1MjcxNDU0
    MTZaFw0xNjA1MjYxNDU0MTZaMDwxGzAZBgNVBAoTEkryYWNsZSBDb3Jwb3JhdGlvbjENMAsGA1UE
    CxMEUHJvZDEOMAwGA1UEAxMFVGFsZW8wgZ8wDQYJKoZIhvcNAQEBBQADgY0AMIGJAoGBAI1YGiXn
    uEicYl19Rfg4Sog2X1JjpzZ4zJq9UVnL4d9KYd+ThfZhNJOOXwafCuFqwo0TXKmroe8Kwv41zPMA
    fuAbFDiKekQoWTy7RAgKUcaRp3nKA6Z3HHEx9ycLgogPzVsb4uwhjimYVYxUd9g6P9wEgt+N4gFv
    xR1VDzIJ6RRvAgMBAAGjXjBcMFoGCCsGAQUFBwEBBE4wTDBKBggrBgEFBQcwAYY+aHR0cHM6Ly96
    MTVhd2xyc3YyLmhjbS50YWxlb2Nsb3VkLm5ldC9zbWFydG9yZy9vY3NwL3N0YXR1cy5qc3MwDQYJ
    KoZIhvcNAQELBQADgYEABIijJjgorOW1gJ8jeCEBflGY9UTbG8h+mpU/2A6qPvkf104bRvtounqn
    5Z9WzflUS9kQ4q2exMh5YaUg/eUTgZ2mVucASvx8pl/zBTC94F994wHUAtA1vRn+1AizA6YQTNyH
    g08+YGb1jdjqKsMt7xi/502urZefPk0d4VwynHY=</ds:X509Certificate>
<ds:X509IssuerSerial>
 <ds:X509IssuerName>CN=Taleo, OU=Prod, O=Oracle Corporation</ds:X509IssuerName>
 <ds:X509SerialNumber>559917324791320663 6</ds:X509SerialNumber>
   </ds:X509IssuerSerial>
   </ds:X509Data>
   </ds:KeyInfo>
   </md:KeyDescriptor>
 <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss"
    ResponseLocation="https://z15awlrsv2.hcm.taleocloud.net/careersection/iam/accessmanage
    ment/globalLogout.jsf?lang=en"/>
 <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="0" isDefault="true"/>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:1.0:profiles:browser-post"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="1"/>
 <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="2"/>
   </md:SPSSODescriptor>
<md:Organization>
 <md:OrganizationName xml:lang="en">Oracle</md:OrganizationName>
 <md:OrganizationDisplayName xml:lang="en">Oracle</md:OrganizationDisplayName>
 <md:OrganizationURL xml:lang="en">http://www.oracle.com</md:OrganizationURL>
   </md:Organization>
   </md:EntityDescriptor>
```

Configuring Oracle Identity Federation

Before you start

Here's what to do

1. To register SmartOrg and career sections, begin by logging into Fusion Middleware's Enterprise Manager.

2. Locate the OIF instance and click it.
3. Click Oracle Identity Federation.
4. Click Administration.
5. Click Federation.
6. Click Add.
    a. Click Choose File.

       Do not change the displayed values.

    b. Browse to the location where the user saved the SmartOrg metadata and upload the metadata to OIF.
    c. Click OK.
7. Select the federation you created and click Edit.
8. Click the Oracle Identity Federation Settings tab.
9. Click the icon to the left of the Identity Provider/Authority Settings section to display the section.
10. In the Identity Provider/Authority Settings section:
    a. Set the Default SSO Response Binding to: HTTP POST.
    b. Select the check box next to Response with Assertion – SOAP.
    c. Select the check box next to Response with Assertion – HTTP POST.
    d. Click Apply.

Legacy SSO Deactivation

Customers can deactivate all legacy single sign-on (SSO) configurations and enable the self-serve sign-on.

A setting is available: Legacy SSO Deactivation (Path: Configuration > General Configuration > Settings).

The setting is set to No by default. Changing the setting to Yes has the following effects:

- All Legacy SSO values are permanently erased and cannot be reactivated. As a result, all SSO flows active with the Legacy SSO setup will stop working.
- Access to the self-serve sign-on interface is granted. Administrators can provide the self-serve sign-on service to users.

TCC Security

TCC Security

TCC Security allows system administrators to manage the TCC Certificate Authentication feature.

Oracle supports the signing of requests and responses between Taleo Connect Client (TCC) and the Oracle Taleo Enterprise Edition zone. Both requests and responses get signed through the TCC Security feature. To activate communication signing, a certificate must be generated in TCC and imported in the Oracle Taleo Enterprise Edition zone. A certificate must also be generated in the Oracle Taleo Enterprise Edition zone and imported in TCC. Both certificates are needed for the signing feature to work.

When requests and responses are sent by both TCC and Oracle Taleo Enterprise Edition, they are signed by the sender. The signature is validated by the receiver before processing the payload.

To use the TCC Security feature, a private setting must be enabled. Once enabled, the system administrator can access the feature under Configuration > Security > TCC Security.

The TCC and TEE Certificate Management page is divided into two sections:

- TEE Certificates
- TCC Certificates

TEE Certificates

You can generate, delete, and download TEE certificates. When generating a TEE certificate, you must set the certificate's validity start date and end date. An alias is also required to identify the certificate. Only one certificate can be valid at a given time. You must create validity periods that do not overlap. Once the certificate is generated, you download it. To complete the certificate setup, the TCC administrator accesses the Certificate Management feature in TCC and imports the TEE certificate. For instructions on how to import the TEE certificate in TCC, see the Connect Client User Guide.

TCC Certificates

You can upload certificates created in TCC to validate the signature of incoming TCC requests. Uploaded certificates can be deleted and downloaded.

Generating a TEE Certificate

Before you start

The TCC Security feature must be enabled.

Configuration > Security > TCC Security

Here's what to do

1. In the TCC and TEE Certificate Management page, click Generate Certificate under TEE Certificates.
2. Enter a start date and end date. You must create validity periods that do not overlap.
3. Enter an alias to identify the certificate.
4. Click Generate. The certificate is displayed in the TCC and TEE Certificate Management page, under TEE Certificates.
5. Click Download to download the certificate in TCC.

Results:

Once the certificate is downloaded in TCC, you need to import the certificate in TCC. For import instructions, see the Connect Client User Guide.

Uploading a TCC Certificate

Before you start

The TCC Security feature must be enabled.

A TCC certificate must be generated in TCC.

Configuration > Security > TCC Security

Here's what to do

1. In the TCC and TEE Certificate Management page, click Upload Certificate under TCC Certificates.
2. Select the TCC certificate file.
3. Click Upload.

Network Data

Network Data Management

Network data management gives system administrators limited control over network data elements.

Network data elements are data common to all Oracle Taleo Enterprise Edition products. With network data management, system administrators can activate, deactivate, filter, and synchronize network data elements within four network data element categories: certifications, employers, institutions, and programs. The values within each category constitute the network data elements.

Data element synchronization is done between the customer's database and NDA central, the master data repository.

For example, the Employer network data category contains a list of all the companies in the Oracle Taleo Enterprise Edition master data repository. These companies are network data elements. A system administrator can activate, deactivate, filter, and synchronize some or all of the companies.

Activating All Network Data Elements

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

This task applies to activating certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

1. Filter list if necessary.
2. Click **Activate All**.
3. Click **Yes**.

Results:

The status of all network data elements in the list changes to Active.

All network data elements are added to the respective list in Recruiting, Performance, Onboarding (Transitions).

Activating a Network Data Element

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

The status of the network data element must be Inactive.

This task applies to activating certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

Click Activate in the Actions column of the network data element you want to activate.

Results:

The status of the network data element changes to Active.

The activated network data element is added to the respective list in Recruiting, Performance, Onboarding (Transitions).

Deactivating All Network Data Elements

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

This task applies to deactivating certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

1. Filter list if necessary.
2. Click **Deactivate All**.
3. Click **Yes**.

Results:

The status of all network data elements in the list changes to Inactive.

All network data elements are removed from the respective list in Recruiting, Performance, Onboarding (Transitions).

Data elements in lists that were selected before the element was deactivated remain selected.

Deactivating a Network Data Element

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

The status of the network data element must be Active.

This task applies to deactivating certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

Click **Deactivate** in the Actions column of the network data element you want to deactivate.

Results:

The status of the network data element changes to Inactive.

The deactivated network data element is removed from the respective list in Recruiting, Performance, Onboarding (Transitions).

Data elements in lists that were selected before the element was deactivated remain selected.

Filtering Network Data Elements

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

This task applies to filtering certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

1. Select an item in the Refine by list.

   The Creation Date is the date the network data element was added to the NDA central database.

   If you filter by Creation Date, click the date and use the calendar to select a specific date. Network data elements created as of the specified date will be listed.

2. Click **Refresh**.

Results:

The filtered items are listed.

Synchronizing the Database with the NDA Central Database

Before you start

You must have the **Manage Foundation Data** user type permission at **Configuration [SmartOrg] Administration [Users] User Types**.

This task applies to synchronizing certification, employer, institution, and program network data elements.

Configuration > **[SmartOrg] Administration** > **[Network Data] Certifications/Employers/Institutions/Programs**

Here's what to do

1. Click **Synchronize**.
2. Click **OK**.

Results:

An email is sent to you when the synchronization is complete.

When synchronizing institutions, reference locations are also synchronized because institutions are associated to reference locations.

Deep Linking

Deep Linking

Oracle Taleo Enterprise Edition supports certain URLs that provide a direct access to Oracle Taleo Enterprise Edition products. Oracle Taleo Enterprise Edition also supports certain URLs to get access to specific actions within a Oracle Taleo Enterprise Edition product.

Users can click on a hyperlink in an email, portal or other environments outside Oracle Taleo Enterprise Edition's application and navigate directly to a screen in the application.

Using the deep linking feature, system administrators can provide URLs to users that directly place the users on the Recruiting Center home page, directly into the create requisition process, or directly into a specific job requisition or candidate file.

If single sign-on (SSO) is used, users are directed directly where the URL points to, without having to go through the User Sign In page. If SSO is not used, users are first prompted to enter their credentials in the User Sign In page before being able to access the page defined by the URL.

To create a URL that directs users to a specific action, specific parameters are required. For example, the following URL directs users to a specific requisition:

https://taleo.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765&language=en

Parameter	Description	Value
<Product URL>	Taleo product identifier URL.	taleo.taleo.net
<action>	Action available for the product.	viewRequisition
<parameter1>	Parameter identifier.	requisitionNumber
<value1>	Key value.	8765
<parameter2>	Language (fixed string).	language
<value2>	Language for users to view the page. If no language is specified, the browser language is	en

Parameter	Description	Value
	used. If no language is specified by the browser, the default language used is English.	

System administrators should evaluate how users are using the product. If specific URLs are appropriate for some audiences, they should implement them to provide easier product or action access.

Taleo 10 Supported Product URLs

Oracle supports certain URLs that provide a direct access to Oracle Taleo Enterprise Edition (Oracle Taleo Enterprise Edition) products.

Change the "client.taleo.net" with the actual zone name.

Supported Product URLs
Central Configuration
https://client.taleo.net/smartorg/index.jsf
Note: Users are redirected to the central configuration menu.
Table of Contents page
https://client.taleo.net/smartorg/smartorg/common/toc.jsf
Sign Out
https://client.taleo.net/smartorg/iam/accessmanagement/globalLogout.jsf
Recruiting Center - Home Page
https://client.taleo.net/enterprise/enterprise/flex.jsf
Career Section - Internal
https://client.taleo.net/careersection/x/jobsearch.ftl?lang=en
Note: x must be replaced by the ID of the internal career section.
Career Section - Job Application
https://client.taleo.net/careersection/<cs_no>/jobapply.ftl?lang=<language>&job=<contest_no_OR_req_id>
Note: <cs_no> needs to be the number of the career section. <language> needs to be replaced with the language abbreviation code. <contest_no_OR_req_id> needs to replaced with the requisition number or the requisition identification ID.
Career Section - Job Details
https://client.taleo.net/careersection/<cs_no>/jobdetail.ftl?lang=<language>&job=<contest_no_OR_req_id>
Note: <language> needs to be replaced with the language abbreviation code. <contest_no_OR_req_id> needs to be replaced with the requisition number or the requisition identification ID.
Career Section - Job Referral

Supported Product URLs
https://client.taleo.net/careersection/<cs_no>/jobrefer.ftl?lang=<language>&job=<contest_no_OR_req_id>
Note: <cs_no> needs to be the number of the career section. <language> needs to be replaced with the language abbreviation code. <contest_no_OR_req_id> needs to be replaced with the requisition number or the requisition identification ID.
Career Section - Urgent Jobs Only
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&urgent =<true>
Career Section - OLF Criteria
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&location=<location's ID>
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&organization =<organization's ID>
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&jobfield=<job field's ID>
Career Section - Keyword
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&keyword=<keyword criteria>
Career Section - Expanded Search Panel
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&searchExpanded=<true or false>
Career Section - Radius Search
https://client.taleo.net/careersection/<url code>/jobsearch.ftl?lang=<language>&radiusType=<K or M, for metric/imperial>& radi us=<radius value>& locationRad=<ID of the location used for radius search>
Career Section - Study Level
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&studylevel=<ID>
Career Section - Employee Status
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&employeestatus=<ID>
Career Section - Schedule
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&jobschedule=<ID>
Career Section - Will Travel
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&travel=<ID>
Career Section - Job Type
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&jobtype=<ID>
Career Section - Shift

Supported Product URLs
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&jobshift=<ID>
Career Section - Job Level
https://client.taleo.net/careersection/<url code>/moresearch.ftl?lang=<language>&joblevel=<ID>
Onboarding (Transitions)
https://client.taleo.net/transition/index.jsf
Performance
https://client.taleo.net/orion/flex.jsf?lang=en

Taleo 10 Supported Action URLs

Oracle supports certain URLs to get access to specific actions within a Oracle Taleo Enterprise Edition (Oracle Taleo Enterprise Edition) product.

Supported Action URLs
Create a requisition
http://client.taleo.net/enterprise/publicurl/createRequisition
Open a specific requisition
http://client.taleo.net/enterprise/publicurl/viewRequisition?requisitionNumber=8765
Note: Instead of requisitionNumber you can also specify the contest number: http://client.taleo.net/enterprise/publicurl/viewRequisition?contestNumber=TOR0000334
Open a candidate list specific to a requisition
http://client.taleo.net/enterprise/publicurl/viewCandidates?requisitionNumber=8765
Open a candidate file
http://client.taleo.net/enterprise/publicurl/viewProfile?candidateNumber= 5159
Open a candidate submission
http://client.taleo.net/enterprise/publicurl/viewApplication?applicationNumber=35097
Open a candidate list for managers
http://client.taleo.net/enterprise/publicurl/viewRequisitions
View recruiting tasks
http://client.taleo.net/enterprise/publicurl/tasks

Supported Action URLs
Approve a requisition
http://client.taleo.net/enterprise/publicurl/tasks?type=approveRequisition&requisitionNumber=7317
Extend posting
http://client.taleo.net/enterprise/publicurl/tasks?type=posting&requisitionNumber=8178
Amend an approval path
http://client.taleo.net/enterprise/publicurl/tasks?type=amendApprovalPath&requisitionNumber=7498
Confirm employee presence
http://client.taleo.net/enterprise/publicurl/tasks?type=confirmEmployeePresence&applicationNumber =7322
Complete selection process
http://client.taleo.net/enterprise/publicurl/tasks?type=completeSelectionProcess&application Number=7347
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
Sourcing strategy to be defined
http://client.taleo.net/enterprise/publicurl/tasks?type=sourcingStrategyToBeDefined&requisitionNumber =7537
To be completed
http://client.taleo.net/enterprise/publicurl/tasks?type=toBeCompleted&requisitionNumber=7483
To be filled
http://client.taleo.net/enterprise/publicurl/tasks?type=toBeFilled&requisitionNumber=6477
Duplicate check
http://client.taleo.net/enterprise/publicurl/tasks?type=verify

Response Center (eShare)

Logging In Before Accessing the Response Center

eShare users must log in before being able to access the Response Center. These users must know their Recruiting user name and password (or their SSO credentials) to log in and process requests from the Response Center.

Time Zones

Time Zone

Time zones are used throughout the system where a date or time is required.

In the Recruiting Center, dates and time are presented in a manner that takes into account the user's time zone thereby making dates easier to understand and freeing users from the task of converting the dates themselves.

System administrators can set the default time zone for an entire company. Users who are in the same time zone as the company do not need to modify their time zone. However, users who are not located in the same time zone as their company will need to modify their time zone to view information in their own time zone (for interview scheduling, for example). Time zone changes can be done by users via the My Setup feature if they were granted the permission by their system administrator.

> **Note:** As a best practice, users should set their time zone under My Setup if they want to have the correct time displayed.

An example where time zone is used is for scheduling interviews with candidates. When scheduling an interview, the time zone of the person scheduling the meeting is used as a reference value. This means that the time of the meeting in the Recruiting Center is displayed according to the time zone selected by the person who scheduled the meeting, but the time of the meeting in Outlook or Lotus Notes is displayed according to the time zone set in the recipients' Windows settings.

For example, a user living in San Francisco schedules an interview from 2 p.m. to 3 p.m. Pacific Time. For an attendee living in New-York, the time of the meeting in Recruiting is from 2 p.m. to 3 p.m. Pacific Time, but the time of the meeting in Outlook is from 5 p.m. to 6 p.m. Eastern Time.

Another example where time zone is used is for requisition posting. When posting requisitions, the time zone taken into account is the time zone of the user doing the posting (and not where the requisition is posted).

Daylight Savings Time

The same calculation is used during the daylight savings period across the Recruiting Center.

Daylight savings time is properly calculated for dates handled across the Recruiting Center. Many dates are time zone sensitive and as such are converted.

Algorithm to Determine a User's Time Zone

To determine a user's time zone, the algorithm is as follows:

- Use the user's preferred time zone (under Recruiting Center > Resources > My Setup > Preferences > Time Zone and also under Configuration > [SmartOrg] Administration > User Accounts > select a user account > General Preferences > Time Zone).
- If the above was not defined, use the user's preferred time zone (Configuration > General Configuration > Settings > Time Zone).
- If the above was not defined (unlikely), use the user's operating system UTC offset.
- If the above was not defined, use the default time zone (Configuration > [Career Section] Settings).

Time Zones in Oracle Taleo Enterprise Edition

City	Time Zone Name	UTC Offset
Midway Islands, Samoa	Samoa Time	UTC -11:00
Honolulu	Hawaii Time	UTC -10:00
Anchorage	Alaska Time	UTC -9:00
Tijuana	Pacific Mexico Time	UTC -8:00
Vancouver, San Francisco, Los Angeles	Pacific Time	UTC -8:00
Chihuahua, La Paz, Mazatlan	Western Mexico Time	UTC -7:00
Edmonton, Denver, Boise, Salt Lake City	Mountain Time	UTC -7:00
Arizona, Hermosillo	Mountain US Time	UTC -7:00
Cancun, Merida	Atlantic Mexico Time	UTC -6:00
Chicago, Winnipeg, Dallas	Central Time	UTC -6:00
San Jose, Managua	Central America Time	UTC -6:00
Regina (Saskatchewan)	Central Canada Time	UTC -6:00
Mexico City	Mexico General Time	UTC -6:00
Bogota, Lima, Quito, Panama City	Pacific South America Time	UTC -5:00
Montreal, New York, Washington D.C.	Eastern Time	UTC -5:00
Kingston, Georgetown	Jamaica Time	UTC -5:00
Caracas	Venezuela Time	UTC -4:30
Asuncion	Paraguay Time	UTC -4:00
Cuiaba	Western Brazil Time	UTC -4:00
La Paz, San Juan	Western South America Time	UTC -4:00
Santiago	Chile Time	UTC -4:00

City	Time Zone Name	UTC Offset
Halifax	Atlantic Time	UTC -4:00
St-John's (Newfoundland)	Newfoundland Time	UTC -3:30
Buenos Aires, Georgetown	Eastern South America Time	UTC -3:00
Greenland, Saint-Pierre and Miquelon	Greenland Time	UTC -3:00
Brasilia	Eastern Brazil Time	UTC -3:00
Mid Atlantic	Mid-Atlantic Time	UTC -2:00
Azores	Azores Time	UTC -1:00
Cap Verde Islands	Cape Verde Time	UTC -1:00
Dublin, Edinburgh, Lisbon, London	Western European Time	UTC 0:00
Abidjan, Dakar, Reykjavik	Greenwich Mean Time	UTC 0:00
Casablanca	Casablanca Time	UTC 0:00
Abuja, Alger, Kinshasa, Luanda, Niamey, Yaounde	Western Central Africa Time	UTC +1:00
Namibia	South Western Africa Time	UTC +1:00
Brussels, Copenhagen, Madrid, Paris	Central Europe Time	UTC +1:00
Sarajevo, Skopje, Warsaw, Zagreb	Central Europe Time	UTC +1:00
Belgrade, Bratislava, Budapest, Ljubljana, Prague	Central Europe Time	UTC +1:00
Amsterdam, Berlin, Bern, Rome, Stockholm, Vienna	Central Europe Time	UTC +1:00
Cairo	Egypt Time	UTC +2:00
Harare, Pretoria	South Africa Time	UTC +2:00
Jordan	Jordan Time	UTC +2:00
Beirut	Lebanon Time	UTC +2:00
Damascus	Syria Time	UTC +2:00
Gaborone, Harare, Lilongwe, Lubumbashi, Lusaka, Maputo	Central Africa Time	UTC +2:00
Athens, Bucharest	Eastern Europe Time	UTC +2:00
Helsinki, Riga, Tallinn, Sofia, Vilnius, Kiev	Baltic States Time	UTC +2:00
Jerusalem	Israel Time	UTC +2:00
Baghdad	Iraq Time	UTC +3:00
Kuwait City, Riyadh	Arabian Peninsula Time	UTC +3:00
Nairobi	Eastern Africa Time	UTC +3:00
Moscow, St. Petersburg, Volgograd	Russia Time	UTC +4.00

City	Time Zone Name	UTC Offset
Tehran	Iran Time	UTC +3:30
Abu Dhabi, Muscat, Dubai	Persian Gulf Time	UTC +4:00
Baku, Tbilisi, Yerevan	Caucasus Time	UTC +4:00
Kabul	Afghanistan Time	UTC +4:30
Bishkek	Kyrgyzstan Time	UTC +5:00
Dushanbe, Islamabad, Karachi, Toshkent	West Asia Time	UTC +5:00
Calcutta, Chennai, Mumbai, New Delhi	India Time	UTC +5:30
Kathmandu	Nepal Time	UTC +5:45
Almaty, Astana	Kazakhstan Time	UTC +6:00
Dhaka	Central Asia Time	UTC +6:00
Novosibirsk	North Central Asia Time	UTC +6:00
Rangoon	Myanmar Time	UTC +6:30
Krasnoyarsk	North Asia Standard Time	UTC +7:00
Bangkok, Hanoi, Jakarta	South Eastern Asia Time	UTC +7:00
Irkutsk, Ulaan Bataar	North Eastern Asia Time	UTC +8:00
Perth	Western Australia Time	UTC +8:00
Beijing, Chongqing, Hong Kong, Urumqi	China Time	UTC +8:00
Singapour	Singapore Time	UTC +8:00
Yakutsk	Yakutsk Time	UTC +9:00
Osaka, Sapporo, Tokyo	Japan Time	UTC +9:00
Seoul	Korea Time	UTC +9:00
Adelaide	South Australia Time	UTC +9:30
Darwin	Australia Northern Territory Time	UTC +9:30
Canberra, Melbourne, Sydney	South Eastern Australia Time	UTC +10:00
Vladivostok	Vladivostok Time	UTC +10:00
Brisbane	Queensland Time	UTC +10:00
Hobart	Tasmania Time	UTC +10:00
Port Moresby	Papua New Guinea Time	UTC +10:00
Lord Howe	Lord Howe Island Time	UTC +10:30
Magadan, Solomon Islands, New Caledonia	Central Pacific Time	UTC +11:00
Anadyr	Chukot Time	UTC +12:00

City	Time Zone Name	UTC Offset
Auckland, Wellington	New Zealand Time	UTC +12:00
Fiji, Kamchatka, Marshall Islands	Fiji Time	UTC +12:00
Eniwetok, Kwajalein	Date Line Time	UTC +12:00
Chatham Islands	Chatham Islands Time	UTC +12:45
Enderbury	Phoenix Islands Time	UTC +13:00
Nuku'alofa	Tonga Islands Time	UTC +13:00
Kiritimati	Line Islands Time	UTC +14:00

Time Zone Sensitive Dates in the Recruiting Center

Requisition File - External Description Block - Opening Date	Requisition File - External Description Block - Closing Date
Requisition File - Internal Description Block - Opening Date	Requisition File - Internal Description Block - Closing Date
Requisition File - History Tab - Event Dates	Requisition File - Posting & Sourcing - Corporate Posting Dates
Requisition File - Posting & Sourcing - eQuest Posting Date	Requisition File - Posting & Sourcing - Staffing Agents
Requisition File - Posting & Sourcing - Staffing Agency (Contingent)	Requisition File - Posting & Sourcing - Source - Event List - Start Date (View & Edit)
Requisition File - Posting & Sourcing - Source - Event List - End Date (View & Edit)	Events in the Candidate Source Tracking Block
Requisition List - Status Detail	Requisition List - Contacted Candidates ("From" in the Callout)
Requisition Template File - Effective From (Status)	Requisition Template File - Effective Till (Status)
Requisition Template List - Effective From	Requisition Template List - Effective Till
Prescreening Question File - Creation Date	Prescreening Question File - History - Event Date
Prescreening Competency File - History - Event Date	Prescreening Disqualification Question File - Creation Date
Prescreening Disqualification Question File - History - Event Date	Requisition Action - Share - Date in Printed PDF
Requisition Approval Task & eShare - Date in Requisition Detail PDF (must reflect the file)	

Candidate Action - Schedule an Interview - Meeting Date	Candidate Action - Update an Interview - Meeting Date
Candidate Action - Cancel Interview - Meeting Date	Candidate File - Detail - Creation Date
Candidate File - Basic Profile - Date of Availability	
Candidate File - Attachments Tab - Submission-specific Attachments	Candidate File - Attachments Tab - Other Attachments
Candidate File - Self-Assigned Task List - Creation Date	Candidate File - History Tab - Event Dates
Candidate File - History Tab - Workflow Event Date	Candidate List - Quick Filters - Since (Effect on filtering)
Candidate List - Quick Filters - Last Activity Date (From & To) (Effect on filtering)	Candidate List - Advanced Filters - Fields of Type Date
Candidate List - Standard Fields of Type Date	Candidate Advanced Search - Date Type criteria
Candidate Workflow Assistant - Workflow Event Date	Candidate Workflow Assistant - Self-Assigned Task - Due Date
Candidate Workflow Assistant - (Hire candidate) Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Candidate Action - Print/Share - Date in Printed PDF
Task List - Due Date - Task List - Task Callout (Assignment Date)	
Offer Grid - Expiration Date	Offer Grid - Created On
Offer Grid - Approved	Offer Grid - Extended
Offer Grid - Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Action - Update Expiration Date
Offer Action - Update Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Action - Extend Offer Verbally
Offer Action - Capture Response (Accepted) - Accepted On	Offer Action - Capture Response (Accepted) - Start Date (with the setting "Ignore Time Zone for Offer Start Date"=NO)
Offer Approval Tab - Decision Date & Time	Candidate Selection Workflow - Update Start Date (No RSOffer) (with the setting "Ignore Time Zone for Offer Start Date"=NO)
Offer Approval Task & eShare - Date in Offer detail PDF (must reflect the grid) (with the setting "Ignore Time Zone for Offer Start Date"=NO)	Offer Approval Task & eShare - Date in Candidate Submission detail PDF (must reflect the file)

Time Zone - Permissions and Settings

The following permissions and settings are used to configure the time zone functionality.

Setting or Preference	Description	Default Value	Location
Time Zone	Indicates the preferred time zone.		Configuration > [Central Configuration] > Settings
Default Time Zone	Indicates the default time zone for Oracle Taleo Enterprise Edition products.		Configuration > [Career Section] > Settings
Time Zone	This is the preferred time zone set by the system administrator for a user.		Configuration > [SmartOrg] Administration > [Users] User Accounts > select a user account > General Preferences
Time Zone	This is the preferred time zone set by the user.		Recruiting Center > Resources > My Setup > Preferences
Ignore Time Zone for Offer Start Date	Ignore the time zone when using the offer start date. This is a Private setting. Contact Oracle Support for details.	No	Configuration > [Recruiting] > Settings

User Type Permission	Description	Location
Access the "Preferences" section in 'My Set-up' menu	For users to have the ability to modify their time zone, the following permission is required. Once the permission is granted, users can modify their time zone in the My Setup feature, in the Preferences tab.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

Using the Time Zone for the Offer Start Date

By default, the time zone is used for the offer start date. A private setting controls this feature. If you do not wish to use the time zone for the offer start date, communicate with Oracle Support to have this setting modified.

3 Foundation Data

Contextualization: Organization-Location-Job Field

The data structure enables each customer to customize Oracle Taleo Enterprise Edition products such that they reflect how the customer does business. Each customer's organization is defined as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred to as contextualization.

Organization describes the hierarchical structure of an organization. Up to 20 organization levels can be created. The system proposes the following organization structure, but other terms may be chosen to better reflect the hierarchical structure of a company:

- Company
- Sector
- Department
- Division

Location represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location). Up to 5 location levels can be created. Locations must be associated to network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. Oracle strongly recommends defining a zip code for the location. A common location structure is:

- Country
- State/Province
- Region
- City
- Work Location

Worker locations can be mapped to the Location structure. The worker location is used as an employee (post-hire) function whereas the location (in OLF) is meant for recruiting purposes. For example, a location could be 100 Main Street and a worker location could be "Sector 44" or "Cubicle A". Worker locations are not created in Configuration. Worker locations are typically imported from an external HRMS system. Once worker locations are imported, worker locations can be mapped to the Location structure via Integration or by the system administrator in Configuration. Any Location element can be given the Worker Location and the Worker Location Address properties. System administrators can then configure worker locations to appear in requisitions, offers, correspondences, requisitions lists, and candidates lists just like any other fields. For details, see Worker Location.

Job Field represents the employment sectors or domains. Up to 4 job field levels can be created. Job fields must also be mapped to the network job fields, again to have a common language with the external world, be for posting or integrations. This mapping also serves to inherit existing classification for competencies. The system proposes the following job field structure, but other terms may be chosen to better reflect the structure of a company:

- Category

- Function
- Specialty

Contextualization, that is the Organization-Location-Job Field structure associated to an element, represents the framework the application uses to organize, classify, link, match or search for information in the application. Although Organization-Location-Job Field structures are configured with the help of an Oracle representative during the implementation phase, modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the system to reflect a company's unique structure and make modifications to Organization-Location-Job field elements in real time so that the data accounts for any changes in the structure.

There are several key elements of the Oracle Taleo Enterprise Edition products that are tied to the Organization-Location-Job field structure such as candidate selection workflows, requisitions and requisition templates, message templates, user management, prescreening, approvals, etc.

The purpose of contextualizing an element is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows. The CSW1 would not be available to the user for this requisition, because the last level of its Location does not match that of the requisition. The CSW2 could be available to the user for this requisition. The parent element of the lowest level of the requisition for each dimension (Organization, Location or Field) must be the same as the lowest level of the workflow for each dimension.

Example:
Requisition:

- Organization: Urban transportation
- Location: United States/California/Los Angeles
- Job Field: Bus driver

CSW1:

- Organization: Urban transportation
- Location: United States/California/San Jose
- Job Field: Bus driver

CSW2:

- Organization: Urban transportation
- Location: United States
- Job Field: Bus driver

When using contextualization, the system applies the AND operator between Organizations, Locations and Job Fields entities. However, the OR operator is applied between elements of the same entity.

In the following example, a field would be displayed if Canada (or any of its children) AND Architecture were selected.

- Location: Canada
- Job Field: Architecture

In the following example, a field would be displayed if Canada AND Architecture were selected, or if United States AND Architecture were selected.

- Location: Canada
- Location: United States

- Job Field: Architecture

Mapping

Mapping is essential to the Organization, Location, and Job Field (OLF) concept because it allows the creation of an association between a custom element and a standard element from an external system.

Through mapping, it is possible to organize and exchange data between two or more systems in a compatible format. Mapping locations, for example, helps the application to communicate location information to job boards when posting a requisition. The two systems agree that the data structure location will represent a geographical place such as a country, a state or a city. The systems are then able to swap information based on a mutually comprehensible data exchange agreement.

Structure Management

The Structure Editor lets you create and delete organization, location, and job field levels according to your organization's needs. The structure that you establish in the Structure Editor will form the basis of the Organizations, Locations, and Job Fields throughout the application.

Creating the Organization-Location-Job Field Structure

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.
6. In the Displayed column, select the levels that you want to display to the user.

   For organizations and job fields, the levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.
7. Click Save.

Adding a Level to the Organization-Location-Job Field Structure

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Create to add levels.
4. Enter a description for each level.
5. Translate the description into every supported content language.
6. In the Displayed column, select the levels that you want to display to the user.

   The levels must be displayed in sequence. For example, you can choose to display levels 1 to 3 and not 4, but you cannot display 1, 2, 4, but not 3.
7. Click Save.

Editing a Level in the Organization-Location-Job Field Structure

Before you start

The *Manage Foundation Data* user type permission is required.

To edit the description of a level, the system must be in maintenance mode.

To edit which levels are displayed, the system must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Make required changes.
4. Click Save.

Deleting a Level in the Organization-Location-Job Field Structure

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

If you want to delete a level in the Organization structure, you must first move elements that are attached to it to another level. You cannot delete levels if elements are linked to the level.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Structure Management under Organizations, Locations or Job Fields.
2. Click Edit.
3. Click Delete next to the desired level.

Element Management

The Element Management feature allows a system administrator to view the properties of the Organizations-Locations-Job Fields structure and to manage their children.

Creating an Element

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Entering a sequence number will overwrite the default alphabetical sequencing available in the system.

For an element to be active, all of its parents must be active. If not, the Active (Pending) status will appear in the Status column.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Create next to Children.
3. Complete the fields.
4. Click Save.

Editing an Element

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Edit in the Actions column.
3. Make the required changes.
4. Click Save.

Moving an Element

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Element Management under Organizations.
2. In the list of Children, select the element that you want to move.
3. Click Move.
4. Specify under which organization you want to move the selected element.
5. Click Save.

Deleting an Element

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Element Management under Organizations, Locations or Job Fields.
2. In the list of Children, select the desired element.
3. Click Delete.

   If the organization, location or job field that you want to delete has elements, you must reassign the elements to another organization, location or job field. Click OK in the message box. When the selector opens, you can reassign the elements by selecting a new organization, location or job field. All the elements (templates, requisitions and candidates) associated to the organization, location or job field are now reassigned to the organization, location or job field selected above.

Adding a Location or Job Field Element

Before you start

The *Manage Foundation Data* user type permission is required.

The application must be in implementation mode or maintenance mode.

Configuration > **[SmartOrg] Administration**

Here's what to do

1. Click Element Management under Organizations, Locations or Job Fields.
2. Click Add next to Children.
3. Select the desired element.
4. Click Select.

Element Deactivation for Recruiting

Over time, customers might need to deactivate or reactivate certain Organization-Location-Job Field elements in SmartOrg to ensure that the foundation data structure reflects changes to their business process structure.

Reports mention whether the status of an Organization-Location-Job Field element is Active or Inactive. In addition, if you deactivate Organization-Location-Job Field elements, they are no longer displayed in the Recruiting Center but if elements or users are part of requisitions, templates, questions, tasks, candidates, etc. and the elements or users are deactivated afterward, that information is retained for reporting purposes.

If a parent Organization, Location, or Job Field element is deactivated or reactivated, all child elements are updated to have the same state as the parent element.

If an Organization-Location-Job Field element is part of a record (e.g., requisition or candidate file) and the element is deactivated, the system continues to display the element in the record. The Organization-Location-Job Field element is not displayed, however, in Organization-Location-Job Field selectors (e.g., Location Selector) if a user creates a new record or edits an existing one. Recruiting Center users can delete a deactivated Organization-Location-Job Field element from an existing record.

Deactivation is available via Taleo Connect Client (TCC). This can be done by changing the status of the Organization-Location-Job Field element.

Taleo Connect Client Impact

Deactivation is available via Taleo Connect Client (TCC).

Web Services Impact

Deactivation is available via Taleo Connect Client (TCC).

Career Section Impact

- If an Organization-Location-Job Field element is part of a candidate's profile and the element is deactivated, the system continues to display the element in the profile. Candidates cannot add a deactivated Organization-Location-Job Field element to their profile.
- A candidate cannot add a deactivated Organization-Location-Job Field element to a new search.
- A candidate cannot add a deactivated Organization-Location-Job Field element to a saved search.
- If the candidate runs a saved search that includes a deactivated Organization-Location-Job Field element, the search uses the next higher active Organization-Location-Job Field element; if there is no parent element, the criteria is excluded from the search.
- If a saved search contains a deactivated Organization-Location-Job Field element, the search uses the closest active parent element. The deactivated Organization-Location-Job Field element is ignored if no parent element exists.

Recruiting Center Impacts

Functionality	Impact
Advanced search	A deactivated Organization-Location-Job Field element can be included in search criteria. This enables the user to retrieve candidates whose candidate file includes an Organization-Location-Job Field element that has since been deactivated.
	If a saved search includes an Organization-Location-Job Field element that has since been deactivated, the element remains part of the search strategy and the search results. The element remains a search criterion if the search is repeated.
Candidate File	If an Organization-Location-Job Field element is deactivated, it continues to be displayed in a candidate file.
	A deactivated Organization-Location-Job Field element is no longer displayed if the Profile tab is edited. This is recorded in the History tab.
	If a user creates a candidate file or a candidate creates a profile, deactivated Organization-Location-Job Field elements are displayed in the Organization-Location-Job Field Selector windows.
	A deactivated Organization-Location-Job Field element has no effect on source tracking contextualization.
	A deactivated Organization-Location-Job Field element has no effect on LUDS selection contextualization.
Candidate Match	A deactivated Organization-Location-Job Field element is not displayed.

Functionality	Impact
Correspondence	The system continues to use deactivated Organization-Location-Job Field elements for contextualization of template.
Offers (Competitive/Expectation)	If a Job is selected, it continues to be displayed if it is deactivated afterward.
	If a Job is selected, and the Job element is later deactivated, and a user then attempts to edit the Job, the deactivated Job continues to be displayed and can be edited.
	If a Job is deactivated, it is no longer displayed in the Selector window.
Prescreening and Disqualification Questions	Prescreening questions and disqualification questions retain their association with deactivated Organization-Location-Job Field elements.
	A deactivated Organization-Location-Job Field element is not displayed.
	Questions associated with a deactivated Organization-Location-Job Field element are only displayed if the user selects an element and then selects Show all questions.
	Questions keep their Active status even if the associated Organization-Location-Job Field element has been deactivated.
Requisition Templates	Requisitions and templates retain their association with deactivated Organization-Location-Job Field elements.
	A deactivated Organization-Location-Job Field element is not displayed.
	Requisitions associated to a deactivated Organization-Location-Job Field element are only displayed if they are associated with other Organization-Location-Job Field elements whose status is Active. For example, a Location element has been deactivated but the corresponding Job Field and/or Organization elements have an Active status.
	When editing requisitions and templates that contain a deactivated Organization-Location-Job Field element, the requisitions retain their Active status.
	If users edit the requisition, this action does not affect the requisition's association with the deactivated Organization-Location-Job Field element.
	When editing requisitions and templates that contain a deactivated Organization-Location-Job Field element, the deactivated Organization-Location-Job Field element is not displayed in the Organization-Location-Job Field Selector windows (e.g.: Location Selector).
	When creating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed.
	When creating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed in Organization-Location-Job Field Selector windows (e.g.: Location Selector).
	When duplicating a requisition or a template, a deactivated Organization-Location-Job Field element is not displayed in Organization-Location-Job Field Selector windows (e.g.: Location Selector).
Competencies	Competencies associated with a deactivated Organization-Location-Job Field element are only displayed if the user selects an element and then selects Show all questions.

Functionality	Impact
	Competencies retain their association with deactivated Organization-Location-Job Field elements.
	Competencies keep their Active status even if the associated Organization-Location-Job Field element has been deactivated.
	A deactivated Organization-Location-Job Field element is not displayed.
Candidate Creation (Capture Resume)	When selecting a requisition, a deactivated Organization-Location-Job Field is not displayed.
	When selecting a requisition, the requisition can be selected based on deactivated Organization-Location-Job Field's next highest active parent element.
	When creating an Organization-Location-Job Field block, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
	When editing an Organization-Location-Job Field block, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window
	When editing an Organization-Location-Job Field, an update is logged on the History tab.
	In source tracking, a deactivated Organization-Location-Job Field has no impact on source tracking contextualization.
	In Personal Information LUDS, a deactivated Organization-Location-Job Field has no impact on element contextualization.

Configuration Impact

Feature	Impact
Agency	In view mode, an agency that has a deactivated Organization-Location-Job Field is displayed and the Organization-Location-Job Field value is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.
	When adding an agency, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Agent	In view mode, an agency that has a deactivated Organization-Location-Job Field is displayed and the Organization-Location-Job Field value is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.
	When adding an agent, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Automated Task	In view mode, tasks that include a deactivated Organization-Location-Job Field are displayed and the Organization-Location-Job Field value is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.
	When adding a task A deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Candidate Selection Workflow	In view mode, a deactivated Organization-Location-Job Field is not displayed but is displayed on the Display Context tab.

Feature	Impact
	In edit mode, a candidate selection workflow can be "resaved" with Organization-Location-Job Field if unchanged.
	When adding a candidate selection workflow, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Career Section Diversity Forms	In view mode, a deactivated Organization-Location-Job Field is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved anew.
	When adding a form, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Career Section - Job Search Filter	In view mode, a deactivated Organization-Location-Job Field is displayed.
	When adding a search filter, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Career Section Organization- Location-Job Field Associations	In view mode, a deactivated Organization-Location-Job Field is displayed.
	When adding an association, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Career Section Statements	In view mode, a deactivated Organization-Location-Job Field is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and the statement can be "resaved" and activated if the Organization-Location-Job Field element has not been edited.
	When adding a statement, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Career Section - URL builder	In view mode, a deactivated Organization-Location-Job Field is displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved anew.
	When creating an URL, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Correspondence	In view mode, a deactivated Organization-Location-Job Field is not displayed.
	In view mode, templates can be retrieved under the next highest parent element of the deactivated Organization-Location-Job Field.
	In edit mode, a deactivated Organization-Location-Job Field is displayed and can be saved.
	When adding correspondence, deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Custom Large Selection Elements	When editing large selection elements, a deactivated Organization-Location-Job Field is not displayed in drop-down lists and the value is lost if the user clicks Save. Only the next highest active parent is displayed in drop-down lists. contextualization.
	When adding a custom large selection, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.
Source Tracking	In view mode, a deactivated Organization-Location-Job Field is not displayed.
	In edit mode, a deactivated Organization-Location-Job Field is displayed in the Properties section.
	In edit mode, a source tracking configuration can be edited and "resaved" if the Organization-Location-Job Field has not been edited.

Feature	Impact
	When adding a source, a deactivated Organization-Location-Job Field is not displayed in the Organization-Location-Job Field Selector window.

Note: When deactivating Organization-Location-Job Field (OLF) elements, there are certain behaviors that are important to note. There are some areas where the deactivated elements will still appear for the system administrator when using the Configuration module. If this is a concern, customers should refrain from deactivating OLF elements until this changes. It is important to note that the system does effectively hide where appropriate deactivated OLF elements from both candidates and Recruiting Center users. Specifically, system administrators can still associate (either via an add or edit action) content with deactivated OLF elements and can still see deactivated OLF elements in the system administrator OLF tree views in the following areas within Configuration:

- Create/Modify Agency (Configuration > [Recruiting] Administration > Agencies)
- Create/Modify Agent (Configuration > [Recruiting] Administration > Agencies > Agents)
- Create/Modify Task (Configuration > [Recruiting] Administration > Automated Tasks)
- Create/Modify Selection - where elements are mapped to OLF (Configuration > [Recruiting] Administration > Selection Lists > Large Selections)
- Create/Modify Source (Configuration > [Recruiting] Administration > Sources)
- Create/Modify OLF mapping to a given candidate selection workflow (Configuration > [Recruiting] Administration > Candidate Selection Workflow > Workflow > Display Context Tab)
- Create/Modify Job Board Account OLF Associations (on the permissions tab during create/modify) (Configuration > [Recruiting] Administration > Job Board Accounts > Job Board Account Permissions Tab)
- Create/Modify Department (Configuration > [Recruiting] Administration > Department List)

In addition, the following tree views within Configuration will still show deactivated OLF elements:

- Source list
- Department list
- Position list

Organization-Location-Job Field Behavior of Deactivated Elements

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Agency		
Agency	View	Not displayed
Agency	Edit	Not displayed
Agency	Add	Not displayed
Agency - generate new posting	Add	Not displayed
PDF Form		
Any future object configuration such as PDF Forms or Screening Services with Organization-Location-Job Field context	Add	Not displayed
Any future object such as PDF Forms or Screening Services with Organization-Location-Job Field context	View	Not displayed
Any future object such as PDF Forms or Screening Services with Organization-Location-Job Field context	Edit	Not displayed
Automated Tasks for defined Organization-Location-Job Field contexts		
Automated Tasks for defined Organization-Location-Job Field contexts	View	Displayed to support historic data integrity
Automated Tasks for defined Organization-Location-Job Field contexts	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Automated Tasks for defined Organization-Location-Job Field contexts	Add	Not displayed
Candidate File		

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Candidate File	View	Displayed to support historic data integrity
Candidate File	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Candidate File	Create	Not displayed
Candidate Search - New search Organization-Location-Job Field preferences		
Candidate Search - New search Organization-Location-Job Field preferences	Other	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	View	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	Edit	Not displayed
Candidate Search - Run saved search with Organization-Location-Job Field preferences	Add	Not displayed
Career Sections Organization-Location-Job Field		
Career Sections Organization-Location-Job Field association	View	Not displayed
Career Sections Organization-Location-Job Field association	Edit	Not displayed
Career Sections Organization-Location-Job Field association	Add	Not displayed
Career Sections URL		
Career Sections URL	View	Displayed
Career Sections URL	Edit	Displayed
Career Sections URL	Add	Not displayed
Correspondence		
Correspondence in Administration menu	View	Not displayed

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Correspondence in Administration menu	Edit	Not displayed
Correspondence in Administration menu	Add	Not displayed
Disqualification Questions		
Disqualification Library	View	Not displayed
Disqualification Library	Edit	Not displayed
Diversity Forms	Add	Not displayed
Large User Defined Selections (LUDS)		
LUDS	View	Not displayed
LUDS	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
LUDS	Add	Not displayed
Offer Data		
Offer Data	View	Displayed to support historic data integrity
Offer Data	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Offer Data	Create	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Prescreening Questions		
Prescreening Library	View	Not displayed
Prescreening Library	Edit	Not displayed
Prescreening Library	Add	Not displayed

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Privacy Agreements		
Privacy agreements configuration	View	Not displayed
Privacy agreements configuration	Edit	Not displayed
Privacy agreements configuration	Add	Not displayed
Reports		
Reporting - Running Reports	Other	Indicated as "inactivated" in the listing
Requisitions		
Requisition file data	View	Displayed to support historic data integrity
Requisition file data	Edit	Displayed if current/historic data selected (to allow re-saving and viewing without affecting data integrity)
Requisition file data	Create	Not displayed
Requisition tree view in Recruiting	Filter	Not displayed
Requisition filter by Manager or Recruiter	Filter	Not displayed
Requisition Templates		
Requisition Templates	View	Indicated as "inactivated" in the listing
Requisition Templates	Edit	Not displayed
Requisition Templates	Create	Not displayed
Automated Tasks		
Run automated tasks for defined Organization-Location-Job Field contexts	Other	Displayed to support historic data integrity
SmartOrg - Organization-Location-Job Field		
SmartOrg - Organization-Location-Job Field	View	Invalid; system doesn't allow

Context	Action	Organization-Location-Job Field behavior if element is deactivated
SmartOrg - Organization-Location-Job Field	Edit	Not displayed
SmartOrg - Organization-Location-Job Field	Create	Not displayed
SmartOrg - User		
SmartOrg - User Admin	View	Invalid; system doesn't allow
SmartOrg - User Admin	Edit	Not displayed
SmartOrg - User Admin	Create	Not displayed
Sources		
Source.Tracking config/admin	View	Not displayed
Source.Tracking config/admin	Edit	Not displayed
Source.Tracking config/admin	Add	Not displayed
User Groups		
User Groups	View	Indicated as "inactivated" in the listing
User Groups	Edit	Not displayed
User Groups	Add	Not displayed
User Groups - access to candidate/requisition data per segmentation rules	Other	Indicated as "inactivated" in the listing
Departments		
Departments	View	Displayed
Departments	Edit	Displayed
Departments	Add	Not displayed
Work Locations		

Context	Action	Organization-Location-Job Field behavior if element is deactivated
Work Locations	View	Indicated as "inactivated" in the list
Work Locations	Edit	Not displayed
Work Locations	Add	Not displayed
Performance Flex GUI - Employee		
Performance Flex GUI - Employee	View	Displayed to support historic data integrity
Performance Flex GUI - Employee	Create	Not displayed
Performance Flex GUI - Employee	Edit	Displayed
Performance Flex GUI - Position		
Performance Flex GUI - Position	View	Displayed to support historic data integrity
Performance Flex GUI - Position	Create	Not displayed
Performance Flex GUI - Position	Edit	Not displayed
Performance Flex GUI – Job Role (Career)		
Performance Flex GUI - Job Role (Career)	View	Displayed to support historic data integrity
Performance Flex GUI – Job Role (Career)	Create	Not displayed
Performance Flex GUI – Job Role (Career)	Edit	Not displayed
Performance Flex GUI – Business Organization		
Performance Flex GUI – Business Organization	View	Displayed to support historic data integrity
Performance Flex GUI – Business Organization	Create	Not displayed
Performance Flex GUI – Business Organization	Edit	Not displayed

Department

A department represents a division or service in the company where a future employee will work.

A department is the lowest level of an organizational unit. An example of a department could be a documentation department where technical writers, translators and editors are working.

Departments are available in:

- Recruiting Administration menu, under Department List, where system administrators create and edit departments.
- SmartOrg Administration menu, under User Accounts, when system administrators create a user account.
- Recruiting Center when recruiters create a requisition.

Departments can be imported from a Human Resource Management System (HRMS) in Recruiting using the integration service or they can be manually created by system administrators. Departments can also be exported, deleted, and recovered via integration service.

Departments can be linked to organizations and locations.

When creating a department, system administrators can define default approvers for requisitions and offers. Specified approvers will be selected automatically when users are requesting the approval of a requisition or an offer.

The autofill functionality is available for departments provided the system administrator has activated the proper setting. Therefore, when users select a department when creating a requisition, the department-related fields will automatically be filled.

Creating a Department

Before you start

The *Enable Department* setting must be activated.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click New...
2. Complete the fields as required.
   The Department Number must be unique.
   The Name field must be translated in every available languages.
3. Optional: Associate the department to an organization.
   a. Click Select.
   b. Select values for the desired organization levels.
   c. Click Done.
4. Optional: Associate the department to a location.
   a. Click Select.

   b. Select values for the desired location levels.
   c. Click Done.
5. Optional: Define preferred approvers for requisitions. Specified approvers will be selected automatically when users are requesting the approval of a requisition.
6. Optional: Define preferred approvers for offers. Specified approvers will be selected automatically when users are requesting the approval of an offer.
7. Specify if the department is always active or if it is active during a specific period of time.
8. Optional: Complete department user-defined fields.
9. Click Done.

Results:

The department is available in the Department List page.

Deleting a Department

Before you start

The *Enable Department* setting must be activated.

The system must be in maintenance mode.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Click the Delete icon.

Results:

The department is no longer available for use and is permanently removed from the database.

Activating a Department

Before you start

The *Enable Department* setting must be activated.

The department must be created.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Specify if the department is always active or if it is active during a specific period of time.
3. Click Done.

Results:

The department is available to users in Recruiting.

Deactivating a Department

Before you start

The *Enable Department* setting must be activated.

The department must have the Active status.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Select Inactive.
3. Click Done.

Results:

The department is unavailable to users while maintaining the information in the database for reuse.

Associating a Department to an Organization

Before you start

The *Enable Department* setting must be activated

You must create a department before you can associate it to an organization.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Specify to which organization the department is associated.
3. Click Done.

Associating a Department to a Location

Before you start

The *Enable Department* setting must be activated

You must create a department before you can associate it to a location.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Specify to which location the department is associated.
3. Click Done.

Dissociating a Department from an Organization

Before you start

The *Enable Department* setting must be activated.

The department must be associated to an organization.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Under Organization, click the Clear Selection icon.
3. Click Done.

Disassociating a Department from a Location

Before you start

The *Enable Department* setting must be activated.

The department must be associated to an organization.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on a department.
2. Under Location, click the Clear Selection icon.
3. Click Done.

Department - Permissions and Settings

The following permissions and settings are used for the department functionality.

User Type Permission	Description	Location
Manage foundation data	Allows users to manage departments.	Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Foundation Data

Setting	Description	Default Value	Location
Enable Department	Activates the Department functionality throughout the system.	No	Configuration > [Recruiting] Settings
Link Requisition Location to Department Location	In requisitions and templates, link the Location field to the location specified for the Department. This is a protected setting activated by Oracle Support.	No	Configuration > [Recruiting] Settings
Link Requisition Organization to Department Organization	In requisitions and templates, link the Organization field to the organization specified for the Department. This is a protected setting activated by Oracle Support.	No	Configuration > [Recruiting] Settings
Department Autofill Activation	Activate the automatic filling of department-related fields in requisitions.	No	Configuration > [Recruiting] Settings
Requisition Action Requires Effective Department	When certain actions are performed in requisitions, the department must be effective.	Not Required	Configuration > [Recruiting] Settings
Send Department Information to eQuest When Posting Requisitions	Send the department code to eQuest when posting requisitions in order to do some reporting in eQuest.	No	Configuration > [Recruiting] Settings

Position

A position indicates the type of work offered in a requisition. For example, an administrative assistant, a technical writer, a translator, an editor are all positions within the Documentation department. Positions are mainly used by large organizations for head count planning and management.

Positions are imported from a Human Resource Management System (HRMS) in Recruiting via the integration service. Positions cannot be created nor edited by system administrators.

Positions appear in the Recruiting Administration menu, under Position List once the setting Enable Position is enabled.

Position in the Create Requisition Assistant Tool

The Position field can be configured to appear in the Create Requisition Assistant tool when recruiters create requisitions. For that, the "Enable Position" and the "Select a Position when creating Requisitions (if concept of Position is activated)" settings must be enabled, and the Position field must be made available in Recruiting (Configuration > Recruiting Administration > Fields > Requisition). When a recruiter creates a requisition, the list of positions displayed depends on the recruiter's permissions. If the recruiter can create requisitions without any restriction, then all compatible positions are displayed and available. If the user's permission is limited to template-linked positions, then only those are displayed. Note that in prior releases, the Create Requisition Assistant tool would display either the Requisition Template selector or the Position selector because positions were linked to requisition templates.

Position in Requisitions and Offers

The Position field can be configured to appear in requisitions and offers. For that, the Position field must be made available in Recruiting for requisitions (Configuration > Recruiting Administration > Fields > Requisition) and for offers (Configuration > Recruiting Administration > Fields > Offer), and the Position field must be added to the requisition file (Configuration > Recruiting Administration > File Configuration> user-defined Files) and the offer form (Configuration > Recruiting Administration > Fields > Offer Field Layout). When the Position field appears in a requisition, the recruiter, when creating an offer for that requisition, can copy the value originating from the requisition or select a different value. A different position can be selected for each offer within a same requisition. When a candidate is hired, the position included in the offer can be exported to the HRMS system for a New Hire record to be created.

Note: The Position OLF has priority over the Position Template OLF.

Position Settings and Permissions

Setting	Description	Default Value	Location
Enable Position	Activates the concept of position throughout the system and allows the auto-filling of requisitions based on position information.	No	Configuration > [Recruiting] Settings
Select a Position when creating Requisitions (if concept of Position is activated)	Determines if the user can select a position when creating a requisition and where the concept of position is activated.	Yes	Configuration > [Recruiting] Settings

Permission	Constraint	Location
Create Requisition	• Only from a requisition template or template-linked position (all requisition types, except contingent) • • Only from a requisition template or template-linked position (contingent recruitment)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Viewing Information on a Position

Before you start

The *Enable Position* setting must be activated.

Configuration > **[Recruiting] Administration** > **Position List**

Here's what to do

1. In the Position List page, click on a position.
2. View the information. Information such as the position ID, position title, Organization-Location-Job Field structure associated to a position is available.
3. Click Close.

Using Pay Basis

Pay basis values are available in the Recruiting Administration menu, under Pay Basis List.

The following Oracle-sourced pay basis values are available. These pay basis values can be deactivated. For backward compatibility reasons, the values Yearly (default value) and Hourly cannot be deactivated.

- Biweekly
- Daily
- Hourly
- Monthly
- Semimonthly
- Total
- Weekly
- Yearly

Pay basis values can be imported from an external HRMS system. Contrary to Oracle-sourced values, the only way to deactivate an imported pay basis, even after it has been used, is via integration. Once deactivated, an imported pay basis will remain displayed on the Pay Basis list but marked as "Inactive".

For each pay basis, the following information is available:

- Code of the pay basis (mandatory and must be unique).
- Name of the pay basis in all the languages used in the company.
- Annualization factor (mandatory).
- Currency (imported pay basis values only).
- Worker legal employer (imported pay basis values only).
- Status.

Note: Oracle-sourced values cannot be configured to contain currency and worker legal employer information.

When configuring the offer form, system administrators should position the Pay Basis, Salary (Pay Basis), Annualized Salary and Currency fields together as a group since they are linked via calculation. Ideally, these fields should be laid out in the sequence order that most users would expect to enter the information.

When configuring the Compensation block (used by the requisition file), system administrators should allow more space for the Pay Basis field. The Annualization Factor always accompanies the Pay Basis field and it is displayed underneath. If not enough room is available, the Annualization Factor value will not be displayed.

Pay Basis in Requisitions and Offers

Recruiters define a pay basis when creating requisitions or offers.

When only Oracle-sourced pay basis values are available in the system, the recruiter selects a pay basis using a drop-down list. When Pay Basis values have been imported in the system, the recruiter selects a pay basis using a selector. The Pay Basis Selector page contains both Oracle-sourced values and imported values. The selector provides quick filters and displays the code, name, and annualization factor (if enabled) of each pay basis as well as the worker legal employer and currency if those values are set for the selected pay basis (and if these fields are configured as available).

When a Pay Basis value is selected, the corresponding annualization factor (if enabled) is displayed under the Pay Basis field. When mousing over the value in view mode, a window displays details such as name, code, and annualization factor (if enabled).

When creating an offer, the recruiter enters a salary in the Salary (Pay Basis) field. The recruiter can specify a Pay Basis value different than the one defined in the requisition. The recruiter can click the Calculator icon to calculate the corresponding annualized salary. The system fills-in the calculated value based on the annualization factor. If currency information is available for the selected pay basis, the Currency field automatically populates with that value and cannot be edited. If no currency was configured, the Currency field is empty and is editable.

Displaying the Annualization Factor

The Annualization Factor field is a read-only field. The annualization factor is obtained by calculating the annualized salary off of a salary based on the selected pay basis (or vice versa). For example, if the pay basis is weekly, the annualization factor is 52 since there are 52 weeks in a year.

System administrators can configure the display of the Annualization Factor field in requisitions and offers. Two Recruiting settings are available:

- Requisition Annualization Factor
- Offer Annualization Factor

By default, the Annualization Factor field is not displayed. When enabled, the Annualization Factor field appears next to the Pay Basis field in edit and view modes. The Annualization Factor field is displayed for informational purposes only. If the field is not displayed, the calculator in the offer grid will still consider it in its calculation.

HRMS Worker Information

HRMS worker-related fields can be imported in Recruiting for use in requisitions, requisition templates, offers, correspondence, requisition lists and candidate lists.

The following HRMS worker-related fields can be imported:

- Worker Business Unit
- Worker Grade
- Worker Job
- Worker Legal Employer

Once values are imported, they are available to be viewed in Recruiting Administration, under General Configuration.

When a recruiter creates a requisition, the selection of worker-related values is performed via a selector. The selector provides quick filters to quickly filter the list down to relevant information. When mousing over a selected value on the requisition, a pop-up window containing details such as name and code is displayed.

When a recruiter creates an offer, the recruiter can decide to specify a worker-related field whether or not it was originally identified in the requisition. Also, if a worker-related field was specified in the requisition, it is possible to specify a different value in the offer. A different worker-related field can be selected for each offer within a same requisition. When a candidate is hired, the worker-related information included in the offer can be exported to the HRMS system to be included as part of the new hire (or other) record

If worker-related fields are used, they should be positioned together as a group on the requisition and the offer.

4 Users

User Account Management

User Account

A user account is created for each user who has access to Oracle Taleo Enterprise Edition applications on a regular or occasional basis.

User accounts are defined by system administrators in SmartOrg. (Navigation: Configuration > [SmartOrg] Administration > [Users] User Accounts.) When creating a user account, system administrators define several elements.

Element	Description
Personal Information	Basic information such as first name, last name, title, employee ID. The Employee ID field is necessary in order to create the employee record when being fed over from an external system. Address information. Email information. The Email Address and Current logged-in user password fields are mandatory. If the zone uses Taleo login, the field Current logged-in user password is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not displayed. Phone information. Department information.
Employee Information	Used for Performance and Dynamic Approval Routing. Once information in this section is provided, both an employee and a candidate file are created for this user and this operation cannot be reverted. Note that only employees can be users of Taleo Performance. Fields to complete are: • Employee picture • Employee status • Employee manager • Organization, Location, Job Role Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode.
Account Information	Contains information such as user name, password, external user identifier. This is where you can perform actions such as generating a new password, deactivating the user account, locking the user account, transferring and delegating tasks to another user.

Element	Description
	The Current logged-in user password field is mandatory. If the zone uses Taleo login, the field Current logged-in user password is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not displayed.
User Types	User types assigned to the user account. Each user account is assigned at least one user type for which a series of permissions are granted.
User Groups	User groups to which the user is part of.
Coverage Areas	Functional domains to which a user has access. For example, development plans and goal plans in Performance, requisitions and search in Recruiting. Functional domains are tied to Organizations, Locations and Job Fields. The configuration is not mandatory.
General Preferences	General preferences are assigned to each user account, for example, frequent collaborators and approvers, preferred content language.

User Account General Preferences

General preferences are assigned to each user account.

A user's general preferences are defined by system administrators in the User Account feature available in SmartOrg. Most general preferences can be modified by users in Recruiting, in the My Setup feature, to fit their personal preferences.

Certain user account general preferences are tied to a configuration setting. When this is the case, the setting sets a value for an entire zone, the user account general preference sets a value for a specific user, then that specific user can set his/her own personal preference (see table below).

> **Note:** It is important at deployment to review the defaults for the Default Recruiter and Default Hiring Manager user preferences in My Setup. By default, if there is no Default Recruiter or Default Hiring Manager specified for a user's preference, when the user creates a requisition he/she will be automatically listed as the "Recruiter" on the requisition. If a user has his/her name in the Default Hiring Manager field, this will take precedence and the user will have his/her name appear in the Hiring Manager field rather than the Recruiter field. For proper behavior of managers, it is recommended to specify this information automatically upon integration imports of manager User data.

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Accessibility Features	Accessibility Features	Accessibility Features	
Candidate List Content		Candidate List Content	By default, shows only candidates that are in selection process (if relevant).
Content Language	Content Language	Content Language	

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Correspondence Language	Correspondence Language	Correspondence Language	
Country			
Default Distance Unit	Default Distance Unit	Default Distance Unit	
Default Hiring Manager		Default Hiring Manager	See Note above.
Default Recruiter		Default Recruiter	See Note above.
Default Text Size	Default Text Size	Default Text Size	
Default Theme	Default Theme	Default Theme	
Display candidates on first CSW step			
Display Question Details in Libraries		Display Question Details in Libraries	
Enable eShare Email for Response Center Access	Enable eShare Email for Response Center Access	Enable eShare Email for Response Center Access	
Enable Recruiting Activity Monitoring			
Fax Notification	Fax Notification	Fax Notification	Sends notifications to users by fax, not by email.
Frequent Collaborators		Frequent Collaborators	
Identifier Content		Identifier Content	
Integration Profile Type		Integration Profile Type	
Last Update		Last Update	
Offer Frequent Approvers		Frequent Approvers - Offer	
Place of Residence		Place of Residence	
Preferred Non-Electronic Media		Preferred Non-Electronic Media	
Requisition File Automatic Filling		Requisition File Automatic Filling	Indicates if the user will use the "automatic filling" option of the requisition file.
Requisition Frequent Approvers		Frequent Approvers - Requisition	
Selected Item Default Color	Selected Item Default Color	Selected Item Default Color	
Sorting Key		Sorting Key	
SSO Preferred Application Language			Allows users who log in using Single Sign-On to change their application language.
Tab displayed when accessing a candidate file from a list		Tab displayed when accessing a candidate file from a list	

User Account General Preference (SmartOrg Administration > User Accounts > General Preferences)	Setting (Configuration > Settings)	User Personal Preference (Recruiting Center > Resources > My Setup)	Comments
Tab displayed when accessing a candidate file in navigation		Tab displayed when accessing a candidate file in navigation	
Time Zone	Time Zone	Time Zone	
When managing by candidate		When managing by candidate	
When managing by offer		When managing by offer	
Workflow Event Notification	Workflow Event Notification	Workflow Event Notification	Keeps the user informed of workflow events by email.
Zip Code			Used in search preferences, with the location (place of residence) and last update.

User Account Status

A user account is assigned a status.

- Active: Only the name and description can be modified.
- Inactive: Only the status can be modified. The only possibility is to go back to the Active status. Inactive users cannot be selected.
- Deleted: The user account has been deleted.
- Locked: The user account has been locked. The user cannot access Oracle Taleo Enterprise Edition products.
- Expired:

Employee Information

Employee information is specific to Performance and to Recruiting for the Dynamic Approval Routing feature.

Employee information is defined in the User Accounts feature available in SmartOrg.

Certain fields in the Employee Information section are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

If inserting a picture of the employee, the file limit is 20 KB and the only supported format is .jpg. Note that the uploaded file is cropped from the center to obtain a square (so make sure the picture is correctly centered) and it is then resized to 48 X 48 pixels which results in about 5 KB.

An employee can have one of the following statuses:

- New: New employees currently in an onboarding process.
- Current: Default value.
- Former Employee

If no data is entered in the Job Role and Employee Status fields, default values are assigned automatically by the system, which are Employee and New respectively.

Any time one of the following events occurs, an entry is added to the Employee History section: updates to employee status; updates to manager, new organization or location; new job role. An entry is recorded whether the change was made directly on the user account page, in Performance or through SmartOrg integration. The Employee History section is only displayed in Show mode.

User Account - Other Configuration Tasks

Creating a User Account

Before you start

The *Manage user accounts* user type permission is required.

In the Employee Information section, certain fields are not mandatory. However, when fields in this section are populated, the Organization and Location fields become mandatory.

In the Employee Information section, if no data is entered in the Employee Status and Job Role fields, these fields will be populated with their default values, Current and Employee.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click Create.
2. Specify the language in which you want to create the user account.
3. Complete the fields in each section presented by the User Account Wizard.
4. Click Next to navigate between sections.
5. Click Finish.

Results:

The user account appears in the User Accounts list.

If the Employee Information section is completed, the user's profile is updated and the person is considered an "employee." Employees are used in Performance and the Dynamic Approval Routing.

Editing a User Account

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Edit next to the section you want to modify.
3. Make required changes.
4. Click Save.

Activating a User Account

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Activate in Account Information.
3. Click Yes.

Deactivating a User Account

Before you start

The *Manage user accounts* user type permission is required.

You need to transfer the user's tasks to another user.

This feature may be useful for contract or temporary workers who assist on a assignment but who may leave and later return to an organization. When these workers return, you can reactivate the user account without having to reset their group association (because they are still tied to their user groups).

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Deactivate in Account Information.
3. Click Yes.

Deleting a User Account From the User Account Page

Before you start

The Manage user accounts - Including HMRS fields user type permission is required..

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Locate the user in the User Accounts list.

2. Click Delete in the Actions column.
3. The action(s) you perform next vary depending on whether the user account is associated with an employee.
    - If the user account is associated with an employee who owns requisitions, templates or folders, or was assigned yet uncompleted actions, or reports to a manager, or has pending tasks or work items, perform the steps in the wizard.
    - If the user account is associated with someone for whom none of the previous conditions applies, click Yes.

Results:

Once deleted, the user account status is set to Deleted and the user account is deactivated.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Using the Wizard

Before you start

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click the user account you want to disable.
2. In the Employee Information section, click Terminate.
   The wizard is displayed.
3. Perform the steps in the wizard.

Results:

The user account has Deleted status and therefore is no longer displayed on the User Accounts page if Active is selected in the View field. The Employee Status value is changed to Former Employee.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Deleting the User Account of an Employee Manually

Before you start

The Manage users - Including HMRS fields user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click user account you want to disable.

2. Edit the Employee Information section as necessary.
3. Set employee status to Former Employee.
4. Provide a termination date.
5. Remove the manager.
6. Transfer direct reports to another manager if applicable.
7. Transfer ownership of talent pools and positions to another user.
8. Transfer pending tasks to another user.
9. Return to the User Accounts page, locate the user account in the list and click the corresponding Delete in the Actions column.
10. Click Yes.

Results:

Once deleted, the user account status is Deleted and the user account is deactivated.

What to do next

To permanently delete employee data related to the employee, including employee metrics and all Performance data (as might be required in EMEA and other regions), see Employee Information Deletion Task.

Assigning a User Type to a User Account

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Edit next to User Types.
3. Click Add next to User Types.
4. Select one or several user types.
5. Click Select.

Results:

The user types appear in the User Types list.

Removing a User Type Assigned to a User Account

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Edit next to User Types.
3. Click Remove next to the user type.

Results:

The user type is no longer displayed.

What to do next

Assigning a user type to the user account.

Associating a Configuration Profile to a User Account

Before you start

The *Manage user accounts* user type permission is required.

Each user account is assigned one configuration profile. If no configuration profile is used, the default value of each setting is used.

Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Edit next to Account Information.
3. Choose a configuration profile.
4. Click Save.

Assigning a Coverage Area

Before you start

The *Manage user accounts* permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click a user account.
2. Click Create next to Personal Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the desired functional domains then click Select.
5. Click Save.
6. If desired, specify organizations, locations and/or job fields for the coverage area.

   If no Organization-Location-Job Field structure is specified, then the coverage area will apply to all organizations, locations and job fields .

Locking a User Account

Allows a system administrator to lock a user account if, for example, the user was fired.

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Lock in Account Information.
3. Click Yes.

What to do next

Deactivating the user account.

Transferring the user's tasks.

Unlocking a User Account

Allows a system administrator to unlock a user account if, for example, a user enters an incorrect password too many times and the system locks the account.

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Unlock in Account Information.
3. Click Yes.

Generating a Password

Allows a system administrator to generate a password for a user if, for example, the user does not have his/her username handy or does not have an e-mail address to receive a temporary access code.

Before you start

The *Manage user accounts* user type permission is required.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Generate Password.
3. Specify if you want to send the password in an e-mail. The user will be forced to change his/her password at next login.
4. Enter your password in the Current logged-in user password field.

   If the zone uses Taleo login, the field is displayed and you must provide your credentials to modify the user's password. If the zone is configured to use SSO, the field is not be displayed.

5. Click Yes.

Results:

The newly created password displayed on screen is masked with asterisks to protect the information from potential shoulder surfing attacks. You can momentarily select the "Show password" check box to view the password when it is considered safe to do so.

Task Delegation

Users may have the ability to delegate tasks to another user for a short preset period of time.

Task delegation is useful during the time a user is on vacation or on a sick leave. When selecting a user (new owner) to whom tasks will be delegated, the following rules apply:

- The new owner must have the same user type permissions (constraints not included) as the current owner.
- The new owner must be at least in all the same groups as the current owner.
- If the current owner is an eShare user (not a Taleo application user), the new owner must also be an eShare user.

Note: When a user delegates tasks to an alternate user, if the user is a collaborator on a requisition, the alternate user must also be made collaborator on that requisition in order to perform the same actions as the user. The system does not automatically allow the delegated to interact as a collaborator on behalf of the original user.

Delegating Work Items

Before you start

The *Manage user accounts* user type permission is required.

For a user to be valid for delegation, the following rules must be applied:

- The new owner must be different from the current owner.
- It is always possible for a Recruiting Center user to be the new owner.

Configuration [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Delegate in Account Information.
3. Select a user.
4. Select From and To dates.
5. Click Save.

Transferring Work Items

Before you start

The *Manage user accounts* user type permission is required.

If the work items transferred belong to an employee, the designated user must also be an employee.

The owner of the work items transferred must have the same user type as the designated user.

Configuration > [SmartOrg] > Administration > User Accounts

Here's what to do

1. Click a user account.
2. Click Transfer in Account Information.
3. Select a user.
4. Click Save.

Results:

Tasks have been transferred permanently to another use.

What to do next

Deleting the user account.

User Type Management

User Type

A user type is composed of a set of permissions from multiple functional domains. These permissions provide access to various products and control what a user associated to the user type can do.

User types are centrally managed in SmartOrg for all products. Default user types are provided with the system. System administrators can also create new user types.

Users are assigned a user type and one user can be associated to several user types. For example, the Recruiter and Administrator user types for Recruiting, and the Manager user type for Performance.

Note:

- It is recommended to leave untouched the default user types.
- When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.
- If possible, use a single user type which combines all necessary permissions.

User Type Permission

User type permissions grant users access to specific features and contexts in a product or application.

Permissions are organized by functional domains (core products):

- Recruiting
- Integration
- Configuration
- Performance
- Grid
- Compensation
- Learning
- Reporting and Analytics
- Mobile
- Common

Functional domains are then separated into sub-domains. Depending on the amount of permissions in a sub-domain, permissions may be grouped into sections. When permissions are grouped into sections, system administrators can select the desired section in a drop-down list and quickly see the permissions grouped in that section.

Example of how permissions are organized in a functional domain	
Functional Domain	Recruiting
Sub-Domain	Requisitions
Section	Requisition Types
Permission	Allow access to professional requisitions
Permission	Allow access to hourly requisitions
Permission	Allow access to campus requisitions
Permission	Allow access to contingent requisitions
Permission	Allow access to executive requisitions

Example of how permissions are organized in a functional domain	
Permission	Allow access to pipeline - general requisitions
Permission	Allow access to pipeline - executive requisitions

Functional domains are displayed in bold when permissions have been granted. Also, the Expand All button allows system administrators to see at a glance all domains, sub-domains and permissions granted to a user type.

If a system administrator modifies the permissions associated with a user type, the changes affect all users who have been assigned the user type.

For a list of default user types and their default permissions, refer to the document entitled *Default User Types and Permissions*.

Default Recruiting User Types

Default recruiting user types are supplied with the system.

These default user types are the ones recommended by Oracle as a starting point for system operability and represents traditional usage patterns. It is recommended to leave untouched the default user types. Sourcing database zones come with these default user types. For existing and migrating zones, these user types can be manually created if desired. Once created, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.

Code	Name	Description
REC_APPROVER	Recruiting - Approver	The Approver does not have access to Oracle Taleo Enterprise Edition. He is in the system only so he can be added to approval path and have the ability to approve requisitions and offers. Depending on each organization's specific needs, you may wish to duplicate this user type and remove or add permissions. This default user type provides a good starting point for other Recruiting management roles.
REC_CONTENT_ADMIN	Recruiting - Content Administrator	The Content Administrator has permissions for all content related features such as templates and questions library as well as for the correspondence management module.
REC_HIRING_MANAGER	Recruiting - Hiring Manager	A Hiring Manager has limited permissions within the Recruiting Center to manage his own hiring cycles. Depending on each organization's specific needs, you may wish to duplicate this user type and remove or add permissions.
REC_RECRUITER	Recruiting - Recruiter	A Recruiter has permissions for most features and functions within the Recruiting Center, but has limited ability to manage prescreening libraries and templates. Depending on each organization's specific needs, you may wish to duplicate this user type and remove or add permissions. This default

Code	Name	Description
		user type provides a good starting point for other Recruiting management roles.
REC_SYSTEM_ADMIN	Recruiting - System Administrator	The Recruiting Administrator has permissions for virtually all recommended features and functions in the Recruiting and Configuration centers.

For a list of all default user types supplied for Oracle Taleo Enterprise Edition products, refer to the document entitled *Default User Types and Permissions*.

User Type - Other Configuration Tasks

Creating a User Type

Before you start

When creating a user type, it is recommended to duplicate an existing user type that has been validated in the zone already to work properly.

The *Manage user types* user type permission is required.

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

Here's what to do

1. Click Create.
2. Enter a code and a name.
3. Enter a description to clarify the intent of the user type.

   The description is displayed in the user type selector and listed under the user account definition page.
4. Select Active from the Status list so it can be added to user accounts and groups, otherwise select Inactive.
5. Click Save.
6. Click the Arrow icon beside the functional domain you want to configure and click Edit to display the user type permissions.
7. Select the required view and manage permissions and click Save.

Activating a User Type

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Click a user type.

2. Click Edit next to Properties.
3. Select either Active or Inactive from the Status list.
4. Click Save.

Results:

If changed to Active, the user type can now be associated with a user account or group and the status Active appears in the User Types list. If changed to Inactive, the user type cannot be associated to any new user accounts or groups, but will remain valid for those it is already associated with.

Deactivating a User Type

Before you start

The *Manage user types* user type permission is required.

The user type must have the Active status.

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

Here's what to do

1. Click a user type.
2. Click Edit next to Properties.
3. Select Inactive in the Status field.
4. Click Save.

Results:

The status Draft appears in the User Types list.

Duplicating a User Type

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Locate the user type you want to duplicate.
2. From the Actions column, click Duplicate for the user type.
3. Change the code, name and description as required.

   When you have more than one language, after entering the name for the initial language, click Refresh and select the next language from the list and click Refresh again. Enter the required value for that language and then choose the next language, click Refresh and repeat the process.
4. Click Save.

Results:

On the user type definition page, your actions are displayed in the History section. On the User Types page, the new user type is displayed and its status is Active.

Editing a User Type Properties

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Click a user type.
2. Click Edit next to Properties.
3. Make the required changes to the code, name and description.
4. Click Save.

Dissociating All Users from a User Type

Before you start

The *Manage user types* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. In the Refine by field, select User Type.
2. In the adjacent field, enter a word or part of a word found in the name of the user type you want to delete.
3. Click Refresh.
4. Click a name displayed in the User Accounts list.
5. Click Edit next to User Types.
6. Locate the user type you want to remove and click Remove in the Actions list.
7. Click Save.
8. Repeat steps 4 to 7 for each user who has the user type you want to delete.

Results:

The user type is no longer displayed in the User Types list.

Deleting a User Type

Before you start

The *Manage user types* user type permission is required.

You can delete a user type provided no users are associated with the user type.

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

Here's what to do

1. Locate the user type you want to delete.
2. Click Delete in the Actions column.

Results:

The user type is no longer displayed in the User Types list.

Granting a User Type Permission

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Click a user type.
2. Click a functional domain.
3. Click Edit next to the sub-domain.
4. Select the permissions you want to grant.
5. Click Save.

Results:

All users assigned with this user type now have the selected permissions.

Revoking a User Type Permission

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Select a user type.
2. Click the functional domain (and in some cases the sub-domain) containing the permission.
3. Click Edit next to the section containing the permission you want to revoke.
4. Clear the check box next to the permission you want to revoke.
5. Click Save.

Results:

On the user type definition page, your actions are displayed in the History section. The users who have the user type will no longer have the permissions you revoked.

User Group Management

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.

User groups are used in Recruiting, Performance, and Reporting and Analytics.

The creation of groups typically simplifies the work of an organization because each group has access only to the information that its members need.

One group, called the Main Group, is created by default for all users within an organization. The Main Group's Organization- Location-Job Field structure cannot be modified.

The creation of user groups by system administrators involves:

- Defining a name for the group.
- Selecting users belonging to the group.
- Defining the coverage areas of the group to specify the product areas to which the group has access, that is selecting domains and sub-domains and linking them to organizations, locations and job fields.

For Reporting, group creation also involves:

- Creating a folder in Business Objects.
- Selecting groups that have the reporting domain tied to it to define who gets access to the reports within that folder.

Special rules regarding user groups:

- Users should be removed from the Main Group after being added to a specific group.
- To gain access to elements associated to a particular group, users must belong to that group.
- It is possible to delete a group only if all its members belong to at least one other group.
- It is not possible to delete a group if a user is associated to this group.
- It is not possible to delete a group if elements (such as requisitions) remain associated to the group.
- If a user is removed from a group and the user owns one or more element (such as requisitions) associated with this group, the elements will appear in red in the system (for example, in the requisition list) to indicate that there is a conflict.

System administrators have the ability to assign a default user group to newly created users. The Default User Groups setting, available under the General Configuration settings, can be used to indicate which user group new users will be automatically assigned. The default user group is automatically assigned only when no user group was manually assigned during the user account creation process. When the setting value is left empty, no default user group is assigned when creating new users. See *Assigning a Default User Group*.

User Group Management

User groups are used in Recruiting, Performance and Reporting and Analytics.

- Recruiting Center
  - It is possible to create a user and to not link the user to a user group. In Recruiting Center, it is recommended that users belong to at least one user group if they are a recruiting user who creates, approves or manages requisitions. If a user is authorized to search, the user will be able to view candidates of all Organization-Location-Job Field structures unless a user group using the recruiting search domain.
  - Search and requisition are independent domains that can be individually applied to a user group.
  - If users do not belong to a group linked to the Requisition domain, and they are a Recruiting user, the user will only see requisitions they own or collaborate on or without restriction (All) if so authorized. The user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. In addition, the user will not see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view.
- Performance
  - Users will only see the data of the domain that belongs to their group, provided they have the proper user type permission.
  - It is possible to create a user and not link the user to a group for a given domain. For all sub-domains (except for the Employee Succession Search) users will not be able to see information in or by group, even if their user type permission state otherwise – since there are no groups linked to the user to view. If a user is authorized to search (sub-domain Employee Succession Search), the user will be able to view employees of all Organization-Location-Job Field structures.
- Reporting and Analytics
  - The reporting administrator creates documents within the reporting and analytics environment. These include Web Intelligence Documents, Analytics, Advanced Analytics, Single Dashboards, Tiered Dashboards, Hyperlinks, Desktop Intelligence Documents and imported files (PDF, XLS, DOC, TXT, etc…)
  - Each reporting document is filed into a "folder."
  - Each reporting folder can be linked to one or more reporting groups containing the reporting domain.
  - Users can belong to one or more groups that have the reporting domain associated, Reporting Administrator ties these groups to reporting folders where reporting and analytic documents are filed.
  - Users only have access to the documents included in the folders to which their group(s) are linked. With the exception of reporting administrators, if a user has no groups linked to a reporting domain, he/she will not be able to see any reports.
  - When generating a report data presented is still derived by user's access in that application (Recruiting Center or Performance)

Creating a User Group

Before you start

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click Create
2. Complete the New Group page.
3. If your organization activated more than one language, enter values for each of the other languages, being sure to click Refresh after you select a new language and before you enter the values for that language.
4. Click Save.

Results:

The system displays the user group. If you display the list of user groups, the new user group appears there.

Adding a User to a User Group

Before you start

The *Manage groups* user type permission is required.

You must create a user group before you can add users to it.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Add next to Users.
3. Click the check box next to each user you want to add to the user group.
4. Click Select.

Results:

The user is displayed in the Users list.

Removing a User from a User Group

Before you start

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Show next to Users.
3. In the Actions column, click Remove next to the user you want to remove.

Results:

The user is no longer displayed in the Users list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

If you remove a user from a group and the user owns one or more requisitions associated with this group, the requisitions will appear in red in the Requisitions list to indicate that there is a conflict. To revert the situation, re-enter the owner of the requisitions in the group, reassign each requisition owned by this user to a new user who belongs to the same group, reassign each requisition owned by this user to a group to which the owner used to belong.

Deleting a User Group

Before you start

The *Manage groups* user type permission is required.

It is not possible to delete a group if requisitions or templates remain associated to the group.

Configuration > **(SmartOrg) Administration** > **User Groups**

Here's what to do

1. In the User Groups list, locate the user group you want to delete.
2. Click Delete in the Actions column.
3. Click Yes.

Results:

The user group is removed from the User Groups list.

Assigning a Default User Group

Before you start

Configuration > **[General Configuration] Settings**

Here's what to do

1. In the Refine by field, select Name.
2. Type Default User Group in the field.
3. Click the setting name.
4. Click Edit.
5. Click Add.
6. Select one or multiple user groups.
7. Click Select.
8. Click Done.

Results:

When creating new users, the selected user groups will be assigned if no user group was manually assigned during the user account creation process.

Coverage Area

A coverage area is a combination of functional domains, Organizations, Locations and Job Fields that together determine the scope of information available to a specific user group.

The coverage areas of a group define exactly what kind of information is available to the group's members. A coverage area typically contains domains (and perhaps subdomains), which are core products, and Organizations, Locations and Job Fields. The combination of domains, Organizations, Locations and Job Fields associated with a coverage area determine the scope of information available to the group for that area.

Adding a Coverage Area to a User Group

Allows the system administrator to limit the information available to a user group by specifying core products and Organizations, Locations and Job Fields.

Before you start

The *Manage groups* user type permission is required.

You must create a user group before you can add coverage areas to it.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Create next to Coverage Areas.
3. Click Add next to Functional Domains.
4. Select the domain/subdomain you want to make available to the user group.
5. Click Select.
6. Click Save.

Results:

The domains you selected are displayed in the Functional Domains section of the Coverage Area page.

Removing a Coverage Area from a User Group

Allows a system administrator to reduce the kinds of information currently available to the user group.

Before you start

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click Remove next to the coverage area you want to remove.
4. Click Yes.

Results:

The coverage area is no longer displayed in the Coverage Areas list. The History section is not updated automatically but if you move to a different page and then display the user group definition page anew, the action you performed is displayed in the History section.

Adding Organizations, Locations and Job Fields to a Coverage Area

Allows the system administrator to further define which information will be available to members of the user group according to organizations, locations and job fields.

Before you start

The *Manage groups* user type permission is required.

You must add functional domains to a coverage area before you can add Organization, Location and Job Field values.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. On a Coverage Area page, click Add next to the type of item you want to add: Organizations, Locations or Job Fields.
2. After the system displays the corresponding selector page, click the check box next to each item you want to add to the coverage area.
3. Click Select.
4. You can repeat the previous steps if you added Organization elements, for example, and you also want to add Location and Job Field elements.

Results:

The Organization, Location and Job Field elements you added are displayed in the corresponding sections of the Coverage Area page.

Removing Organizations, Locations and Job Fields from a Coverage Area

Before you start

The *Manage groups* user type permission is required.

Configuration > **[SmartOrg] Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click a coverage area.
4. On the Coverage Area page, click Remove next to the item you want to remove.

Results:

The Organization, Location or Job Field element you removed is not longer displayed in the corresponding section of the Coverage Area page.

Reducing the Scope of a Coverage Area

You can remove functional domains, Organizations, Locations and Job Fields if you want to reduce the scope of a coverage area.

Before you start

Configuration > **(SmartOrg) Administration** > **User Groups**

Here's what to do

1. Click a user group.
2. Click Show next to Coverage Areas.
3. Click the coverage area you want to modify.
4. You can perform any of the following steps.
    - To remove a functional domain, Organization, Location or Job Field, click the corresponding Remove in the Actions column.
    - To remove all Organizations, all Locations or all Job Fields, click Remove All next to the corresponding item.

Results:

The items you removed are no longer displayed the Coverage Areas page. The actions you performed are displayed in the History section of the user group definition page.

Configuration Profile

Configuration Profile

A configuration profile is a set of settings which control how the application behaves for a specific set of users to better fit the user experience.

It is through the configuration profile that different product behaviors can be achieved such as a streamlined manager product experience vs. a more robust recruiter product experience. Users may have the same set of permissions which grant access to specific features, but how a user is presented access to the features is then further controlled by the configuration profile designation.

In addition to user types (which define user access to specific features via permissions and product access) and user groups (which further define access to elements and functions based on Organization-Location-Job Field, users are assigned a configuration profile which defines what they will see in the Recruiting Center.

Configuration profiles are created in SmartOrg. Once created, a configuration profile is assigned to Recruiting Center users via their user account. Therefore, depending on the user signing into the application, elements displayed to the user will vary depending on the configuration profile associated to the user.

Three default configuration profiles are provided:

- Recruiter
- Hiring Manager
- Hourly Manager

System administrators can edit the settings for these default configuration profiles and can also create new configuration profiles. Changes made to a configuration profile are applied the next time a user linked to this configuration profile logs in. For a list of configuration profile settings, see *Configuration Profile Settings*.

System administrators have the ability to assign a default configuration profile to newly created users. The Default Configuration Profile setting, available under the General Configuration settings, can be used to indicate which configuration profile new users will be automatically assigned. The default configuration profile is automatically assigned only when no configuration profile was manually assigned during the user account creation process. When the setting value is left empty, no default configuration profile is assigned when creating new users. See *Assigning a Default Configuration Profile*.

Configuration Profile Settings

Configuration Profile Setting	Description
About Link in Auxiliary Menu	Display the about link in the auxiliary menu.
Advanced Search "Save Query" Button	Displays the "Save Query" button in the advanced search page.
Advanced Search Links	Displays the advanced search links.
Advanced Search Toolbar	Displays the advanced search toolbar.
Auxiliary Navigation Bar	Displays the auxiliary navigation bar.
Candidate File Creation	Indicates the files used to create a candidate.
Candidate List Format	Candidate list format available for users having this configuration profile.
Center Stage - Separator Line	Display a line between the Welcome title and the content of the main center stage (this line helps to help distinguish the title from the body portion of the page).
Center Stage - Welcome Title	Display the Welcome message when users first log in and are presented the Recruiting center stage.
Center Stage Configuration	Determine which center stage combination is used.
Center Stage Footer Text	Indicates if the center stage footer is displayed.
Communication Channel - Custom Link	Contains the link text towards the custom page in the communication channel.

Configuration Profile Setting	Description
Communication Channel - Custom Link Tooltip	Contains the tooltip text for the link towards the custom page in the communication channel.
Communication Channel - Custom Link URL	Indicates the URL of the custom page in the communication channel.
Communication Channel - Custom Text	Contains the text to be displayed in the custom communication channel.
Communication Channel - Custom Title	Contains the title to be displayed in the custom communication channel.
Communication Channel - HTML Custom URL	Indicates the URL of the HTML custom page in the communication channel.
Communication Channel Mode	Indicates the "Communications" channel mode to be used.
Core Navigation Bar	Displays the core navigation bar.
Customer Support Section	Enable the customer support section.
Customer Support Text	Contains the text to be displayed in the customer support section.
Default "Advanced Search" Field Configuration	Displays the selection of fields that are available to the user when performing an advanced search.
eLearning Section URL	Indicates the target URL to the eLearning section.
Oracle Support Link in Auxiliary Menu	Display the Support link in the auxiliary menu.
Recruiting Header Text	Displays the Recruiting header text.
Release Notes	Display the release note information when accessing the application, according to the user's profile.
Requisition File Automatic Filling	I want to use the "automatic filling" option of the requisition file.
Requisition File Creation	Indicates the files used to create a requisition.
Requisition List Format	Requisition list format available for users having this configuration profile.
Search Widget	Displays the search widget.
Default Value for the Show Information Filter	Determines the default value of the Show Information filter which controls the requisitions displayed in the Requisitions list and center stage channels. Possible values are: Requisitions I own (default); Requisitions I collaborate on; Requisitions I own or collaborate on; Requisition in my coverage area, I own or collaborate on; All requisitions.
Show information for Filter Visibility	Indicates whether the context filter control is displayed on the Recruiting requisition list and homepage.
Training Section URL	Indicates the target URL to the training section (Oracle University). The URL is http://education.oracle.com/pls/web_prod-plq-dad/ ou_product_category.getPage?p_cat_id=356.
View or Edit Requisition File	File used for viewing or editing a requisition.
Welcome Center Content	Indicates which customized content and layout will be used in the Welcome Center.

Creating a Configuration Profile

Before you start

The *Manage configuration profile* user type permission is required.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click Create.
2. Provide a code and a name.
3. Click Save.
4. Click configuration profile settings and set them as desired.
5. Click Save.

Activating a Configuration Profile

Before you start

A configuration profile must have the Draft or Deactivated status.

The *Manage configuration profile* user type permission is required.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click Activate.

Associating a Configuration Profile to a User Account

Before you start

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

Here's what to do

1. Click a user account.
2. Click Edit next to Account Information.
3. Select a configuration profile.
4. Click Save.

Deactivating a Configuration Profile

Before you start

A configuration profile must be activated.

The *Manage configuration profile* user type permission is required.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click Deactivate.

Deleting a Configuration Profile

Before you start

The *Manage configuration profile* user type permission is required.

The configuration profile must have the Draft or Inactive status.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click Delete next to the configuration profile.
2. Click Yes.

Assigning a Default Configuration Profile

Before you start

Configuration > **[General Configuration] Settings**

Here's what to do

1. In the Refine by field, select Name.
2. Type Default Configuration Profile in the field.
3. Click the setting name.
4. Click Edit.
5. Click Search.
6. Select a configuration profile.
7. Click Select.
8. Click Save.

Results:

When creating new users, the selected configuration profile will be assigned if no configuration profile was manually assigned during the user account creation process.

Configurable Employee Metrics

Configurable Employee Metrics

System administrators have the ability to define their own list of values for employee metrics used in the application.

Employee metrics can be configured in SmartOrg Administration under Configurable Metrics and used across the Oracle Taleo Enterprise Edition products. System administrators can manage the list of available values offered in the system for the following standard employee metrics:

- Employee Impact of Loss
- Employee Potential
- Promotability Readiness
- Reassignment Candidate
- Employee Risk of Loss

The following configuration capabilities are available:

- Creating, deleting, activating, and deactivating values.
- Reordering values.
- Changing the code and name of a value.
- Specifying a value as being the default value.
- Adding, modifying and removing the icon representing the value.

Creating a Configurable Metric Value

Before you start

Configuration > [SmartOrg] Administration > [Users] Configurable Metrics

Here's what to do

1. Click a metric.
2. Click Create.
3. Provide a code and a name.
   The name is mandatory and multilingual. Set the name in every supported language.
4. Select the Default value check box if you want the value to be the default value for the metric.
   A default value is automatically set when an employee is created or modified.
5. Add a metric value icon.

6. The icon is optional. It allows providing a graphical representation of the metric value. Products that support this option may display the icon instead of the metric label or both.
7. Click Save.

Reordering Configurable Metric Values

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configurable Metrics**

The display sequence is used to sort elements in the selection drop down when the employee is updated for a given metric.

Here's what to do

1. Click a metric.
2. Click Reorder.
3. Select a value.
4. Click the Up/Down arrow to move the value.

Activating a Configurable Metric Value

Before you start

To activate a metric value, its status must be Draft or Inactive.

Configuration > **[SmartOrg] Administration** > **[Users] Configurable Metrics**

Here's what to do

1. Click a metric.
2. Locate the metric value you want to activate and click the corresponding Activate in the Actions column.

Deactivating a Configurable Metric Value

Before you start

To deactivate a metric value, its status must be Active.

Configuration > **[SmartOrg] Administration** > **[Users] Configurable Metrics**

When a metric value is deactivated, products stop offering this value as a possible choice when updating an employee. However, it has no impact on employees being currently assessed on this value. Even if the value has been disabled, employees will still show this value until they are updated to another valid value.

Here's what to do

1. Click a metric.
2. Locate the metric value you want to deactivate and click the corresponding Deactivate in the Actions column.

Deleting a Configurable Metric Value

Before you start

A metric value can only be deleted if its status is Draft.

Configuration > **[SmartOrg] Administration** > **[Users] Configurable Metrics**

Here's what to do

1. Click a metric.
2. Locate the metric value you want to delete and click the corresponding Delete in the Actions column.

Employee Metrics Settings

Employee metric settings are used to configure how denormalized numerical scores are displayed in products.

Employee metric settings are available under Configuration > General Configuration > Settings.

Employee Metrics Settings	Description	Default Value
"Competency Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Competency Rating" metric.	Score
"Goal Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee - Goal Rating" metric.	Score
"Review Rating" Metric Rating Model	Indicates the rating model used to determine the available values for the "Employee – Review Rating" metric.	Score
Metric Rating Display	Indicates the display format of rating values, based on a set of predefined formats.	In numeric format
Metric Rating Model Rounding	Indicates the rounding percentage used to determine the rating value corresponding to a given score.	50

Three employee metrics are using denormalized numerical scores:

- Review Rating
- Goal Rating
- Competency Rating

A numerical score can be represented in various forms:

- As a percentage (%).
- In numeric format (4).
- In numeric format with rating scale (4 [1,5]).
- In text format (Excellent).

- In text and numeric format (Excellent (4)).

The display format is determined by the Metric Rating Display setting.

- If the setting is 1, then the score is displayed directly as a percentage.
- If the setting is 2, 3, 4, or 5, a rating model must be provided. The Metric Rating Model Rounding also indicates how to round the value to fit within a value of the rating scale.

5 Lists and Filters

List Format

List formats allow the display of candidate and requisition information within columns.

Default candidate and requisition list formats are provided with the application. However, system administrators can create new list formats to better suit their organization needs.

List formats are available in the List Formats page. Recruiting Center users can select (among the list formats made available by their system administrator) the list format they wish to use to display candidate and requisition information . They can also create up to three list formats and select columns to display specific information (if permissions were granted). Columns available to choose from have been previously defined by system administrators.

List Format Context

List formats are organized by context, that is pages in the system where candidate files and requisition files would be presented to Recruiting Center users.

List format contexts are provided by the system. System administrators cannot create new ones. A context can contain several list formats. The number of list formats that can be created for a context is defined by Oracle.

Type of List	Default List Format Contexts
Candidate	• All Candidates by Requisition List • All Candidates by Folder List • All Candidate by Offer List • List of automatically pooled candidates • Requisition Specific Candidate List • Candidate Capture/Possible Duplicates List • Search Results / Advanced Search • Search Results / Quick Search
Requisition	• Requisition List • Mini Requisition List

List Format Variation

Variations are used to organize list format contexts.

Three variations are available. Each Recruiting Center user is linked to a variation via their *configuration profile*.

Configuring List Formats

The configuration of a list format consists of the following steps.

1. *Configuring fields so they can be used as column headers in a list.*
2. *Creating the list format.*
3. *Displaying advanced filters in the list.*
4. *Displaying quick filters in the list.*
5. *Creating custom instructions for the list format context.*
6. *Assigning a list format variation to configuration profiles.*

Note: Be aware of the following specific field visibility behavior in candidate lists. Fields can be made visible for internal or external candidates (via the candidate security level permissions) and fields can be contextualized to appear only for certain Organizations-Locations-Job Fields or staffing types circumstances. As a result:

- When a field was not made visible to the user for both internal and external candidates, the column will appear but data will be blank for situations where the user should not see the data.
- When a field was made visible to the user for either internal or external candidates, the column will appear but data will be blank for situations where the user should not see the data.
- When a field was made visible and available (active) to the user but was not used in the candidate file, data will be displayed if it exists. (This may happen if the field was supplied on another submission where the field is present).
- When a field is not present on the file because it was not configured for display in a specific context (Organizations-Locations-Job Fields or staffing types), data will be displayed if it exists. (This may happen if the field was supplied on another submission where the field is present.)

Note: If compensation data is hidden from certain user types, it is important not to allow these fields to be available in the requisition list view context for these user types. If compensation fields are present in a list view, the data will appear to the user regardless of compensation data viewing permissions. It is possible to hide these fields from select user populations only by using the list format "variation" concept that is applied to a user's configuration profile.

Configuring a Field as a Column Header in a List

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability next to Properties.
4. Under Show Standard Fields, select Taleo Recruiting.
5. Click Save.

Results:

The field can be selected to appear as a column header in a list.

Creating a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click on the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: Specify if the list format you are creating will be the default list format for the context.
9. Choose columns for the list by selecting the check box next to each column name.
10. Order columns by selecting a number in the Sequence Number column, then click Reorder.
11. Sort candidate or requisition files that will be displayed in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click Up Arrow icon repeatedly.
12. Optional: Select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

What to do next

If you created a candidate list format, *specify the candidate file identifier content*.

Displaying Advanced Filters

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Select Show Advanced Filters.
5. Click Done.

Results:

The Advanced Filters button is displayed in the Recruiting Center for the selected candidate or requisition list format context.

Displaying Quick Filters in a List

System administrators have the ability to configure quick filters available in requisitions and candidates lists.

For a list format context, system administrators can select quick filters amongst a predefined list of filters. See *Candidate Quick Filters* and *Requisition Quick Filters*.

System administrators can define a default value for certain quick filters. These default values are automatically applied to the list.

- If a quick filter is displayed to users, users can choose to edit the default value for the filter.
- If a quick filter is not displayed to users, this means that the users will only see candidates or requisitions according to this default value. As a result, the total number of candidates or requisitions can be different from what users see on their list.

Example: In the list format "All Candidates / By Requisition", the system administrator decides to not display the ACE filter but yet decides to set the ACE filter as a default value. As a result, when users review the candidates list of a specific requisition, they will see a certain number of candidates. However, if they click the "candidate" number, which will display the list format "All candidates / By Requisition" for that same requisition, the system will present them with only the ACE candidates, but will not display the ACE filter and therefore the number of candidates they see are reduced to only show ACE candidates.

Displaying Quick Filters

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, click the Quick Filters tab.
5. Select filtering criteria by selecting the Displayed check box next to each criterion.
6. Optional: You can select a default criterion by selecting the Default Value check box next to the criterion.
7. Order filtering criteria by selecting a number in the Sequence Number column.

   For candidate list filters, the configuration option appears repeatedly for every single list format, however, similar requisition formats such as requisition specific candidate list formats will share the same configuration. Changing it in one location, will change it in all others as well.
8. Click Apply.
9. Click Done.

Results:

Quick filters are displayed in the Recruiting Center for the selected requisition or candidate list format context.

Creating Custom Instructions for a List Format Context

Before you start

Only one text can be customized by context by language.

The text must be created for all available languages.

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Step Information field, enter information that could help clarify, for example, the list format options to Recruiting Center users or explain that other contexts are available for different recruiting circumstances.

   A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.
5. Click Done.

Results:

The text appears in a callout located to the left of the List Format Configuration icon which is available in the top right hand corner of a list. The callout only appears if instructions are provided. The instructions appear for all lists in the context.

Assigning a List Format Variation to Configuration Profiles

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

List Format - Other Configuration Tasks

Selecting a Column for a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

Adding a Column to View Completed Submissions

When configuring list formats, system administrators can add a column, called Submission Completed Date, in requisition-specific candidate lists so that recruiters can view and sort candidate submissions based on the date when a job submission was completed.

Once the column Submission Completed Date is added to a requisition-specific candidate list, the title of the column in Recruiting is displayed as Submission Complete.

Job submissions are considered complete when:

- A candidate completed a job submission and clicked the Submit button.
- 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 job submission or when a match is done with an incomplete job submission).
- An import is done on a job submission.
- A candidate is hired on a job submission.

This feature was developed to allow recruiters to look through a list of candidate submissions from top to bottom, where the candidate submission on the top is the oldest and the one at the bottom is the most recent. In some companies, this way of screening is mandatory as selection is performed in a first come first serve manner. To do this, the recruiter must see and sort on the submission completion date (ascending order) such that the oldest submissions are displayed on the top and the recruiter goes down through the list one candidate at a time. In addition to this, the correct filter must be activated in order not to include submissions that are not completed.

System administrators should verify if they were using the Submission Creation Date column in list formats to accomplish a behavior similar to the new Submission Completed Date column. If this is the case, it is recommended to use the new Submission Completed Date column instead because the Submission Creation Date column can include candidates that have not completed their submission (either because they saved as draft and never came back or simply because they simply dropped out of the process.

All candidate (submission) list contexts support the new Submission Completed Date column except for the following:

- All Candidates by Folder
- All Candidates by Offer
- All Candidates by Talent Pool
- Candidate Capture/Possible Duplicates
- List of automatically pooled candidates
- Search results/Advanced search
- Search results/ Conceptual search
- Search results/ Quick search

Ordering Columns in a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.

5. Select a number in the Sequence Number column.
6. Click Reorder.
7. Click Done.

Results:

Columns are placed in the list according to the order specified.

Selecting a Default List Format

Before you start

The list format must be Active.

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the option Default format for this context.
6. Click Done.

Results:

In the Context Details page, under the Formats for this Context tab, a check icon appears in the Default column, next to the list format. The list format will be applied by default to the list.

Setting Sort Criteria in a List Format

Before you start

The list format must be created in order to set sorting criteria.

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. To select a criterion, click in the Sort By column next to the desired column name.
6. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
7. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
8. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
9. Click Done.

Grouping Files in a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the option Group records by first sort criterion.
6. Click Done.

Results:

Files are grouped in the candidate or requisition list. For example, a system administrator could decide to group candidate files by cities. As a result, the candidate list could display candidate files grouped by the city of Boston, then the city of Los Angeles, New York, San Francisco, etc.

Ordering List Formats

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, select a number in the Sequence Number column.
5. Click Reorder.
6. Click Done.

Results:

List formats for the context are displayed in the specified order.

Deactivating a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Clear the Active checkbox.
6. Click Done.

Results:

In the Context Details page, under the Formats for this Context tab, a check icon no longer appears in the Active column next to the list format. Also, the list format is unavailable when users select a list format for a candidate or requisition list.

What to do next

If you no longer want this list format, you can delete it.

Deleting a List Format

Before you start

A default list format cannot be deleted.

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, select a list format.
5. Click the Delete icon.

Results:

The list format is deleted from the database. It no longer appears in the Context Details page, under the Formats for this Context tab and it is unavailable to users.

Adding a Column to a Context

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Columns in this Context tab, click Add...

5. Select a field group.
6. Select a field in the Available Fields list.
7. Click Add.
8. Click Done.

Results:

The column appears in the Columns in this Context tab. The column is available to Recruiting Center users when they customize their list formats.

Removing a Column from a Context

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In Columns in this Context tab, select a column.
5. Click Remove.

Results:

The column no longer appears in the Columns in this Context tab. Also, the column is not displayed to users when they customize their own candidate or requisition list format.

What to do next

Reordering columns in the context.

Hiding Advanced Filters

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Clear Show Advanced Filters.
5. Click Done.

Results:

The Advanced Filters button is no longer displayed for the selected candidate or requisition list format context.

Candidate File Identifier

The candidate file identifier is used to specify which candidate-specific information is presented in the Candidate column of candidates lists.

The candidate file identifier can provide the following information in the form of text or icon:

- Candidate name (first name, last name, middle initial)
- Identification number
- Ace Candidate icon
- Internal Candidate icon
- In Selection Process icon
- Referred Candidate icon

The Candidate column is always displayed in candidates lists. System administrators are responsible of defining which information will appear by default in this column. However, Recruiting Center users can modify the default set by their system administrator via their personal preferences available under My Setup.

Specifying the Default Candidate File Identifier Content

Before you start

Configuration > **[Recruiting] Administration** > **[Fields] File Identifiers**

Here's what to do

1. Click Candidate.
2. Select the information you want to display.
3. Select a sorting key to determine which value will be used to sort the candidate column.
4. Click Done.

Results:

Selected values appear in the Record Identifiers page. Also, the elements selected will appear by default in the Candidate column of candidates lists.

List Format - Permissions and Settings

The following permissions and settings are used for the list format functionality.

User Type Permission	Description	Location
Create personal list formats for the requisition list	Allows Recruiting Center users to create personalized requisition list formats.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

User Type Permission	Description	Location
Create personal list formats for the candidate list	Allows Recruiting Center users to create personalized candidate list formats.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Access requisition-specific candidate lists	Allows Recruiting Center users to access requisition-specific candidate lists.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Setting	Description	Default Value	Location
Item Requiring Attention icon in Candidate Submissions	Removes the Item Requiring Attention icon from the candidate file upon some specific actions performed by a recruiter or a hiring manager against a candidate, even if the candidate's file has not been physically viewed.	On	Configuration > [Recruiting] Settings
Maximum Number of Items in List	Indicates the maximum number of items displayed in the list (tasks, requisitions, templates, submissions, etc). The maximum number of items allowed is 1000. Contact Oracle Support for details.	1000	Configuration > [Recruiting] Settings
Maximum Candidate List Columns	Sets the number of columns that can be used in a candidate list format. The default value is 17 columns.	17	Configuration > [Recruiting] Settings
Maximum Number of UDF for Candidate List Columns	Sets the number of columns of type user-defined field (UDF) that can be used in a candidate list format. The default value is 12. Contact Oracle Support for details.	12	Configuration > [Recruiting] Settings
Item Requiring Attention icon in Candidate Submissions	Removes the Item Requiring Attention icon when an action has been performed against a candidate, even if the candidate's file has not been physically viewed.	No	Configuration> [Recruiting] Settings
Last Activity Date Default Filter	By default, apply the filter "Last Activity Date".	No	Configuration> [Recruiting] Settings
Last Activity Date Default Filter Value	Show only candidate files whose last activity date has occurred during the last X days (0=today).	30	Configuration> [Recruiting] Settings

The table below indicates the actions affected by the activation of the *Item Requiring Attention icon in Candidate Submissions* setting.

Action	Is the Item Requiring Attention icon removed?
General Actions	
Go in the candidate profile	No
Offer Actions	
Create Offer	Yes
Make Offer	Yes
Cancel Offer	Yes
Capture Expectation	Yes
Capture Candidate Response	Yes
Capture Competitive Offer	Yes
Extend Offer	Yes
Renege Offer	Yes
Rescind Offer	Yes
Send Offer	Yes
Update Expiration Date	Yes
Update Start Date	Yes
Request Approval	Yes
Amend Approval Path	Yes
Decide on Approval	Yes
Terminate Approval	Yes
Candidate Selection Workflow Actions	
Move/Change Status Step	Yes
Bypass	Yes
Reject	Yes
Has Declined	Yes
Hire	Yes
Schedule Interview	Yes
Update Interview	Yes
Cancel Interview	Yes
Mark as Yes	Yes
Mark as No	Yes
Mark as Maybe	Yes

Action	Is the Item Requiring Attention icon removed?
Move all to next step	Yes
Move to next step	Yes
Revert	Yes
Reset Selection Process	Yes
Candidate File Actions	
Match	No
Merge	No
Share	No
Fill Out Form	No
Print	No
File in folder	No
Compare	Yes
Add Comment	No
Add Grade	No
Attach File	No
Send Correspondence	No
Find Similar Candidate	No
Remove candidate	No
Delete Submission	Yes
Undelete Submission	Yes
Create Screening Request	No
Open Candidate Submission	Yes

Column Width in Lists

The width of columns in lists differs whether the column header contains an icon or words.

The width of columns represented with an icon is 26 pixels.

The width of columns represented with a word (field) is set as follows: the word length + the sorting icon length. There is a minimum default width of 50 pixels. If a column has two fields (like Employer/Title or Step/Status), then the width would be increased by 30 pixels.

There are exceptions to the above rule. The table lists columns that have a specific hard-coded default width.

Candidate List Column	Hard-coded Width
Application LinkedIn ID	70 pixels
Profile LinkedIn ID	70 pixels
Application City	100 pixels
Profile City	100 pixels
Application State, City	100 pixels
Profile State, City	100 pixels
Contest Number, Job Information, Title	170 pixels
Job Information, Title	170 pixels
Application CRI	170 pixels
Profile CRI	170 pixels

Requisition List Column	Hard-coded Width
Requisition Active Locales	45 pixels
Requisition Mini Active Locales	45 pixels
Job Active Locales	45 pixels
Requisition Status	100 pixels
Requisition Status Detail	100 pixels
Requisition Mini Status Detail	100 pixels
Job Status	100 pixels
Requisition Recruiter	100 pixels
Requisition Mini Recruiter	100 pixels
Requisition Recruiter Assistant	100 pixels
Requisition Mini Recruiter Assistant	100 pixels
Job Recruiter	100 pixels
Requisition ID	100 pixels
Requisition Title	170 pixels
Requisition Mini Title	170 pixels
Requisition Job Information Title	170 pixels
Requisition Mini Job Information Title	170 pixels
Requisition Mini Title 2	170 pixels
Requisition Mini Title 3	170 pixels

Requisition List Column	Hard-coded Width
Job Information Title	170 pixels

Maximum Number of Rows Displayed in a List

	Maximum number of rows returned	Results displayed if the maximum number of rows returned is exceeded	Results are sorted if not all rows can be displayed	Scrollbar available
Requisitions List	1000	Yes (but, no indication that the results exceeded the limit)	Yes. A system sort is applied using the last modification date. The user can then perform a sort on the 1000 requisitions.	Yes
Candidates List	1000	No (but a message indicates to filter the list)	No	Yes
Job-Specific Candidate List	1000	No (but a message indicates to filter the list)	The user can perform a sort.	Yes
Automatic Candidate Pooling List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Advanced Search Results List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Offers List	1000	No (but a message indicates to filter the list)	No	Yes
Selectors (such as Organizations, Locations, Job Fields, Employers, Institutions, etc.)	1000	Yes (but, no indication that the results exceeded the limit)	Alphabetical sort	Yes

Quick Filter

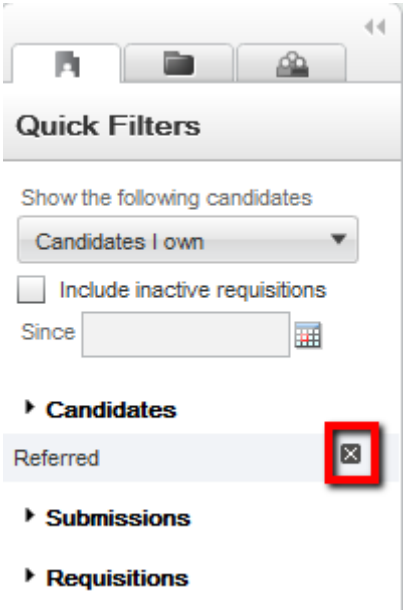
Quick filters help Recruiting Center users to quickly filter a list down to relevant information.

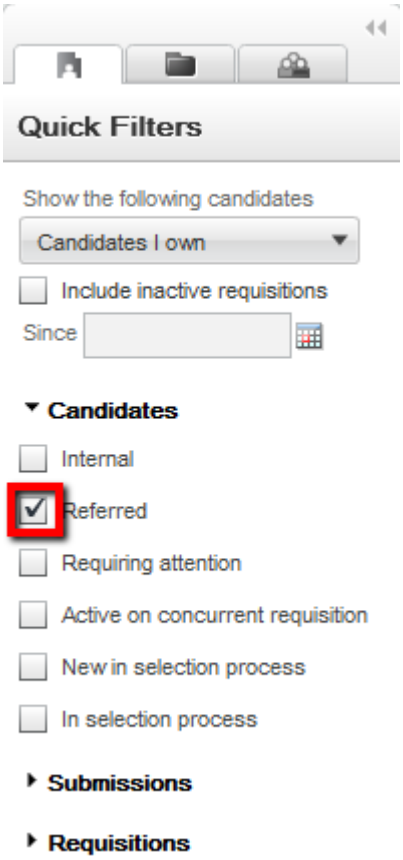
Quick filters are displayed on the left panel of a page and are available in the following lists:

- Tasks
- Requisitions
- Candidates
- Offers

- Requisition Templates
- Questions
- Interview Questions
- Disqualification Questions
- Competencies
- Evaluation Categories
- Evaluation Questions
- Evaluation Questionnaires

By default, quick filter categories are collapsed and only display selected filtering criteria. When a filter category is collapsed, you can remove a criterion by clicking the Remove icon to the selected criterion. When a filter category is expanded, you can remove a criterion by clearing the criterion.





When no quick filter is selected, the list displays all available entries. As soon as one filter is selected, it is automatically applied to the list and the list refreshes according to the selection made. Users do not need to refresh the list. For example, in the Requisitions list, if the "Status - Open" quick filter is selected, only open requisitions are displayed in the list.

Several quick filters can be applied at a time. Some quick filters have a Refresh icon to refresh the related list. Also, when entering data in more than one field and clicking the Refresh icon or pressing the Enter key, the refresh action takes into account the data entered in all the fields.

> **Note:** When applying Organization, Location or Job Field quick filters, select the desired value and then click into another field in the quick filter area to get the list to refresh with the criteria applied.

Displaying Quick Filters in a List

System administrators have the ability to configure quick filters available in requisitions and candidates lists.

For a list format context, system administrators can select quick filters amongst a predefined list of filters. See *Candidate Quick Filters* and *Requisition Quick Filters*.

System administrators can define a default value for certain quick filters. These default values are automatically applied to the list.

- If a quick filter is displayed to users, users can choose to edit the default value for the filter.

- If a quick filter is not displayed to users, this means that the users will only see candidates or requisitions according to this default value. As a result, the total number of candidates or requisitions can be different from what users see on their list.

Example: In the list format "All Candidates / By Requisition", the system administrator decides to not display the ACE filter but yet decides to set the ACE filter as a default value. As a result, when users review the candidates list of a specific requisition, they will see a certain number of candidates. However, if they click the "candidate" number, which will display the list format "All candidates / By Requisition" for that same requisition, the system will present them with only the ACE candidates, but will not display the ACE filter and therefore the number of candidates they see are reduced to only show ACE candidates.

Displaying Quick Filters

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Context Details page, click the Quick Filters tab.
5. Select filtering criteria by selecting the Displayed check box next to each criterion.
6. Optional: You can select a default criterion by selecting the Default Value check box next to the criterion.
7. Order filtering criteria by selecting a number in the Sequence Number column.

   For candidate list filters, the configuration option appears repeatedly for every single list format, however, similar requisition formats such as requisition specific candidate list formats will share the same configuration. Changing it in one location, will change it in all others as well.
8. Click Apply.
9. Click Done.

Results:

Quick filters are displayed in the Recruiting Center for the selected requisition or candidate list format context.

Quick Filters in the Requisitions Lists

Quick filters are available in requisitions lists and mini requisitions lists.

Quick filters in the requisitions list:

- Primary Location
- Organization
- Job Field
- Status
- Requisition Title

Note: The Status quick filter is considered a multi-select within the same field and acts as an OR filter. For example, when selecting the Draft and Open status filters, the user will see all requisitions that are either in Draft or Open status.

Quick filters in the mini requisitions list:

- Primary Location
- Organization
- Job Field

Candidate List Quick Filters

The table presents the quick filters available in different candidates lists.

Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Candidates - Internal	Yes	Yes	Yes	Yes	Yes	Yes
Candidates - Referred	Yes	Yes	Yes	Yes	Yes	Yes
Candidates - Requiring Attention	Yes	Yes	Yes	Yes	Yes	
Candidates - In selection Process	Yes	Yes				
Candidates - Active on Current Requisition	Yes			Yes		
Candidates - Active on concurrent requisition	Yes			Yes	Yes	Yes
Candidates - Exclude disqualified	Yes			Yes		
Candidates - New in selection process	Yes			Yes		
Submissions - Submission completed	Yes			Yes		
Submissions - Meet required criteria	Yes			Yes		

Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Submissions - ACE	Yes			Yes		
Submissions - Assets Met	Yes			Yes		
Submissions - Results between %	Yes			Yes		
Submissions - Creation Date	Yes			Yes		
Submissions - Completion Date	Yes			Yes		
Submissions - Last Activity Date	Yes			Yes	Yes	Yes
Submissions - Step	Yes			Yes		
Submissions - Status	Yes			Yes		
Submissions - Employer	Yes	Yes		Yes	Yes	
Submissions - Program	Yes	Yes		Yes	Yes	Yes
Submissions - Radius						Yes
Requisitions - Status	Yes					
Requisitions - Organization	Yes					
Requisitions - Primary location	Yes					
Requisitions - Job Field	Yes					
Requisitions - Requisition ID	Yes					
Folder Name		Yes				
Offer Status			Yes			
Shift					Yes	Yes
Offer Dates: Creation, Start, Approval, Expiration & Acceptance			Yes			

Quick Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates

Note: Candidates quick filters are considered a single select on different fields and the AND operator is used between filters. For example, when selecting the "Internal" and "Referred candidate" filters, the user will only see the candidates that are both Internal and Referred.

Note: The Candidates - Active on Current Requisition filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in hire step/status). The Candidates - In selection Process filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in a hire step/status) and not flagged as disqualified based on disqualification questions.

Quick Filters in the Offers List

Quick filters are available in the offers list.

Quick filters in the offers list:

- Status
  - Accepted
  - Approval in Progress
  - Approval Rejected
  - Approved
  - Canceled
  - Draft
  - Extended
  - Has Declined
  - In Negotiation
  - Offer to be made
  - Refused
  - Rejected
  - Reneged
  - Rescinded
- Creation Date
- Start Date
- Approval Date
- Expiration Date
- Acceptance Date
- Candidates
  - Internal

- Referred
- Requiring attention
- Most advanced progression status

Quick Filters in the Tasks List

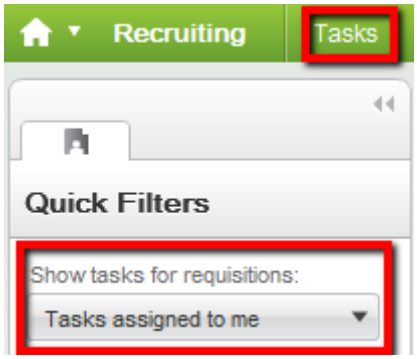
The table presents quick filters available in the Tasks list.

Quick Filter	Description
Requiring attention	Displays tasks that have the Item Requiring Attention icon. Self-assigned tasks are the only type of tasks that do not have an Item Requiring Attention icon because it is always the assignee who creates the task.
Hide completed tasks	Removes tasks that have the Completed status.
Due date	Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option "Exclude task without due date" is selected, tasks without a due date will not appear in the list.
Task type	Displays the type of task selected. If no task type is specified, all task types appear in the list.
Related to Candidate	Displays tasks related to the selected candidate.
Related to Requisition	Displays tasks related to the selected requisition.
Related to Assignee	Displays tasks related to the selected user.

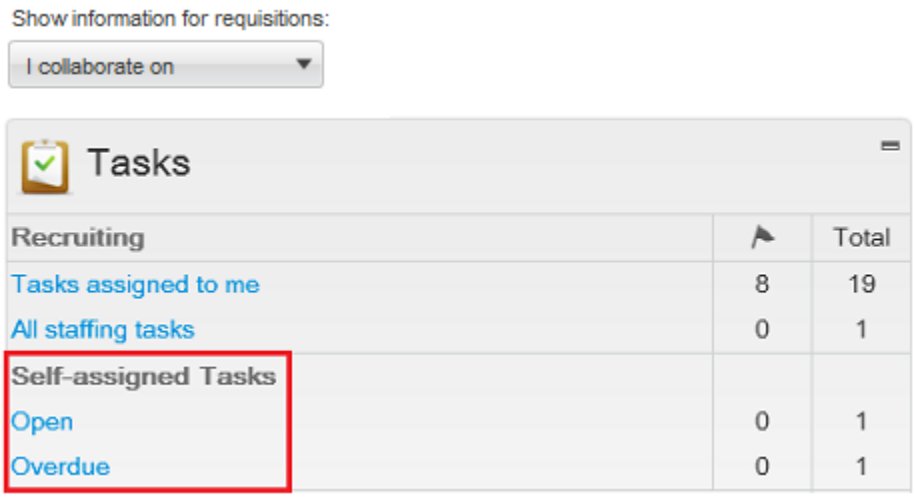
"Tasks assigned to me" filter

The "Tasks assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own.

The "Tasks assigned to me" filter is available in the Tasks list and Tasks channel. In the Tasks list, the filter is available in the "Show tasks for requisitions:" drop-down menu. It is the default value when accessing the Tasks list. In the Tasks channel, the "Tasks assigned to me" link brings users to the Tasks list which displays tasks assigned to them.



In the Tasks channel, when a task is clicked under Self-assigned Tasks, users are brought to the Tasks list. The "Tasks assigned to me" value in the Tasks list is selected by default no matter what the "Show the following information" filter on the home page is set to.

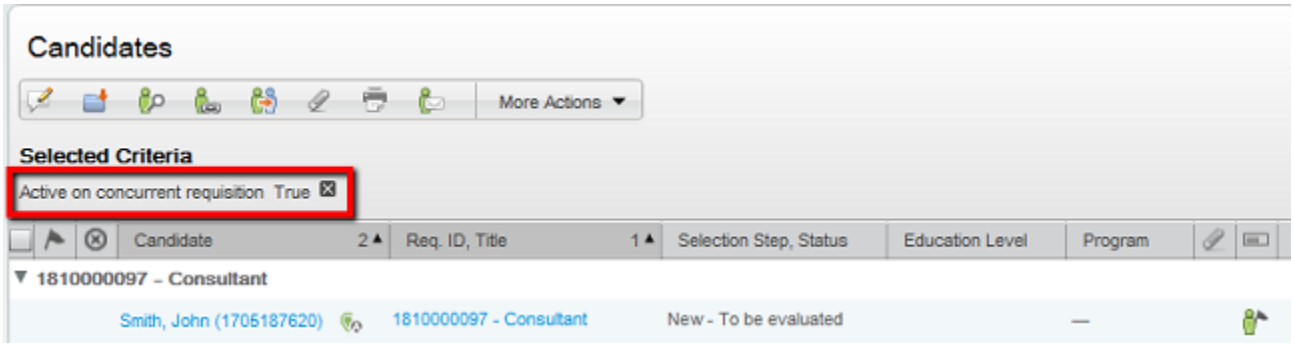


In the Tasks channel, when a task is clicked under Requisitions, Candidates, Offers, etc., users are brought to the Tasks list and the value in the "Show tasks for requisitions:" filter is identical to the value selected in the "Show information for requisitions:" filter of the home page. Example: If "I own" is selected in the home page, then "I own" will be selected by default in the "Show tasks for requisitions:" filter of the Tasks list. If a group is selected in the "Show information for requisitions:" filter on the home page, then the same group will be selected in the Tasks list.

Advanced Filter

Advanced filters help Recruiting Center users to filter lists using an expansive set of filtering criteria.

Both requisitions and candidates lists have an Advanced Filters button in the left panel, at the very bottom of the Quick Filters panel. Recruiting Center users can select several advanced filter criteria to filter a list. Once criteria are selected, the criteria are presented to the user across the top of the screen with a Remove icon next to the criteria. When clicking the Remove icon, the criteria is removed and the list is dynamically updated according to the updated criteria set. User-defined fields can also be available as filtering criteria.



Advanced filters are filtering on an already filtered list, that is whatever advanced filter criteria is selected, the list will be filtered based on what is already displayed in the list.

Example: A user filters a requisitions list using the "Pending", "Open" and "On Hold" status quick filters (he does not select the Draft status filter). The user then applies the advanced filter "Status Details/Draft". The list will display "No matches found". In this example, the system first displays all requisitions except Draft ones. Then, from the results displayed by the quick filters, the system finds those requisitions that are draft.

When using advanced filters for which words must be entered, users can enter partial words. For example, a user could filter a candidate list with candidates whose first name starts with "cath". The system would retrieve candidates whose first name is "cathy", "catherine" or "cathia".

Advanced Filter - Keyword

When using the Keyword advanced filter in a requisitions list, the system looks through this content of the requisition file:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Requisition/Job Information UDF
- Offer UDF
- Department UDF

Displaying Advanced Filters

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. Select Show Advanced Filters.
5. Click Done.

Results:

The Advanced Filters button is displayed in the Recruiting Center for the selected candidate or requisition list format context.

Show Filter

The Show information for filter allows Recruiting Center users to filter information displayed in a list using ownership, collaboration or status criteria.

The Show information for filter can appear in the home page, the Requisitions list, Candidates list, Tasks list, Offers list, etc.

The Show filter:

- Can be configured to be displayed everywhere except on the home page.
- Can be configured to be displayed everywhere including the home page.
- Can be hidden.

Values appearing in the Show filter depend on the permissions granted to the user and on the configuration of the application. Available values are the same for all three pages where the Show filter can appear. Possible values are:

- ... I own
- ... I collaborate on
- ... I own or collaborate on
- ... in my coverage area, I own or collaborate on
- All

For example:

- If a user's permissions does not allow the user to see requisitions they don’t own, the user will only see the "I own" value.

- If a user's permissions allow the user to see requisitions they don't own but the collaborator feature is not available in the company, the user will not see the following values related to the collaborator feature: "I own or collaborate on", "I collaborate on" and "in my coverage area, I own or collaborate on".
- If a user's permissions allow the user to see requisitions they don't own and the collaborator feature is available in the company, the user will see the following values related to the collaborator feature: "I own or collaborate on", "I collaborate on" and "in my coverage area, I own or collaborate on".

When displaying the Candidates list, a check box called *Include inactive requisitions since* appears just underneath the Show filter. Selecting this check box will add to the Requisitions list the Deleted, Canceled and Filled requisitions.

Displaying the Show Filter

The following settings are used to configure the Show filter.

Setting	Description	Default Value	Location
Show information for Filter Visibility	To set whether the Show filter control is displayed on lists and the home page. If you think users will not need to change the value of the Show filter, consider not displaying the Show filter to them.	Everywhere including in the home page	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Default Value for the Show Information Filter	Default Value for the Show Information Filter	Requisitions I own	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

6 Fields and Selection Lists

Field

Field

The Recruiting Center uses standard fields supplied by the system and which provide standardized information on candidates, requisitions, offers. User-defined fields (UDFs) can also be created to capture any additional information required by your organization.

Fields are divided into four categories based on where they are used in the Recruiting Center:

- Candidate
- Department
- Offer
- Requisition

When you click on a category, standard fields for that category are displayed. You can filter the list using the Show Fields filter. If you click the Show User-defined Fields link, you can see available UDFs. You can also click Create User-defined Fields to create new UDFs.

Field Category	Filter
Candidate	• Certifications • Contingent Staffing • Education • Employee Metrics • Evaluation Management • Personal Information • References • Submission • Work Experience
Offer	• All Offer Types • Competitive Offer • Expectations • Offer Terms • Requisition

Field Category	Filter
Requisition	• All • Department • Offer • Requisition

Field Properties

Various properties can be applied to both standard fields and user-defined fields:

- Availability: Where the field is used, that is the Recruiting Center, career sections, the candidate search feature, the History tab, reports (for UDFs). See *Field Availability*.
- Personally Identifiable Information (in Career Section): This option is available for the Date of Birth, Social Security Number, and candidate user-defined fields. When the option is selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See *Masking Values for Date of Birth, Social Security Number and Candidate UDFs*.
- Content Required: The content of a field may be required to save, approve (requisition fields only), or source (requisition fields only) and users must enter information in the field in order to proceed. If content is not required, users do not have to enter any information in the field.
- Security Level: Each field is associated to a security level to restrict access or viewing of a field. Security levels are General, Restricted, or Confidential. See *Field Security Level.*
- Organizations, Locations, and Job Fields: To make fields relevant to a specific context. See *Field Contextualization.*
- Exceptions: An exception regarding a staffing type, that is Professional, Hourly, Campus, Contingent, Executives. See *Field Staffing Type Exception*.

Default Maximum Number of UDFs

There are limitations to the number of user-defined fields (UDF) that can be created. The default maximum number of UDFs is 100 per category of fields. Examples of category of fields are Requisition, Candidate, Offer, Department, Work Experience, Education, etc. There is a limit of 100 reportable UDFs per business entity. If a customer wants more than 100 UDFs, the customer will need to enter a service request with Oracle Support.

Field Availability

Standard fields and user-defined fields (UDFs) can be made available for use in the Recruiting Center, career sections, the candidate advanced search feature, the History tab, and reports (UDFs only).

The availability of a field varies by field category. The following table indicates where categories of fields are available.

Availability	Candidate	Requisition	Offer	Department
Taleo Recruiting	Yes	Yes	Yes	Yes

Availability	Candidate	Requisition	Offer	Department
Career Section	Yes	Yes		
Candidate Search	Yes			
History	Yes			
Custom Report Universe (UDFs only)	Yes	Yes	Yes	Yes

The Recruiting setting "UDF Tracking Activation" defines the number of candidate user-defined fields (UDF) that can be tracked when changes are made. Each time a change is made to a candidate UDF of type Personal Information, Work Experience and Education, a tracking entry appears in the candidate file History tab to track the previous value. A limit of 20 candidate UDFs can be tracked. Once the limit is reached, system administrators are not able to set more UDFs as available in "History".

Candidate Submission User-Defined Fields Available in Recruiting Center

When candidate submission user-defined fields (UDFs) are made available to be used in the Recruiting Center, they can be used in the following areas:

- User-defined forms and files: Submission UDFs are available in the Basic Profile, Candidate Personal Information, and Submission Information form types. When administrators create user-defined forms using one of these form types, they can select submission UDFs to design their form. When administrators create user-defined files, Submission Information forms are available under the Basic Profile, Candidate Personal Information, and Submission Information blocks. Submission Information forms can be used in both profile and submission contexts. Depending on which context Submission Information forms are being used, the visibility of submission UDFs is controlled. Even though the form and block contain submission information, submission information is visible to the users only in a submission context. In a profile context, submission information is automatically hidden. Note that in a submission context, if a block doesn't contain any submission information, the entire block is hidden.
- List formats: Submission UDFs can be used in the following list format contexts: All contexts associated to CSW steps, Requisition-specific Candidate List Global (GLOBAL), All Candidates / By Offer, All Candidates / By Requisition. Submission UDFs are not available in list formats which are used in profile context.
- Auto-progression of candidates: Submission UDFs can be used to create conditions to automatically progress candidates in the candidate selection workflow. When administrators create a new condition, submission UDFs are available for selection under Job-specific submission > User-defined Field > Submission Information.
- Message variables: Submission UDFs can be used as variables in message templates. The token format is {Submission.UDF_fieldname} where fieldname is the UDF value.

Candidate Submission User-Defined Fields Available in Career Section

When candidate submission user-defined fields (UDFs) are made available to be used in career sections, they can be used in the following areas:

- Forms and flows: Submission UDFs are available in the Basic Profile, Candidate Personal Information, Candidate Personal Information - Agency, and Submission form types. When administrators create user-defined forms using one of these form types, they can select submission UDFs to design their form. When administrators create application flows, Submission Information forms are available under the Basic Profile, Candidate Personal Information, and Submission Information blocks.

Field Security Level

Each field is associated to a security level to restrict access or viewing of a field.

When configuring fields, system administrators define how sensitive each field is by assigning the General, Restricted or Confidential security level..

Security Level	Description
General	No security, fields can be viewed and edited. It is the most basic security level; most fields have this level by default.
Restricted	Medium security, most users can view the fields, but only designated users can edit them. It is used to restrict specific users from either viewing or editing the information.
Confidential	Top secret security, only designated users can view and edit the fields. This is a confidentiality level beyond the Restricted security level that can be used to restrict users from viewing and/or editing the information, especially sensitive information. Two fields are marked as Confidential by default: Social Security Number and Date of Birth.

Some requisition fields are always visible regardless of their security level. This allows control over who can edit fields, but does not prevent visibility, important in most cases.

- Requisition ID
- Title
- Primary Location
- Organization
- Job Field
- Recruiter
- Hiring Manager

The security level of a field is also associated to security level permissions granted for requisitions, candidates and offers, in view mode and in edit mode. Security level permissions define if users have a general, restricted or confidential access to fields displayed in the system. Note that for the above listed fields, the security level in view mode can be configured, but will not apply. Only the security level in edit mode will be applied.

User Type Permission	Location
Security level for requisitions (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for requisitions (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for internal candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General

User Type Permission	Location
Security level for internal candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for offers (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General
Security level for offers (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General

When defining a user type, system administrators need to decide which security level will be granted for these specific permissions. Each user type has one of the above security levels associated to it to define if the user type has a general, restricted or confidential access to information.

The security level of a field can be modified at any time, thus impacting the user types associated to that security level.

At a high level, the user type permissions work as follows:

- Users having the "general" permission access will only see/edit fields set at the "general" security level.
- Users having the "restricted" permission access will see/edit fields set at the "general" and "restricted" security levels.
- Users having the "confidential" permission access will see/edit fields set at all security levels, that is "general", "restricted", and "confidential".

For example, a hiring manager might have a view and edit access to general requisition fields, a view only access to restricted requisition fields and no access at all to confidential requisition fields, while having a view only access to general offer fields.

More specifically the behaviors of these permissions are:

- Restricted/Confidential fields in View mode in the file:

  If a field is at a higher security level than the user has access to view, the field will not be displayed to the user.
- Restricted/Confidential fields in Edit mode in the file:

  If a field is at a higher security level than the user has access to edit, but the field security level gives them access to view it, then the field will be in read only mode in the edit. If a field is at a higher security level than the user has access to edit or view, then the field will not be displayed to the user.
- Restricted/Confidential fields on the list:

  If a field is at a higher security level than the user has access to view for both external AND internal candidates, the user will see what he is allowed to see and an empty field will be displayed for the information the user cannot see. If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the column will be displayed and the field will be empty for those candidates that the user is restricted from seeing the content, whether the field has data or not. As well, grouping by this field on the list will not be possible in this scenario.
- Restricted/Confidential fields in the advanced/quick filters of a list:

  If a field is at a higher security level than the user has access to view for both external AND internal candidates, then the column will not be available in the advanced or quick filters. If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the column will be available in the advanced or quick filters. If the user filters using this field, then the system will filter as specified for the

candidate type that they can view, but will not filter the candidate type that they are restricted from seeing the content and therefore will return all candidates for that type.

- Restricted/Confidential fields in the search (Quick/Advanced/Duplicate Check):

  If a field is at a higher security level than the user has access to view for both external AND internal candidates, then the field will not be available in the search.

  If a field is at a higher security level than the user has access to view for either external OR internal, but not both, then the field will be available in the search. If the user searches using this field, then the system will search as specified for the candidate type that they can see, but will not search the candidate type that they are restricted from seeing the content.

- Restricted/Confidential fields in message templates (correspondence):

  If a field is at a higher security level than the user has access to view, then the user will not be able to send a message template that contains the restricted or confidential token.

Note: Some candidate fields may automatically be set to Restricted or Confidential and should be reviewed and possibly edited to achieve the desired behavior. For example, by default many related personal information fields may be set to Restricted, and date of birth and social security number are always set to Confidential. It is important to review the state of these fields and ensure they are set properly according to the customer desired outcome.

Field Contextualization

Field contextualization resides in specifying the Organization-Location-Job Field structure for a field.

For each field, with the exception of fields set as mandatory by the system, system administrators can choose to define that a field is only available for a specific Organization, Location or Job Field. This means that outside of the defined structure, the field will not be visible.

Example: Let's say your organization wants the "Citizenship Status" field to only appear in US jobs. To do that, the system administrator needs to associate the "Citizenship Status" field to the "United States" location (Configuration > [Recruiting] Administration > [Fields] Requisition > Citizenship Status > Edit Field Availability). When creating a requisition, the "Citizenship Status" field will only be available if the location of the requisition is the United States.

The contextualization of candidate fields in Career Sections will display based on the Organization-Location-Job Field of the requisition for which candidates are applying or based on the Organization-Location-Job Field in the candidate's record if candidates are in a General Profile flow.

There are two ways for the Organization-Location-Job Field contextualization to get onto the general profile of a candidate.

- When the Organization-Location-Job Field block is part of the General Profile flow, then the candidate must make a selection on Organization-Location-Job Field .
- When a candidate applies on a requisition, the Organization-Location-Job Field for that requisition is added to the candidate's General Profile.

Example: Let's say your organization wants the "Social Security Number" field to appear for candidates applying to jobs in the US. To do that, the system administrator needs to associate the "Social Security Number" field to the "United

States" location (Configuration > [Recruiting] Administration > [Fields] Candidate > Social Security Number > Edit Field Availability). With this contextualization:

- When a candidate applies for a job, the job must have the United States location in order for the Social Security Number field to be presented for completion.
- When a candidate creates a general profile, the candidate must have the United States location specified in his/her job preferences for the Social Security Number field to be presented for completion.
- When a recruiter views/edits (if authorized) a job submission, the Social Security Number field will not appear unless the job associated with the submission has a United States location.
- When a recruiter views/edits (if authorized) a candidate general profile, the Social Security Number field will not appear unless the candidate's job preferences include a United States location.

Note: The following fields cannot be contextualized or marked with various security level because they are mandatory to support the requisitions or candidates in the system: Creation Date, Last Modified Date, Requisition Number.

Field Staffing Type Exception

A field can be associated to a given Organization-Location-Job Field structure for different staffing types.

An exception regarding the staffing type (Professional, Hourly, Campus, Contingent, Executives) can be created for a field. System administrators can define an Organization-Location-Job Field structure specifically for staffing types where specific contextualization is required. When doing this, system administrators are able to define new properties for the field as well as a new Organization-Location Job Field structure for the field for that staffing type.

Examples:

- A customer wants the Shift Availability Grid field to be visible for Hourly job submissions only. This would be done by modifying the property of the field to not available, and then adding an exception for the Hourly staffing type where the property for the field is set to available.
- A customer wants to set the Social Security Number field so that it does not appear on any candidate submissions except for Hourly submissions in the United States. This would be done by modifying the property for the field to not available, and then adding an exception for the Hourly staffing type where the property for the field is set to available and has the United States location linked to it.
- A customer wants to allow the designation of whether medical clearance is an employment precondition on all requisitions in the Medical Testing division except for executive jobs where clearance is only required for Medical Testing requisitions in China, the United States and the United Kingdom. The customer does NOT want this field to display in any other contexts. This would be done by making the field available for recruiting, linking the field to the Medical Testing organization, and then creating an exception for the Executives staffing type where the property of the field is set to available and is linked to the China, United Kingdom and United States locations and the Medical Testing organization.

Modifying Standard Fields

The modification of a standard field consists of the following steps.

1. *Defining the properties of the field.*
2. *Associating the field to Organizations, Locations, Job Fields.*

3. *Creating a staffing type exception for the field.*
4. *Granting security level permissions for requisitions, candidates, and offers.*

Defining the Properties of a Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability next to Properties.
4. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (UDFs only).
5. For the Date of Birth, Social Security Number, and any candidate user-defined fields, the Personally Identifiable Information (in Career Section) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See *Masking Values for Date of Birth, Social Security Number and Candidate UDFs*.
6. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

   Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the *security level* of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

   Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
7. Specify the *security level* of the field, that is General, Restricted, or Confidential.
8. Click Save.

Associating a Field to an Organization, Location, Job Field

Before you start

The *Enable Field Classification* setting must be enabled in the Recruiting settings.

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Organizations, Locations, or Job Fields.
4. In the selector, select one or more elements.
5. Click Select.

Results:

The organizations, locations and job fields selected appear in the field page. The field is available in the Recruiting Center for an Organization-Location-Job Field structure context associated to the same organizations, locations or job fields. For details, see *Field Contextualization*.

Creating a Field Exception

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Exceptions.
4. Select a staffing type from the Staffing Types drop-down list.
5. Click Create.
6. If desired, click Add next to Organizations, Locations and/or Job Fields.
7. Select organizations, locations and/or job fields.
8. Click Select.

Results:

The selected staffing type appears in the Exceptions section of the field page. The field will no longer be available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type. For details, see *Field Staffing Type Exception*.

Granting Security Level Permissions for Requisitions, Candidates, and Offers

The security level of a field is associated to the security level for requisitions, candidates and offers, in view mode and in edit mode.

This is done using the following security level permissions:

User Type Permission	Location
Security level for requisitions (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for requisitions (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for internal candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General

User Type Permission	Location
Security level for internal candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for offers (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General
Security level for offers (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General

Granting Security Level Permissions for Requisitions

Before you start

Configuration > [SmartOrg] Administration > User Types

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Requisitions.
3. Select the permission Security level for requisitions (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for requisitions (in view mode).
6. Set the desired security level.
7. Click Save.

Granting Security Level Permissions for Candidates

Before you start

Configuration > [SmartOrg] Administration > User Types

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Granting Security Level Permissions for Offers

Before you start

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

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Offers.
3. Select the permission Security level for offers (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for offers (in view mode).
6. Set the desired security level.
7. Click Save.

Creating a User-Defined Field

User-defined fields (UDF) can be created to collect information according to specific organization requirements.

The following types of user-defined fields can be created:

- Text and multilingual text
- Number
- Date
- Selection

The creation of a user-defined field consists of the following steps:

1. *Creating a user-defined field of type text, number, date, selection.*
2. *Defining the properties of the field.*
3. *Associating the field to Organizations, Locations, Job Fields.*
4. *Creating a staffing type exception for the field.*
5. *Granting security level permissions for requisitions, candidates, and offers.*

Creating a User-Defined Field of Type "Text" or "Multilingual Text"

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.

2. Click Create User-defined Field.
3. In the Type list, select Text or Multilingual Text.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.

   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording "not translated" at the end.

   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user's attention.
6. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
   a. In the Max. Num. Chars. field, enter a number to set the maximum number of characters in this field.
   b. In the Width field, enter a number to set the width of the field in terms of characters. For example, a value of 20 means that the field will be 20-character wide.
   c. In the Num. of lines field, enter a total number of lines for this field.
   d. In the Default field, enter the default text that will appear in the Text field when it is displayed. The text must respect the format settings listed previously.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.

Creating a User-Defined Field of Type "Number"

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Number.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

6. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. Enter information in the Attributes section.
   a. In the Specific Number Type field, select a number type: Not Specified, Number, Amount.

      In you selected Not Specified, enter in the Num. of Decimals field a number to set the maximum number of decimals in this field (numeric value only). Decimals count as digits. Therefore, the value entered in Num. of Decimals must be lower than the number entered in the Maximum field.
   b. In the Width field, enter a number to set the width of the field in terms of characters. For example, a value of 20 means that the field will be 20-character wide.
   c. In the Maximum field, enter a number to set the maximum number of digits in this field, including decimals.
   d. In the Default field, enter the number that will appear in the Number field by default. This number must reflect the settings entered previously. The Default value must be equal to, or higher, or lower than the maximum number of digits.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.

Creating a User-Defined Field of Type "Date"

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Date.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. Enter information in the Attributes section.
   a. In the First Year in Range field, select the earliest year to be displayed.
   b. In the Last Year in Range field, select the last year to be displayed.
   c. In the Display Order field, select the order in which the years will be displayed.
   d. Select Day Displayed option to display the day.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.

Creating a User-Defined Field of Type "Selection"

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select Selection.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition and Offer user-defined fields.
7. In the New/Modified Element field, enter a value for the selection then click Apply.

   The newly created value appears in the Available Elements list.
8. Repeat step 7 for all the values in the selection.
9. Activate the values by selecting each value and clicking Add.
10. If you want one of the value to be selected by default, select the value in the Active Elements list, then select the Default option.

    The word Default appears in parenthesis beside the value.
11. Indicate if you want the selection to be of type single answer or multiple answers.
12. Translate the selection into all available languages. Languages are available at the upper right of the page.
13. Click Save.

Defining the Properties of a Field

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability next to Properties.
4. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (UDFs only).
5. For the Date of Birth, Social Security Number, and any candidate user-defined fields, the Personally Identifiable Information (in Career Section) option is available. When selected, if candidates enter a value in these fields and

save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See *Masking Values for Date of Birth, Social Security Number and Candidate UDFs*.

6. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

   Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the *security level* of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

   Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
7. Specify the *security level* of the field, that is General, Restricted, or Confidential.
8. Click Save.

Associating a Field to an Organization, Location, Job Field

Before you start

The *Enable Field Classification* setting must be enabled in the Recruiting settings.

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Organizations, Locations, or Job Fields.
4. In the selector, select one or more elements.
5. Click Select.

Results:

The organizations, locations and job fields selected appear in the field page. The field is available in the Recruiting Center for an Organization-Location-Job Field structure context associated to the same organizations, locations or job fields. For details, see *Field Contextualization*.

Creating a Field Exception

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Add next to Exceptions.
4. Select a staffing type from the Staffing Types drop-down list.

5. Click Create.
6. If desired, click Add next to Organizations, Locations and/or Job Fields.
7. Select organizations, locations and/or job fields.
8. Click Select.

Results:

The selected staffing type appears in the Exceptions section of the field page. The field will no longer be available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type. For details, see *Field Staffing Type Exception*.

Granting Security Level Permissions for Requisitions, Candidates, and Offers

The security level of a field is associated to the security level for requisitions, candidates and offers, in view mode and in edit mode.

This is done using the following security level permissions:

User Type Permission	Location
Security level for requisitions (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for requisitions (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for internal candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for internal candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for offers (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General
Security level for offers (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General

Granting Security Level Permissions for Requisitions

Before you start

Configuration > [SmartOrg] Administration > User Types

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Requisitions.
3. Select the permission Security level for requisitions (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for requisitions (in view mode).
6. Set the desired security level.
7. Click Save.

Granting Security Level Permissions for Candidates

Before you start

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

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Granting Security Level Permissions for Offers

Before you start

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

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Offers.
3. Select the permission Security level for offers (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for offers (in view mode).
6. Set the desired security level.
7. Click Save.

Field - Other Configuration Tasks

Deleting a Field

Before you start

Only user-defined fields can be deleted.

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click Show Custom Fields.
3. Click Delete next to the field to be deleted.
4. Click Done.

Dissociating a Field from an Organization, Location, Job Field

Before you start

The *Enable Field Classification* setting must be enabled in the Recruiting settings.

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Remove next to an organization, location, or job field.

Results:

The field selected no longer appears in the field page. The field will be available in the Recruiting Center for all Organization-Location-Job Field structures.

Removing an Exception from a Field

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Remove next to an exception.

Results:

The field is available when creating a user-defined form for a specific staffing type or Organization-Location-Job Field structure of a staffing type.

Masking Values for Date of Birth, Social Security Number and Candidate UDFs

The Date of Birth, Social Security Number, and candidate user-defined fields can be configured such that if candidates enter a value in the field and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page.

If candidates edit their candidate profile or the job-specific application after saving a page containing fields configured for masking, they have to reenter the information in these fields because the existing values will have been cleared. If candidates neglect to reenter the information, a warning message lists the cleared fields and invites the candidates to reenter values.

Similarly, if candidates fill out other job-specific applications on the same career section and the corresponding application workflows contain fields configured for masking, the candidates have to reenter the values if they want to include them in the job submission. If candidates neglect to reenter the information, a warning message lists the empty fields and invites the candidates to reenter values.

Candidate user-defined fields that can be configured for masking can be of Text, Multilingual Text, Selection, Date, Number or Boolean type. The values that candidates enter will be masked in the following blocks of application flows that include them: Candidate Personal Information, Referrer Personal Information, Personal Information-Agency, Education, Work Experience, Basic Profile Information.

> **Note:** Because candidates are obliged to reenter information in fields configured for masking each time they edit their general profile or apply for jobs, configuring fields in this manner can have a negative impact on the candidate experience. The inclusion of such fields in "primary" flows is therefore not recommended. Date of Birth, Social Security Number and candidate user-defined fields configured for masking (if included at all) are more suitable for "secondary" flows such as Invitation to Self-Identify and Request More Info.

Masking Values for Date of Birth, Social Security Number and Candidate UDFs

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click the Candidate link.
2. Click the Date of Birth field, the Social Security Number field, or any candidate user-defined field.
3. Click Edit Field Availability.
4. Select the Personally Identifiable Information (in Career Sections) option.
5. Click Save.

Results:

If candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page.

Field - Permissions and Settings

The following permissions and settings can be used to configure fields.

Setting	Description	Default Value	Location
Enable Field Classification	Determines if fields can be classified by Organizations, Locations, and Job Fields.	No	Configuration > [Recruiting] Settings
Maximum Number of UDFs	This is a Private setting. The maximum number of available custom fields for any entity of the suite.	100	Configuration > [General Configuration] Settings
UDF Tracking Activation	This is a Protected setting. Activates the tracking of changes made to custom candidate fields relating to the personal information, work experience and education. For details, see *Field Availability*.	20	Configuration > [Recruiting] Settings

The following permissions are used to associate the field security level for requisitions, candidates and offers, in view mode and in edit mode.

User Type Permission	Location
Security level for requisitions (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for requisitions (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Security level for internal candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for internal candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for external candidates (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Candidates > General
Security level for offers (in view mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General
Security level for offers (in edit mode)	Configuration > [SmartOrg] Administration> User Types > Recruiting > Offers > General

Requisition Template Fields

Requisition Template Job Code Field

Requisition templates can be assigned a job code.

Customers not using the Job Code field can deactivate it. When the Job Code field is deactivated:

- The Code column does not appear in lists.
- The Job Code field does not appear in files, in view or edit modes. It does not appear in the Requisition Templates list and cannot be included in the configurable Requisition lists.
- The Job Code field is not available in selectors.
- The Job Code field does not appear in callouts.

Deactivating the Requisition Template Job Code Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click Requisition Template.
2. Click Job Code.
3. Click Edit Field Availability.
4. Do not check the Taleo Recruiting option.

   Note that the Security Level and Content Required options cannot be configured. This is why they are grayed out. Also, no Organization-Location-Job Field contextualization and no staffing type exception can be specified.
5. Click Save.

Results:

The Job Code field is deactivated and is not displayed in the Recruiting Center.

Selection

Global Selection List

A global selection list is a list of elements (values) used to define a field, that can be used by several Oracle Taleo Enterprise Edition products and that can only be viewed and edited.

These global selection lists are available in the Configuration menu, under Selection Lists:

- Education Levels
- Employee Statuses
- Job Levels
- Job Types
- Schedules
- Shifts
- Travels
- Currencies

Global selection lists can be edited, that is system-defined items can be added or removed. Users will only see the items selected by the system administrator.

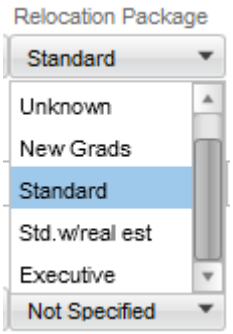
Recruiting Selection List

A recruiting selection list is a list of elements (values) used to define a field, that can be used in the Recruiting Center and that can be viewed, edited, and created.

The following types of selections are available:

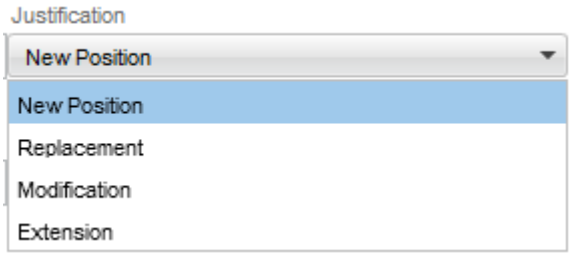
- **Small Selection - Standard:** A predefined selection provided by the system. The selection provides a few elements and is represented by a radio button or a drop-down list. These selections can only be modified, that is elements in the selection can be created, added, or removed. For certain small standard selections (for example, Advance Notice), system administrators can add and remove pre-defined elements. For others (like Commission Package, Option Package, Relocation Package and Stock Package), they can create new elements.
- **Small Selection - Custom:** A small selection created by system administrators to collect information for specific organization requirements.
- **Large Selection - Standard:** Large standard selections such as Employers, Institutions, Locations are predefined selections provided by the system. The selection provides a large number of elements and is represented by a quick search lookup.
- **Large Selection - Custom:** Large user-defined selections (LUDS) are created by system administrators. The selection provides a large number of elements and is represented by a quick search lookup. LUDS can be associated to Organizations, Locations, and Job Fields. The only goal of doing a OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.

Example of Small Selection - Standard



Example of Large Selection - Selection with a quick search lookup

Example of Large Selection - Selection with a drop-down



Creating Large User-Defined Selections (LUDS)

The creation of large user-defined selections consists of the following steps:

1. *Creating the large user-defined selection.*
2. *Adding elements to the large user-defined selection.*
3. *Creating the user-defined field that will display the elements of the selection.*

Creating a Large Selection

Before you start

Configuration > **[Recruiting] Administration** > **[Fields] Selection Lists**

Here's what to do

1. Click the Large Selections tab, then the Custom tab.
2. Click New...
3. Enter a name and a code.

4. In the Language Requirements section, specify where descriptions are required. Once the large custom selection is created (including activated elements), it is no longer possible to edit this section.
    - If you select "Require descriptions in WebTop languages", the selection and its elements will be available in the Recruiting Center only.
    - If you select "Require descriptions in WebTop languages and content languages", the selection and its elements will be available in the Recruiting Center and Career Sections.
5. Select Activate effective dating if you want selections to be activated for specific periods of time.
6. You may associate the selection to the Organization, Location, or Job Field structure. The only goal of doing a OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.
7. Select Require mapping for every element if you want every element to be mapped to the Associated Structure Type selected.
8. Translate the selection into all available languages. Languages are available at the upper right of the page.
9. Click Done.

Creating an Element for a Large Selection

Before you start

The large selection must be created first.

Configuration > [Recruiting] Administration > [Fields] Selection Lists

Here's what to do

1. Click the Large Selections tab, then the Custom tab.
2. Locate the large user-defined selection you just created.
3. Click the link (should display 0) located in the Number of Elements column.
4. In the Selection Element List page, click New...
5. Enter a code and a description.
6. Indicate if the element is always active or inactive.
7. Translate the element into all available languages. Languages are available at the upper right of the page.
8. Click Add.
9. Create as many elements as required.
10. Click Close.

Results:

The new elements are added to the large user-defined selection.

Creating a User-Defined Field that Displays the Elements of a Selection

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click on a field category.
2. Click Create User-defined Field.
3. In the Type list, select the large user-defined selection you created.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
7. Indicate if you want to display the code, description, or both in the Recruiting Center selector.
8. Indicate if you want to display the folder tree and the Start Date and End Date in the Recruiting Center selector.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.

Creating Small Custom Selections

The creation of small custom selections consists of the following steps:

1. *Creating the small custom selection.*
2. *Creating the user-defined field that will display the elements of the selection.*

Creating a Small Selection

Before you start

Configuration > **[Recruiting] Administration** > **[Fields] Selection Lists**

Here's what to do

1. Click the Small Selections tab, then the Custom tab.
2. Click New...
3. Enter a name for the selection.

   The name must be unique. The name of the selection cannot be modified once the selection is saved.
4. In the New/Modified Element field, enter a value for the selection, then click Apply.

   The newly created value appears in the Available Elements list.
5. Repeat step 4 for all the values in the selection.
6. Activate the values by selecting each value in the Available Elements list and clicking Add. The values appear in the Active Elements section.
7. Order the values using the up and down arrows next to the Active Elements section.
8. Translate the selection into all available languages. Languages are available at the upper right of the page.
9. Click Done.

Results:

The selection is available under Small Selections, Custom.

Creating a User-Defined Field that Displays the Elements of the Selection

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click on a field category.
2. Click Create User-defined Field.
3. In the Type list, select the small custom selection you created.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
6. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
7. Indicate the type of answer available: single answer and multiple choice answer.
8. Translate the field into all available languages. Languages are available at the upper right of the page.
9. Click Save.

Recruiting Selection List - Other Configuration Tasks

Deleting a Large Selection

Before you start

The large selection must not be in use.

Configuration > **[Recruiting] Administration** > **[Fields] Selection Lists**

Here's what to do

1. Click the Large Selections tab, then the Custom tab.
2. Select a selection.
3. Click the Delete icon.
4. Confirm the deletion.

Results:

The large custom selection is no longer available under Large Selections, Custom.

Removing an Element from a Large Selection

Before you start

An element cannot be removed if it is being used.

Configuration > **[Recruiting] Administration > [Fields] Selection Lists**

Here's what to do

1. Click the Large Selections tab, then the Custom tab.
2. Locate the desired selection.
3. Click the number located in the Number of Elements column.
4. In the Selection Element List page, select an element.
5. Click the Delete icon.

Deleting a Small Selection

Before you start

Configuration > **[Recruiting] Administration** > **[Fields] Selection Lists**

Here's what to do

1. Click the Small Selections tab and the Custom tab.
2. Click a selection name.
3. In the Selection Editor, click the Delete icon.
4. Confirm the deletion.
5. Click Done.

Results:

The small selection is no longer available under Small Selections, Custom.

Removing an Element from a Small Selection

Before you start

An element cannot be removed if it is being used.

Configuration > **[Recruiting] Administration > [Fields] Selection Lists**

Here's what to do

1. Click the Small Selections tab and the Custom or Standard tab.
2. Click a selection name.

3. In the Active Elements list, select an element then click Remove.
4. Click Done.

Results:

The element is no longer displayed in the Active Elements list.

Field Layout

Field Layout

Field layout consists in determining the position of standard and user-defined fields in offer forms, requisition files, and candidate files.

Field layout works differently depending on the type of field.

Offer Field Layout: Both standard and custom offer fields can be positioned in the offer form. The layout consists in specifying in which category/section of the offer form the field will be displayed (Top Section, General Terms, Bonuses, Details, Other Terms) and which sequential field position it should occupy.

Offer field layout configuration is available in the Offer Field Layout feature available in the Recruiting Administration.

Department Field Layout: Only custom department fields can be positioned in a department configuration page (Recruiting Administration > Department List). The layout consists in specifying the line and position where the field will appear in the department configuration page.

Department field layout configuration is available in the Department Field Layout feature available in the Recruiting Administration.

Candidate and Requisition Field Layout: To position candidate and requisition fields in a form, you need to create blocks of information (called user-defined forms) where you can place standard and custom fields intermixed within the same form.

Candidate and requisition field layout configuration is available in the User-defined Form feature available in the Recruiting Administration.

Adding a Field to the Offer Form

Before you start

Offer fields must first be created.

Configuration > **[Recruiting] Administration** > **[Fields] Offer Field Layout**

Here's what to do

1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

Results:

The field appears in the Field Layout - Offer page.

Positioning Fields in the Offer Form

Before you start

Both standard and custom offer fields can be positioned in the offer form.

For custom fields to appear in the Field Layout - Offer page, you must first create them.

Configuration > **[Recruiting] Administration** > **[Fields] Offer Field Layout**

Here's what to do

1. In the Field Layout - Offer page, for each field select a value under Category to specify in which section of the form the field will be placed.
2. Select a number under Line to specify on which line in the section the field will be placed.
3. Click Apply.

Removing a Field from the Offer Form

Before you start

Custom offer fields must be included in the Offer form.

Configuration > **[Recruiting] Administration** > **[Fields] Offer Field Layout**

Here's what to do

1. Select a field.
2. Click Remove.

Results:

The field no longer appears in the Field Layout -Offer page.

Adding a Field to the Department Form

Before you start

Custom department fields must first be created. See *Creating a User-defined Field*.

Configuration > **[Recruiting] Administration** > **[Fields] Department Field Layout**

Here's what to do

1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

Positioning Department Fields in the Requisition File

Before you start

Custom department fields must first be created. See *Creating a User-defined Field*.

Configuration > [Recruiting] Administration > [Fields] Department Field Layout

Here's what to do

1. In the Field Layout - Department page, for each field select the line and position to determine the position of the field.
2. Click Apply.

Removing a Field from the Department Form

Before you start

Custom department fields must be included in the form.

Configuration > [Recruiting] Administration > [Fields] Department Field Layout

Here's what to do

1. Select a field.
2. Click Remove.

7 Forms and Files

Requisitions and Candidate Files Configuration

Configuring Requisition Files

Requisition files are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a requisition file consists of the following steps:

1. Selecting the fields to include in the requisition file. You can use standard fields provided by Oracle or you *can create your own user-defined fields.*
2. Selecting the forms to include in the requisition file. You can modify existing forms or *create user-defined forms* from scratch.
3. *Creating the requisition file.*
4. *Selecting the situation when the requisition file will be used.*
5. *Associating the requisition file to a staffing type.*
6. *Associating the requisition file to configuration profiles.*
7. *Granting permissions to create, view, and edit requisitions.*

Creating a User-defined Field

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.

   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording "not translated" at the end.

   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user's attention.
6. Enter a label.

This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

7. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

    Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

    Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception..

Creating a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.

5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Creating a Requisition File

Before you start

When creating a requisition file, the blocks in the Prescreening section must be placed in the following order: 1) Disqualification Questions 2) Competencies 3) Questions. Not all sections must be deployed, but when used they must be used in this relation to one another to ensure users do not encounter errors in the layout of the file.

Configuration > **[Recruiting] Administration** > **User-defined Files**

Here's what to do

1. Click Create.
2. Select Requisition File in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Determine how requisition approval and posting will be handled during the creation process of the file.
   - Without Assistants: This is the default value. There is no special behavior.
   - With Assistants: When this value is selected, Recruiting Center users will be prompted through the approval and posting pages upon saving and closing the requisition file provided the requisition is ready for approving and posting.
6. Click Save. The requisition file you just created is displayed.
7. If you want to add information on each of the requisition file tab, click Show next to Tab Management, then click on the tab name.

   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
8. Create sections in the requisition file.
   a. Click Edit next to Section Ordering.
   b. Type the name of the section in the Add a Section field.

      The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.
   c. Click Create Section. The new section appears on the right, under File.
9. Add blocks to the sections.
   a. In the Available Blocks section, select a block.
   b. Drag and drop the block in the section.
10. Click Save.
11. Click Activate.

Selecting the Situation When a Requisition File is Used

Before you start

The user-defined file must be created and activated.

Configuration > [Recruiting] Administration > Requisition File Setup

Here's what to do

1. Click Edit.
2. For Requisition 1, select the situation when the requisition file will be used. For example, without posting.
3. Repeat the same process for Requisition File 2 and Requisition File 3.
4. Click Save.

Associating a Requisition File to a Staffing Type

Before you start

Configuration > [Recruiting] Administration > Requisition File Setup

Here's what to do

1. Click Edit.
2. For Requisition File 1, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the requisition file will be used.
5. Click Save.

Associating a Requisition File to a Configuration Profile

Before you start

Configuration > [SmartOrg] Administration > Configuration Profiles

Here's what to do

1. Click a configuration profile.
2. Click the Requisition File Creation setting.
3. Click Edit.
4. Select the desired requisition file.
5. Click Save.

Permissions to Create, View, and Edit Requisitions

Permissions granted to Recruiting Center users so they can create, edit and view requisitions.

To create requisitions in the Recruiting Center, users must have the following permissions.

User Type Permission	Location
Create requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
View requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Allow access to n requisitions Note: For a requisition type currently active.	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > Requisition Types

To view requisitions in the Recruiting Center, users must have the following permissions.

User Type Permission	Description	Location
View requisitions	Note that even if users can view requisitions "without restriction", users will not be able to view requisitions belonging to requisition/ staffing types that they do not have access to.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

To edit requisitions in the Recruiting Center, users must have the following permissions.

User Type Permission	Description	Location
Edit requisitions	This permission also allows users to enter comments on requisitions they are allowed to edit. Users can also cancel requisitions with this permission. When users have the **Create requisitions** permission but not the **Edit requisitions** permission, they will be able to edit a requisition until it is saved. Once the requisition is saved, they cannot change any value. Also, for the Recruiter and Recruiter Assistant fields contained in a requisition, only users that have the **Edit requisitions** permission will be displayed in the User Selector. Users with the **Create requisitions** permission will not be displayed. Regardless of the security level for certain requisition fields while in edit mode, users with the **Create requisitions** permission are able to capture foundation data in the Create a Requisition tool. Fields in the tool are always editable regardless of their security level.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Note: The "Edit requisitions" user type permission has two constraints:

- *But not if requisitions are in approval process*
- *But not if requisitions have been approved*

These two constraints do not take effect in the user's current session; they will apply only at the user's next login. This is because user type permissions are verified at login to determine what a user can access and the system does not know of the change until the credentials are verified again. For example, a user has the "Edit requisitions - But not if requisitions have been approved" permission. If a requisition changes from Draft to Approved during the user's session, the user will still be able to edit the requisition or attach/remove files in the requisition until he/she logs out of the system. Likewise, if a requisition was in the approval cycle during the user's login and it then completes the approval cycle. If that user is not authorized to edit requisitions during the approval process, he/she may need to log out and back in again in order to regain the edit access to the requisition.

Configuring Requisition Templates

A requisition template is a requisition file containing information that will likely be reused for a similar job position. Requisition templates are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a requisition template consists of the following steps:

1. Selecting the fields to include in the requisition template. You can use standard fields provided by Oracle or you can *create your own user-defined fields.*
2. Selecting the forms to include in the requisition template. You can modify existing forms or *create user-defined forms* from scratch.
3. *Creating the requisition template.*
4. *Selecting the situation when the requisition template will be used.*
5. *Associating the requisition template to a staffing type.*
6. *Granting permissions to create, view, and edit requisition templates.*

Creating a User-defined Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.

5. Enter help text if you are creating a Candidate field.

   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording "not translated" at the end.

   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user's attention.
6. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

    Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

    Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception..

Creating a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Creating a Requisition Template

Before you start

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click Create.
2. Select Requisition Template in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Click Save. The requisition template you just created is displayed.
6. If you want to add information on each of the requisition template tab, click Show next to Tab Management, then click on the tab name.

   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
7. Create sections in the requisition template.
   a. Click Edit next to Section Ordering.
   b. Type the name of the section in the Add a Section field.

      The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.
   c. Click Create Section. The new section appears on the right, under File.
8. Add blocks to the sections.
   a. In the Available Blocks section, select a block.
   b. Drag and drop the block in the section.
9. Click Save.
10. Click Activate.

Selecting the Situation When a Requisition Template is Used

Before you start

The user-defined file must be created and activated.

Configuration > [Recruiting] Administration > Requisition File Setup

Here's what to do

1. Click Edit.
2. Under Requisition Template, select the situation when the requisition template will be used.
3. Click Save.

Associating a Requisition Template to a Staffing Type

Before you start

Configuration > [Recruiting] Administration > Requisition File Setup

Here's what to do

1. Click Edit.
2. Under Requisition Template, click Add Staffing Type.
3. In the first drop-down list, select a requisition template.
4. In the second drop-down list, select the situation when the requisition template will be used.
5. Click Save.

Permissions to Create, View, and Edit Requisition Templates

Several permissions are related to requisition templates.

To create requisition templates in the Recruiting Center, users must have the following permissions.

User Type Permission	Description	Location
Create templates		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Modify template information imported from HRMS		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Note: It is possible to configure the requisition template file to include the CSW designation. If it is not necessary to specify this field on the requisition template, it should not be included on the Template File configuration. When not included on the template, the legacy CSW configuration of workflow OLF contextualization will be honored. If the template contains a CSW field, the CSW defined on the template will override the definition of workflow contextualization in the CSW configuration area.

To view requisition templates in the Recruiting Center, users must have the following permission.

User Type Permission	Description	Location
View templates	This permission only controls the list of templates in the Requisition Templates Library. It does not control template selection within a requisition, which is based on the selected requisition type and Organization-Location-Job Field contextualization.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

To edit requisition templates in the Recruiting Center, users must have the following permission.

User Type Permission	Description	Location
Edit templates	Note that users are able to create requisition templates even if they do not have the Edit templates permission. Users will be able to fill the new template, save it, and modify it until the file has been closed. Once closed, it will no longer be possible for users to modify it.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Configuring Candidate Files

Candidate files are created with the combination of multiple forms and predefined blocks grouped within sections.

The configuration of a candidate file consists of the following steps:

1. Selecting the fields to include in the candidate file. You can use standard fields provided by Oracle or you can *create your own user-defined fields*.
2. Selecting the forms to include in the candidate file. You can modify existing forms or *create user-defined forms* from scratch.
3. *Creating the candidate file*.
4. *Selecting the situation when the candidate file will be used*.
5. *Associating the candidate file to a staffing type*.

Creating a User-defined Field

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.

   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording "not translated" at the end.

   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user's attention.
6. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

    Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the

field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.

17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception..

Creating a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Creating a Candidate File

Before you start

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click Create.
2. Select Candidate File in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.

5. Click Save. The candidate file you just created is displayed.
6. If you want to add information on each of the candidate file tab, click Show next to Tab Management, then click on the tab name.

   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
7. Create sections in the candidate file.
   a. Click Edit next to Section Ordering.
   b. Type the name of the section in the Add a Section field.

      The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.
   c. Click Create Section. The new section appears on the right, under File.
8. Add blocks to the sections.
   a. In the Available Blocks section, select a block.
   b. Drag and drop the block in the section.
9. Click Save.
10. Click Activate.

Selecting the Situation when a Candidate File is Used

Before you start

User-defined files must first be created and activated.

Configuration > **[Recruiting] Administration** > **Candidate File Setup**

Here's what to do

1. Click Edit.
2. Under Candidate File, for each situation, select the candidate file that will be used.
3. Click Save.

Associating the Candidate File to a Staffing Type

Before you start

Configuration > **[Recruiting] Administration** > **Candidate File Setup**

Here's what to do

1. Click Edit.
2. Under Candidate File, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Configuring the Create Candidate File

The Create Candidate feature is used when a recruiter receives a resume and wants to capture or enter the candidate's information into the system. The Create Candidate action is available in the Recruiting Center home page (center stage) as well as in the candidates list via the More Actions menu.

The configuration of the Create Candidate feature consists of the following steps:

1. Selecting the fields to include in the candidate file. You can use standard fields provided by Oracle or you can *create your own user-defined fields*.
2. Selecting the forms to include in the candidate file. You can modify existing forms or *create user-defined forms* from scratch.
3. *Creating the Create Candidate file*.
4. *Selecting the situation when the file will be used*.
5. *Associating the candidate file to a staffing type.*
6. *Associating the create candidate file to configuration profiles*.
7. Granting the **Create candidates** permission (SmartOrg Administration > User Types > Recruiting > Candidates). When the permission is granted, the Create Candidate action is available in the Recruiting Center.
8. Granting the **Attach a file (general)** and **Attach a file (on preselected candidates)** permissions (SmartOrg Administration > User Types > Recruiting > Candidates). Users must have the "Attach a file (general)" and "Attach a file (on preselected candidates)" permissions for the resume parsing option to work properly when creating a candidate.

Creating a User-defined Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click Create User-defined Field.
3. In the Type list, select the type of field you want to create.
4. Enter a name for the field.

   The name is used internally. It must be unique and without any spaces. Spaces can result in problems for integration with other HRIS applications. Underscores can be used.
5. Enter help text if you are creating a Candidate field.

   The help text will be displayed in the career section directly below the user-defined field, providing candidates with an explanation of the field. If using multiple languages, you will have to enter a translation of the help text for those languages. If translations are not provided, the system copies the help text into the other languages and adds the wording "not translated" at the end.

   The help text can contain up to 1000 characters (spaces count as characters). It is recommended, however, that help text be kept as short as possible to improve readability and to ensure that the text does not compete against more important information for the user's attention.

6. Enter a label.

   This is the name that will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.
7. Enter a short label.

   This label name is used in lists. Short Label is not available for Department, Requisition, and Offer user-defined fields.
8. Enter information in the Attributes section.
9. Translate the field into all available languages. Languages are available at the upper right of the page.
10. Click Save.
11. Click Done.
12. In the list of fields, click the field you just created.
13. Click Edit Field Availability.
14. Select where the field will be available: Recruiting Center, career sections, the candidate search feature, the History tab, and in reports (for user-defined fields).
15. For candidate user-defined fields, the Personally Identifiable Information (in Career Sections) option is available. When selected, if candidates enter a value in these fields and save the page, the value is no longer displayed in the field and asterisks are displayed in place of the value on the Summary page. See Masking Values for Date of Birth, Social Security Number and Candidate UDFs.
16. Indicate if the content for the field is required to save, approve (requisition fields only), or source (requisition fields only) or if it is not required.

    Recruiting Center users will need to enter information in the field in order to proceed. If content is not required, users do not have to enter information in the field. If a field in a file is mandatory and the user is not authorized to edit the field because of the security level of the field, an error message will be displayed and the user will not be allowed to complete the transaction.

    Offer fields configured as required only apply in the context of a job offer (Offer Terms). As a result, offer fields are not required when users are creating other types of offers (that is, current job, competitive offer, expectations). Also, users permitted to create/edit supplementary offers are able to enter as much or as little data as they desire, and when creating a job offer they are required to complete any required fields prior to saving.
17. Specify the security level of the field, that is General, Restricted, or Confidential.
18. Click Save.
19. Click Add next to Organizations, Locations, or Job Fields to associate the field to Organizations, Locations and/or Job Fields.
20. Click Add next to Exceptions to create a staffing type exception..

Creating a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.

5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Creating the Create Candidate File

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Files**

Here's what to do

1. Click Create.
2. Select Create Candidate in the drop-down list then click Create.
3. Provide a code and a name.
4. Provide a description to facilitate future references.
5. Specify if you want to send the ACE Candidate Alert email.
6. Specify if you want to send the Capture Resume Acknowledgement email.
7. Click Save. The file you just created is displayed.
8. If you want to add information on each of the file tab, click Show next to Tab Management, then click on the tab name.

   The name of a tab in a user-defined file can be modified. You must send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.
9. Create sections in the file.
   a. Click Edit next to Section Ordering.
   b. Type the name of the section in the Add a Section field.

      The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.
   c. Click Create Section. The new section appears on the right, under File.
10. Add blocks to the sections.
    a. In the Available Blocks section, select a block.
    b. Drag and drop the block in the section.
11. Click Save.
12. Click Activate.

Selecting the Situation when the Create Candidate File is Used

Before you start

Configuration > **[Recruiting] Administration** > **Candidate File Setup**

Here's what to do

1. Click Edit.
2. Under Create Candidate, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Associating the Create Candidate File to a Staffing Type

Before you start

Configuration > **[Recruiting] Administration** > **Candidate File Setup**

Here's what to do

1. Click Edit.
2. Under Create Candidate, for each situation, click Add Staffing Type.
3. In the first drop-down list, select a requisition type.
4. In the second drop-down list, select the situation when the file will be used.
5. Click Save.

Associating the Create Candidate File to a Configuration Profile

Before you start

Configuration > **[SmartOrg] Administration** > **Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Candidate File Creation setting.
3. Click Edit.
4. Select the desired files.
5. Click Save.

Permission and Field Security Level not Considered when Creating a Candidate

Recruiting Center users have the ability to create candidates without the restriction of security level permissions and field security level.

When creating a candidate general profile or job-specific submission (via the Create Candidate action), the file presented to users will not take into consideration security level permissions in view and edit modes for those users and will allow them to input data into all the fields no matter the security level permissions granted or the security level set for the fields.

Security Level Permission	Location
• Security level for internal candidates (in edit mode) • Security level for internal candidates (in view mode) • Security level for external candidates (in edit mode) • Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates

Security Level - Candidate Field	Location
• General • Restricted • Confidential	Configuration > [Recruiting] Administration > Fields > Candidate

Below is an example of a candidate creation process. In this example, the user does not have security level permissions in edit and view mode for the First Name and Last Name fields:

- The user selects Create Candidate in the More Actions list.
- When doing the duplicate check before creating the candidate, the user has access to the First Name and Last Name fields.
- When creating the candidate, the user also has access to the First Name and Last Name fields.
- Once fields have been filled, the user clicks Save or Save and Close. The system does a check to see if all mandatory fields are filled. If not, the user remains in the create candidate process until he/she fills in all mandatory fields and clicks Save or Save and Close again.
- When all mandatory fields are filled, the user is then moved out of the create candidate process and into the edit or view candidate process. All security level permissions are then considered again. As a result, the user does not see the First Name and Last Name fields in view mode and in edit mode as he/she does not have the security level permissions for that.

Note that when creating a candidate job-specific submission, if the user does not have access (security level permissions) to view or edit the candidate file, the system will automatically redirect the user to the Recruiting Center home page. For example, if the user was creating an internal candidate and he/she is not allowed to see internal candidates, as soon as the user saves the file (that is, exit the create mode), the system will close the file and take the user back to the home page.

File

User-defined File

User-defined files are used to build requisitions, requisition templates, and candidate files.

A user-defined file is a page consisting of sections, each section contains blocks, a block contains forms, and a form contains fields.

This image illustrates a requisition file. For this requisition file, there is a section called Logistics. A block contains the form Identification. The form contains several fields such as Requisition ID, Requisition Title, Number of Openings.

Four types of user-defined files can be created:

- Requisition File
- Requisition Template
- Candidate File
- Create Candidate

When creating a user-defined file and starting with a default, any fields that are part of the default which are inactive will still appear in the file and will need to be manually removed during the configuration of the file.

Block

Blocks are added to sections of a user-defined file.

When creating a user-defined file, system administrators create sections then add blocks in each section. These blocks appear as sub-sections within the file. System administrators also define the properties of each block. This is where they can select a specific user-defined form for a block. For example, three Candidate Personal Information forms are available. When adding the Candidate Personal Information block to the file, the administrator can choose which of the three Candidate Personal Information forms will be used for that file.

Some block types have special properties that system administrators can configure.

Candidate Blocks	Special Properties
Candidate Personal Information	Option to force users to provide a valid US social security number.
Certification	Option to set the minimum number of entries required.
Education	Option to set the minimum number of entries required.
References	Option to set the minimum number of entries required.
Work Experience	Option to set the minimum number of entries required.

Requisition Blocks	Special Properties
Information	This block must be one of the first four blocks in the file.

Beside the user-defined forms that are used as blocks of information in a file, pre-defined blocks of information provided with the system are available and can be incorporated in a file. Some of these blocks have special properties. Note that the field level content of these blocks is not configurable, but system administrators do have control over the placement of this information in the file.

System-defined Candidate Blocks	Special Properties
Account information	None
Additional Information	None
Contingent Staffing	None
Cover Letter	None
Disqualification Questions	None
Employment Preferences	Option allowing the display of the Organization menu.
Job Posting Notification	Option to send by default an email notification whenever a new position matching this profile is posted.
Prescreening Questionnaire	Option allowing the display of mandatory questions (none, single answer, single and multiple answer, all).
Prescreening Skills	Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.
Profile Questionnaire	Option allowing the display of mandatory questions (none, single answer, single and multiple answer, all).
Profile Skills	Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.
Regulations	Option allowing the display of the mandatory statement checkbox. Setting allowing the selection of the skill assessment format (Simple, Detailed or Combined). Setting allowing to save only skill assessments when a candidate provides information about a given skill.

System-defined Candidate Blocks	Special Properties
Resume	Option to define the minimum number of characters required in the resume field.
Screening	None
Shift Availability Grid	None
Source Tracking	None
Submission Medium	None

System-defined Requisition Blocks	Special Properties
Abstract	Not in template.
Candidate Selection Workflow	This block is required in a requisition file and the field is always required to save a requisition. This block is optional for inclusion in the requisition template file, and if included, it will be required to save a template.
Disqualification Questions	Not in template.
Group	Not in template. This block must be one of the first four blocks in the file.
Owners	This block must be one of the first four blocks in the file. In addition, settings allow the display of the following fields: hiring manager, hiring manager assistant, recruiter assistant, collaborators. Note: There is no setting to disable the recruiter field, but this can be accomplished by contextualizing the field so that it only shows up in very limited circumstances. Technically, this field is required to save a requisition to the database as the recruiter is considered the primary owner, but if the field is hidden from view, the user creating the requisition will be assigned the role of recruiter behind the scenes. If the customer has activated Dynamic Approval Routing, the Owners block display the Manager field for users to be able to route a requisition for approval.
Questions	None
Regulatory Services	None
Screening	None
Skills	Option to select the simple skill assessment format when the skill assessment format is set to Simple or Detailed.
Structure	This block must be one of the first four blocks in the file. Also, settings allow the display of organization, work location or job role fields.

Duplicating a User-defined File

Before you start

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click Duplicate next to the file.
2. Provide a code and a name.
3. Provide a description to facilitate future references.

4. Complete any other fields.
5. Click Save.

Editing the Properties of a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

The user-defined file must not be in use.

Configuration > Recruiting] Administration > User-defined Files

Here's what to do

1. Cick a user-defined file.
2. Click Edit next to Properties.
3. Modify the description.
4. Click Save.

Activating a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Activate.

Results:

The user-defined file status is changed to Active. It can now be selected when specifying the situation when the file will be used (via the Candidate File Setup or Requisition File Setup feature).

Deactivating a User-defined File

Before you start

The user-defined file must have the Active status.

The user-defined file must not be in use.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Deactivate.

Results:

The user-defined file status is changed to Draft. You can now modify the user-defined file or make it unavailable when building requisition or candidate files.

Deleting a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click Delete next to the file.
2. Confirm the deletion.

Results:

The user-defined file no longer appears in the User-defined Files list and can no longer be used.

Adding a Section in a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Type the name of the section in the Add a Section field.
   The name of the section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.
4. Click Create Section.

Results:

A new section appears on the right, under File.

Deleting a Section from a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Click Delete next to a section.
4. Click Save.

Results:

The section and its blocks are no longer displayed in the file.

Adding a Block in a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. In the Available Blocks section, select a block.
4. Drag and drop the block in the section.
5. Click Save.

Removing a Block from a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

The block must not be mandatory.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. Select a block included in a section located on the right hand side.
4. Drag and drop the block to the Available Blocks list.
5. Click Save.

Modifying the Title of a Section

Before you start

The user-defined file must have the Inactive or Draft status.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Under Sections Ordering, click on a section.
3. Click Edit next to Properties.
4. Modify the value in the Title field.
   The Title field supports 75 text based characters.
5. Click Save.

Results:

The title of a section is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.

Modifying the Title of a Block

Before you start

The user-defined file must have the Inactive or Draft status.

The Title field supports 75 text based characters.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Under Sections Ordering, click on a block.
3. Click Edit next to Properties.
4. Modify the value in the Title field.
   The Title field supports 75 text based characters.
5. Click Save.

Results:

The title of a block is viewable by Recruiting Center users when they are in view and edit modes within a file as well as in the file's Table of Contents.

Modifying the Name of a Tab

The name of a tab in a user-defined file can be modified. The system administrator can send the new name to Oracle Support who will then activate the text for your zone. Contact Oracle Support for further information.

Creating Custom Instructions for a Block

Before you start

Configuration > [Recruiting] Administration > User-Defined Files

Here's what to do

1. Click a user-defined file.
2. Click on a block.
3. Click Edit next to Properties.
4. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
5. Format instructions if desired.
6. Click Save.

Results:

The specific instructions appear underneath the block title of a file to assist Recruiting Center users in understanding what they need to do in a specific block of a file.

Creating Custom Instructions for a Section

Before you start

Configuration > [Recruiting] Administration > User-Defined Files

Here's what to do

1. Click a user-defined file.
2. In the Section Ordering section, click on a section title (displayed in bold).
3. Click Edit next to Properties.
4. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
5. Format instructions if desired.
6. Click Save.

Results:

Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the section title to assist users in understanding what they need to do in a specific section of a file.

Creating Custom Instructions for a Tab

Before you start

Configuration > [Recruiting] Administration > User-Defined Files

Here's what to do

1. Click a user-defined file.
2. In the Tab Label Management section, click Show.
3. Click on a tab.
4. Click Edit next to Properties.
5. In the Description field, enter custom instructions.
   The Description field supports 4000 text based characters.
6. Format instructions if desired.
7. Click Save.

Results:

Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the tab header to assist users in understanding what they need to do in the History, Referral and Attachments tabs of a file.

Choosing a User-defined Form for a Block

Before you start

Not available for all block types.

The user-defined file must have the Inactive or Draft status.

Configuration > **[Recruiting] Administration** > **User-defined Files**

Here's what to do

1. Click a user-defined file.
2. Under Section Ordering, click on a block.
3. Click Edit next to Properties.
4. Select a form in the User-defined Form drop-down list.
5. Click Save.

Form

User-defined Form

A user-defined form is a page containing standard fields and user-defined fields.

User-defined forms can be created for these file types:

- requisition files
- requisition templates
- candidate files

Several types of forms are available for each file type. These types of forms are suggested ways of packaging information and each form contains a default template that system administrators can use to start building the form. System administrators can also choose to build the form from scratch and ignore the default template. Note that it is possible to create multiple user-defined forms for each type of form. For example, three different user-defined forms for references could be created and used for different purposes.

The table presents the types of user-defined forms available for requisition files, requisition templates, and candidate files.

Requisition Files	Requisition Templates	Candidate Files
Abstract	Additional Information	Background Check
Additional Information	Budget	Basic Profile
Budget	Compensation	Candidate Personal Information
Compensation	Contingent Terms	Certifications
Contingent Terms	External Description	Education
External Description	Identification	Employee Metrics
Identification	Internal Description	eSignature
Internal Description	Other	References
Other	Profile	Submission Information
Profile		Work Conditions
		Work Experience

Creating a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.

7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Duplicating a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

Click Duplicate next to the form.

Results:

The new user-defined form has the same code with the extension (copy).

Previewing a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

Click Preview next to the user-defined form.

Deleting a User-defined Form

Before you start

The user-defined file must have the Inactive status.

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

1. Click Delete next to the user-defined form.
2. Confirm the deletion.

Results:

The user-defined form no longer appears in the User-defined Forms list. The user-defined form can no longer be used in user-defined files.

Activating a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

Click Activate next to the user-defined form.

Results:

The user-defined form status is changed to Active. The user-defined form can be used when creating user-defined files.

Deactivating a User-defined Form

Before you start

The user-defined form status must be Active.

The user-defined form must not be in use.

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

Click Deactivate next to the user-defined form.

Results:

The user-defined form status is changed to Draft. The user-defined form is unavailable when creating user-defined files.

Adding Fields to a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

1. Click a form.
2. Select a field from the Field Chooser list.
3. Drag and drop the field in the desired section.
4. Edit the properties of a field by selecting the field and scrolling to the *Selected Element Properties* section at the bottom of the form.
5. Click Save.

Editing the Properties of a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

1. Click a user-defined form.
2. Modify the Name, Code and Description fields.
3. Click Save.

Editing the Properties of a Field included in a User-defined Form

Before you start

Configuration > **[Recruiting] Administration > User-defined Forms**

Here's what to do

1. Click a user-defined form.
2. In the Page Content section, click in a field.
3. In the *Selected Element Properties* section, located at the bottom of the form, modify the properties of the field.
4. Click Save.

Adding a Static Hyperlink in a User-defined Form

Before you start

Configuration > **[Recruiting] Administration** > **User-defined Forms**

Here's what to do

1. Click a user-defined form.
2. Click a field.
3. In the Selected Element Properties section, under Field Type, select URL.
4. In the Selected Element Properties section, under Access Type, select Read-only.

   Access must be set to read-only to ensure the user cannot change the value of the URL.

Adding Custom Instructions to a Field

Before you start

Configuration > **[Recruiting] Administration** > **User-Defined Forms**

Here's what to do

1. Click a user-defined form.
2. In the Page Content section, click in a field.
3. In the Selected Element Properties section at the bottom of the page, enter custom instructions in the Instructions field.

   The Instructions field supports 1000 characters, embedded HTML and hyperlinks.

   Note that the Help Callout field is not used in Recruiting.
4. Format instructions if desired.
5. Click Save.

Results:

Instructions are only viewable by Recruiting Center users when they are in edit mode within a file. The instructions appear underneath the field to assist users in understanding what they need to do with certain fields contained in a file.

User-defined Forms Selected Element Properties

Available properties depend on the type of field. Not all properties are available for all elements or for all products.

Property Option	Description
Access (Editable/ Read Only)	Indicates if the field is read-only or editable. When read-only is selected, a user is unable to modify the field. Default value is Editable.
Binding field	Data source to which the element is bound. The value displayed in the Binding field represents the data value (available in the first list of the Field Chooser) to which the element is associated. For example, the Annual Bonus field is bound to the AssignmentOfferForForm/AnnualBonus. The value in the Binding field is not editable.
Columns	Number of columns. Administrator can determine how many columns of fields to display in each area of each page of the forms.
CSS Style	The desired visual style for displaying the value within an input field. Use styles as defined in the Cascading Style Sheets 2.0 standard: *ww3.org reference*. This style will override the main style that is used when the form is displayed to assignees and viewers. If no style information is entered, the default visual presentation will be used for that page.
CSS Style Label	This is used to control the formatting of the label above the input field that is displayed to the assignee and form viewer.
CSS Style Instructions	This style will override the style defined in the career section theme. If no information is entered, the style defined in the career section theme will be used.
Default Value	Default value of the input field
Field Label	Input Field Label
Field Size	Indicates the number of elements displayed in a list. Field Size is used for multiple-selection fields. Default value is 1. For example, if the field size is 2, the list will display 2 values.
Field Type	This property should not be used for fields that are filled by candidates in career sections because RTF input is not supported. Field type is mainly used for requisition content. • Text Input

Property Option	Description
	• Password Input • Suggest • Text Area • Check Box • Radio Button • Drop-down List • Check Box • Multi level Selector - this enables the user to select a collection of cascading values that are dependent on each other. Such as selecting a country, followed by a state/province and then a city. • Date input • Date Drop- down list • Selector • Read-only Text • URL - this enables the value of the field to be displayed as a clickable link when the user accesses the form. • Image URL - works the same as the URL, but makes the corresponding image a clickable link.
Help Callout	Similar to instructions, but this is displayed as a help bubble on the form and can provide information about a field to the user.
Input Mask	Format of the input value. The following syntax must be used:9=any number, a = any letter, n=any letter or number, |=logical, or\9=the 9 character, \a=the a character, \n=the n character, \\|=the, | character, Any other symbol=the symbol (including a space). Possible formats for SSN and Zip/Postal codes: SSN: 999-99-9999ZIP Code United States: 99999|99999-9999Postal Code Canada: a9a9a9|a9a 9a9|a9a-9a9Note: Make sure to not add a space before and after the | operator. For example, do not enter 99999 | 99999-9999
Instructions	This can be used to provide any special instructions necessary to explain what is being requested for the field. The instructions will appear just below the field. Note that the instructions are not displayed when the field type is "read-only text".
Mandatory	Indicates, by selecting the Yes or No option, if the field must be completed. When a field is mandatory, a red square appears in front of the field. This can be useful for preventing an assignee from submitting a form with the value 'Not Specified' in a user-defined selection. Marking the field as Mandatory will require the assignee to specify a value.
Rows	Number of rows available in a text area.
Save Literals	If Input Mask is used for a field, it may require that specific numbers or letters appear within the field when the assignee fills it out at runtime. Save Literals determines if specific characters in the input mask will be saved in this field, or if they are simply required for the user to type in but removed from the saved value. This is useful for helping assignees to recognize the right information to type in, while removing the redundant characters for later use.
Status (Deactivated/Activated)	Indicates if the field is activated or deactivated (that is, grayed out or not). The use of this field depends on the value selected in the Access field. Editable access + Activated status=field can be modified Read-only access + Activated status=field not editable Read-only access + Deactivated status=field not editable Editable access + Deactivated status=field not editable

Property Option	Description
Tooltip	Displays the text entered in the input field as a tooltip when the assignee/viewer hovers over the field in the form.
Value	Area where user input should be entered or where the information saved in a field is displayed.

Candidate and Requisition File Setup

Candidate and Requisition File Setup

The Candidate File Setup and Requisition File Setup features allow system administrators to indicate in which situations user-define files will be used and to associate user-defined files to staffing types.

System administrators first define a primary file. Then, if desired, they can set a different file to be used for each staffing type. If a staffing type is not specified, the default file will be used.

Candidate File Setup	Purpose
Candidate File	Activated candidate file for viewing and editing general profiles. **Note:** The same file is used for both editing and viewing purposes.
	Activated candidate file for viewing and editing job submissions. **Note:** The same file is used for both editing and viewing purposes.
Create Candidate	Activated file for the quick creation of candidate profiles (default file).
	First activated file for creating candidate profiles.
	Second activated file for creating candidate profiles.
	Third activated file for creating candidate profiles.
	Fourth activated file for creating candidate profiles.
	First activated file for creating job-specific submissions.
	Second activated file for creating job-specific submissions.
	Third activated file for creating job-specific submissions.
	Fourth activated file for creating job-specific submissions.
	Activated file for creating referrer and candidate profiles.
	Activated file for capturing referrer profiles and job-specific submissions.

At least one Create Candidate flow must be activated for the Create Candidate feature to work.

Requisition File Setup	Purpose
Requisition File	Requisition File 1.
	Requisition File 2.
	Requisition File 3.
Requisition Template	Activated file for creating requisition templates.

Dissociating a Requisition File from a Staffing Type

Before you start

Configuration > **[Recruiting] Administration** > **Requisition File Setup**

Here's what to do

1. Click Edit.
2. Click Remove next to a staffing type.
3. Click Save.

Results:

If no other staffing types are associated to the requisition file, the requisition file will be used with all types of staffing.

Disassociating a Candidate File from a Staffing Type

Before you start

Configuration > **[Recruiting] Administration** > **Candidate File Setup**

Here's what to do

1. Click Edit.
2. Click Remove next to a staffing type.
3. Click Save.

Results:

If no other staffing types are associated to the candidate file, the candidate file will be used with all types of staffing.

8 Candidate Selection Workflow

Candidate Selection Workflow Key Concepts

Candidate Selection Workflow

A candidate selection workflow (CSW) provides the framework to move candidates through the hiring process in order to evaluate and find the best candidate for a job.

A CSW includes steps, statuses, and actions a recruiter must go through before hiring a candidate. An analogy can be drawn between the candidate selection workflow 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 selected.

The CSW is created by the system administrator then selected by recruiters when creating a requisition. When candidates apply on the requisition, the selected CSW is used to track and manage candidates from the time they are new to the system to the time that they are hired. Candidate files in each step of the CSW can have a status. Specific actions can be performed on these candidate files depending on the steps and statuses. A set of user type permissions grant users access to the actions that can be performed in a candidate selection workflow.

The CSW can be displayed to recruiters on a priority basis. The system will sort workflows according to the level of compatibility and ensure that the most appropriate workflow is displayed when recruiters create a requisition.

Candidate Selection Workflow Step

Candidate selection workflows are comprised of steps that represent the levels that candidates reach as they progress through the hiring process. A step represents a major stage or event in a candidate selection workflow.

A step in a candidate selection workflow can be mandatory or optional.

- If a step is mandatory, the user must take the candidate through the step before moving on to any subsequent steps. The user will not have access to the subsequent list of steps until the step is completed.
- If a step is optional, the user can skip the step entirely and move the candidate on to the next step. Or, the user can move a candidate conditionally through a step without completing the step in order to move to a subsequent step, and return to the conditional completion step later to complete it.

Most steps are mandatory and sequential, meaning that they must be completed in the prescribed order. In some scenarios, a user may be able to move a candidate to a step without completing the current one, but the system will require that all mandatory steps be completed before completing the hiring of a candidate.

Each step must be finished with a completion status, indicated by an asterisk (*), before a candidate can move to another step in the hiring process. A completion status completes the step.

A step can have a Restricted confidentiality level. In many organizations, hiring managers are not involved in the earliest steps of the candidate selection process. Recruiters are responsible for evaluating new job applications and only submit qualified candidates to the hiring managers. It is possible to configure steps to prevent hiring managers from viewing specific selection steps (such as New) in the Recruiting Center Candidates list.

Notifications can be added to steps. This allows sending a message to users to let them know when a step is reached by candidates.

> **Note:** There is no limit on the number of steps that can be used in a CSW. However, a best practice is to only add necessary steps.

Candidate Selection Workflow Status

A status indicates the detail or state of where a candidate is within a step.

A candidate can change status during a step but the candidate can only have one status at a time in each step. Statuses are more flexible than steps as most are optional and do not need to be followed in a certain order. Statuses can be temporary therefore requiring an additional action from the user or they can complete a step (indicated by *) because they complete the step by either moving the candidate to the next step or terminating the candidate selection process.

Statuses may have different progression levels:

Progression Level	Description
Not Started	Indicates that the step has not started yet. Example: For the 1st Interview step, "To be Scheduled" is a Not Started status because the interview has not been scheduled and the step has not officially started.
In Progress	Indicates that a candidate needs to be moved to other statuses before moving to the next step. The option "move" is not available to the user at this point. Example: For the 1st Interview step, "Scheduled" is an In Progress status.
Completed	Indicates that a candidate can move to the next step. The "move" option is available to the user at this point. When selecting the Completed level, the following option becomes available: "Allow completion even if some activities remain pending". This option allows the move to the next step even if some activities are still pending from a previous step.

Status change buttons (or shortcut buttons) allow recruiters to change the status of a candidate without having to open the Action window. A status can be linked to one of these buttons. Only one status can be assigned to a specific button in the current step.

Button	Behavior in the Candidate File	Behavior in the Candidate List
	Changes the status of the candidate to a completion status.	Changes the status of all selected candidates to a completion status.
	Changes the status of the candidate to Rejected.	Changes the status of all selected candidates to Rejected.

Button	Behavior in the Candidate File	Behavior in the Candidate List
	Changes the status of the candidate to Under consideration.	Changes the status of all selected candidates to Under consideration..

Candidate Selection Workflow Action

An action is an event performed on a candidate file during the hiring process.

An action is linked to a specific step of the candidate selection workflow. The action is performed by a recruiter when a candidate reaches the step of the workflow.

Candidate selection workflow actions are provided by the system. Available actions for a candidate selection are:

Action	Description
Add Comments	Add comments to a candidate file.
Bypass	Bypass a step in a candidate selection workflow without any restriction.
Change Status	Change the status of a step in a candidate selection workflow.
Enter Grade	Enter or remove a grade in a candidate file.
Move	Move a candidate from one step to another.
Reset Selection Process	**Note:** The rules for the "Reset Selection Process" action are not well implemented and for now it is best to not implement this action. This manual candidate feature is activated via the permission "Reset the selection process of an existing submission".
Revert	Undo the last action in a step.
Self-Assigned Task	When a candidate gets to the step where the Self-assigned Task action was added, Recruiting Center users can select the Create a self-assigned task option in the Change Step and Status window or Bypass window. If the option is selected, users have to provide a name, due date, description, and comments for the self-assigned task. The task then becomes available under the Tasks tab.
Send Correspondence	Send a correspondence to a candidate.
Share Candidate in CSW Assistant	Share a candidate while the candidate is moving in the selection workflow.
Start New Hire Transition Process	Start a new hire process.
Start Onboarding Process	Start an onboarding process.
Start Pre Hire Transition Process	Start a prehire process.
Undelete	Undelete a candidate file.
Update Start Date	Update the start date of a candidate.

Qualifier and Qualifier Group

Qualifiers provide a reason or additional information to move a candidate in a candidate selection workflow or to change the status of a candidate.

Qualifiers are created by the system administrator. When configuring the statuses of a step, the administrator can specify if qualifiers are optional or mandatory and if one or several qualifiers can be selected by candidates.

When users change the status of a candidate, the qualifiers displayed will vary depending on the statuses linked to the steps chosen for the selected candidate selection workflow.

For example, a candidate may decline a job for personal reasons. The qualifiers could be:

- Not willing to relocate
- Not willing to travel
- Feels that salary is insufficient
- No reason given

Qualifiers are grouped together into qualifier groups.

Candidate Selection Workflow Example

The example illustrates a candidate selection workflow with six steps and several statuses for each of the steps.

: Shortcut button to change to a completion status.

: Shortcut button to change to the rejected status.

Step 1: New	Step 2: HM Review	Step 3: Interview / Assessment	Step 4: Offer	Step 5: Background Check	Step 6: Hire
New Applicant	To be HM Reviewed	To Be Interviewed	Offer to be Made	Initiate Background Screening	Proceed to Hire
Under Consideration	To be Rejected Post HM Reviewed	Invite to Scheduling Center	Draft	Background Follow-Up in Progress	Candidate No-Show (Rescind or Renege Offer)
Recommended	HM Approved	Phone Screen	Approval in Progress	Background Screening Completed	Hired
Rejected	Rejected	1st Interview	Approved	Rejected	Rejected
Has Declined	Has Declined	2nd Interview	Extended	Has Declined	Has Declined

Step 1: New	Step 2: HM Review	Step 3: Interview / Assessment	Step 4: Offer	Step 5: Background Check	Step 6: Hire
		3rd Interview	Rescinded		
		Interviews Completed	In Negotiation		
		Rejected	Refused		
		Has Declined	Accepted		
			Reneged		
			Rejected		
			Has Declined		

Reference Model

Steps and statuses must be mapped to a core standard process for reporting and database administration.

The reference model is made up of the following steps:

- New
- Reviewed
- First Interview
- Second Interview
- Third Interview
- Testing
- Offer
- Hired
- Rejected
- Declined
- Pipeline
- Inactive

Standard Candidate Selection Workflows

Default candidate selection workflows (CSWs) are supplied with the system. They can be used as templates to create customized workflows.

Default candidate selection workflows are:

- Complex CSW
- Detailed CSW
- Pipeline
- Reference Workflow
- Simple CSW

Candidate Selection Workflow Configuration

Building a Candidate Selection Workflow

Building a candidate selection workflow consists of the following steps.

1. *Duplicating an existing candidate selection workflow to fit your organization needs.*
2. *Reviewing the steps and statuses included in the new candidate selection workflow.*
3. *Reviewing the actions tied to the steps of the candidate selection workflow.*
4. *Associating an OLF to the candidate selection workflow.*
5. *Associating a requisition type to the candidate selection workflow.*
6. *Activating the candidate selection workflow.*

Duplicating a Candidate Selection Workflow

Before you start

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

Here's what to do

1. Click the Workflows tab.
2. Click on a candidate selection workflow.
3. Click Duplicate.
4. Enter a name for the new candidate selection workflow and translate it in all available languages.
5. Enter a code, comments, and description.
6. Select Default if you this workflow to be the default one when users create a requisition.
7. Review the current steps in the workflow.
    a. Remove the steps that are not necessary. Select the checkbox next to a step, then click Remove.

b. Add new steps if necessary. Click Add..., select the desired step, then click Add.
c. Reorder steps if necessary. Select a position (number) in the list for each step, then click Reorder.
d. Review the properties of each step.

   "Mandatory" indicates that the step is required to be completed.

   "Restricted" prevents a step from being visible in the Recruiting Center candidate list for those who do not have the permission to see restricted steps. If you make a step Restricted, you must also set the permission "View candidates in steps whose confidentiality level is "Restricted".

   "Allow" allows users to move candidates from one step to another and to complete unfinished tasks at a later time on the selection process.
e. Set notifications so that users receive a message when a step is reached by a candidate. Select a recipient, then select a message template.
f. Click Done.

8. Click Done.

Reviewing the Steps and Statuses Included in a Candidate Selection Workflow

Before you start

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Steps tab.
2. Click on a step that is included in the candidate selection workflow.
3. Review the statuses comprised in the step.
   a. Remove the statuses that are not necessary. Select the checkbox next to a status, then click Remove.
   b. Add new statuses if necessary. Click Add..., select the desired status, then click Add.
   c. Reorder statuses if necessary. Select a position (number) in the list for each status, then click Reorder.
4. Review the properties of each status.
   a. Indicate if the status is the initial status of the step.
   b. Determine the step progression level, that is Not Started, In Progress, Completed.
   c. Select a status change button that is used as a shortcut to change the status of a candidate directly in a candidate file.
   d. Select the *Ask for a qualifier* option if you want the user to select a qualifier to motivate the change to this status. This option is available only if the status has qualifiers defined.
   e. Select the *Ask for comments* option if you want the user to enter a comment when the change is done to this status.
   f. Select the *Interview Scheduling Behavior* option if you want the system to automatically change the status once an interview is scheduled for the step. This option is used with the Interview Scheduling feature only. You can activate the Interview Scheduling Behavior option for statuses related to the 1st, 2nd and 3rd Interview steps. When a recruiter creates a meeting in Recruiting, if the *Interview Scheduling Behavior*

option is selected in more than one status, the recruiter will have to select the appropriate status in the Action Dialog window. The Interview Scheduling permission must be enabled.

g. Set notifications so that users receive a message when a status is reached by a candidate. Select a recipient, then select a message template.
h. Activate the *automatic progression of candidates* feature if desired and create conditions.
i. Click Done.

5. Make the step available by clicking the Available option.
6. Repeat the above steps for each step comprised in the candidate selection workflow.

Reviewing the Actions Tied to the Steps of the Candidate Selection Workflow

Before you start

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

Here's what to do

1. Click the Steps tab.
2. Click on a step that is included in the candidate selection workflow.
3. Click the Actions Usage tab.
4. Review the actions tied to the step.
   a. Remove the actions that are not necessary. Select the checkbox next to an action, then click Remove.
   b. Add new actions if necessary. Click Add..., select the desired action, then click Add.
   c. Reorder actions if necessary. Select a position (number) in the list for each action, then click Reorder.
5. Click Done.

Associating a Candidate Selection Workflow to Organizations, Location and/or Job Fields

Before you start

The candidate selection workflow must be created.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Display Context tab.
4. Click Add in the Jobs, Organizations and/or Locations sections.
5. Select Organization-Location-Job Field elements.
6. Click Done.

Results:

The candidate selection workflow is associated to an Organization-Location-Job Field (OLF) structure. When users create a requisition, only the workflows matching the OLF structure of the requisition will be displayed. When associating an OLF structure to a candidate selection workflow, the more specific the level of the structure is, the more compatible the workflow will be with a requisition. Moreover, the system will automatically select the workflow which provides the highest degree of compatibility with the requisition.

Associating a Candidate Selection Workflow to a Requisition Type

Before you start

The candidate selection workflow must be created.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Display Context tab.
4. Select a requisition type in the Available Requisition Types list.
5. Click Add
6. Click Done.

Results:

When users create a requisition, workflows are displayed according to the requisition type (professional, hourly, contingent, etc.) selected for the requisition (instead of all workflows of the company).

Activating a Candidate Selection Workflow

Before you start

The candidate selection workflow must be created.

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

Here's what to do

1. Click the Workflows tab.
2. Click on a candidate selection workflow.
3. Select Available.
4. Click Done.

Results:

In the Workflows page, a check mark appears in the Available column next to the candidate selection workflow. The candidate selection workflow is now available to users when creating a requisition.

Candidate Selection Workflow - Permissions and Settings

The following permissions and settings are used for the candidate selection workflow functionality.

User Type Permission	Description	Location
Permissions related to candidate selection workflows are grouped under Candidate Selection Workflow.		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow
Choose a candidate selection workflow		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > General
Set candidate selection workflow event dates	This permission must be granted if you selected the option "Allow event date entry and modification" while configuring a status.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow

Setting	Description	Default Value	Location
Reset Candidate Selection Workflow after Candidate Re-applies	Reset the candidate selection workflow to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the "Offer" step or if an interview has been scheduled.	If the submission has reached the status Hired, Inactive or Withdrawn	Configuration > [Recruiting] Settings
Simultaneous Hiring of Multiple Candidates	Allow users to hire multiple candidates simultaneously. The setting is a global setting that affects all requisition types (professional, executive, hourly, etc.). It cannot be activated for a specific requisition type. As a recommended practice, customers should activate this feature to perform mass hiring.	Yes	Configuration > [Recruiting] Settings
Threshold CSW Step - Hide from Search	Indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have	Minimum Workflow Sequence	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Possible values are: • Not Specified (candidates are never excluded from search result) • New • Reviewed • Declined • Rejected • Testing • Offer • Minimum Workflow Sequence • 1st Interview • 2nd Interview • 3rd Interview		

Candidate Selection Workflow - Other Configuration Tasks

Creating a Candidate Selection Workflow

Before you start

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Workflows tab.
2. Click New...
3. Enter a name for the new candidate selection workflow and translate it in all available languages.
4. Enter a code, comments, and description.
5. Click the Steps Usage tab.
6. Add steps to the workflow.
    a. Click Add...
    b. Select steps.
    c. Click Add.
7. Reorder steps.

a. Select a position (number) in the list for each step.
b. Click Reorder.

8. *Associate Organizations, Locations and Job Fields to the workflow.*
9. *Associate a requisition type to the workflow.*
10. Click Done.

Results:

The candidate selection workflow appears in the Workflows page.

Deleting a Candidate Selection Workflow

Before you start

A workflow being used by another user cannot be deleted.

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

Here's what to do

1. Click the Workflows tab.
2. Select a candidate selection workflow.
3. Click the Delete icon.

Results:

The candidate selection workflow can no longer be used in the Recruiting Center. The candidate selection workflow is permanently removed from the database.

Deactivating a Candidate Selection Workflow

Before you start

A candidate selection workflow must be active in order to deactivate it.

It's important to understand the impact of inactivating a CSW prior to doing so. Consider the following:

- If a CSW is used on a requisition when it is made unavailable, candidates may be processed using that workflow for those requisitions.
- It won't be possible to edit and save a requisition using this workflow. The user will be forced to select another active workflow before the requisition can be saved.
- Users won't be able to create a new requisition using that workflow as it won't be available anymore in the list of available CSWs.
- The steps associated to this CSW will be removed from the candidates step filter.
- The list formats associated to the CSW step contexts will also be removed.

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

Here's what to do

1. Click the Workflows tab.

2. Click a candidate selection workflow.
3. Clear the Available check box.
4. Click Done.

Results:

In the Workflows page, a check mark no longer appears in the Available column next to the candidate selection workflow. Users can no longer use the candidate selection workflow. The candidate selection workflow remains available in the database.

It's important to understand the impact of inactiviating a CSW prior to doing so.

Selecting a Default Candidate Selection Workflow

Before you start

The candidate selection workflow must be activated.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Select Default Workflow.
4. Click Done.

Results:

In the Workflows page, a check mark appears in the Default column next to the candidate selection workflow. The candidate selection workflow appears by default when users create a requisition.

Adding a Step to a Candidate Selection Workflow

Before you start

The step must be activated in order to add it to the candidate selection workflow.

There is no limit on the number of steps that can be used in a candidate selection workflow.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Under the Steps Usage tab, click Add...
4. Select a step.
5. Click Add.
6. Click Done.

Removing a Step from a Candidate Selection Workflow

Before you start

The step must be included in the candidate selection workflow.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the check box next to a step.
4. Click Remove.

Results:

The step is no longer included in the candidate selection workflow. A step removed from a candidate selection workflow is not deleted permanently; it is still available in the Steps page and can be reused.

When you remove a step from a candidate selection workflow, the step becomes inactive. Although the step is inactive, its order within the step sequence is retained and remains configurable. This is because deactivating a step removes the ability to move candidates to that step in the future, but it does not remove candidates from within such steps, if applicable. It is therefore recommended that inactive steps continue to be sequenced logically with respect to other steps (whether active or inactive) such that, if candidates are in fact in those steps, they can still follow a selection process that is coherent.

Ordering Steps in a Candidate Selection Workflow

Before you start

Steps must have been added to the candidate selection workflow.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Steps Usage tab.
4. Select a new position (number) in the list next to the step name.
5. Click Reorder.

Configuring a Step Used in a Workflow

Before you start

The step must have been added to the candidate selection workflow before configuring it.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Click the Steps Usage tab.
4. Click the name of a step.
5. Review the properties of each step.

   "Mandatory" indicates that the step is required to be completed.

   "Restricted" prevents a step from being visible in the Recruiting Center candidate list for those who do not have the permission to see restricted steps. If you make a step Restricted, you must also set the permission "View candidates in steps whose confidentiality level is "Restricted".

   "Allow" allows users to move candidates from one step to another and to complete unfinished tasks at a later time on the selection process.
6. Set notifications so that users receive a message when a step is reached by a candidate.
   a. Select a recipient.
   b. Select a message template.
7. Click Done.

Results:

In the Workflow Details page, under the Steps Usage tab, a check icon appears in the Mandatory, Restricted and Allow columns depending of your configuration choices.

Selecting the Default Status of a Step

Before you start

The step must be created.

Only one status must be defined as the initial status for a specific step.

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Steps tab**

Here's what to do

1. Click on a step.
2. In the Statuses Usage tab, click on the desired status.
3. Select the option *This is the initial status for this step*.
4. Click Done.

Results:

In the Step Details page, under the Statuses Usage tab, a check mark appears in the Initial column next to the status. The default status is used when a candidate reaches the step.

Creating a Step

Before you start

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

Here's what to do

1. Click the Steps tab.
2. Click New...
3. Enter a name for the new step and translate it in all available languages.
4. Enter a short name (which appears on the Step tab in the Candidate List of Recruiting), code, and comments.
5. Complete the Step Information field if you want to provide custom instructions for the step.
   Only one text can be entered for each step for each language. A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.
6. Select a reference model. Reference models are used to map steps to reports, emails, EEO status settings in Regulations as well as to other functions used throughout the application. They are also used to determine the status that will trigger the *Employment Equity Information (USA)* recruiting setting.
7. Click the Statuses Usage tab.
   The Rejected and Declined statuses are present by default; they can be removed if desired.
8. Add statuses to the step.
   a. Click Add...
   b. Select statuses.
   c. Click Add.
9. Reorder statuses.
   a. Select a position (number) in the list for each status.
   b. Click Reorder.
10. Click the Statuses Usage tab.
11. Review the actions tied to the step.
    a. Remove the actions that are not necessary. Select the checkbox next to an action, then click Remove.
    b. Add new actions if necessary. Click Add..., select the desired action, then click Add.
    c. Reorder actions if necessary. Select a position (number) in the list for each action, then click Reorder.
12. Click Done.

Deleting a Step

Before you start

The step must not be used in a candidate selection workflow.

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

Here's what to do

1. Click the Steps tab.
2. Select a step.
3. Click the Delete icon.

Results:

The step no longer appears in the list of steps, and information is permanently deleted from the database.

Activating a Step

Before you start

The step must be created.

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

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Select Available.
4. Click Done.

Results:

In the Steps page, a check mark appears in the Available column next to the step. The step is available for selection when creating a candidate selection workflow.

Deactivating a Step

Before you start

The step must not be used by a candidate selection workflow.

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

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Clear the Available option.
4. Click Done.

Results:

In the Steps page, a check mark no longer appears in the Available column next to the step. The step is removed from the list of steps available when creating a candidate selection workflow. The step remains in the database.

Creating Custom Instructions for a Step

Before you start

Only one text can be entered for each step for each language.

Text must be provided for all available languages.

A maximum of 1000 text based characters is supported. HTML, rich text format (RTF) and hyperlinks are not supported.

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

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Enter text in the Step Information field.
4. Click Done.

Results:

The instructions appear in a callout located within the Selection Workflow area in the left hand side of a page. The callout displays all step-related instructions for the specific workflow, no matter what step the user has selected. The provided information regarding a step in a candidate selection workflow can explain to users, for example, the purpose of the step, what are the next steps in the workflow, etc.

Adding an Action to a Step

Before you start

The action must be activated.

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

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Click Add...
5. Select an action.
6. Click Add.

Adding the Share Action in a Candidate Selection Workflow

Before you start

Configuration > **Recruiting Administration** > **Candidate Selection Workflow**

Here's what to do

1. Click the **Steps** tab.
2. Click on a step that is included in the candidate selection workflow.
3. Click the **Actions Usage** tab.
4. Click **Add...**
5. Select the **Share Candidate in CSW Assistant** action, then click **Add**.
6. Click **Done**.

Results:

When recruiters select the Change Step/Status action or the Bypass action in the More Actions menu, a Share candidate option is available in the Candidate Selection Workflow assistant window so that users can share a candidate while the candidate is being progressed in the selection workflow.

In order to share candidates, users must have the Share candidates permission (Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Candidates).

Removing an Action from a Step

Before you start

The action must be activated.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Select an action.
5. Click Remove.

Results:

The action is no longer available for the step. An action removed is not deleted permanently, it is still available in the Actions tab and can be reused.

Reordering Actions in a Step

Before you start

Configuration > [Recruiting] Administration > Candidate Selection Workflow > Steps tab

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Click the Actions Usage tab.
4. Select a new position (number) in the list next to the action name.
5. Click Reorder.

Creating a Status

Before you start

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Statuses tab.
2. Click New...

3. Enter a name for the new status and translate it in all available languages.
4. Enter a code and comments.
5. Select a reference model. Reference models are used to map statuses to a core standard process for reporting and database administration.
6. Select the option "Allow event date entry and modification" (optional).

   This option is used for actions that result in a change of status (that is, Change Status, Move, Bypass, Offer, Hire a Candidate, Candidate has Declined, Reject Candidate). The results displayed in reports will reflect the actual dates when events were performed. Users will be able to enter the date when an event was performed, rather than when it was recorded.
7. Select the option "Activate the corresponding action" if you want the status to be available as an action in the More Actions list.

   This option is available for these statuses: Rejected, Declined, Offer, Verbal Offer, Hired.
8. Add qualifier groups.
   a. Click Add...
   b. Select qualifier groups.
   c. Click Add.
9. Reorder qualifier groups.
   a. Select a position (number) in the list for each qualifier group.
   b. Click Reorder.
10. Click Done.

Results:

The status appears in the Statuses page.

Deleting a Status

Before you start

The status cannot be used in a step.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Statuses tab.
2. Select a status.
3. Click the Delete icon.

Results:

The status no longer appears in the list of statuses and is permanently removed from the database.

Activating a Status

Before you start

The status must be created.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Statuses tab.
2. Click a status.
3. Select the Available option.
4. Click Done.

Results:

In the Statuses page, a check mark appears in the Available column next to the status. The status is available for selection when creating a step.

Deactivating a Status

Before you start

A status must be active in order to deactivate it.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Statuses tab.
2. Click a status.
3. Clear the Available check box.
4. Click Done.

Results:

In the Statuses page, a check mark no longer appears in the Available column next to the status. The status no longer appears in the list of statuses available when creating a step. The status remains in the database.

Configuring a Status Used in a Step

Before you start

The status must be added to the step before configuring it.

Configuration > [Recruiting] Administration > Candidate Selection Workflow

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Click the Statuses Usage tab.
4. Click a status.
5. Indicate if the status is the initial status of the step.
6. Determine the step progression level, that is Not Started, In Progress, Completed.
7. Select a *status change button* that is used as a shortcut to change the status of a candidate directly in a candidate file.

8. Select the *Ask for a qualifier* option if you want the user to select a qualifier to motivate the change to this status. This option is available only if the status has qualifiers defined.
9. Select the *Ask for comments* option if you want the user to enter a comment when the change is done to this status.
10. Select the *Interview Scheduling Behavior* option if you want the system to automatically change the status once an interview is scheduled for the step. This option is used with the Interview Scheduling feature only. You can activate the Interview Scheduling Behavior option for statuses related to the 1st, 2nd and 3rd Interview steps. When a recruiter creates a meeting in Recruiting, if the *Interview Scheduling Behavior* option is selected in more than one status, the recruiter will have to select the appropriate status in the Action Dialog window. The Interview Scheduling permission must be enabled.
11. Set notifications so that users receive a message when a status is reached by a candidate. Select a recipient, then select a message template.
12. Activate the automatic progression of candidates feature if desired and create conditions.
13. Click Done.

Adding a Status to a Step

Before you start

The status must be activated in order to add it to the step.

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

Here's what to do

1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Click Add...
5. Select a status.
6. Click Add.
7. Click Done.

Removing a Status from a Step

Before you start

You cannot remove a status that was selected as the initial status. You must first select another status that will become the initial status.

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Steps tab**

Here's what to do

1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Select a status.
5. Click Remove.
6. Click Done.

Results:

The status is no longer included in the step. A status removed from a step is not deleted permanently; it is still available in the Statuses page and can be reused.

Ordering Statuses in a Step

Before you start

Statuses must be included in the step before ordering them.

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

Here's what to do

1. Click the Steps tab
2. Click a step.
3. Click the Statuses Usage tab.
4. Select a new position (number) in the list next to the status name.
5. Click Reorder.
6. Click Done.

Activating an Action

Before you start

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

Here's what to do

1. Click the Actions tab.
2. Click an action.
3. Select the Available option.
4. Click Done.

Results:

In the Actions page, a check mark appears in the Available column next to the action. The action is available for selection when creating a step.

Deactivating an Action

Before you start

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Actions tab**

Here's what to do

1. Click the Actions tab.

2. Click an action.
3. Clear the Available check box.
4. Click Done.

Results:

In the Actions page, a check mark no longer appears in the Available column next to the action. Also, the action is no longer available in the list of actions for selection when creating a step.

Making Comments Mandatory for an Action

Before you start

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

Here's what to do

1. Click the Actions tab.
2. Click an action.
3. Select the option Make comment mandatory.
4. Click Done.

Results:

In the Actions page, a check mark appears in the Comment Mandatory column next to the action and users will need to provide a comment for this action.

Creating a Qualifier

Before you start

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

Here's what to do

1. Click the Qualifiers tab.
2. Click New...
3. Enter a name for the new qualifier and translate it in all available languages.
4. Enter a code and comments.
5. Select the Available option.
6. Click Done.

Results:

The qualifier appears in the Qualifiers page.

Deleting a Qualifier

Before you start

The qualifier must be deactivated.

The qualifier must not be used in a candidate selection workflow.

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Qualifiers**

Here's what to do

1. Click the Qualifiers tab.
2. Select a qualifier.
3. Click the Delete icon.

Creating a Qualifier Group

Before you start

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

Here's what to do

1. Click the Qualifier Groups tab.
2. Click New...
3. Enter a name for the new qualifier group and translate it in all available languages.
4. Enter a code and comments.
5. Select the Available option.
6. Click Add to add an existing qualifier or New to create a new qualifier.
7. Select at least one qualifier.
8. Click Done.

Results:

The qualifier group appears in the Qualifier Groups page. Users have a means to explain why they moved a candidate in the candidate selection workflow or changed the status of a candidate.

Deleting a Qualifier Group

Before you start

Qualifier group must not be in use.

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Qualifier Group**

Here's what to do

1. Click the Qualifier Groups tab.

2. Select a qualifier group.
3. Click the Delete icon.

Bulk Move to the Hire Step/Status

Recruiting Center users can move several candidates to the Hire step/status in a single transaction.

When this feature is activated, users are able to select more than one candidate to move to the Hire step/status. The system performs a verification to see if the number of candidates selected is equal to or less than the number of positions still open. If additional information is required during the hire action, for example the start date, all the information entered will apply to all candidates hired in that action.

This feature supports candidate selection workflows with or without the RSOffer step.

Activating the Bulk Move to Hire Step/Status

Before you start

Configuration > [Recruiting] Settings

Here's what to do

1. Click the *Simultaneous Hiring of Multiple Candidates* setting.
2. Click Edit.
3. Select Yes.
4. Click Save.

Step/Status Change in One Click

Recruiting Center users can use the Next Action feature to access steps and statuses directly in the candidates list without having to select an action in the More Actions list.

The Next Action column is available in a candidate list format. The Next Action column contains actions that will give access to the next status or step related to a candidate. Actions available in the new column will allow users to:

- Change the status of a candidate to the next completion status (if the step is not already completed).
- Move the candidate to the initial status of the next step if the current step is completed.

Actions available in the Next Action column are Candidate Selection Workflow (CSW) movements only, either a

- Move to the next step in the CSW.
- Change to the completion status within the current step.

If the current status is not a completion status, the action displayed will be a move (change status) to the first completion status of the current step. If the current status is a completion status, then the action will be a move to the

next step at the initial status. In a one-step CSW (reference workflow), only statuses configured as a "completion status" will show up as next steps.

Updating Steps and Statuses for Submissions on Different Requisitions

Recruiting Center users can select multiple submissions on different requisitions and update the corresponding step or status.

Recruiting Center users can select several candidate submissions submitted on different requisitions and move them to the next step, bypass the current step, or change the step's status provided all the submissions are at the same step and all the requisitions use the same Candidate Selection Workflow (CSW).

Whichever action users want to perform (move candidate submissions to the next step, change a step's status, or bypass the current step) on multiple submissions, the users require the corresponding user type permission. If users do not have a particular permission, the corresponding action is unavailable for selection.

If users select multiple submissions and some of them do not correspond to the user type permission that governs the action the users want to perform, a message at the end of the updating process indicates which submissions were not updated. Take the case of a user who had a user type that had the **Bypass steps: Only if this user is an owner of the requisitions** permission. Suppose the user selected multiple candidate submissions on different requisitions and all the submissions were at the 1st Interview step. The user then performed the bypass action to advance the submissions directly to the 3rd Interview step. If the selection included submissions from candidates for whom the user was a collaborator rather than the owner, the system would generate a message listing the submissions that were not updated. The submissions of candidates "owned" by the user would be updated to the 3rd Interview step.

If users change the current step of multiple submissions to Hire and some of the requisitions are then filled, a message is displayed for each filled requisition.

- If there are active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. The system will then unpost the requisition. However, you must first rescind all other offers extended to be able to close the requisition.
- If there are no active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. If the system is not able to unpost the requisition and change its status to "Filled", the requisition will have to be filled manually and the system will assign a task to {0}. Do you want to hire the selected candidates? If the user answers "No", the action is canceled; none of the submissions selected initially are updated to the Hire step.

While a user is updating the step or status of a selection of submissions on different submissions, the "Send correspondence" check box is available for selection if the individual has a user type that has the following permission and value: **Send correspondence (while changing the status of a candidate in a workflow) - Without restriction**. If the value is instead Only if this user is an owner of the requisitions or a collaborator, the check box is displayed only if the individual is the owner of or a collaborator for all of the submissions selected.

While a user is updating the step or status of a selection of submissions on different submissions, the workflow Event Date calendar is available for selection provided that all the submissions selected satisfy the **Set candidate selection workflow event dates** permission for the user type assigned to the user. For example, if the setting value is **Only if this**

user is an owner of the requisitions or a collaborator, the user must be the owner of or a collaborator for all of the submissions or Event Date calendar will not be displayed.

Configuration

The following permissions are listed because they have an effect not only when a user wants to update a step or status for a single submission but also when multiple submissions are selected for updating as a batch.

User Type Permission	Location
Change submission status	Configuration > [SmartOrg] Administration > [Users] User Types > [Functional Domains] Recruiting > [Candidates] Edit
Move submissions to next step	Configuration > [SmartOrg] Administration > [Users] User Types > [Functional Domains] Recruiting > [Candidates] Edit
Bypass steps	Configuration > [SmartOrg] Administration > [Users] User Types > [Functional Domains] Recruiting > [Candidates] Edit
Send correspondence (while changing the status of a candidate in a workflow)	Configuration > [SmartOrg] Administration > [Users] User Types > [Functional Domains] Recruiting > [Candidates] Edit
Set candidate selection workflow event dates	Configuration > [SmartOrg] Administration > [Users] User Types > [Functional Domains] Recruiting > [Candidates] Edit

Reverting a Step or Status Change

A permission can be granted to users so they can access the Revert action, which enables them to revert a candidate submission's progression in the candidate selection workflow.

The permission "Revert step or status change" was created to grant or deny users access to the Revert action in the More Actions menu. With this permission, it is possible to determine if:

- a user can revert a step or status change,
- a user can revert a step or status change but only if the action to be reverted has been performed by that user,
- a user cannot revert a step or status change.

The following permissions/rules apply on top of the "Revert step or status change" permission. A user granted the "Revert step or status change" permission will be unable to perform a revert action if one of the existing rules is not met.

- Users must have the "Change submission status" permission to revert a status change action.
- Users must have the "Change submission status" permission and the "Move submissions to next step" permission to revert a step change action.
- Users must have the "View candidates in steps whose security level is "Restricted" permission to see restricted steps to revert a step change action for which, once reverted, the submission will be on a restricted step.

User Type Permission	Location
Revert step or status change	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow
Change submission status	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow
Move submissions to next step	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow
View candidates in steps whose security level is "Restricted	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Selection Workflow

Candidate Progression Status

The candidate progression status indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.

To see the progression status of a candidate, the Progression Status column must be added to the candidate list format. Icons are used to indicate the furthest active progression status of a candidate across all positions where the candidate is being considered. When clicking a progression status icon, a tooltip indicates the active status and a date. For example: "Most advanced progression status: New (as of 2011-Oct-17)".

Progression Status Icon	Description
	New
	Reviewed
	First, second, and third interview
	Testing
	Offer
	Hired
	Pipeline
	Contact

In the example below, a candidate has applied to four jobs:

Job	Job Status	Candidate Status
1	Active for sourcing	New > To be reviewed
2	Closed	Interview 2 > To be scheduled
3	Active for sourcing	Offer > Rejected
4	Active for sourcing	Interview 1 > To be scheduled

The icon that would appear for this candidate across all contexts would be Interview 1 icon because it is the furthest active progression status on an active job. Both requisition status and candidate status must be active to be considered for the furthest active progression status.

In the Candidates list, the In Selection Process icon remains available and shows the parallel job applications of the candidate. In a job-specific candidate list, the progression status icon may be displayed while the In Selection Process icon may not be displayed if there is only one job application. In the search result list, if the In Selection Process icon is displayed, the progression status icon is also displayed. If no In Selection Process icon is displayed, the progression status column is empty.

It is recommended to remove the tracking solution (In Selection Process icon) and to replace it with the Progression Status feature in general lists (such as search result lists, folder lists) if you allow users to view the content of requisitions to which a candidate has applied and to which the user has access. In a job-specific candidate list, the In Selection Process icon is visible only when there is at least one concurrent active job application, and the progression status icon is visible as soon as there is one active job application.

Threshold CSW Step - Candidates Hidden from Search Results

The main objective of this feature is to exclude from search results candidates who have reached a specific status to avoid creating additional applications.

With the following setting, the system administrator configures what "step" in the candidate selection workflow when reached and still active should prevent candidates from being searched by unauthorized users.

Setting	Description	Default Value	Location
Threshold CSW Step - Hide from Search	Indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Possible values are: • Not Specified (candidates are never excluded from search result)	Minimum Workflow Sequence	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	• New • Reviewed • Declined • Rejected • Testing • Offer • Minimum Workflow Sequence • 1st Interview • 2nd Interview • 3rd Interview		

The above setting works in conjunction with the following user type permission. The system administrator can specify which user types can view, through searches, candidates who are being considered on other requisitions.

User Type Permission	Location
View candidates in search results even if the submission status has already reached the threshold step to hide from search	Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates > Candidate Selection Workflow

Competitive Workflow Restriction

This feature prevents Recruiting Center users from advancing a candidate in the candidate selection workflow if the candidate is already in an advanced stage of selection (offer or hire step) for another position.

The system can be configured such that if the workflow for one active submission is advanced beyond the selected threshold reference workflow step, users are prevented from advancing the workflow of other submissions for this candidate.

Note that an active submission is a submission where the user is in the step on an active requisition and not at a terminal that ends the workflow, such as Rejected or Withdrawn. In other words, the candidate is still being actively considered on an active requisition or the candidate has been hired.

To enable this feature, the following setting must be configured. System administrators must select the reference workflow step that once reached will invoke blocking the progression on other submissions. If no step is selected, the function is not activated.

Setting	Description	Default Value	Location
Threshold CSW Step - Prevent Advancing	Indicates the CSW reference model step at which, once reached, candidates are locked to the submission and cannot be advanced on other submissions		Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	(unless the user type has overriding permission). Possible values are: • Not Specified (candidates are never locked from the submission) • Reviewed • 1st Interview • 2nd Interview • 3rd Interview • Testing • Offer		

System administrators can grant the following user type permission to bypass this blocking and allow associated users to advance candidates regardless of other submissions:

User Type Permission	Location
Advanced candidates in workflow even if already reached the threshold step on a different submission	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

When all of the above has been configured, users will only notice a change if all the following elements are true:

- The candidate has two or more submissions.
- One of those submissions is active (not rejected or withdrawn), and its workflow has advanced beyond the threshold step.
- The requisition is active or the candidate is marked as being hired.
- The user tries to advance the workflow of one of the other submissions from this candidate.
- The user does not have user type permission to ignore this restriction.

Note that the Competitive Workflow Restriction feature is complementary to the feature which hides candidates from search results if they are beyond a threshold step (which is activated by the *Threshold CSW Step - Hide from Search* setting). See *Threshold CSW Step - Candidates Hidden from Search Results*.

Automatic Progression of Candidates

When configuring a status used in a step, it is possible to allow candidates to reach the status automatically when specific conditions are met.

This is done by configuring the Automatic Progression of Applications feature in the Status Details page. You can create and edit conditions that will be used to identify candidates who are allowed to reach this status automatically. If setting the condition to be based on the Job Specific Submission for the candidate having all the required criteria or not, it is recommended that the prescreening questions and competencies be mandatory as part of the application process, so

that the automatic progression can progress properly. If a candidate completes the submission but does not answer the prescreening questions and competencies because they were not mandatory, the candidate will be viewed as not having the required criteria and could not therefore progress based on that.

Another option for the automatic progression of candidates is based on Screening Services results. Passport is responsible for handling requests to and from external service providers. It communicates with other modules in order to maintain requests up to date and interacts with the assessment platform to request assessment evaluations. The automatic progression of submissions automates the candidate selection workflow process based on the results obtained by Passport external services.

Activating the Automatic Progression of a Candidate

Before you start

Requisition and candidate statuses must be active to consider a candidate for the furthest active progression status.

Tracking solution must be removed.

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

Here's what to do

1. Click the Steps tab.
2. Click a step.
3. Click the Statuses Usage tab.
4. Click a status.
5. Select the option *Allow candidates to reach this status automatically when the (optional) conditions specified below are met*.
6. Click Create a Condition...
7. Complete the fields.

   The list of available condition providers will vary according to the providers selected at your organization. Information will vary according to service selected. For more information on available services, please contact Oracle.
8. Click Done.
9. Click Done.

Results:

The automatic progression feature is now activated for the status so that candidates can reach a status automatically when specified conditions are met.

Automatic Progression of Candidates using Fields

Candidates can automatically be progressed in the candidate selection workflow based on certain fields present in their job submission.

When system administrators configure a candidate selection workflow and define a status usage within a step, they can create conditions to automatically progress candidates in the candidate selection workflow.

Rules Created with Standard Fields

Specific standard fields in these categories can be used to create automatic candidate progression rules:

- Personal Information
- Work Conditions
- Work Experience
- Education
- Certifications
- References
- Contingent Staffing
- Evaluation Management
- Other

For a list of specific standard fields supported to create auto-progression conditions, see *Standard Fields for Automatic Progression of Candidates*.

Automatic candidate progression rules based on specific fields can be used for different purposes. For example, to automatically bypass workflow steps for internal candidates. Let's say that a company has a candidate selection workflow based on the candidate being an internal candidate (employee) or an external candidate. The way the system knows if a candidate is an employee is based on the Internal Candidate field being selected. When an employee applies for a job, the system verifies the Internal Candidate field and if the field is selected, the candidate is automatically progressed to the specified status in the workflow.

Automatic candidate progression rules allow progressing candidates to a later status within the same step. It is however possible to move candidates to another step by enabling the automatic progression on the initial status of a step. This way, candidates being on the completion status of a step will be moved to the step where automatic progression is enabled on the initial status. Note that if there are mandatory steps in between the two steps, the automatic progression will not occur. This feature also allows to connect multiple automatic progression rules one after the others in order to move candidates to a later step and progress them to a specific status within that step.

Rules Created with User-defined Fields

User-defined fields in these categories can also be used:

- Education
- Personal Information
- Work Experience
- Job-specific Submission

When submission UDFs are made available in Recruiting, they can be used to create conditions. When administrators create a new condition, submission UDFs are available for selection under Job-specific submission > User-defined Field > Submission Information.

Important Notes

System administrators must design and test new CSW rules thoroughly as they may lead to undesired behavior if not used correctly. For the same reason, it is not recommended to use the automatic progression of candidates functionality to automatically reject candidate submissions.

Standard Fields for Automatic Progression of Candidates

Personal Information			
Accepts Job Posting Notifications	Education Level	Last Name	Resume
Address (line 1)	Email Address	Middle Name	Schedule
Address (line 2)	Employee Number	Minimum Annual Salary	Shift
Advance Notice	Employee Status	Pager Number	Social Security Number
Anonymous job submission	Fax Number	Place of Residence	Suffix
Application Medium	First Name	Preferred Job	Travel
Cellular Number	Home Phone Number	Preferred Location	Website Address
City	Internal Candidate	Preferred Organization	Work Phone Number
Cover Letter	Job Level	Prefix	Zip/Postal Code
Currency	Job Type	Primary Number	

Work Conditions	Work Experience	Education	Certifications
Currency	Achievements	City	Location
Expected Hourly Pay Rate	Current Job	Education Level (Achieved)	Number/ID
Hours per week willing to work	May we contact the supervisor?	GPA	Organization
Hours per week, preferred	Name During Employment	GPA out of	
Willing to work on holidays	Supervisor's Email Address	Graduated from High School or GED	
Willing to work on weekends	Supervisor's Name	Location	
	Supervisor's Phone	Student name while attending the program	

Work Conditions	Work Experience	Education	Certifications
	Supervisor's Title		

References	Contingent Staffing	Other	Evaluation Management
Email Address	Agency Requisition Number	Prescreening score	Completed Questionnaires
First Name	Hourly Rate Paid to the Worker	ACE candidate	Questionnaire Average Score
Last Name	Sales tax must be charged	Background Check Consent	
Location	Staffing Agency Hourly Rate	eSignature complete	
Middle Name	Worker ID	Application State	
Organization	Worker Type		
Phone Number			
Relationship			
Title			
Type			

Creating a Rule to Automatically Progress Candidates Based on Job-Submission Fields

Before you start

Configuration > **Recruiting Administration** > **Candidate Selection Workflows**

Here's what to do

1. Click the **Steps** tab.
2. Click a step.
3. Click the **Statuses Usage** tab.
4. Click a status.
5. Select the option **Allow candidates to reach this status automatically when the (optional) conditions specified below are met**.
6. Click **Create a Condition...**
7. Provide a name to the condition.
8. In the **Condition Statement** section, select **Job-specific submission** in the first drop-down menu.
9. Select Standard Field or User-defined Field.

10. Select other elements to create the condition.
11. Click **Done**.
12. Click **Done**.

Results:

The auto-progression rule is now activated and candidates can reach the step automatically when specified conditions are met.

Automatic Progression of Candidates using Submission Medium

Recruiting Center users can see which medium was used to submit information about a candidate initially and which medium was used most recently.

Submissions for a job can be entered into the system in a number of ways: candidates can apply through a standard or mobile career section; candidate submissions can also be submitted by way of an agency, a referral, or a match performed in the Recruiting Center. The candidates are later invited to visit the career section to complete the application workflow.

The Recruiting Center displays in the Profile section of the candidate file, two fields for medium:

- The Original Submission Medium field indicates the medium used when the candidate submission was submitted the first time. The Original Submission Medium is read-only.
- The Latest Submission Medium field indicates the medium used for the most recent submission. The Latest Submission Medium field is updated automatically when a submission is updated using a medium that is different from the one last used.

Recruiting Center users can manually indicate the most recent medium used by making a selection from the corresponding list.

System administrators can configure Candidate Selection Workflow (CSW) auto-progression rules such that when the original or latest submission medium takes on a specific value, the submission advances automatically to a different step and/or status. This is best explained by an example.

Example: Suppose an organization wanted Recruiting Center users to consider candidates for a phone screening interview only after the candidates had submitted a fully completed submission that included an e-Signature. Original submissions that typically contain rudimentary information could originate, for example, from matches performed by Recruiting Center users, from the recommendations of friends, or from candidates who applied through mobile career sections. The Original Submission Medium value would be Matched to Job, Referral and Online Mobile respectively. In all of these cases, the candidates would receive an email message requesting them to visit the organization's "standard" career section and complete their submission. When the candidates provided a complete submission including an e-Signature, the value of the Latest Submission Medium would be changed automatically to Online. Suppose that the organization had configured a CSW such that candidates whose submission medium was Online were advanced automatically to the Phone screen step and Under consideration status. This would ensure that the candidates at the phone screening step in the CSW had submitted complete submissions.

System administrators can also configure a list format to have the Original Medium and Latest Medium appear as columns in candidates list.

Creating a Rule to Automatically Progress Candidates Based on Submission Medium

Before you start

Configuration > **Recruiting Administration** > **Candidate Selection Workflows**

Here's what to do

1. Click the **Steps** tab.
2. Click a step.
3. Click the **Statuses Usage** tab.
4. Click a status.
5. Select the option **Allow candidates to reach this status automatically when the (optional) conditions specified below are met**.
6. Click **Create a Condition...**
7. Provide a name to the condition.
8. In the **Condition Statement** section, select **Job-specific submission** in the first drop-down menu.
9. Select **Standard Field** in the second drop-down menu.
10. Select **Submission** in the other drop-down menu.
11. Select **Latest Submission Medium** or **Original Submission Medium**.
12. Select a medium.
13. Click **Done**.
14. Click **Done**.

Results:

The auto-progression rule is now activated and candidates can reach the step automatically when specified conditions are met.

Candidate Selection Workflow Priority

The candidate selection workflow priority ensures that the most appropriate workflow is displayed to the Recruiting Center user when they create a requisition.

The system can sort candidate selection workflows (CSW) according to the level of compatibility and ensure that the most appropriate workflow is displayed when a user is creating a requisition.

The system administrator must identify one CSW as the company default workflow. However, the default workflow will be preselected only if no other workflow is found to be compatible to the requisition or if other workflows are compatible because they are linked to all Organization, Location and Job Field (all-all-all).

The system automatically preselects the most compatible workflow as follows:

- The system makes the sum of the differences between the levels specified in the workflow and in the requisition.
- The workflow with the least differences is the one displayed in the Candidate Selection Workflow field.

- In case of a tie, the sort is performed on the code of the workflows.

A workflow with no value (Null) for a dimension (Organization, Location or Job Field) will consequently be associated to all structure elements from that dimension. However, associating a workflow to no specific value (equivalent to all) will penalize its level of compatibility. Hence, a workflow tied to all-all-all will be much less pertinent than a workflow with the slightest specificity in its categorization.

Below are examples of workflow using these OLF values:

- Organization: Food Processing/Food Production
- Location: United States/California/Los Angeles
- Job Field: Cashier

Workflow 1: There is no difference between the Organization-Location-Job Field information of this workflow and that of the requisition.

	Code	Organization	Location	Job Field
	CSW1	Food Processing/Food Production	United States/California/ Los Angeles	Cashier
Difference		(0)	(0)	(0)

Workflow 2: Because there is no job field, the sum of the difference is 20.

	Code	Organization	Location	Job Field
	CSW2	Food Processing/Food Production	United States/California/ Los Angeles	All
Difference		(0)	(0)	(20)

Workflow 3: There is a difference of one level in the Organization dimension, and a difference of two levels in the Location dimension, so the sum of the differences is 3.

	Code	Organization	Location	Job Field
	CSW3	Food Processing	United States	Cashier
Difference		(1)	(2)	(0)

Workflow 4: There is no difference between the Organization-Location-Job Field information of this workflow and that of the requisition.

	Code	Organization	Location	Job Field
	CSW4	Food Processing/Food Production	United States/California/ Los Angeles	Cashier

	Code	Organization	Location	Job Field
Difference		(0)	(0)	(0)

Workflow 5: Since no dimension is specified in this workflow, the sum of the differences is 60.

	Code	Organization	Location	Job Field
	CSW5	All	All	All
Difference		(20)	(20)	(20)

Workflow 6: Once again, since no dimension is specified in this workflow, the sum of the differences is 60. However, this is the default workflow.

	Code	Organization	Location	Job Field
	CSW6	All	All	All
Difference		(20)	(20)	(20)

Workflow 7: The location of this workflow is not compatible with that of the requisition. This means that this workflow is excluded. In this example, the workflow that would be displayed in the Candidate Selection Workflow field is Workflow 4 (a_csw4), because even though Workflow 1 (z_csw1) and 4 are tied and have he lowest sum of differences, Workflow 4 will be displayed first when a sort is performed on the code.

	Code	Organization	Location	Job Field
	CSW7	Food Processing/Food Production	United States/California/ San Jose	Cashier
Difference				

9 Candidate and Requisition Search

Candidate Search

Candidate Quick Search

The candidate quick search allows Recruiting Center users to quickly find specific candidates.

The candidate quick search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

When performing a candidate quick search, the search engine searches for candidates who applied on a job, submitted a profile, or are registered but did not apply on a job (could be a person who referred a friend for a job and who had to register as a new user, or a person who registered while clicking My Account).

The candidate quick search engine searches information in the following fields of the candidate file:

- first name
- last name
- middle name
- email address
- username
- candidate identification number

When performing a candidate search, users can enter partial names (either the first or last name with the * wildcard) or complete names in the field. However, a best practice is to enter complete names to obtain better results.

Users can also perform a search with a middle initial if they know the person's full name (example: Sam P Jones). If searching for someone who's first name contains initials, we recommend entering just the initials (example: Jr. will give you the following results: Jr., j.r., or JR).

If looking for someone who hyphenates their name, it is not required to enter both names. Let's say Smith-Jones is the name you are looking for. Entering Smith, Jones, Smith space Jones or Smith-Jones, will bring back Smith-Jones.

The candidate quick search searches for all the search terms in the above mentioned fields. It works only for users having access to all the fields. For example, if the email field is hidden for a user type, searching by name will not work. For this reason, the *specific candidate search* often produces search results that are more relevant than those generated by the candidate quick search.

Configuring the Candidate Quick Search

The configuration of the candidate quick search consists of the following steps.

1. *Enabling the Search Widget setting.*
2. *Granting the candidate quick search permission.*
3. *Setting the security level* for the First Name, Middle Name, Last Name, and Email Address fields so that users can see these fields and search on them.
4. *Creating a list format to display search results.* You can also use the default list format or modify it.
5. *Assigning a list format variation to configuration profiles.*

The candidate quick search allows users to search information in the following fields: first name, last name, middle name, email address, candidate ID. If you do not want these fields to be visible to certain users, do not give them access to the candidate quick search. Otherwise, they will be able to perform a quick search but no candidates will be returned.

Enabling the Search Widget Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Quick Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access candidate Quick and Specific search but find external candidates only.
5. If you want the user type to search for internal candidates, select the permission If access to Quick and Specific Search is granted, find Internal candidates (in addition to external candidates).
6. Click Save.

Setting the Security Level of a Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click the name of a field.
3. Click Edit Field Availability.
4. Select the security level of the field: General, Restricted, Confidential.
5. Click Save.

Creating a List Format for Quick Search Results

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning the List Format to a Configuration Profile and User Account

Before you start

Configuration > [SmartOrg] Administration > Configuration Profiles

Here's what to do

1. Click on a configuration profile.
2. Click on the Requisition List Format or the Candidate List Format setting.
3. Click Edit.
4. Select a variation.
5. Click Save.
6. Go back to the SmartOrg Administration menu.
7. Click User Accounts.
8. Click on a user account.
9. Click Edit next to Account Information.
10. Select a configuration profile.
11. Click Save.

Candidate Quick Search - Permissions and Settings

The following permissions and settings are used to configure the candidate quick search.

User Type Permission	Location
Access candidate Quick and Specific search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Quick and Specific Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search

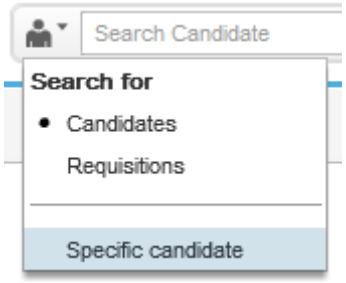
Setting	Description	Default Value	Location
Search Widget	Displays the search widget.	Yes	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Quick Search Candidate Pool Size	Indicates the maximum number of candidates returned by a quick search. This is a private setting that is activated by Oracle Support.	300	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
Search Results Default Limit	Maximum number of search results. This is a protected setting that is activated by Oracle Support.	300	Configuration > [Recruiting] Settings

Specific Candidate Search

The specific candidate search can be used when too many results are returned by the candidate quick search. It is considered to be an extension of the candidate quick search in that it offers greater result precision.

The specific candidate search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.



If Recruiting Center users have the permission to access candidate identification information, the candidate search will allow them to search by:

- candidate identification number only (you must use at least two numbers of the total identification number or more, otherwise the search will not work)
- candidate first name
- candidate last name
- candidate first and last names
- email address

Using the specific candidate search, users can enter the same or different search terms in any of the four fields. For this reason, the specific candidate search often produces search results that are more relevant than those generated by the *candidate quick search*.

Wild card can be used with one or two characters in the specific candidate search, to support searching for combined words.

For example, d* in first name and monroe in last name will return all monroe with first name starting by d.

Configuring the Candidate Specific Search

The configuration of the specific candidate search consists of the following steps.

1. *Enabling the Search Widget setting.*
2. *Granting the candidate specific search permission.*
3. *Creating a list format to display search results.* You can also use the default list format or modify it.
4. *Assigning a list format variation to configuration profiles.*

Enabling the Search Widget Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Specific Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access candidate Quick and Specific search but find external candidates only.
5. If you want the user type to search internal candidates, select the permission If access to Quick and Specific Search is granted, find Internal candidates (in addition to external candidates).
6. Click Save.

Creating a List Format for Quick Search Results

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning a List Format Variation to Configuration Profiles

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.

11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

Candidate Specific Search - Permissions and Settings

The following permissions and settings are used to configure the candidate specific search.

User Type Permission	Location
Access candidate Quick and Specific search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Quick and Specific Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
Access candidate identification and contact information	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidate

Setting	Description	Default Value	Location
Search Widget	Displays the search widget.	Yes	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Quick Search Candidate Pool Size	Indicates the maximum number of candidates returned by a quick search. This is a private setting that is activated by Oracle Support.	300	Configuration > [Recruiting] Settings
Search Results Default Limit	Maximum number of search results. This is a protected setting that is activated by Oracle Support.	300	Configuration > [Recruiting] Settings

Advanced Search

The Candidate Advanced Search allows Recruiting Center users to search for candidates using precise criteria in the form of keywords and structured fields.

The Candidate Advanced Search enables users to find and match relevant candidates to their open requisitions. Users can create search queries using keywords to search across numerous text fields of the candidate file and combine them with specific fields such as prescreening questions and skills that typically produce search that have a higher degree of precision.

The Candidate Advanced Search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

Configuring the Candidate Advanced Search

The configuration of the candidate advanced search consists of the following steps.

1. *Enabling the Advanced Search Links setting.*
2. *Granting the candidate advanced search permission.*
3. *Creating a list format to display advanced search results.* You can also use the default list format or modify it.
4. *Assigning a list format variation to configuration profiles.*

Enabling the Advanced Search Links Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Advanced Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access advanced search but find external candidates only.

5. If you want the user type to also search internal candidates, select the permission If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)
6. Click Save.

Creating a List Format for Advanced Search Results

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Advanced Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning a List Format Variation to Configuration Profiles

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Candidate List Format setting.

3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

Candidate Advanced Search - Permissions and Settings

The following permissions and settings are used to configure the candidate advanced search.

User Type Permission	Location
Access advanced search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
Other search permissions are available in the Search functional domain.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search

Setting	Description	Default Value	Location
Advanced Search Links	Displays the advanced search links.	Yes	Configuration > [SmartOrg Administration] Configuration Profiles
Advanced Search Toolbar	Displays the advanced search toolbar.	Yes	Configuration > [SmartOrg Administration] Configuration Profiles
Advanced Search "Save Query" Button	Displays the "Save Query" button in the advanced search page.	Yes	Configuration > [SmartOrg Administration] Configuration Profiles
Default "Advanced Search" Field Configuration	Displays the selection of fields that are available to the user when performing an advanced search.	Variation 1	Configuration > [SmartOrg Administration] Configuration Profiles
Activate Segmentation in Search	Indicates if candidate search results are restricted based on the coverage area	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	of the search user's groups and staffing types.		
Display Incomplete Application	Display incomplete submissions in candidate list and in candidate search results. This is a Protected setting activated by Oracle Support. This setting does not apply to the Candidate Quick Search.	Yes	Configuration > [Recruiting] Settings
Display Identification Missing Candidates	Include candidates whose identification is missing in candidate list and in candidate search results (does not apply to Quick Search).	Yes	Configuration > [Recruiting] Settings
Candidate Search Mask Processed	Exclude candidates in selection process on open requisitions from candidate search results in the advanced search.	No	Configuration > [Recruiting] Settings
Threshold CSW Step - Hide from Search	Indicates the CSW reference model step beyond which candidates will be excluded from search results (unless user type has overriding permission).	New	Configuration > [Recruiting] Settings
OFCCP Search Trace Activation	Defines if customers want to archive search criteria. Part of OFCCP regulation. This is a protected setting activated by Oracle Support. • Disabled: The feature is disabled. • Enabled (without requisition identification): The feature is always enabled. • Mandatory (with requisition identification): An error message appears if users forget to specify a requisition in order to archive data. • Optional (with requisition identification): Users may select the option and specify a requisition in order to archive data.	Disabled	Configuration > [Recruiting] Settings
OFCCP Search Trace Candidate IDs Activation	Defines if system will archive search criteria as well as search results (candidates IDs). Part of OFCCP regulation. This setting can be activated only if the Search Regulation Trace Functionality setting is activated. This is a protected setting activated by Oracle Support.	Yes	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
Search Randomize Enabled	Randomized search results activated. This is a protected setting activated by Oracle Support.	No	Configuration > [Recruiting] Settings
Search Results Default Limit	Maximum number of search results. This is a protected setting activated by Oracle Support.	300	Configuration > [Recruiting] Settings
Activate exact match for search using structured fields (OLF)	When enabled, the result of the candidate search using required criteria for place of residence or OLF preferences will display only candidates with exact match at the same level or below. No parent or empty value will be returned.	No	Configuration > [Recruiting] Settings
Attachments searched by Candidate Keyword Search	Determines the list of attachments searched by the Candidate Advanced Search with keywords. Possible values are: • All Attachments • All Candidate Visible • All Resumes When "All Resumes" is selected, the system will only search attachments tagged as resumes.	All Candidate Visible	Configuration > [Recruiting] Settings
Content searched by Candidate Keyword Search	Determines the list of candidate profile fields searched by Candidate Advanced Search with keywords. It is recommended that the setting be set to "Optimal" for optimal search results. The "Legacy" value should only be chosen to revert to original list of profile fields used prior to 13C – primarily to include "comments" in keyword search.	Optimal	Configuration > [Recruiting] Settings

Prevent Users from Searching Internal Candidates

To prevent unintended exposure to internal candidates' data, permissions are available to only find external candidates when doing a quick search or advanced search.

The table lists permissions to find external candidates only. It also lists permission to find both external and internal candidates.

User Type Permission	Location
Access advanced search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
Access candidate Quick and Specific search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Quick and Specific Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search

Advanced Candidate Search Form

Because system administrators can customize the Advanced Candidate Search form, the search form might have a different layout in different zones and even for different users, based on their configuration profile.

By default, the following search criteria are included in the Advanced Candidate Search form:

- Keywords
- Last Update
- Place of Residence: recruiters can select a reference location or a company location when searching for candidates.

Users who have the required permission can add other search criteria provided they were made available by the system administrator. This is done using the Customize... button. For a list of fields available for the Candidate Advanced Search, see *Advanced Search Fields*.

For many search fields, users can specify an additional criterion:

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

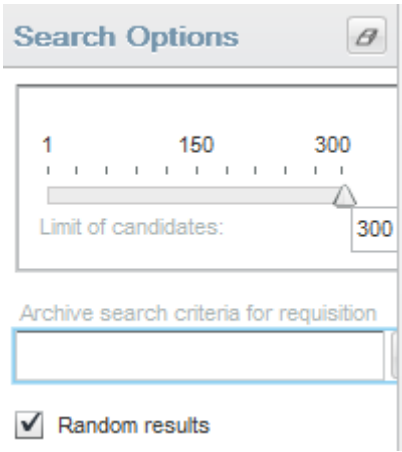
Users may also search on precise Organization-Location-Job Field (OLF) elements without incorporating candidates with parent preferences or null values in preferences. When this feature is enabled, if a user is performing a Candidate

Advanced Search using Place of Residence as a Required criteria or Organization-Location-Job Field as a Required criteria, search results will display only candidates with an exact match at the same level. No parent or empty value will be returned. For example, searching for San Francisco will no longer return candidates within California, United States or that have an empty preference value.

When users perform a candidate advanced search and enter a value in the Institution, Program, Employer, Job Function or Certification field, the system looks for candidates who have the same value either in the corresponding field or in the corresponding "Others" field.

For example, if a recruiter performs an advanced search and enters "Oracle*" in the Employer field, the system will return candidates who have an Employer field with text starting with "Oracle" or an "Other Employer" field with text starting with "Oracle".

Two search options are available on the left side of the Advanced Candidate Search page: "Archive search criteria for requisition" and "Random results". These options support OFCCP requirements and are usually activated only for customers located in the United States through protected settings. The Archive search criteria for requisition field, once activated, can be optional or mandatory. Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years. The Random results option generates a different set of candidates who match the required fields every time you run the same search if the total number of candidates matching your criteria is above the number of displayed candidates, usually set to 300. For details, see *Search Results Archiving* and *Randomized Search Results*.



When performing a Candidate Advanced 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 Candidate Advanced Search with only a few criteria, and to then 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 is 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 in order to obtain a viable candidate pool.

The search engine can retrieve any number of candidate files although, for performance and management reasons, only 300 are displayed. By default, we suggest to display the top 300 by relevancy.

Advanced Candidate Search Page

The Candidate Search Page feature allows system administrators to select search criteria that will be available to Recruiting Center users when performing an advanced candidate search.

1. *Identifying fields as search criteria.*
2. *Customizing the Advanced Candidate Search form.*
3. *Associating the advanced search form to configuration profiles.*You can define for each available configuration profile, the fields that will be available in the Advanced Search page. Therefore, depending on the selections you make for each configuration profile, the fields displayed to users linked to different configuration profiles will differ.
4. *Granting the "Customize advanced search queries permission" to allow users to customize the Advanced Candidate Search.*

Note: When configuring the advanced candidate search form, be sure to only include fields in the form that you want users to use. If users have the permission to perform an advanced candidate search, they will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if users are not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where users cannot view the data.

Identifying a Field as a Search Criterion

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click a field category.
2. Click a field.
3. Click Edit Field Availability next to Properties.
4. Select Candidate Search.
5. Click Save.

Results:

In the Fields list, Candidate Search appears in the Availability column. The field is available in the Candidate Search Page feature.

Customizing the Advanced Candidate Search Form

Before you start

The Candidate Search option in the Properties page of a field must be selected for a field to appear in the Available Fields list.

When customizing the advanced candidate search form, be sure to only include fields in the form that you want Recruiting Center users to use. If a user has the permission to perform an advanced candidate search, he/she will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if the user is not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where the user cannot view the data

Configuration > **[Recruiting] Administration** > **Candidate Search Page**

Here's what to do

1. Select a field in the Available Fields list.
2. Click Add.
3. Click Save.

Results:

The field appears in the Selected Fields list. It is available to Recruiting Center users when customizing the advanced candidate search form provided they have access to the advanced search.

Associating a Default Advanced Search Form to Configuration Profiles

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Select a configuration profile.
2. Click on the Default "Advanced Search" Field Configuration setting.
3. Click Edit.
4. Select Variation 1, 2, or 3.
5. Click Save.

Results:

If you do not not configure a specific selection of fields for a given configuration profile, or if a user is not linked to a configuration profile, then only the default set of fields will be available in the Recruiting Center when customizing a search query.

Granting the "Customize advanced search queries" Permission

Before you start

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

Here's what to do

1. Click a user type.

2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Customize advanced search queries permission.
5. Click Save.

Candidate Advanced Search Fields

The table presents fields available in the Advanced Candidate Search page.

To be available to Recruiting Center users, these fields must first be made available by system administrators. Then, users who have the required permission can add these fields in the Advanced Candidate Search page using the Customize... button.

Fields available in the Advanced Candidate Search page:

- All user-defined fields (UDF) marked as "Candidate Search" at the field property level.
- Personal information:
  - Accepts Job Posting Notifications
  - Date of Birth
  - Email Address (or User Name)
  - Employee Number
  - First Name
  - Last Name
  - Middle Name
  - Prefix
  - Referred/Not Referred
  - Social Security Number
  - Work Phone Number

- Basic profile from the profile:
  - Advance Notice
  - Date of Availability is
  - Employee Status
  - Job Level
  - Job Shift
  - Job Type
  - Schedule
  - Travel
  - Preferred Job
  - Preferred Location
  - Preferred Organization
  - Shift Availability Grid
  - Willing to work on holidays
  - Willing to work on weekends
  - Expected Hourly Pay Rate
  - Hours per week willing to work
  - Hours per week, preferred
- Education from the profile:
  - Institution
  - Other Institution
  - Program
  - Other Program
  - Education level (Achieved)
  - Graduation date
  - Start Date
  - GPA (normalized value)
  - Graduated
  - Any searchable education user-defined field

- Experience from the profile:
  - Current Job
  - Employer
  - Other Employer
  - Job Function
  - Other Function
  - Any searchable experience user-defined field
- Questionnaires:
  - Questions from library (no local questions from requisition)
  - Skills
- Sources and mediums from all submissions:
  - Application Medium
  - Event ID
  - Source Name
  - Source Type
- Certification:
  - Certification
  - Other Certification
  - Location
  - Certification ID
  - Issuing Organization
  - Issue Date is between
  - Expiration Date is between

Candidate Advanced Search with Keywords

Keywords can be used when performing a Candidate Advanced Search.

In earlier releases, when users used the candidate advanced search's Keywords field, the system searched a large number of Candidate Profile fields as well as the five most recently attached files (three attached by candidates and two attached by users). Now, system administrators can configure a setting that will determine the fields that will be searched when using the Keywords field in the Advanced Candidate Search form. The setting can be set to Optimal (default value) or Legacy. The Legacy value should only be chosen to revert to original list of profile fields used prior to 13C – primarily to include "comments" in keyword search.
The table shows the fields searched by the candidate advanced search's Keywords field whether the setting is set to Optimal or Legacy.

Fields searched when the setting is set to Optimal	Fields searched when the setting is set to Legacy
Personal information fields: • first name • last name • middle initial • employee number • street address • city • phone numbers • email address • postal code	Personal information fields: • first name • last name • middle initial • employee number • street address • city • phone numbers • email address • postal code
Text-based user-defined field answers.	Text-based user-defined field answers.
Pasted cover letter from the general profile.	Pasted cover letter from the general profile.
Pasted resume from the general profile.	Pasted resume from the general profile.
Career objectives from the general profile.	Career objectives from the general profile.
Additional information from the general profile.	Additional information from the general profile.
All file attachments from the candidate provided the attachments have one of the following supported file formats: • .doc, .docx (Word) • .txt (standard text file) • .rtf (rich text format) • .pdf (Adobe Portable Document Format) • .htm or .html (hypertext markup language documents) • .wpd (Word Perfect) • .odt (if Oracle 11G is used)	The three most recent file attachments per candidate: • .doc, .docx (Word) • .txt (standard text file) • .rtf (rich text format) • .pdf (Adobe Portable Document Format) • .htm or .html (hypertext markup language documents) • .wpd (Word Perfect) • .odt (if Oracle 11G is used)
The two most recent file attachments from users (displayed in the Attachments tab), limited to supported file format type.	The two most recent file attachments from users (displayed in the Attachments tab), limited to supported file format type.
Education [Institution, Program, Other institution, Other Program and text-based	Education (Other institution, Other Program and text-based user defined fields) from the general profile.

Fields searched when the setting is set to Optimal	Fields searched when the setting is set to Legacy
user defined fields] from the general profile.	
Work Experience (Employer, Job Function, Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.	Work Experience (Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.
Text-based answers to questions from the library.	Text-based answers to questions from the library.
	Comments (from the History tab).
	Source and event names.
	User name.

System administrators can also specify the types of attachments searched by the candidate advanced search's Keywords field:

- all attachments
- candidates visible attachments
- attachments tagged as resumes

Keywords and Boolean Operators

Keyword search is considered to provide exact matches. However, if a user includes OR in a search query, the search engine looks of course for exact matches for one word or the other. Boolean operators are pretty straightforward but when a complex search query using multiple Boolean operators is incorrectly formulated, results are unpredictable. The Keywords search supports the following boolean operators:

Boolean Operator	Description
AND	By default, words entered in the Keywords field are linked (transparently) by the AND operator. If you searched for "product manager" (without the double quotation marks) or for "product and manager" (without the double quotation marks), the search results would be the same. The search engine would retrieve all candidates whose file contains both words (the words will not necessarily be next to each other).
OR	You can use the OR operator to change the default behavior (AND) or to build more complex queries. For example, if you searched for "competitor1 OR competitor2 OR competitor3" (without the double quotation marks), the system will retrieve candidates whose file contains at least one of the competitors' names.
NOT	You can use the NOT operator to exclude specific keywords from a query. For example, if you wanted to exclude from the search results candidates whose file contained the name of a specific company, but did refer to a specific competitor, you could search for "competitor1 NOT company1" (without the double quotation marks).

Boolean Operator	Description
Parentheses	Operations enclosed in parentheses are performed before other operations. For example, a search query for candidates who worked as marketing or advertising consultants could look like the following: (market* or advertis*) and (consult* or agent or representative). The search engine would retrieve candidate files that satisfy the two conditions: • Candidate files containing a word that begins with market or advertis such as market, markets, marketing, advertise, advertising, advertisement AND, • Candidate files containing agent, representative, or a word beginning with consult such as agent, representative, consult, consults, consulting, consulted, consultant.
Wild Card	The wild card "*" (asterisk) can be placed at the end of a word. For example, a search for comput* will retrieve all words that begin with comput such as computer, computing, computers, computation. Wild cards within double quotation marks are not supported. **Note:** An update to the Lucene search server engine slightly modified the behavior when using the wild card * in the quick search, specific search, and advanced search. If the number of words returned by the query reaches 5000, no warning message will be displayed asking you to refine the search. Be aware that it might take a while for the search engine to return any result when the query is too generic. Also note that when performing a quick search using the wild card * at the beginning of a word, such request is heavier on the search server and you might have a longer response time.
Double quotation marks around strings	You can use double quotation marks to search for a specific string. For example, if you wanted to find product managers but not product specialists who are also assistant managers, you could type "product manager" (*with* the double quotation marks). **Note:** You need to *type* the double quotes in the Keywords field; do not copy them from other applications such as Word and paste them into the field. Also note that double quotes can vary from one keyboard language to another. If you use a French keyboard and use these «quotes», the search engine does not recognize them as double quotes in the Keywords field.

Keywords and Stop Words

Stop words are indexed in the Keywords field when doing an advanced candidate search. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as "no, not, the, one, and, or" and all single letters are stop words.

Stop words are considered by the system when placed within quotation marks or parenthesis. For example, when users are searching for "The Store" placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The Store without quotation marks nor parenthesis, the system will ignore the stop word in the query.

Keywords and Special Characters

In general, special characters used as punctuation or separators are not included in the search index and cannot be used to retrieve information. This is the case for the following characters:

- :

- ;
- .
- ,
- "
- '
- -
- _
- &
- *

Note: Exception: When used in email and phone number fields, some special characters are supported. For example, john.smith@taleo.net is supported as is, because the system recognizes this is an email address.

Keywords and Exact Term

When you perform a Keywords search with Exact Term selected, words that match exactly the terms you entered are returned and highlighted. You can use the wild card *, quotation marks, parentheses, and Boolean operators (AND, OR, NOT) to construct sophisticated candidate search queries. The system applies the AND operator between words.

Keywords and Related Terms

The OR operator is applied transparently when the Related Term option is selected. The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system. Such related terms might be particularly relevant to your search while other related terms might be less pertinent.

You should use the Related Terms feature when your initial query did not retrieve a lot of candidates. The Related Term feature enables you to retrieve candidates whose file contains a word that is similar in meaning to your search word in addition to candidates whose file contains your exact search word. In addition to retrieving similar words, it retrieves words with the same first 6 letters, since those words are most likely in the same family. For example, if you search for "Administration" using related terms, the engine will also search for "administrative", "administrator", etc.

Keywords and Conceptual Search

The conceptual option for the advanced search is available if your system administrator has activated the proper setting.

The conceptual search is an extension of the related term search, where instead of finding variations of entered words, the system automatically finds the right concepts to search for based on the text provided and then broaden its search. The conceptual search allows you to use large blocks of text (typically from a candidate's resume or a job description) to search for candidates. Conceptual search is typically the best tool to use when searching for candidates with attached files. This tool can be used when you are viewing a relatively large amount of text regarding particular sections of a candidate's resume such as experience and education, or a job description and you want to know if there are other candidates whose records contain similar information. For details, see *Conceptual Search*.

Keywords and Highlighting

Keyword highlighting is activated by your system administrator and is limited to Advanced Search results. Each occurrence of the keyword is highlighted in yellow on all tabs in the candidate file and in the attached files. Up to fifty different terms can be highlighted. A private setting is used to limit the number of highlighted words (contact Oracle Support for details). The search will highlight words together when the search keyword includes double quotes, to better match what is really retrieved by the search engine. For example, searching for "product manager" displays only

candidates with "product manager" in their file. Words are highlighted throughout the entire candidate file, even the labels, so some of the highlighted words are not used to retrieve the candidates.

Note: When performing a candidate advanced search with the Keywords field, an entire word or 3 characters with a wild card (*) can be used as a keyword.

Conceptual Search

Conceptual Search is an alternative way to search candidate files that broadens the search result by including documents that are similar based on concepts and proximities. The retrieved documents do not need to contain everything entered as search criteria, only related concepts.

In a Conceptual Search, most of the structured data elements are not part of the candidate file and are leveraged by the Advanced Search engine. Although Conceptual Search might be the preferred search method of some users, the Conceptual Search engine was built to complement the Advanced Search. Advanced Search can retrieve candidate files with more precision, using mandatory criteria used to source candidates for a specific requisition and can clearly define the required criteria set for a specific job. But what if you don't have precise criteria for a search? What if you have candidates without structured data and who have simply a pasted resume or an attached file? Or perhaps you cannot find any candidates using the Advanced Search and want to know what your database holds with regard to a hard-to-fill job description or candidates used as a basis to find other candidates. These are scenarios for which the Conceptual Search is most suitable.

Once the Conceptual Search module is enabled, the system administrator can control which users will have access to Conceptual Search by granting them a user type permission.

The Conceptual Search is available via the Advanced Search. When selecting the Conceptual option, users must enter significant text in the Keywords field (typically taken from a candidate's resume or a job description) to search for candidates. The search engine then looks through the following content of the candidate file:

Content Searched by the Conceptual Search
Pasted resume from the general profile.
Career objectives from the general profile.
Additional information from the general profile.
Education (Other Institution, Other Program, Education Level (Achieved), and text-based User Defined Fields) from the general profile.
Work Experience (Other Employer, Other Job Function, Achievements, and text-based User Defined Fields) from the general profile.
Text-based answers to questions from the library.
Text-based user-defined field answers.
The last three attachments per candidate provided the attachments use one of the following supported file formats:

Content Searched by the Conceptual Search
• .doc, .docx (Word) • .txt (standard text file) • .rtf (rich text format) • .pdf (Adobe Portable Document Format) • .htm or .html (hypertext markup language documents) • .wpd (Word Perfect) • .odt (if Oracle 11G is used)

On top of that, users can increase the Conceptual Search with any specific search criteria made available to them. This provides the possibility to mine the database on various concepts to find interesting candidates, but also restricts the result with more precise criteria, which was not available before.
The conceptual search cannot retrieve disqualified candidates because they are not indexed in the database.

Below are a few tips when using Conceptual Search.

Tip 1: Provide enough text in the Keywords field

If you only need to type a few words, it is usually advisable to perform a Keyword search or Related Terms search instead of a Conceptual Search. The Conceptual Search analyzes a text, extracts the most significant elements and compares them with significant words and relationships between words extracted from a sample of about 100,000 candidate files from your database. The system discards non-significant words from its reference list in the knowledge base. A word used by only a few candidates or another used by almost all candidates might not have any weight in the Conceptual Search "brain".

For example, if you searched for the word "consultant" in a consultant database, then the word would occur so many times that it might not even share any concept with other words. The search engine would perform a search using the exact word "consultant" and most or all of the candidates would have this criterion.

If you performed a Conceptual Search using only a few words, chances are that some of the words would be non-significant. You would better off pasting entire paragraphs and let the system determine what is important in each one and identify the best candidates based on this information.

Tip 2: Sort results by decreasing relevancy

The Conceptual Search engine tends to retrieve a lot of candidates. What distinguishes them is the relevancy between the candidate file and the Conceptual text box. You will typically want to sort the retrieved candidates from most relevant to least relevant.

Configuring the Conceptual Search

The configuration of the conceptual search consists of the following steps.

1. *Enabling the Conceptual Search Activation setting.*
2. *Enabling the Advanced Search Links setting.*
3. *Granting the candidate advanced search permission.*
4. *Granting the conceptual search permission.*
5. *Creating a list format for advanced search results.* You can also use the default list format or modify it.
6. *Assigning a list format variation to configuration profiles.*

Enabling the Conceptual Search Setting

Before you start

Configuration > **[Recruiting] Administration** > **Settings**

Here's what to do

1. Locate the Conceptual Search Activation setting using the Refine by feature.
2. Click the Conceptual Search Activation setting.
3. Click Edit.
4. Select the Yes value.
5. Click Save.

Enabling the Advanced Search Links Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Advanced Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access advanced search but find external candidates only.
5. If you want the user type to also search internal candidates, select the permission If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)
6. Click Save.

Granting the Conceptual Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access conceptual search option of the advanced search.
5. Click Save.

Assigning a List Format Variation to Configuration Profiles

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Candidate List Format setting.
3. Click Edit.
4. Select a list format variation in the Value drop-down list.
5. Click Save.
6. Click the Requisition List Format setting.
7. Click Edit.
8. Select a list format variation in the Value drop-down list.
9. Click Save.
10. Go back to the SmartOrg Configuration menu.
11. Click User Accounts.
12. Click a user account.
13. Click Edit next to Account Information.
14. Select a configuration profile.
15. Click Save.

Creating a List Format for Advanced Search Results

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Advanced Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

Conceptual Search - Permissions and Settings

The following permissions and settings are used to configure the conceptual search.

User Type Permission	Location
Access advanced search but find external candidates only	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
Access conceptual search option of the advanced search	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search
Other search permissions are available in the Search functional domain.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Search

Setting	Description	Default Value	Location
Conceptual Search Activation	Activates the conceptual search functionalities.	No	Configuration > [Recruiting] Settings
Other settings related to the Advanced Search are available under Recruiting settings. You can also refer to the *Advanced Search - Permissions and Settings* table.			Configuration > [Recruiting] Settings

General Profile Search

It is possible to return search results of candidates who have only submitted a general profile but have not yet applied on any specific requisition.

When this feature is enabled, users may add the "Exclude candidates who applied on requisitions" search criteria in the advanced search form and decide to search only for candidates who have submitted a general profile but have not yet applied for a specific position. This feature helps to ensure candidates who do not apply for a specific job are also considered.

Configuring the General Profile Search

The configuration of the general profile search consists of the following steps.

1. *Adding the "Exclude candidates who applied on requisitions" field in the advanced search form.*
2. *Enabling the Advanced Search Links setting.*
3. *Granting the candidate advanced search permission.*

Adding the "Exclude candidates who applied on requisitions" Field in the Advanced Search Form

Before you start

This is a prerequisite for this task.

Configuration > **[Recruiting] Administration** > **Advanced Search Page**

Here's what to do

1. In the Field Group, select Basic Profile.

2. In the Available Fields, select Exclude candidates who applied on requisitions.

   Click Add.

3. Click Save.

Granting the Candidate Advanced Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access advanced search but find external candidates only.
5. If you want the user type to also search internal candidates, select the permission If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)
6. Click Save.

Enabling the Advanced Search Links Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Similar Candidate Search

Recruiting Center users can look for similar candidates based on information of an existing candidate.

This type of search (often referred to as "more like this" search) can be performed from a candidate list or from within a candidate file by using the Find Similar Candidates icon.

The "find similar candidates" search uses the candidate file, which includes the fields used in the *Conceptual Search*, as the search criteria.

In addition to this information, the system uses default values for the Last Update and all the underlying search parameters applied in the Conceptual Search. The candidate's location is ignored because the system cannot assume you want to search for the current candidate location. You can, however, direct the "find similar candidates" search in your preferences to use your default search location. The 2,500 character limitation that applies to the Conceptual Search does not apply to the "find similar candidates" search. The Last Update value and Place of Residence (location) are user preferences that can be defined in My Setup.

Performing a "find similar candidates" search using a candidate file that contains no information in any of the list of fields used in the Conceptual Search retrieves no candidates and even displays a message informing the end user that the selected candidate cannot return any candidate. A candidate selected as a reference for a Conceptual Search must have significant text information, like an attached resume or a plain text pasted resume.

The "find similar candidates" search can be performed for one candidate file at a time.

The "find similar candidates" is available for all types of job submissions, including hourly candidate job submissions.

Configuring the Similar Candidate Search

When the conceptual search is enabled and configured, the similar candidate search becomes automatically available to Recruiting Center users.

For details, see *Configuring the Conceptual Search*.

Randomized Search Result

The randomized search result feature allows Recruiting Center users to specify that the information contained in the advanced search result list be returned in random order.

The randomized search results feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United Stated through protected settings. Randomized search means that candidates displayed in the advanced search result list are picked randomly in the overall list of candidates matching search criteria. An advanced candidate search done with randomization will return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any 300 of the matching candidates, with no predetermined priority, and will sort them based according to the sorting criterion set for the list. Any candidate matching the search criteria can be returned.

In the Recruiting Center, the Random results option is disabled when users perform a Conceptual Search. In previous releases, when the Random results option was selected in the Advanced Candidate Search page and the number of matches was higher than the limit of returned results, the system returned a random set of results from the matching set (and the resulting set was sorted by relevancy). This is not an issue when search criteria are specific and the result set is small. However, when performing a Conceptual Search or a very broad search (using related terms, for example), the result set might be quite large and the Random results option might provide poor quality results:

- When performing a conceptual search, the Random results option is turned off.
- When using the "find candidates matching a job requisition" feature (available in the requisition file toolbar) or the "find similar candidates" feature (available in the candidate file toolbar), the Random results option is turned off.

Note: The Random results option continues to be available for both the Exact term and Related Terms keyword search. For customers who have the Search Randomize Enabled setting set to Yes, the Random results option will be selected by default for both the Exact term and Related Terms keyword search. In these types of search, if the number of matches is higher than the limit of returned results, the system will return a random set of results from the matching set. Conceptual Search analyzes a relatively large amount of text when performing a broad match against the candidate database. As such, this type of search is used to discover hard-to-find candidates and is not a tool to exclude candidates. The search results from a Conceptual Search only make sense when they are ranked in order of relevancy and as such is incompatible with the Random results option.

Enabling Randomized Search Result

Before you start

Configuration > [Recruiting] Settings

Here's what to do

Contact Oracle Support to have the *Search Randomize Enabled* protected setting enabled.

Search Result Archiving

The search result archiving feature allows Recruiting Center users to select the requisition for which they want to archive search criteria and results.

The search result archiving feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for customers located in the United Stated through protected settings. When performing an advanced search, search criteria and/or results are archived in the database. The information is kept in the database for two years for audit purposes and prevents candidates from hard deletion.

When the feature is activated, all search results, even those done for requisitions outside the US will be archived.

Enabling Search Results Archiving

Before you start

Configuration > [Recruiting] Settings

Here's what to do

Contact Oracle Support to have the OFCCP Search Trace Activation and OFCCP Search Trace Candidate IDs Activation protected settings enabled.

Exclusion of Agency Owned Candidates in Search Results

Agency owned candidates can be excluded from candidate search results.

When this feature is enabled, users may add the "Exclude candidates owned by agencies" search criteria in the advanced search form and decide to include or not agency owned candidates in search results.

Adding the "Exclude candidates owned by agencies" Field in the Advanced Search Form

Before you start

This is a prerequisite for this task.

Configuration > **[Recruiting] Administration** > **Advanced Search Page**

Here's what to do

1. In the Field Group, select Basic Profile.
2. In the Available Fields, select Exclude candidates owned by agencies.

   Click Add.
3. Click Save.

Excluding Candidates with Specific Statuses from Search Results

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Open the *Threshold CSW Step - Hide from Search* setting.
2. Select a threshold step in the Value field.
3. Click Save.

Why Advanced Search is not Displaying Expected Results

Certain elements could have an impact on advanced search results.

Data segmentation: If your organization has activated data segmentation, this might exclude a lot of candidates from your search results. For this reason, it is important to verify if your organization has implemented such restrictions and, if this is the case, ask how they affect which candidates you are entitled to view. There are two dimensions to data segmentation: a user type permission whereby the candidates displayed to a user are determined by the person's staffing type; and the Organization, Location and Job Field (OLF) associated with groups that the user is a member of. While it might be easy to manage only a few groups around specific organizations, the effect of segmentation can be difficult to clearly understand if users are associated with multiple groups incorporating various OLF. Ask your system administrator if the *Activate Segmentation in Search* setting was activated.

Incomplete submissions: Many candidates never complete their submissions for various reasons. An incomplete general profile will not be retrieved during a search if your organization has configured the system that way. In average,

33% of candidates might not have completed a job specific submission or a general profile. An interesting alternative to not displaying such candidates is to display them and add an Incomplete Submission column.

Remember that the "incomplete submission" flag refers to the online submission process, not to the completeness of the candidate file overall. If your organization does not display incomplete submissions, incomplete submissions that might contain a lot of information are obviously not displayed. On the other hand, you might have partial submissions, that were captured or imported, and those partial submissions have the "complete" flag, even if only few fields were captured. Thus, incomplete submission refers to online submissions or online profiles that have not passed the submission page, regardless of whether all the content has been provided or not. Ask your system administrator if the *Display Incomplete Application* Protected setting was activated.

Identification missing: "Identification missing" candidate files are missing a candidate's first and last name and do not have the official "anonymous" flag. Ask your system administrator if the *Display Identification Missing Candidates* setting was activated.

Excluding candidates in selection process: Candidates who are in a selection process associated with an open requisition can be excluded from search results. Ask your system administrator if the *Candidate Search Mask Processed* setting was activated.

Excluding candidates in selection process who have attained or proceeded beyond a specific status: The *Threshold CSW Step - Hide from Search* setting indicates the CSW reference model step at which, once reached, candidates will be excluded from search results (unless the user type has overriding permission). Candidates are excluded from search results once they have reached the threshold step or when they are at a step that comes after the threshold step in the reference model sequence. Ask your system administrator if that setting and user permission were activated.

Matching the place of residence: By default, when a user searches for candidates associated with a specific place of residence, the system retrieves candidates associated with a "higher" location in addition to the specific location (place of residence). It is recommended that you include "higher" levels (country and state/province) because even if in theory candidates do have all levels (down to region), some might not. Exceptions are:

- If the place of residence field is not mandatory (usually only optional in capture candidate or through import).
- If it is a new country. Place of residence locations, which are centrally managed, increase in number as customers request that specific new countries be included. Oracle had numerous countries without states or regions in the past and started to add into the database such countries' regions on a customer-by-customer basis. Some candidates never had the opportunity to select a 2nd or 3rd level so it is important that they are not excluded by default when a search is performed.

The number of exceptions should be less than the number of candidates with an exact match and Oracle feels it is fair to retrieve those candidates who never had the opportunity to indicate their structured place of residence. Some Oracle customers might want to change this setting however.

Requisition Search

Requisition Quick Search

The requisition search allows Recruiting Center users to quickly find specific requisitions.

The requisition search tool is available at the top right hand corner of the Recruiting Center pages. It is available to users if it has been configured in the user's configuration profile and if the user type permission has been granted.

When performing a requisition search, users enter the title, the number, or a keyword to find the desired requisition. A wild card search may also be used. The search engine only returns results appropriate to the user's permissions and group association.

When performing a requisition search using a keyword, the search engine looks through this content of the requisition file:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Requisition UDF
- Offer UDF
- Department UDF
- Requisition Primary Location
- Requisition standard fields (Hire Type, State, Job Schedule, Job Level, Job Shift, Job Type, Study Level, Will Travel, Employee Status)

When performing a requisition search using a keyword, stop words are indexed. Stop words are small words not included in the index and excluded from a search because they are not considered to be significant. For example, words such as "no, not, the, one, and, or" and all single letters are stop words. Stop words are considered by the system when placed within quotation marks or parenthesis.

For example, when users are searching for "The GAP" placed within quotation marks or parenthesis, the system will consider the stop word "the". When users are searching for The GAP without quotation marks nor parenthesis, the system will ignore the stop word in the query.

For the requisition search, the system automatically applies the boolean operator AND. The AND, OR, and NOT operators can be entered manually.

The search is not case sensitive.

For performance and management reasons, a maximum of 300 matching files are displayed.

Configuring the Requisition Quick Search

The configuration of the requisition quick search consists of the following steps.

1. *Enabling the Search Widget setting.*
2. *Granting the requisition search permission.*
3. *Creating a list format for search results.* You can also use the default list format or modify it.
4. *Assigning a list format variation to configuration profiles.*

Enabling the Search Widget Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Search Widget setting using the Refine by feature.
3. Click the Search Widget setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Requisition Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the Access requisition search permission.
5. Click Save.

Creating a List Format for Quick Search Results

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click on the Candidate tab.
2. Select a variation in the Show list.
3. Click the Search Results / Quick Search list format context.
4. In the Context Details page, under the Formats for this Context tab, click New...
5. Provide a name for the list format.
6. Translate the name of the list format using the Languages list located on the top right hand side of the page.
7. Optional: Enter comments.
8. Optional: You can specify if the list format you are creating will be the default list format for the context.
9. Choose the desired columns by selecting the check box next to each column name.
10. Order columns in the list format by selecting a number in the Sequence Number column then click Reorder.
11. Sort files in the list according to a specific criterion. Up to three different sorting criteria can be specified.
    a. To select a criterion, click the Up Arrow icon in the Sort By column next to the desired column name.
    b. To select a second sorting criterion, click the Up Arrow icon in the Then by column next to the desired column name.
    c. To select a third sorting criterion, click the Up Arrow icon in the second Then by column next to the desired column name.
    d. To select ascending or descending sorting order, click the Up Arrow icon repeatedly.
12. Optional: You can select the Group records by first sort criterion option if you want to group files in the list format.
13. Click the Active check box to activate the list format.
14. Click Done.

Results:

The list format appears in the Context Details page, under the Formats for this Context tab.

Assigning the List Format to a Configuration Profile and User Account

Before you start

Configuration > **[SmartOrg] Administration** > **Configuration Profiles**

Here's what to do

1. Click on a configuration profile.
2. Click on the Requisition List Format or the Candidate List Format setting.
3. Click Edit.
4. Select a variation.
5. Click Save.
6. Go back to the SmartOrg Administration menu.
7. Click User Accounts.
8. Click on a user account.
9. Click Edit next to Account Information.
10. Select a configuration profile.

11. Click Save.

Search Queries

Search Query

A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other Recruiting Center users.

A search query is a set of search criteria selected by a Recruiting Center user to perform an advanced candidate search. Each time an advanced search is performed, a search query can be created. A search query can be used as a basis for future searches and can be changed to narrow or broaden search results when needed.

The search query feature is available at the top right hand corner of the Recruiting Center pages.

Users can save a search query if the feature is activated in the user's configuration profile and if the user type permission has been granted. The fields that can be selected in the Recruiting Center to customize a search query are set by the system administrator for each configuration profile. If a user is not linked to a configuration profile or is linked to a configuration profile for which the system administrator has not selected additional fields, then only the set of default fields are displayed when customizing a search query in the Recruiting Center.

Two types of queries can be created:

- Personal search queries will remain available only to the user that created the query.
- Shared search queries are queries that are made available to selected users.

Search queries can be saved in folders. For details, see *Folder*.

Configuring the Search Query Feature

The configuration of the search query feature consists of the following steps.

1. *Enabling the Search Query setting.*
2. *Enabling the Advanced Search Links setting.*
3. *Granting the candidate advanced search permission.*

Enabling the Search Query Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Advanced Search "Save Query" button setting using the Refine by feature.
3. Click the Advanced Search "Save Query" button setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Results:

The Save Query button is displayed to Recruiting Center users when creating an advanced search.

Enabling the Advanced Search Links Setting

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Locate the Advanced Search Links setting using the Refine by feature.
3. Click the Advanced Search Links setting.
4. Click Edit.
5. Select the Yes value.
6. Click Save.

Granting the Candidate Advanced Search Permission

Before you start

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Search.
4. Select the permission Access advanced search but find external candidates only.

5. If you want the user type to also search internal candidates, select the permission If access to Advanced Search is granted, find Internal candidates (in addition to external candidates)
6. Click Save.

Data Segmentation

Data Segmentation

Data segmentation is the ability to limit candidates retrieved in the search results based on predefined Organization-Location-Job Field associated with the search domain.

Data segmentation is used to identify which Recruiting Center users are authorized to view candidates according to corporate guidelines or potentially country guidelines for data privacy and sharing. With this feature, not all candidates will be visible to all users.

To enable data segmentation, system administrators must do the following:

What to do	Where to do it
Enable the *Activate Segmentation in Search* setting.	Configuration > [Recruiting] Settings
Create a user group and define a coverage area (that is, select the Search functional domain and associate the group to Organizations, Locations or Job Fields).	Configuration > [SmartOrg] Administration > User Groups
Add users to the user group.	Configuration > [SmartOrg] Administration > User Groups
Define requisition type access for users (that is, define access to professional, hourly, campus, contingent, and executive requisitions).	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions > Requisition Types

Example 1:

A system administrator needs to set up a Recruiting team such that they can only search and retrieve candidates who have expressed an interest in working anywhere in Europe, as kept in their location preferences. The system administrator will have to do the following:

- Enable the *Activate Segmentation in Search* setting.
- Create the user group "Recruiting – Europe".
- Assign at least one coverage area to the user group:
  - Domain=Recruiting > Search.
  - Locations=Austria, Belgium, Bulgaria, Cyprus, Czech Republic, Denmark, Estonia, Finland, France, Germany, Greece, Hungary, Ireland, Italy, Latvia, Lithuania, Luxembourg, Malta, Netherlands, Poland, Portugal, Romania, Slovakia, Slovenia, Spain, Sweden, United Kingdom (that is, all countries in Europe).
- Add users to the "Recruiting – Europe" user group.

- Define requisition type access for users.

Alternatively, system administrators can create personal coverage areas with the search domain at the user level instead of using a group with such coverage area. As a result, while searching candidates using the candidate advanced search, quick search or specific search as well as the view candidates under the job posting notification feature, such users will only be able to retrieve candidates having selected at least one of the listed European countries. Note that candidates without any preference can be retrieved.

Example 2:

An organization wants to segment candidate general profiles by user group. The organization has eight different companies sharing one zone. Each company has its own career section and the company's recruiters are setup in a user group contextualized by Organization. The companies do not want to share candidate general profiles that come in through their own specific career section. Data segmentation is driven by the employment preferences created automatically while applying on a job or collected in the general profile application flow. The system administrator will have to do the following:

- If profile only submission is allowed, make sure the Employment Preferences block is included in the Candidate Profile application flow (Configuration > [Career Section] Administration > Application Flows).
- Enable the *Activate Segmentation in Search* setting.
- Create a user group contextualized by Organization and make sure the Recruiting - Search domain is associated with such organization.
- Add users to the user group.

When the candidate completes the Employment Preferences block on the career section, the Organization that the candidate selects drives the data segmentation of the candidate general profile by user group. When a recruiter from a user group runs a search on a candidate that has selected an Organization outside of their user group, a recruiter with one or many search domains will be limited to candidates who had selected at least one of the search domain organization available. A candidate who had selected an organization outside of the recruiter group will not be visible if the recruiter's organization(s) is not selected.

10 Candidate and Requisition Matching

Matching Candidates and Requisitions

There are three contexts where candidates and requisitions can be automatically matched.

***Matching candidates when posting a requisition*:** When posting a requisition to an external career section, Recruiting Center users can view candidates who were found to match the requisition they are posting. This feature is available via the Preview Matching Candidates button. This matching is based on matching candidate criteria you have set. When configuring this feature, you have the ability also set an option to send an email to candidates who match the selected requisition. Candidates who have all the Required criteria will receive an email inviting them to apply on the job that is posted (*Job Posting Notification*). There are also default filters available for matching candidates. Configuring these filters will help the user narrow down or widen the list of matching candidates.

***Matching candidates while viewing their candidate file*:** This is known as a reverse search since Recruiting Center users start with the candidate file and then work back to matching requisitions. This can be helpful when there are two top candidates for a position and one is hired; users can use a reverse search to find another open requisition for the candidate who was not hired. This feature is available via the Add Candidates to Requisition icon. The matching requisitions criteria lets you select criteria that will guide the system on how to match candidates to requisitions.

In a career section, candidates can access jobs that match their preferences: Candidates who have completed a job-specific submission or a general profile can access jobs that match the preferences they have set in their general profile. Jobs that match display on the Personalized Job List. The configuration of the Personalized Job List is done in the Career Section Administration menu. For details, refer to the *Career Section Configuration Guide*.

Matching Candidates when Posting a Requisition

The configuration of this feature consists of the following steps.

1. *Setting matching candidate criteria.*
2. *Setting matching candidate filters.*
3. *Specifying preview settings.*
4. *Activating the matching candidate email notification.*

Setting Matching Candidate Criteria

Before you start

Configuration > **[Recruiting] Administration** > **Matching Candidate Criteria**

Here's what to do

1. In the Matching Criteria — Job Posting Notification page, select *matching criteria* and specify if they are required or desired.

2. Click Save.

Setting Matching Candidate Filters

Before you start

Configuration > **[Recruiting] Administration** > **Matching Candidate Filters**

Here's what to do

1. In the Default Filters for Matching Candidates page, select *matching candidate filters*.
2. Click Save.

Specifying Preview Filters

Before you start

Configuration > **[Recruiting] Administration** > **Matching Candidate Preview**

Here's what to do

1. In the Preview Matching Candidates page, select a country in the Available Countries list.

   Having no selection in the Selected Countries list disables the Preview Matching Candidates button in the requisition file.

2. Click Add.
3. Click Save.

Results:

If a requisition's location corresponds to the country you selected, the Preview Matching Candidates button will be available in the requisition Posting and Sourcing tab. This feature is useful if a company may not feel comfortable in showing to users a list of matching candidates for job posted in some countries because of regulation reasons (EEO regulations for example).

Activating the Matching Candidate Email Notification

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Locate the Email Job Matching Candidates Default setting.
2. Click Edit.
3. Select Yes.
4. Click Save.

Results:

In the requisition file, the option E-mail this job posting to matching candidates is selected by default. An email will be automatically sent to candidates that match a requisition requirements.

Matching Candidates while Viewing their Candidate File

The configuration of this feature consists of the following steps.

1. *Setting matching requisition criteria.*

Setting Matching Requisition Criteria

Before you start

Configuration > **[Recruiting] Administration** > **Matching Requisition Criteria**

Here's what to do

1. In the Matching Criteria - Match Candidate page, select *matching requisition criteria* and specify if they are required or desired.
2. Click Save.

Matching Candidates and Requisitions - Permissions and Settings

The following permissions and settings are used for the matching candidates and requisition functionality.

User Type Permission	Location
Match candidates to requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Search

Setting	Description	Default Value	Location
Email Job Matching Candidates Default	By default, check the "Email this job posting to matching candidates" check box. See *Job Posting Notification*.	No	Configuration > [Recruiting] Settings

Criteria for Matching Candidates

The table presents criteria used for matching candidates when posting a requisition.

Recruiting Administration > Matching Candidate Criteria
Preferred Jobs/Job
Preferred Locations/Locations
Preferred Organizations/Organization
Place of residence/Location
Competencies
Questions
Job Level
Job Type
Schedule
Shift
Employee Status
Education Level
Travel
Minimum Annual Salary

Matching candidate criteria are set by system administrators. However, they can be modified by Recruiting Center users to find more relevant requisitions for a particular candidate.

Matching criteria (except for competencies and questions) can be set as desired or required:

- Required: The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.
- Desired: The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user. Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.

Filters for Matching Candidates

The table presents filters used to control the number of candidates displayed to users when viewing a list of candidates matching a requisition.

Recruiting Administration > Matching Candidate Filters
Invite internal candidates.
Invite candidates living in: all countries, the requisition country, the requisition state/province or the requisition region.
Invite only candidates whose information has been modified during the last x month.
Do not invite candidates who have an incomplete profile that has not been modified during the last x month.
Do not invite candidates who have at least one application with any of the selected statuses: New, Reviewed, 1st, 2nd, 3rd interview, Testing, Offer, Hired, Rejected, Decline, Inactive.
Invite candidates who have applied at least once through any of the following source types or sources:

Matching candidate filters are set by system administrators. However, they can be modified by Recruiting Center users.

Matching Requisition Criteria

The table shows criteria used when matching candidates while viewing their candidate file (reverse search).

Recruiting Administration > Matching Requisition Criteria
Preferred Jobs/Job
Preferred Locations/Locations
Preferred Organizations/Organization
Place of residence/Location
Competencies
Questions
Job Level
Job Type
Schedule
Shift
Employee Status
Education Level
Travel
Minimum Annual Salary

Matching criteria (except for competencies and questions) can be set as desired or required:

- Required: The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.
- Desired: The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user.

Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.

11 Approval

Approval

Approval

When requesting an approval, Recruiting Center users must choose from a list the name of the individuals who will be required to do the approval. The list of approvers can be configured or not by the system administrator depending on the type of approval chosen by an organization.

- If the standard approval process is used within an organization, the Recruiting Center user will select approvers from a list containing all of the active users of the database. The Recruiting Center user will also be able to create a list of *frequent approvers* in the My Setup feature.
- If the Dynamic Approval Routing (DAR) process is used within an organization, the list of approvers is pre-populated upon selecting the Request Approval action. The list of approvers to be generated is configured by the system administrator within the Dynamic Approval Routing feature. These approvers are displayed based on configured rules and conditions.

The approval path can be carried out in two ways:

- Sequential: When the first approver receives an approval request, he/she approves the item (requisition or offer). Once approved, the approval request goes to the next approver, and so on. The item does not move forward until each approver has approved it in the sequence defined.
- Parallel: Multiple approvers receive an approval request and they can all approve the item at the same time. Approvers can approve the item without having to wait for the others.

If the standard approval process is used within an organization, the system administrator must activate settings to enable sequential or parallel approval. If Dynamic Approval Routing is used, the approval will be sequential unless there are more than one approver for the same role in which case the approval will be parallel.

All files requiring an approval are in PDF format. When conducting the approval from either the Tasks list or from eShare, the user will receive a PDF print version of the file to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

> **Note:** In the Request Approval window, there is a checkbox to add the approvers as frequent collaborators. This function will only add these users as frequent collaborators under My Setup > Preferences. It will not add these users as collaborators on the requisition currently open. Also note that users will need to log out and log back in to see the change applied to their list of frequent collaborators under My Setup > Preferences.

Approver

An approver is a Recruiting Center user who will approve requisitions and/or offers.

A list of approvers can be defined by the system administrator at the department level. A list of personal default approvers, called frequent approvers, can also be defined by the Recruiting Center user in the My Setup feature. When a requisition and/or offer is ready to be approved (by selecting the Request Approval action), the approval path is selected by default as follows:

- If frequent approvers were defined under My Setup, these approvers will be automatically selected.
- If frequent approvers were not defined under My Setup, the approvers set at the department level by the system administrator will be selected automatically.

When a user selects approvers, the selector only displays users who can be potential approvers. It is possible that no approvers are displayed if none of them are allowed to do the approval. An approver must be an active user and have the user type permission to approve requisitions and/or offers.

Requirements to Approve Requisitions

The minimum requirements for a user to approve requisitions are described below.

- The user must be active.
- The user belongs to the user group of the requisition. (Note: For Dynamic Approval Routing, this requirement is not enforced; users not belonging to the group can be approvers.)
- The user has the following permissions:

User Type Permission	Location
Access Recruiting Center AND/OR Access the Response Center (used primarily by eShare users)	Configuration > [SmartOrg] Administration > User Types > Recruiting > Other
View requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions The user can view requisitions in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, even if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisitions being routed for approval is not owned by him/her.
Allow access to professional requisitions OR Allow access to hourly requisitions OR Allow access to campus requisitions OR Allow access to contingent requisitions OR Allow access to executive requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions The requisition type here must match the type of the requisition being approved.

User Type Permission	Location
Approve requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions

Requirements to Approve Offers

The minimum requirements for a user to approve offers are described below.

- The user must be active.
- The user belongs to the user group of the requisition. (Note: For Dynamic Approval Routing, this requirement is not enforced; users not belonging to the group can be approvers.)
- The user has the following permissions:

User Type Permission	Location
Access Recruiting Center AND/OR Access the Response Center (used primarily by eShare users)	Configuration > [SmartOrg] Administration > User Types > Recruiting > Other
View requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions The user can view requisitions in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, even if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisitions being routed for approval is not owned by him/her.
Allow access to professional requisitions OR Allow access to hourly requisitions OR Allow access to campus requisitions OR Allow access to contingent requisitions OR Allow access to executive requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions
Access requisition-specific candidate lists	Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates
View offers	Configuration > [SmartOrg] Administration > User Types > Recruiting > Offers The user can view offers in any context meaning that as long as the user can view the object in some circumstances, he/she will be able to access the object to be approved, even if that object is not otherwise visible to the user. For example: a manager can view requisitions that he/she owns but the requisition for the offer being routed for approval is not owned by him/her.
View internal job submissions (if the candidate is an internal candidate)	Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates This permission only applies if the candidate receiving the offer is internal and the user needs it also granted at some level, regardless of the context level - like view offers and view requisitions.

Requirements to Terminate an Approval Path

The requirements for a user to terminate a requisition approval path is described below.

- The user has the permission to edit requisitions, AND
- The user is the originator of the approval path, OR
- The user is the owner of the requisition (that is, manager, manager assistant, recruiter, recruiter assistant).

Automatic Approval Reminders

System administrators can configure an automatic reminder so that e-mails are sent to approvers to remind them to review and approve offers and requisitions.

Two settings are available:

- Requisition Approval Automatic Reminder
- Offer Approval Automatic Reminder

System administrators configure these settings by defining the number of days after which a reminder e-mail is sent to remind approvers to review and approve offers and requisitions. When an approval task is created and a notification is sent to a user by e-mail, the system automatically sends a reminder to that user if a decision has not yet been taken within the time span defined. The system continues to send the reminder at the defined frequency (number of days) until the approver provides a decision on the approval request. Note that after one year, reminders are no longer sent. As an example, if the setting is set to 1 day, reminders will be sent every day for a period of one year or until the approver provides a decision. If the setting is set to 7 days, a reminder will be sent every week.

This functionality decreases the likelihood of approvers holding up the approval process. It also reduces the approval process duration.

The following message templates are used for both the notifications and automatic approval reminders. Since the same message templates are used, it might be beneficial for system administrators to make adjustments to the content of the four message templates.

- Standard Notification for an Offer Approval Request
- Standard Notification for an Offer Approval Request (E-Share)
- Standard Notification for a Requisition Offer Approval Request
- Standard Notification for a Requisition Approval Request (E-Share)

Approving Requisitions and Offers via the Tasks List or eShare

Recruiting Center users have the ability to approve requisitions and offers either via the Tasks list and/or eShare.

System administrators can choose the methods of approval for different users:

- eShare: available to users when the *Access response center* user type permission is granted (Configuration > [SmartOrg] Administration > User Types > Recruiting > General) and when the user's preference *Enable eShare Center E-mail* is set to Yes (Recruiting Center > My Setup > Preferences).
- Tasks list: Tasks are available to users if system administrators have configured the Tasks channel into the user's center stage (Configuration > [Recruiting] Administration > Center Stage) and/or they have granted access to the Core Navigation Bar in the user's configuration profile (Configuration > [SmartOrg] Administration > Configuration Profiles).
- Either eShare or Tasks list: if eShare and the Tasks channel are both configured for the user, the user can receive both eShare approval requests and also track them in the Tasks list. Users can decide on approval from either location. Tasks executed from the eShare center will be automatically updated in the user's Tasks list as well. If an approval is executed from the Tasks list, the eShare request will indicate that the decision has already been made and the eShare is no longer active.

eShare Approval Acknowledgment

eShare users can receive a confirmation of their requisition approvals.

This feature is automatically available on all eShare approvals. When users respond to an eShare approval request, there is a check box to trigger the receiving of an approval acknowledgment. If users choose to receive the acknowledgment, upon completing their decision on the request, the users will receive an email message confirming their action.

Three system message templates have been created for this purpose. There is a standard message available and if desired, system administrators can modify the text of the message sent. The acknowledgment sent will depend on the decision of the approver:

- Requisition Approved Acknowledgment
- Requisition Rejected Acknowledgment
- Requisition Passed Acknowledgment

Approvals decided via the Tasks channel do not have an acknowledgment option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

Requisition Approval Path Amendment

From time to time, it may be necessary to change the approvers that were originally selected for a requisition. This is done by using the action called Amend Approval Path.

The Amend Approval Path action allows users to modify an existing requisition approval path. Users, if they have the permissions, can add or remove approvers, reorder them, and even decide for them.

The Amend Approval Path action is available in the More Actions menu only if:

- the requisition status is set to "Pending - To be Approved";
- the user has one of the following permissions:

User Type Permission	Location
Amend an approval path created by this user	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval section
Amend an approval path created by another user (user B)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval section

Adding Approvers

It is possible to add approvers to an existing approval path. When clicking the Add Approvers button located at the bottom of the Amend Approval window, a window appears and users can filter and select one or many approvers. The newly added approvers appear at the top section of the window with the other approvers. When approvers are added to the approval path, the event "Approval Request Amended: Approvers Added" is added to the requisition's History tab.

Removing Approvers

It is possible to remove approvers from an existing approval path. When clicking the Remove icon next to the approver's name, the approver is removed from the approval path. When approvers are removed from the approval path, the event "Approval Request Amended: Approvers Removed" is added to the requisition's History tab.

Specific rules apply when removing approvers:

- A user can remove approvers from an approval path only if the approvers have not yet received the Approve Requisition task.
- A user can remove approvers from an approval path created by himself only if he has the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user."
- A user can remove approvers from an approval path created by another user only if he has the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user."

Reordering Approvers

It is possible to reorder approvers in an existing approval path. When approvers are reordered in the approval path, the event "Approval Request Amended: Approvers Reordered" is added to the requisition's History tab.

Specific rules apply when reordering approvers:

- A user can change the order of the approvers only if the approvers have not yet received the Approve Requisition task.
- A user can change the order of the approvers only if the approvers have not yet render their decision.

Deciding for Approvers

It is possible to take an approval decision for an approver. When all the approvers have rendered their decision, an event is added for each decision in the requisition's History tab.

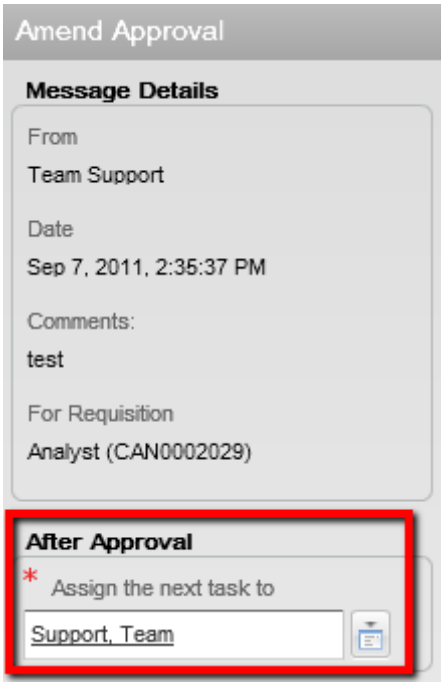
Specific rules applies when deciding for approvers:

- A user can decide for an approver only if the approver has not yet rendered his decision.
- A user can decide for an approver even if the approver has already received the Approve Requisition task.

- A user can decide for an approver in an approval path created by himself only if he has the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user."
- A user can decide for an approver in an approval path created by another user only if he has the permission "Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user."
- A user can set the decision to Pass for an approver only if he has the permission "Choose to pass when this user decides on behalf of another approver". Two exceptions: a) Except if the approval path has been created by himself and the option "But not when amending an approval path created by the user" was selected for that permission. b) Except if the approval path has been created by another user and the option "But not when amending an approval path created by another user" was selected for that permission.
- A user cannot set the decision to Pass for the last approver if all other approvers have also set their decision to Pass.
- When a decision has been taken for an approver, the decision is displayed in the requisition's Approvals tab: {Current User} on behalf of {Approver Name}.

Assigning the Task After the Approval

It is possible to change the person who will perform the next task once the approval has been rendered. This is done using the selector next to the **Assign the next task to** field.



Adding Approvers to the List of Collaborators

When the option "Add the approvers to the list of collaborators defined for this requisition" is selected, the selected approvers will be automatically added to the requisition's collaborators list. This option is visible if:

- the Collaborators list has been enabled for the requisition;

- the user adding the approvers is the owner of the requisition (Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant). If the user is not the owner of the requisition, he must have the permission "Reassign requisitions to owners and collaborators if the user is not an owner".

When the option "Add the approvers to the list of my frequent collaborators" is selected, the selected approvers will automatically be added to the user's frequent collaborators list (available under My Setup > Preferences). It will not add the approvers in the collaborator's list of the requisition. This option is visible only if the Collaborators list has been enabled for the requisition.

Offer Approval Path Amendment

From time to time, it may be necessary to change the approvers that were originally selected for an offer. This is done by using the action called **Amend Approval Path**.

The Amend Approval Path action allows users to modify an existing offer approval path. Users, if they have the permission, can add or remove approvers, reorder them, and even decide for them.

The Amend Approval Path action is available in the More Actions menu only if:

- the offer status is set to "Approval in Progress";
- the user has the permission "View and Manage Offers".
- the user has the permission "Amend an Approval Path".

Adding Approvers

It is possible to add approvers to an existing approval path. When clicking the Add Approvers button located at the bottom of the Amend Approval window, a window appears and users can filter and select one or many approvers. The newly added approvers appear at the top section of the window with the other approvers.

Removing Approvers

It is possible to remove approvers from an existing approval path. When clicking the Remove icon next to the approver's name, the approver is removed from the approval path.

To remove an approver, the user must have the permission "Edit approvers when requesting approvals".

Specific rules apply when removing approvers:

- A user can remove approvers from an approval path only if the approvers have not yet received the Approve Offer task.
- A user cannot remove an approver from an approval path if the approver has already render a decision.

Reordering Approvers

It is possible to reorder approvers in an existing approval path.

To reorder approvers, the user must have the permission "Edit approvers when requesting approvals".
Specific rules apply when reordering approvers:

- A user can change the order of the approvers only if the approvers have not yet received the Approve Offer task.
- A user can change the order of the approvers only if the approvers have not yet render their decision.

Deciding for Approvers

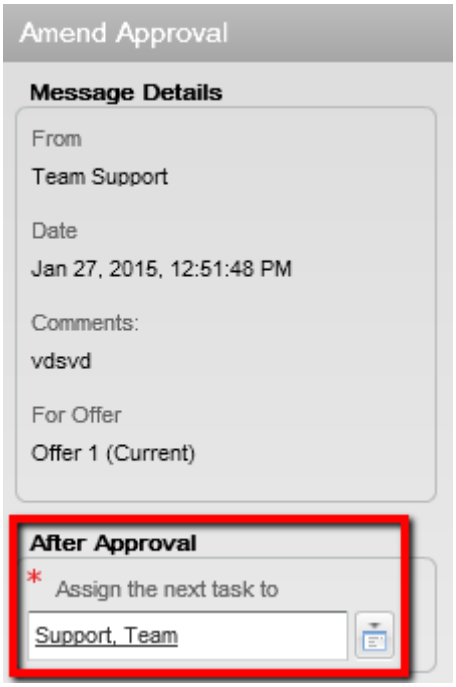
It is possible to take an approval decision for an approver.

Specific rules applies when deciding for approvers:

- A user can decide for an approver only if the approver has not yet rendered a decision.
- A user can decide for an approver even if the approver has already received the Approve Offer task.
- A user can decide for an approver if the user has the permission "Decide for other approvers".
- A user cannot set the decision to Pass for the last approver if all other approvers have also set their decision to Pass.

Assigning the Task After the Approval

It is possible to change the person who will perform the next task once the approval has been rendered. This is done using the selector next to the **Assign the next task to** field.



Adding Approvers to the List of Collaborators

When the option "Add the approvers to the list of collaborators defined for this requisition" is selected, the selected approvers will be automatically added to the requisition's collaborators list. This option is visible if:

- the Collaborators list has been enabled for the requisition;
- the user adding the approvers is the owner of the requisition (Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant). If the user is not the owner of the requisition, he must have the permission "Reassign requisitions to owners and collaborators if the user is not an owner".

When the option "Add the approvers to the list of my frequent collaborators" is selected, the selected approvers will automatically be added to the user's frequent collaborators list (available under My Setup > Preferences). It will not add

the approvers in the collaborator's list of the requisition. This option is visible only if the Collaborators list has been enabled for the requisition.

Configuring the Access to Items Being Approved

Access to items being approved by users must be configured.

For eShare via email:

- The eShare Response Center Product must be activated by Oracle Support.
- The *Access the Response Center (used primarily by eShare users)* permission must be granted in SmartOrg (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
- The *Enable eShare Email for Response Center Access* user's preference must be enabled in the Recruiting Center (Recruiting Center > Resources > My Setup > Preferences). Note: The same setting exists under Configuration > [General Configuration] Settings. By default, it is set to No for all users. If changing the value of this setting, the change will apply to all users that have not manually edited their own user preference.

For Tasks via the Recruiting Center:

- The *Access Recruiting Center* permission must be granted in SmartOrg (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
- Access must be given to the tasks via one or both of the following means:
  - The Tasks tab available in the core navigation bar. The core navigation bar is enabled via the SmartOrg Configuration Profiles feature.
  - The Tasks channel available in the main panel. The Tasks channel is configured via the Center Stage feature. The Center Stage is then associated to the user's configuration profile.

Requisition Approval Rerouting After Changes

Configuration options when activated can force requisitions to automatically be rerouted for approval when certain business scenarios occur.

System administrators can configure certain settings to force requisitions to automatically be rerouted for approval when certain business scenarios occur. System administrators define which scenarios they wish to activate. Each of the settings can be individually set to control if that situation when it occurs will cause the requisition to be re-routed for approval:

Setting	Description
Restart Approval Process After "Cancel" Step	Restart the approval process when reopening a requisition after it has been canceled.
Restart Approval Process After "Fill" Step	Restart the approval process when reopening a requisition after it has been filled.

Setting	Description
Restart Approval Process After "On Hold" Step	Restart the approval process when reopening a requisition after it has been placed on hold.
Restart Approval Process After Editing the Number of Positions	Restart the approval process when editing the number of positions for the requisition.
Restart Approval Process After Editing the Salary Fields	Restart the approval process when editing the salary fields in the requisition file.

Immediately upon a Recruiting Center user has performed an action that makes true one of the above activated settings:

- The requisition status will return back to Draft.
- The requisition will be unposted.
- The requisition tasks will be deleted.

Also, if the requisition was posted and the Recruiting Center user modifies the requisition file, the requisition will be re-routed to the Draft status and it will also be unposted.

If a Recruiting Center user re-opens a canceled requisition and if the *Restart Approval Process After "Cancel" Step* setting has been activated, rather than the requisition reverting back to it's original state, the requisition will revert back to the status of To be approved. The requisition must be reapproved before sourcing for the position can be restarted. The prior approval process will still be visible from the tracking history, but the approval tab will reflect the most current approval cycle. If the requisition had originally been canceled during the approval process, the prior approval cycle that was in process will be terminated and will be replaced by the new one which must be initiated from the beginning.

Setting a Default Approval Path for Requisitions

Setting a default approval path for requisitions allows you to specify, at the department level, which approvers will be selected by default when users are requesting the approval of a requisition. Such default approval path is used when no default approval path is set at the user level and when a department is selected while creating a requisition.

Before you start

The *Enable Department* setting must be activated.

A department must be created before defining approvers.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on the desired department.
2. Under the Approver Preferences - Requisitions section, click the Plus icon.
3. Select one or several approvers from the user list then click Done.
4. To change the order of the approvers, select a number from the list next to the approver, then click Reorder.
5. Click Done.

Setting a Default Approval Path for Offers

Before you start

The *Enable Department* setting must be activated.

A department must be created.

Configuration > **[Recruiting] Administration** > **Department List**

Here's what to do

1. Click on the desired department.
2. Under the Approver Preferences - Offers section, click the Plus icon.
3. Select one or several approvers from the user list.
4. Click Done.
5. To change the order of the approvers, select a number from the list next to the approver, then click Reorder.
6. Click Done.

Results:

The default approval path for offers has been created. The approvers selected by default when users are requesting the approval of an offer are selected at the department level.

Approval - Permissions and Settings

The following permissions and settings are used for the approval functionality.

User Type Permission	Location
Forego the approval process	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers > Approval
Choose to pass when this user is asked to approve an offer	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers > Approval
Amend an approval path	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers > Approval
Decide for other approvers	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers > Approval
Send an approval request reminder for offers	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers > Approval
Approve requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Save a requisition as open	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Choose to pass when this user is asked to approve a requisition	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Choose to pass when this user decides on behalf of another approver	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval

User Type Permission	Location
Create an approval path	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Decide for other approvers when creating an approval path	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Amend an approval path created by this user	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by this user	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Amend an approval path created by another user (user B)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Remove approver, change decision of approver, or change approved requisition recipient when amending an approval path created by another user	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval
Send an approval request reminder for requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Approval

Data Access Security

When conducting an approval, users will be able to see data they are authorized to view based on their viewing permissions. For example:

- If a user is authorized to view fields with the General security level, then these fields will be displayed on the file. Fields having the Restricted or Confidential security level will not appear on the file.
- If a user is only authorized to view compensation data on requisitions where he/she is the owner, compensation fields on requisitions outside of their ownership will not be displayed.

If a system administrator has forgotten to give users at least viewing permission to fields with the General security level, general viewing rights will be granted to allow the file to render.

Exception Scenarios

If a user's group changes so that they no longer belong to the authorized approving user group: This will not change the user's ability to execute the approval. The user will still receive the task and will be able to complete the approval review and decision.

If a user's permissions change so that they are no longer authorized to conduct the approval: The user will not be able to complete the approval request. The task will remain assigned to the user but when trying to complete the task, the user will receive a message indicating that the user is not authorized. For the approval process to proceed, the user's permissions will need to be changed, or the approval path will need to be amended.

Setting	Description	Default Value	Location
Enable Approval Models	Allows collaborative (parallel) approval in addition to sequential approval. It allows forwarding	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	an approval request to another approver if the user has the permission to amend approval paths. When using Dynamic Approval Routing, if more than one user included in a functional role matches the given Organization-Location-Job Field context, then all those users are included within the same sequence in the approval path, resulting in the approvers being in parallel.		
Offer Default Approval Model	Defines the approval model that will be used by default when users are creating an offer approval request.	Sequential	Configuration > [Recruiting] Settings
Requisition Default Approval Model	Defines the approval model that will be used by default when users are creating a requisition approval request.	Sequential	Configuration > [Recruiting] Settings
Offer Approval Workflow Activation	Determines whether or not approvals are used on offers.	Optional	Configuration > [Recruiting] Settings
Offer Letter Must be Selected for Approval Request	Allows a request for approval only if an offer letter has been selected.	No	Configuration > [Recruiting] Settings
Requisition Approval Automatic Reminder	Remind approver to provide a decision on the requisition approval X days after having sent the last notification. The maximum value is 365 days. Setting the value to 0 does not send any reminder.		Configuration > [Recruiting] Settings
Offer Approval Automatic Reminder	Remind approver to provide a decision on the offer approval X days after having sent the last notification. The maximum value is 365 days. Setting the value to 0 does not send any reminder.		Configuration > [Recruiting] Settings

Note: For requisitions approval, there are two standard message templates that behave as follows:

- Standard Notification of a Requisition Approval Request (eShare): Message sent to approvers for both the initial request and any reminders, provided that the eShare center has been activated.
- Standard Notification of a Requisition Approval Request: Message sent to approvers for both the initial request and any reminders, in cases where the eShare center has not been activated. In this message, the Respond hyperlink does not appear by default (to prevent cases where the eShare center is not available). If users are receiving this message for requisition approval requests, it means that you are trying to use the eShare function but it is not implemented. You should call support and ask to have the eShare Center activated.

The above behavior does not exist for offer approval notifications. For offers, there is only one offer approval notification template; it is sent in all cases, regardless of whether or not the eShare center has been activated.

Dynamic Approval Routing

Dynamic Approval Routing

Dynamic Approval Routing is an advanced tool that automatically populates requisition and offer approvers through the use of inclusion and exclusion rules. These rules, based primarily on functional and hierarchical roles, enable customers to enforce processes and simplify the approval process for the initiator.

Dynamic Approval Routing basically works as follows: When a user routes a requisition or an offer for approval, if the Dynamic Approval Routing is relevant for the context of the requisition or the offer, it will predetermine the list and sequence order of approvers. The initial list of approvers may be modified by the user routing the approval request based on his user type permissions. With the path already generated, the user can simply click to request that the approval process be initiated. Approvers will receive approval requests just as they do with the standard approval functionality.

Once the Dynamic Approval Routing module has been activated by Oracle, it becomes available in the Configuration menu. The system administrator is responsible for configuring the Dynamic Approval Routing feature. The configuration involves many steps:

- Defining the "reports to" structure and configuring users involved in the Dynamic Approval Routing process.
- Defining hierarchical and functional roles.
- Defining inclusion and exclusion rules.
- Configuring approval paths and sequences.

Once the Dynamic Approval Routing is configured, it is important to test the workflow with a small sample that can be easily controlled prior to full deployment. This step is recommended to ensure that the desired results are achieved prior to rolling out to the entire employee population.

Checklist prior to testing:

- Ensure roles are activated and assigned properly to users.
- Ensure all Dynamic Approval Routing components are active (approval paths, rules, sequences).

- Ensure inclusion rules are included on the active workflow for every role expected to be included in the approval workflow.
- Ensure sequences are defined for the desired Organizations-Locations-Job Fields contexts and contain all possible approver roles.
- Observe the approval path presented to the initiating user and ensure it is as expected.

Note: System changes after an object is routed for approval will not change the list of approvers. For example: If a new approval path is created and activated, it will only impact newly created approval requests, it will not impact the approvals that are already in process. If a user replaces another user in a functional role, the update will only affect new approval requests, not existing approvals in process where the prior user was assigned. (Customers can still use the delegate feature for an approval task assigned to one user to be routed to a different user).

What happens when the system finds more than one appropriate match:

- If a workflow has a rule invoking the inclusion of a functional role, the "best" matching user will be assigned a task. Based on the configuration, it is possible that more than one match be equally suitable. In such case, if more than one user included in a functional role matches the given Organization-Location-Job Field context, then all those users are included within the same sequence in the approval path (users will be included in parallel).
- If a user matches more than one inclusion rule, the system removes any duplicates, and the last appearance of the user in the approval path is kept and all others are removed. For example, a compensation team has an opening and the director of compensation is pulled in for both a functional and hierarchical role. Once all roles are resolved (the same user is included because its hierarchical role is included and its functional role is included), the system removes any duplicates.

Locking Generated Approval Paths

With the introduction of the Dynamic Approval Routing (DAR) feature, a mechanism was required so users would not be able to remove or reorder approval paths generated by the DAR engine.

This feature is available for all but makes practical sense to use in conjunction with the Dynamic Approval Routing feature.

The following permission allows system administrators to control if a user type is authorized to remove or reorder the pre-populated approvers presented during the request approval action.

User Type Permission	Location
Edit approvers when requesting approvals	Configuration > [SmartOrg] Administration > User Types > Recruiting > Other

When the Dynamic Approval Routing is used to generate the list of approvers, this permission can be used to lock out the user's ability to modify that list of approvers. This permission can also be used if the requisition approval path is always created from scratch (which means the user has no frequent approvers and is not using requisition duplicate function) and the customer wants to enforce that for offer approvers; the same approvers who approved the requisition must also approve the offer.

When a user does not have the above permission:

- When using the Request Approval action (for requisitions or offers), the user conducting the approval request cannot remove nor reorder system-generated approvers. These may have been inserted from DAR, requisition duplication, frequent approvers, or from requesting offer approval (in which case a starting list of approvers always exists, either via DAR, frequent approvers, or pulling in the initial approvers from the requisition).
- The user can add and reorder additional approvers, and remove approvers that he/she has added.
- The user, if authorized, may amend approval paths once routed for approval (this is managed by another permission).

When the permission is not granted, the Delete icon will not be present when hovering over an approver and the order sequence drop-down boxes will be unable to be selected.

Configuring the Dynamic Approval Routing

The system administrator is responsible for configuring the Dynamic Approval Routing feature.

The configuration involves many steps:

1. *Defining the Dynamic Approval Routing "Reports to" structure.*
2. *Creating and configuring hierarchical roles.*
3. *Creating and configuring functional roles.*
4. *Creating and configuring unconditional inclusion rules.*
5. *Creating and configuring conditional inclusion rules.*
6. *Creating and configuring exclusions rules.*
7. *Defining the approval path properties, settings and notifications.*
8. *Creating and configuring sequences.*
9. *Linking inclusions rules to the approval path.*
10. *Testing the approval workflow with a small sample.*
11. *Activating the Dynamic Approval Routing approval path.*

The Dynamic Approval Routing module is used to define the business rules for how approval workflows will operate. This module is implemented distinctly for each requisition type. So the configuration steps would need to be repeated for the requisition types for which the system administrator plans to implement Dynamic Approval Routing.

Dynamic Approval Routing Reports to Structure

The "Reports to" structure is used for the Dynamic Approval Routing to define to whom each user reports to.

If a customer intends to use hierarchical roles or the reports to ("up # levels") to populate the flow, the "Reports to" structure must be implemented for Dynamic Approval Routing. If a customer intends to use only functional roles, the customer can still implement Dynamic Approval Routing but the "Reports to" structure does not need to be populated.

The "Reports to" structure should be done via a user integration. If an integration is not used, the system administrator can alternatively manually configure all users involved in the Dynamic Approval Routing via the User Accounts feature in SmartOrg (*Configuration > SmartOrg Administration > User Accounts*). When configuring user accounts:

- All users must be classified as having the "Current" employee status.

- All users must have an "Employee Manager" specified. This is who the user reports to.

Defining the Dynamic Approval Routing Reports to Structure

Before you start

Configuration > **[SmartOrg] Administration** > **User Accounts**

Here's what to do

1. Click on a user account.
2. Click Edit next to Employee Information.
3. Set the employee status to Current.

   A user cannot be designated as someone's manager unless he/she is a "current" employee.
4. Specify the employee manager.

   The manager is the person to whom the user reports to. Note that in order for a user to be available in the Employee Manager field, he/she must be classified as "Current" in the Employee Status field.
5. Select an Organization and a Location.

   Note that these fields are not relevant to the functioning of Dynamic Approval Routing. They are required to support behaviors in Taleo Performance. These fields are not required to be specified if using Integration to update the employee information.
6. Click Save.

Hierarchical Role

Hierarchical roles are the explicitly defined roles in the organization and their order of relationships.

Hierarchical roles are used in the Dynamic Approval Routing (DAR) feature to define the order of approval path relationships and the level in this hierarchy that must be achieved for different types of approvals.

Example: CEO > Senior Vice President > Vice President > Director > Manager > Team Leader.

It is recommended to use an employee integration to associate users to their hierarchical role so that this information stays current and synchronized with the HRMS. If an integration is not used, the creation and configuration of hierarchical roles can be done using the Hierarchical Roles feature (*Configuration > Roles > Hierarchical Roles*). When creating and configuring hierarchical roles:

- Start from the top of the organization hierarchy and go down. It will be easier to associate subordinate roles if the highest level is active first.
- Create codes that will allow you to sort them in an order that represents the organization hierarchy. For example, Code: 01 - Name: CEO; Code: 02 - Name: Senior VP; Code: 03 - Name: VP, and so on.
- Specify the superior role in the hierarchy. For example, if creating the Manager role, the hierarchy will be Director, meaning that the Manager will report to the Director.
- Associate users to a hierarchical role. Several users can be associated to one hierarchical role, but only one hierarchical role can be assigned to a user.

Creating and Configuring a Hierarchical Role

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

1. Click Create.
2. Enter a code and a name.

   Create codes that will allow you to sort them in an order that represents the organization hierarchy. For example, 01, 02, etc.
3. Optional: Enter a description.
4. Click Save.
5. In the Hierarchy section, specify the superior role:
   a. Click Select next to Hierarchy.
   b. Select the role that will be above the role you are configuring. For example, if creating the Manager role, the hierarchy could be Director, meaning that the Manager will report to the Director.
   c. Click Select.
6. In the Assignees section, assign users to the hierarchical role. Several users can be associated to one hierarchical role, but a user may only be associated to one hierarchical role.
   a. Click Add next to Assignee.
   b. Select one or multiple users.
   c. Click Select.
7. Click Activate.

Results:

The new role appears in the Hierarchical Roles list and can be used to choose the superior role of a hierarchy.

Functional Role

Functional roles are used in the Dynamic Approval Routing (DAR) feature. A role is used to choose users that will be assigned to approve a requisition or an offer based on contextualization (OLF).

Functional roles are created and configured via the Functional Roles feature (*Configuration > Roles > Functional Roles*).

Each functional role must be assigned a single default user. When requesting an approval, if no other users are selected for the role, the default assignee will be called upon for an approval using this role.

Each role may also have users assigned for specific Organization-Location-Job Field (OLF) structure and from there are called into play in approval workflows when objects are created for their structure. For example, you are creating an HR Leader role. You select John Smith as an assignee and associate him to the Canadian Operations organization. As a result, John is now the HR Leader for the Canadian Operations. When a functional role is invoked in an approval

process, the employee matching the requisition's OLF will be used. If there is no matching employee for the OLF context, then the default assignee will be used.

It is possible to have multiple assignees have the same functional role in the exact same context. When this is the case, all people having that functional role will be included in the approval path, with the same sequence number, and will have to approve the requisition or offer.

Users can be associated to more than one role in the approval path. By default, the system will:

- Create the list of roles based on the approval path inclusion rules.
- Filter roles out based on exclusion rules.
- Resolve users from roles.
- Remove duplicated users.

For example, if an approval path looks like Hiring Manager, Role-1, Role-2 and an exclusion rule is created for Hiring Manager, the final approval path will look like Role-1, Role-2. However, if one specific user was both the Hiring Manager on the requisition and was also associated to the Role-1, then this user will still be part of the final approval path as it still includes Role-1.

Creating and Configuring a Functional Role

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. Click Create.
2. Enter a code and a name.
3. Optional: Enter a description.
4. Select a default assignee.

   Each functional role must have a single default user. When requesting an approval, if no other users are selected for the role, the default assignee will be called upon for an approval using this role.
5. Click Save.
6. Select other assignees and associate them to an Organization-Location-Job Field structure.
   a. Click Create next to Assignees.
   b. Click Search.
   c. Select a user.
   d. Click Select.
   e. Click Save.
   f. Click Add next to Location, Organization and/or Job Field.

Results:

The new role appears in the Functional Roles list.

Dynamic Approval Routing Rules

Rules are used in the Dynamic Approval Routing feature to allow the approval path to be very flexible and accommodate a myriad of business requirements. They are used to dynamically determine the circumstances whereby specific users/roles will be included in an approval path. Every user and/or role to be added to an approval path must be added by a rule.

Two types of rules are used for the Dynamic Approval Routing:

- *inclusion rules*
- *exclusion rules*

When configuring the Dynamic Approval Routing, it is recommended to create rules first, then create the approval paths because inclusion rules are required to populate paths. Once rules have been defined, the system administrator can configure the actual approval path.

Inclusion Rule

Inclusion rules define the roles that will be included in the approval path.

At least one inclusion rule must be added to an approval path prior to activation.
There are two types of inclusion rules:

- Unconditional
- Conditional

Unconditional inclusion rules always includes the role in the approval path, regardless of the context of the requisition or the offer (other than the specified requisition type for which the path is defined).

Example: Always include the job posting approver.

When creating an unconditional rule, the only thing that needs to be specified is the roles to be included. The operators for including roles are outlined below.

Option	Description
From the manager role up to the number of specified direct reports. The system administrator then defines the # of direct reports.	When this type of rule is used, the system will ignore all roles in the system and pay attention only to the employee "reports to" structure. The system will look at who is the Manager of the requisition/offer and will go up the number of specified direct reports from that manager.
Only the selected role.	Allows the selection of a specific hierarchical or functional role in the approval path. Note: when a hierarchical role is used, the system will look at who is the Manager of the requisition/offer and will go through the "reports to" structure until it finds an employee with the specified hierarchical role. It will then include the first matching employee in that hierarchical role. For example, if there were two directors in the "reports to" structure and the director hierarchical role was selected, only the first director in the hierarchy would be added to the flow ordered by how they report to one another.

Option	Description
All roles included up to the specified number of levels. The system administrator then specifies the role and the # of upper levels.	Allows the selection of a series of employees using the hierarchical role structure in the approval path. The system will use the Hiring Manager of the requisition and will go through the reports to structure until it finds the first employee with the specified role. It will then include this person and every employee in the reporting structure up to and including the first employee it finds at # hierarchical roles above the specified role in the path.
All roles between the following roles. The system administrator defines the two roles.	Allows the selection of a series of employees using the hierarchical role structure in the approval path. The system will use the Hiring Manager of the requisition and will go through the reports to structure until it finds the first employee with the lower level role. It will then include this person and every employee up to and including the first employee it finds at the upper level hierarchical role.

Conditional inclusion rules include a role when certain conditions are met.

Example: Include the CFO on all requisitions where the base salary is > $100,000 and the Location is United States.

For conditional inclusion rules, the rule operator process is the same as it is with unconditional rules, but there is a another step involved where the user creates the conditions under which the specified roles will be included in the path. When creating a condition, the first step is to define the fields to be used in the condition. For each field there are available operators to define how the field condition will work. Conditions can be applied on requisition fields as well as on offer fields, depending on the approval type. For a requisition approval path, conditions can be applied only on requisition fields. For an offer approval path, conditions can be applied only on offer fields. All Offer and Requisition fields, either user-defined or system defined, can be used to create conditions. Conditional rules used within approval paths for offers may also contain a unique condition that compares the offer salary to the maximum salary on the requisition. Note that this comparison is entirely numeric, and does not take variables such as pay basis or currency into account when including an approver.

For example, for numeric fields, operator options include: is equal to, is less than, is greater than, is not equal to, is less than or equal to, is great than or equal to. Once the operator is set, the value is determined for the condition. An example of a condition might be: Salary is greater than or equal to 100,000K US.

Once a condition is created it can be added to the formula builder. The system administrator can add as many conditions as necessary to define the necessary rules. Once the conditions have been added, they can be strung together using boolean operator logic: And, Or, (,) and Not are supported functions. The conditions and formula functions can be moved around in the formula area by highlighting the item (represented in orange) using the < and > keys.

Creating an Unconditional Inclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Unconditional Rule next to Inclusion Rules.
3. Enter a code and a name.
4. Click Save.
5. Click Add next to Roles.
6. Select from the drop-down list how roles will be included in the approval process.

7. To select a role, click Search.
8. Click Save.
9. Click Activate.

Results:

The rule appears in the Inclusion Rules list of the Approval Paths and Rules page. The role is added to an approval path regardless of the Organization-Location-Job Field structure.

Creating a Conditional Inclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Conditional Rule next to Inclusion Rules.
3. Enter a code and a name.
4. Click Save.
5. Click Edit next to Conditions.
6. Create a condition by completing the fields then click Add this criteria to formula.
7. Click Save.
8. Click Add next to Roles.
9. Select from the drop-down list how roles will be included in the approval process.
10. To select a role, click Search.
11. Click Save.
12. Click Activate.

Results:

The rule appears in the Inclusion Rules list of the Approval Paths and Rules page.

Exclusion Rule

Exclusion rules define exceptional roles that may have been included in certain structure but an exception needs to be applied to remove that role in certain Organization-Location-Job Field circumstances.

Exclusion rules are optional. When activated, unlike inclusion rules, they automatically apply to all approval paths for that requisition, they do not need to be inserted into the approval path definition to work. Exclusion rules will omit matching approvers from the approval path.

Example: Never include the Director when the Organization is Canadian Operations.

When defining exclusion rules, three options are available:

Option	Description
All roles included between the following roles	When this type of rule is used, the system will ignore all roles in the system and pay attention only to the employee "reports to" structure. The system will look at who is the Manager of the requisition/offer and will go up the number of specified direct reports from that manager.
Only the selected role	Allows the selection of a specific hierarchical or functional role in the approval path. Note: when a hierarchical role is used, the system will look at who is the Manager of the requisition/offer and will go through the "reports to" structure until it finds an employee with the specified hierarchical role. It will then include the first matching employee in that hierarchical role. For example, if there were two directors in the "reports to" structure and the director hierarchical role was selected, only the first director in the hierarchy would be added to the flow ordered by how they report to one another.
All roles included up to the specified number of levels. The system administrator specifies the role and the # of upper levels.	Allows the selection of a series of employees using the hierarchical role structure in the approval path. The system will use the Hiring Manager of the requisition and will go through the reports to structure until it finds the first employee with the specified role. It will then include this person and every employee in the reporting structure up to and including the first employee it finds at # hierarchical roles above the specified role in the path.

Exclusion of Users Based on Their Roles

It is possible to exclude people who have a particular role but also people having that role, regardless of which other inclusion rules their roles may fit. An option is available when configuring exclusion rules: **Prevent users from being included by any inclusion rule.** If this rules applies (based on OLF), it will definitively exclude the user from the approval path.

For example, a recruiter submits a requisition for approval. The hiring manager for the requisition, Dan, is also a director at the company. The DAR rules specify that hiring managers should not approve requisitions. The DAR rules also specify that directors must approve requisitions. The system administrator selected the new option **Prevent users from being included by any inclusion rule.** As a result, Dan the hiring manager and director is not an approver on the requisition (even though the inclusion rule specifies that directors must approve requisitions).

Creating an Exclusion Rule

Before you start

The Dynamic Approval Routing feature must be activated.

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Create next to Exclusion Rules.
3. Enter a code and a name.
4. Select the option "Prevent users from being included by any inclusion rule" if you want to exclude people who have a particular role but also users having that role, regardless of which other inclusion rules their roles may fit.

   Users who meet a particular exclusion criterion are definitively removed from an approval process, regardless of whether they meet other inclusion criteria. This ensures that unintended approvers cannot be added to an approval path for requisitions and offers.
5. Select an Organization, Location, Job Field for which the rule will apply.
6. Click Save.

7. Click Add next to Roles.
8. Select from the drop-down list how roles will be included in the approval process.
9. To select a role, click Search.
10. Click Save.
11. Click Activate.

Results:

The role to be excluded appears in the Roles section. Users associated to the role, and with a matching Organization, Location and Job Field, will not be requested for approval for that category of approval path.

Creating an Approval Path

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Create next to Approval Paths.
3. Provide a code and a name.
4. In the Notifications section, specify who you want to be notified when an approver inserted into a path does not have the authorization to access or approve a requisition.

   There is one notification specific for Dynamic Approval Routing to help with the scenario where there is an approver inserted into a path who does not have the authorization to access or approve a requisition. When this scenario occurs, the users specified via the *People notified of users without access* notification setting will be sent a correspondence informing them so that they can take action to fix the situation by either updating roles in the system to ensure the user is granted the correct permissions. The message template for this correspondence is available in the correspondence manager and is titled *Standard Notification for a Dynamic Approval Request*.
5. In the Settings section, configure settings as desired.

   Different settings are used for the DAR, that is if comments will be mandatory when rejecting an approval, if the sequence of approvers generated by DAR will be presented to the approval initiator and/or subsequent approvers.
6. Click Save.

Results:

A new approval path is available for the chosen approval path category.

Sequence

A sequence is the order in which the approvers will be displayed to the user when requesting approval.

Sequences are used in the Dynamic Approval Routing (DAR) feature. A sequence is part of the approval path and determines the order of approvers (roles) for the assigned context. Roles may be set as "required" on a sequence so that progress is halted if selected roles are not included. If these approvers are not available when the path is generated, the user will not be able to proceed in generating the approval request and will instead be required to contact their system

administrator to proceed. This will allow the system administrator to intervene and review configuration to ensure the appropriate approvers are in place for the requisition.

Multiple sequences may be active on a path at one time. The sequences are contextualized, so the sequence can be different for different Organizations, Locations and/or Job Fields. Where DAR is activated, a sequence must exist. It is recommended that a default sequence be used to ensure approvals can proceed if a context does not match any other defined sequence.

It is possible to create a sequence and not give it a specific context. In this case, the sequence will reside at the root level and will apply as the default sequence to be used in any case where a more specific context matching sequence is not found.

It is important when defining a sequence to include all possible roles that may ever be included in an approval path. Any invoked role that has no defined sequence will be randomly appended to the end of the approval path.

Note, when the *From the manager role up to the number of specified direct reports* inclusion rule option is used, these individuals will always appear first in the sequence before any other approvers.

Creating a Sequence

Before you start

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Create next to Sequence.
4. Provide a code and a name.
5. Click Search next to Organization, Location or Job Field to define a context.
6. Click Save.
7. Click Add next to Sequence.
8. Select one or several roles.
9. Click Select.
10. Click Reorder to order roles.

    The roles are presented in the Sequence list in the chosen order so that the role appearing at the top of the list is the first role to be requested for approval.
11. Use the up and down arrows.
12. Click Save.
13. Click Edit next to Properties.
14. In the Sequence section, indicate which role is required.
15. Click Save.

Results:

The approvers will be requested for approval in the selected order.

Linking Inclusion Rules

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click an approval path.
3. Click Add next to Inclusion Rules.
4. Select one or several inclusion rules.
5. Click Select.
6. Click Save.

Testing the Dynamic Approval Routing Workflow

By narrowly constraining the Organization-Location-Job Field sequence contexts on the active workflow, it is possible to test your Dynamic Approval Routing workflow prior to full deployment with a small sample that can be easily controlled. This step is recommended to ensure that the desired results are achieved prior to enrolling out to the entire employee population.

Before you start

Configuration

Here's what to do

1. Ensure roles are activated and assigned properly to users.
2. Ensure all DAR components are active (approval paths, rules, sequences).
3. Ensure inclusion rules are included on the active workflow for every role expected to be included in the approval workflow.
4. Ensure sequences are defined for the desired Organizations-Locations-Job Fields contexts and contain all possible approver roles.
5. Observe structure for active path and create entity (requisition) within that category.
6. Observe the approval path presented to the initiating user and ensure it is as expected.

Activating an Approval Path

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Activate next to the name of the approval path.

Results:

The activated approval path can no longer be assigned the draft status. The approval path is available to users when requesting an approval for the given category.

Dynamic Approval Routing - Settings and Permissions

The following permissions and settings are used to configure the Dynamic Approval Routing (DAR) feature.

User Type Permission	Location
Manage Functional and Hierarchical Roles	Configuration > [SmartOrg] Administration >User Types > Configuration > User Management
View Functional and Hierarchical Roles	Configuration > [SmartOrg] Administration >User Types > Configuration > User Management
Manage approval paths.	Configuration > [SmartOrg] Administration > User Types > Configuration > Approval path
Access exclusion rules.	Configuration > [SmartOrg] Administration > User Types > Recruiting >Administration
All requisition approval permissions are grouped under the Approval functional domain.	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions > Approval

Setting	Description	Default Value	Location
Enable Approval Models	Enhances the approval path model for requisitions and offers. Allows collaborative (parallel) approval in addition to sequential approval. Allows forwarding an approval request to another approver if the user has the permission to amend approval paths.	No	Configuration > [Recruiting] Settings

Hierarchical Role

Activating a Hierarchical Role

Before you start

The hierarchical role must be draft or inactive.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Activate.

Results:

The role will be available in the Role Selector page when creating an approval path. The role can no longer be deleted.

Deactivating a Hierarchical Role

Before you start

The hierarchical role must be active.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

1. In the Hierarchical Roles list, click on an role.
2. In the Hierarchical Role page, click Deactivate.

Results:

The role will no longer be available when creating an approval path and when selecting a superior role.

Deleting a Hierarchical Role

Before you start

The hierarchical role must be draft.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

In the Hierarchical Roles list, click Delete next to a role.

Results:

The hierarchical role is permanently deleted from the database and will no longer appear in the Hierarchical Roles list.

Adding a User to a Hierarchy

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Add next to Users.
3. In the User Selector page, select a user.
4. Click Select.

Results:

The user will appear in the users list of the hierarchical role. The selected user will be called upon when an approval path uses this role.

Removing a User from a Hierarchy

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Hierarchical Roles**

Here's what to do

1. In the Hierarchical Roles list, click on a role.
2. In the Hierarchical Role page, click Remove next to a user.
3. Click Yes to confirm the deletion.

Results:

The user no longer appears in the users list of the hierarchical role. The selected user will no longer be called upon when an approval path uses this role.

Functional Role

Activating a Functional Role

Before you start

The functional role must be draft or inactive.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Role**s

Here's what to do

1. Click on a role.
2. Click Activate.

Results:

The role will be available in the role selector when creating an approval path. The role can no longer be deleted.

Deactivating a Functional Role

Before you start

The functional role must be active.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. Click on a role.
2. Click Deactivate.

Results:

The role will no longer appear in the Role Selector page when creating or editing an approval path.

Note that roles already selected in dynamic approval routing will continue to be resolved. You might want to review already defined DAR.

Deleting a Functional Role

Before you start

The functional role must be draft.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

Click Delete next to the role.

Results:

The functional role is permanently deleted from the database and will no longer appear in the Functional Role list.

Creating an Assignee

Allows a system administrator to add an assignee to a functional role.

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. In the Functional Role page, click on a functional role.
2. In the Role page, click Create next to Assignees.
3. In the New Assignee page, click Search.
4. In the User selector, select a user.
5. Click Select.
6. Click Save.

Results:

The selected user will appear in the Assignees list of the role.

Deleting an Assignee

Allows a system administrator to remove an assignee from a functional role.

Before you start

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. In the Functional Role page, select a functional role.
2. In the Role page, click Delete next to the assignee.
3. Click Yes to confirm the deletion.
4. Click Save.

Results:

The deleted assignee no longer appears in the Assignees list of the role. The assignee will no longer be called upon for approval when the role in which it was included will be used in an approval path.

Associating an Assignee to an Organization, Location or Job Field

Allows a system administrator to contextualize the use of an assignee in a role.

Before you start

The assignee must be created.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. Click on a role.
2. Click on an assignee.
3. Click Add next to Organization, Location or Job Field.
4. Make a selection.
5. Click Select.

Results:

The assignee will be available in Recruiting only if the Organization, Location or Job Field matches the Organization, Location or Job Field specified for the requisition or the offer for which an approval is being requested.

Dissociating an Assignee from an Organization, Location or Job Field

Before you start

The assignee must be created.

The *Manage Functional and Hierarchical Roles* user type permission is required.

Configuration > **Functional Roles**

Here's what to do

1. Click on a role.
2. Click on an assignee.
3. Click Remove next to an organization, location or job field.

Results:

The assignee will be available in Recruiting when requesting an approval for any organization, location or job field.

Dynamic Approval Routing Rule

Activating an Exclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

The exclusion rule must be draft or inactive.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. In the Exclusion Rule page, click Activate.

Results:

The exclusion rule appears as active in the Exclusion Rules list.

Deactivating an Exclusion Rule

Before you start

The exclusion rule must be active.

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Deactivate.

Results:

The exclusion rule appears as inactive in the Exclusion Rules list and can no longer be used in an approval path.

Deleting an Exclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

The exclusion rule must be draft.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to the exclusion rule.

Results:

The exclusion rule no longer appears in the Exclusion Rules list; it is permanently deleted. It therefore can no longer be used in an approval path.

Adding a Role to an Exclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Add next to Roles.
4. Select from the drop-down list how roles will be included in the approval process.
5. To select a role, click Search.
6. Click Save.

Results:

The role appears in the Roles list of the Exclusion Rule page. Users associated to the role will be excluded from the approval path.

Removing a Role from an Exclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an exclusion rule.
3. Click Remove next to the role.

Results:

The role will no longer appear in the Roles list of the Exclusion Rule page. Users associated to the role can be selected in the approval process.

Activating an Inclusion Rule

Before you start

The inclusion rule must be inactive or draft.
The *Manage approval paths* user type permission permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Activate.

Results:

The inclusion rule appears as active in the Inclusion Rules list so it can be used in an approval path to include users from approving requisitions or offers.

Deactivating an Inclusion Rule

Before you start

The inclusion rule must be active.
The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Deactivate.

Results:

The inclusion rule appears as inactive in the Inclusion Rules list and can no longer be used in an approval path.

Deleting an Inclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

The inclusion rule must be draft.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to an inclusion rule.
3. Click Yes to confirm the deletion.

Results:

The inclusion rule no longer appears in the Inclusion Rules list and is permanently deleted from the database.

Adding a Role to an Inclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Click on an approval path category.
2. Click on an inclusion rule.
3. Click Add next to Roles.
4. Select from the drop-down list how roles will be included in the approval process.
5. To select a role, click Search.
6. Click Save.

Results:

The role appears in the Roles list of the Inclusion Rule page. Users associated to the role will be requested for approval.

What to do next

Activating an inclusion rule.

Removing a Role from an Inclusion Rule

Before you start

The *Manage approval paths* user type permission is required.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an inclusion rule.
3. Click Remove next to the role.

Results:

The role no longer appears in the Roles list of the Inclusion Rule page.

Dynamic Approval Routing Categories - Other Configuration Tasks

Activating an Approval Path Category

Before you start

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

Configuration

Here's what to do

Under Dynamic Approval Routing, click Activate next to an approval path category.

Results:

When an approval is requested by a user, if the approval path category is activated for the approval being requested, then it is the dynamic approval routing process that will be used in Recruiting.

Deactivating an Approval Path Category

Before you start

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

Configuration

Here's what to do

In the Configuration page, under Dynamic Approval Routing, click Deactivate next to an approval path category.

Results:

When an approval is requested by a user, if the approval path category is deactivated for the approval being requested, then it is the standard approval process that will be used.

Deleting an Approval Path

Before you start

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

The approval path must be draft.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click Delete next to an approval path.

Results:

The approval path is no longer available for the chosen approval path category.

Deactivating an Approval Path

Before you start

The *Manage approval paths* user type permission must be granted in the SmartOrg User Types feature.

The approval path must be active.

Configuration

Here's what to do

1. Under Dynamic Approval Routing, click on an approval path category.
2. Click on an approval path.
3. Click Deactivate next to the name of the approval path.

Results:

The approval path is no longer available to users when requesting an approval for the given approval path category.

12 Correspondence

Message Templates

Message Template

Message templates are used in correspondences whenever a notification or e-mail is sent via the application. Message templates can be used, for example, during a process review, an interview scheduling, an approval process, etc.

Message templates are available via the Configuration menu:

- Message templates under Configuration (Security) are messages relating to the security of Oracle Taleo Enterprise Edition products. They are system-generated messages provided by Oracle.
- Message templates under Specific Configuration are messages specific to each Oracle Taleo Enterprise Edition product. provides system-generated message templates. But new message templates can also be created by system administrators. Paragraphs are added to messages. They can be accessed directly, or from within a message template.

The Message Templates list contains system-generated message templates provided with the product as well as user-defined message templates created by system administrators. User-defined message templates can be edited by system administrators. The properties, context, content, and attachments can be modified. System-generated message templates can also be edited by system administrators. The properties and content can be edited but the context (that is, the recipient, delivery type, triggering event, OLF) cannot be edited. Also note that system-generated message templates cannot be deactivated.

The Message Templates list contains the following columns. All columns (except the Actions column) can be sorted by clicking on the column header.

- Code
- Name
- Status: Active or Inactive.
- Delivery Type: Automatic, Manual, Any.
- Origin: System or User-Defined.
- Creation Date
- Last Modification Date
- Actions

The Refine by tool in the Message Templates list provides the following options: All, Name, Code, Status, Intended for, Read-only Attachment, Confidential, Used in Status, Used, in Step, Used in Workflow, Language.

Message Template Key Concepts

Several elements are configured when creating message templates.

Message Template Properties: In the Properties section of a message template, the following elements are defined:

- Delivery Type: There are two types of delivery mechanisms for messages:
  - Automatic: Messages are sent by the system when a specific triggering event occurs during the hiring process. For example, a message is automatically sent when a candidate applied on a requisition. You can also specify if the system will automatically send email messages when a candidate reaches a specific step/status in a candidate selection workflow. For example, you can automatically have the system send a Congratulatory message when a candidate is moved to the Hired step.
  - Manual: Recruiting Center users may decide to send messages to candidates when taking actions on a candidate file or from a candidates list.

- Message Format: A message template can be created in different formats:
  - Read only PDF file: The message is converted into a read-only PDF file that is attached to the e-mail. This prevents candidates and other users from modifying the message. The sender has the opportunity to enter a plain text introduction message before sending it which is displayed in the body of the e-mail.
  - HTML: The contents of the message are displayed in the body of the e-mail in HTML. A HTML copy of the message is also included as an attachment with the label "this_message_in_html.htm". The attachment is for those who cannot read HTML in the mail reader or, in some cases, where the contents do not render perfectly well.
  - Plain text: The contents of the message are not displayed in the body of the e-mail, and are replaced with the text "The details of this message can be viewed by opening the enclosed attachment. Replies to this message are undeliverable. Please do not reply." A HTML copy of the message is included as an attachment with the label "this_message_in_html.htm". The attachment is for those who cannot read HTML in the mail reader or, in some cases, where the contents do not render perfectly well. For those without the ability to read HTML in their e-mail, they will not be exposed to wacky HTML content. Instead, they see only a clean plain text that instructs them to open the attachment containing the message (that will open an HTML reader (browser).
- Confidentiality: If selecting the **Once sent, this message is confidential** option, the content of the message can only be viewed by the sender of the message, by users who have the permission to view confidential messages, and by the recruiter, the recruiter assistant, the hiring manager, and the hiring manager assistant. From the candidate file History tab, users can see that a confidential message was sent but they cannot view the content if they don't have the required permission.

- Message Header: The message header contains the To, Cc, Bcc, and Subject fields where variables can be dragged and dropped. These *variables* will automatically call information from the system and display it in the template.

Context: When creating a message template, a context can be defined in order to specify in which specific conditions the template will be used. In the Context section of a message template, the following elements are defined:

- Recipient: You can specify who will receive the message:
  - All Candidates
  - Internal Candidates
  - External Candidates

- Referrer
- Agent
- Recruiting User

> **Note:** When more than one message template is associated to the same triggering event, the system must be able to match the correct message to send to the recipient based on audience type. We are able to create a duplicated message template with a customized audience, and when the automatic message is triggered, the system will send the correct version for that audience type, even if there is more than one possible match due to the "all candidates" selection. If a candidate is internal and an internal only audience template exists for the triggering event, the internal candidate(s) will only receive that internal audience message, even if another template exists for all candidates. If a candidate is external and an external only audience template exists for the triggering event, the external candidate(s) will only receive that external audience message, even if another template exists for all candidates.

- Delivery Type: While you first indicated the delivery type in the Properties section (Automatic or Manual), you now need to define the details in the Context section, that is the triggering event or the candidate selection workflow, step and status.
- Organization-Location-Job Field Association: If contextualization is configured for a message template, the template is available only if the Organization-Location-Job Field structure of the message template matches the Organization-Location-Job Field structure of the object for which the template is being used. Note that the message template contextualization only looks at the Primary Location of a requisition; the "Other Locations" are not considered. For example, if a message template is created to be triggered for each new job posting in Antarctica, then the message template will be sent only for a requisition with Antarctica as a Primary Location. Note that when sending a message in the context of a candidate's General Profile, no OLF association exists, so all messages are available regardless of the message OLF context.

Paragraphs: You define the content of the message by working with paragraphs. You can add existing paragraphs or create new ones.

Attachments: Files can be attached to message templates.

Variables: Messages can contain variables (or "tokens"). For example, if inserting the {Requisition.JobTitle} variable, the message would display the actual requisition title when the message is sent.

Paragraph

A paragraph is a block of text added to a message template.

Paragraphs can be accessed from two places:

- Paragraphs list: The Paragraphs list is available via the Paragraphs link in the product administration menu and via the Quick Access box within the Message Templates feature.
- Message templates: Message templates are available via the Message Templates link in the product administration menu and via the Quick Access box.

The Paragraphs list contains the following columns. All columns (except the Actions column) can be sorted by clicking on the column header.

- Code

- Name
- Status: Active or Inactive.
- Creation Date
- Last Modification Date
- Actions

The Refine by tool in the Paragraphs list provides the following options: All, Code, Language, Name, Status, Text. When users enter text in the Text option and click Refresh, the system will display only the paragraphs that contain the text. Note that the text field is not case sensitive. Also, the search is performed for the selected language only.

Paragraphs can be created from either the Paragraphs list or from within a message template. When creating a paragraph from the Paragraphs list, the paragraph is available for new and existing message templates. When creating a paragraph from within a message template, the system administrator is prompted to choose whether or not the newly created paragraph should be added to the Paragraphs list. If choosing Yes, the paragraph becomes available in the Paragraphs list to view, edit, and configure. If choosing No, then the paragraph can only be accessed from within the message template.

Paragraph content is created by typing text and/or by adding variables. Variables automatically call information from the candidate file or job specific submission and display it in the template. For example, if the {Candidate.LastName} variable is used, then the last name of the candidate will be automatically included by the system in the outgoing message. By default, all variables are listed in the Available Variables list. However, a shorter list of variables can be displayed by entering a few letters contained in a variable. The system then automatically suggests variables containing these letters. For example, if entering the letters "add", the system could suggest the following variables: "Candidate.Address", "Candidate.Address2", "ElectronicSignature.IpAddress". Once the right variables are displayed, the system administrator can drag and drop the desired variables in the paragraph. To return to the default list of variables, the system administrator just needs to remove the letters they entered.

Paragraphs can be supplied with the system (message templates supplied with the system have default paragraphs attached to them). They can also be duplicated (when duplicating a message template, paragraphs can be duplicated) or they can be created from scratch.

Edits made to a paragraph in the Paragraphs list will affect all message templates using the paragraph, regardless of whether the edits are made directly from within a message template or from within the Paragraphs list.

When viewing a paragraph (by clicking the name of the paragraph), a section called Used In is available. Within this section, users can:

- See the list of message templates where the paragraph is used in.
- Open the message templates where the paragraph is used in. Users have the ability to modify the message templates from there.
- See if the paragraph is included by default in the message templates.
- Preview the message templates with the paragraph in it. When previewing a message template, all the paragraphs included by default in the message template are displayed. The paragraph from which the message template was opened is highlighted in yellow if more than one paragraph is included in the message template.

Variable

Variables are strings of text replaced by contextual data that you can include in a message or a paragraph.

Variables (also sometimes referred to as tokens) are very useful in the creation of customized messages. Variables are most often used in paragraphs within the body of a message but they can also be inserted in the To, Cc, Bcc, and Subject fields.

When creating message templates, you can select variables from a list of standard variables. Standard variables are provided with the system and represent a specific value in the database. For example, if inserting the {Requisition.JobTitle} variable, the message would display the actual requisition title when the message is sent. or you can create custom variables.

If you do not find the variables you need in the list of standard variables, you can create custom variables by following these rules:

- Custom variables must be enclosed in curly braces { }.
- Custom variables must contain valid characters: capital letters (A-Z), numbers (0-9) and the underscore symbol (_).
- Custom variables must contain no spaces.

Custom variables should only be used in messages sent manually since user intervention is required to replace the variables by text strings just before the message is sent. Note that in the case of eShare, there is no interface presented to the user to make such edits, and as such any custom variables that are contained in a message template will not resolve and will display a blank space.

Messages can contain variables associated to user-defined fields (UDFs). Messages will resolve UDFs even if these UDFs are restricted from the user's view access. You should refrain from inserting sensitive data in message templates if you do not want a user to be able to see such information while sending the correspondence.

Standard field viewing permissions are honored when a user sends a manual correspondence. In such cases, fields are not exposed or included in the message sent if the user sending the message is not authorized to view the field.

> **Note:** If not desired for display, users should be advised to remove unresolved variables prior to sending a printed/ faxed correspondence. If variables are not resolved, they will appear as unresolved vs. being hidden in the printed file. This precaution is not necessary when sending a correspondences via e-mail.

For a list of variables, see the table *List of Variables* at the end of the Correspondence chapter. For the most current list of variables, you can go to the Paragraphs feature in the Recruiting Administration menu.

Editable Message Templates

Message Template	Product
Activity Reminder, Recruiter / Task Reminder, Recruiter	Recruiting
ACE Alert Notification	Recruiting
Attached File Contains Invalid Resume Information, Agent	Recruiting
Attached File Contains Invalid Resume Information, Candidate	Recruiting

Message Template	Product
Attached File Contains Invalid Resume Information, Recruiter	Recruiting
Attached File Contains Virus, Agent	Recruiting
Attached File Contains Virus, Candidate	Recruiting
Attached File Contains Virus, Recruiter	Recruiting
Candidate Account Locked	Recruiting
Candidate Matched to Requisition	Recruiting
Completing Online Assessment Questionnaire	Recruiting
Completing Online Assessment Questionnaire (Post-application)	Recruiting
Completing Online Screening Questionnaire	Recruiting
Completing Online Tax Questionnaire	Recruiting
Contribution Request, Agent	Recruiting
Daily Recruiting Report	Recruiting
Duplicated Candidate Email, Agent	Recruiting
Duplicated Candidate Email, Candidate	Recruiting
Duplicated Candidate Email, Recruiter	Recruiting
EEO, Invitation to Self-Identify	Recruiting
Error in Attachments, Agent	Recruiting
Error in Attachments, Candidate	Recruiting
Error in Attachments, Recruiter	Recruiting
ERT, Job-Specific Referral, New Candidate	Recruiting
ERT, Job-Specific Referral, Registered Candidate	Recruiting
ERT, Job-Specific, Referrer	Recruiting
ERT, Unsolicited Referral, New Candidate	Recruiting
ERT, Unsolicited Referral, Registered Candidate	Recruiting
ERT, Unsolicited, Referrer	Recruiting
Fax Cover Sheet	Recruiting
Forgot Password	Recruiting
Forgot User Name	Recruiting

Message Template	Product
Interview Notification	Recruiting
Invitation to Refer Candidates	Recruiting
Job Posting Notification	Recruiting
Job Search Agent Notification	Recruiting
Job-Specific Application Acknowledgement	Recruiting
Job-Specific Capture Resume Acknowledgement, New Candidate	Recruiting
Job-Specific Capture Resume Acknowledgement, Registered Candidate	Recruiting
Job-Specific Referral, Agent	Recruiting
Merge of Candidate Files, Agent	Recruiting
Merge of Candidate Files, Candidate	Recruiting
Missing Attachments, Agent	Recruiting
Missing Attachments, Candidate	Recruiting
Missing Attachments, Recruiter	Recruiting
Notification for a media placement request	Recruiting
Notification for a requisition approval event	No context specific
Notification for a sourcing strategy request	Recruiting
Notification for an Internet mining request	Recruiting
Offer Approval Decision Notification	Recruiting
Offer Approval Final Decision Notification	Recruiting
Offer Approved	Recruiting
Offer Rejected	Recruiting
Rejection Letter	Recruiting
Rejection letter - Requisition closed	Recruiting
Request contribution	Recruiting
Request More Info	Recruiting
Requisition Approved	Recruiting
Requisition Canceled	Recruiting
Requisition Filled	Recruiting
Requisition On Hold	Recruiting

Message Template	Product
Requisition Reactivated	Recruiting
Requisition Rejected	Recruiting
Resume Parsing Service Unavailable to Agents	Recruiting
Resume Parsing Service Unavailable, Agent	Recruiting
Resume Parsing Service Unavailable, Candidate	Recruiting
Resume Parsing Service Unavailable, Recruiter	Recruiting
Selection Assessment Request (Candidate)	Recruiting
Selection Assessment Request (Recruiter)	Recruiting
Selection Assessment Request (Recruiter) ñ Candidate Email Missing	Recruiting
Send Job to Friend	Recruiting
Share Candidate Notification	Recruiting
Sourcing Event Notification	Recruiting
Standard notification for a candidate account confirmation	SmartOrg
Standard notification for a First Login	SmartOrg
Standard notification for a Forgot Username	SmartOrg
Standard notification for a Password Reset	SmartOrg
Standard notification for a Password Reset	Onboarding
Standard notification for a posting about to expire	Recruiting
Standard notification for a registration	SmartOrg
Standard notification for a reminder	No context specific
Standard notification for a reminder	Onboarding
Standard notification for a Request Approval	Recruiting
Standard notification for a requisition approval	Recruiting
Standard notification for a self-registration	Recruiting
Standard notification for a self-registration	SmartOrg
Standard notification for an expired posting	Recruiting

Message Template	Product
Standard notification for the Offer approval	Recruiting
Standard notification to fill out a user-defined form	No context specific
Submission Progression Notification	Recruiting
Unsolicited Application Acknowledgement	Recruiting
Unsolicited Capture Resume Acknowledgement, New Candidate	Recruiting
Unsolicited Capture Resume Acknowledgement, Registered Candidate	Recruiting
Unsolicited Email Application Acknowledgement, Agent	Recruiting
Unsolicited Email Application Acknowledgement, Candidate	Recruiting
Unsolicited Referral, Agent	Recruiting
Workflow Event Notification	Recruiting

Data Security in Correspondence

Data security is handled for correspondence sent manually by Recruiting Center users as well as correspondence sent automatically by the system.

For correspondence sent manually by a Recruiting Center users:

- The data that can be included in the message body and that is rendered in the message preview as well as in the outgoing message is constrained to data that the message sender is authorized to view.
- The security level of user-defined fields (UDFs) is not considered when a user sends a message. These fields still appear to the message sender even if the user is not able to otherwise view such data. It is therefore recommended to not use confidential UDFs in message templates where exposure to this data may cause concern.
- If a user is not authorized to view a field that is included in a correspondence, the field will be blank both for the message sender as well as the message recipient. Fields may not be visible because the field is at a security level that the user is not authorized to view or the field is a Screening Service field and the user is not able to view that type of service result. If a user tries to print a correspondence, the variables will render and appear unresolved rather than being stripped out.

For correspondence sent automatically by the system:

- The visibility of data is set according to the message recipient's permissions. If the message recipient is a candidate or referrer, there is no restriction. If the message recipient is a Recruiting Center user, the message is sent according to the restricted security profile.

- UDFs are not considered when messages are sent. Regardless of message recipients or senders viewing permission, UDF variables are always resolved.

Security restrictions are applied on sent correspondence. If a user does not have sufficient permission, the user can see the "Correspondence sent" tracking event in the candidate file History tab but when clicking the correspondence to view its content, the following error message will be displayed: "Your user permission does not authorize you to view this message." To view the content of a sent correspondence, users must have the required security level permissions.

- Users having the "general" permission access will only see messages including fields set at the "general" security level.
- Users having the "restricted" permission access will see messages including fields set at the "general" and "restricted" security levels.
- Users having the "confidential" permission access will see messages including fields set at all security levels, that is "general", "restricted", and "confidential".

There are also security restrictions regarding the display of confidential and non-confidential correspondence in the candidate file History tab:

- If a message is non-confidential, all users can see the "Correspondence sent" tracking event.
- If a message is confidential, only users having the permission "View Confidential Messages" can see the "Correspondence sent" tracking event.

When viewing a correspondence, users must have the proper permissions to view specific data. For example, to view a correspondence that contains an attachment and requisition fields with a security level set to "Restricted", users must have the "Security level for requisitions (in view mode)" permission set to "Restricted" or "Confidential" as well as the "Access Attachments tab" permission.

Category of Data	Required Permission	Permission Location
Current job data	View candidate current job terms	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers
Competitive data	View competitive offer details	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers
Expectation data	View and capture candidate expectations	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers
Offer data	View offers	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers
Compensation data	View Compensation section in requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Attachments	Access Attachments tab	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Other attachments	View other attachment	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Enhancements to the way security is handled in correspondence have brought a change in behavior regarding selected recipients. For automatic message templates, the system will send the message to the recipient audience identified on the message template as configured in the Correspondence Manager, as well as any other recipients indicated in the message header fields (To/Cc/Bcc). To enable customized notifications to users, an exception exists for automatic messages triggered by the Candidate Selection Workflow Context triggering event (Configuration > [Recruiting] Message Templates > Context). For this trigger only, the system will behave differently. Messages sent automatically by the Candidate Selection Workflow Context triggering event will be sent to the recipient if the selected recipient audience is either "External Candidates" or "Internal Candidates;" otherwise, for all other audiences the system will only deliver the message to those recipients identified in the message header fields (see table below). As with all automatic messages sent by the system, Recruiting Center user recipients will only receive messages with tokens resolved for General or Restricted fields, while messages sent to Candidate and Referrer recipients will resolve confidential tokens. Be sure to consider this point when configuring messages triggered by the Candidate Selection Workflow Context triggering event.

Recipient	Automatic triggering event	Delivered to the recipient?	Delivered to the recipients defined in the To, Cc, and Bcc fields
All candidates	Candidate Selection Workflow Context	No	Yes
Internal candidates	Candidate Selection Workflow Context	Yes	Yes
External candidates	Candidate Selection Workflow Context	Yes	Yes
Referrer	Candidate Selection Workflow Context	No	Yes
Agent	Candidate Selection Workflow Context	No	Yes
Recruiting User	Candidate Selection Workflow Context	No	Yes

Message Template Configuration

Creating a Message Template

The creation of message templates consists of the following steps.

1. *Defining the message properties.*
2. *Defining the message context*
3. *Adding paragraphs to the message template* or *creating new paragraphs.*
4. *Ordering paragraphs in the message template.*
5. *Adding an attachment to the message template.*
6. *Activating the message template.*

Defining the Message Properties

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **[Recruiting] Message Templates**

Here's what to do

1. Click Create.
2. Enter a code, a name, and a description.
3. Select the message format.
4. Select a delivery type.
5. Specify if the message is confidential.
6. Complete fields in the message header by adding variables.
    a. Scroll the list of variables to find the desired variable. To display a short list of variables matching a specific keyword, you can enter the keyword in the Available Variables field. For example, entering candidate would display all variables containing the word candidate.
    b. In the list of variables, select the variable (including curly braces) with your cursor.
    c. Drag the variable in the desired location.
7. Click Save.

Defining the Message Context

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **[Recruiting] Message Templates**

Here's what to do

1. In the message template, click Edit next to Context.
2. Select the recipients.
3. Select the delivery type.

   If selecting the automatic delivery, select the triggering event.

   If selecting the manual delivery, indicate if the message template will be available for all candidate selection workflows or for a specific workflow, step or status.
4. Associate the message template to an Organization, Location, Job Field.
5. Click Save.

Adding a Paragraph to a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The paragraph must be created and activated.

Configuration > **Message Templates**

Here's what to do

1. In the message template, click Add next to Paragraphs.
2. Select one or several paragraphs.
3. Click Select.

Results:

The paragraph appears in the Paragraphs section of the message template.

Creating a Paragraph for a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **Message Templates**

Here's what to do

1. In the message template, click Create next to Paragraphs.

   A message appears asking you if you want to add the new paragraph in the paragraph library so that it can be reused in other message templates.
2. Enter a name and a code.
3. Type the content of the paragraph in the Text box. You can add variables in the text and format the text using the RTF Editor options.
4. Click Save.

Results:

The paragraph appears in the Paragraphs section of the message template.

Ordering Paragraphs in a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **Message Templates**

Here's what to do

1. In the message template, click Reorder next to Paragraphs.
2. Select a paragraph you want to move to a different position.
3. Use arrows to move the paragraph.
4. Click Save.

Adding an Attachment to a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

By default, the attached file maximum size is 1 Mb (setting Attached File Maximum Size).

By default, the maximum number of file attachments allowed per entity record is 10 (setting Attached File Maximum Number).

Configuration > **Message Templates**

Here's what to do

1. In the message template, click Add next to Attachments.
2. Enter a code.
3. Click Browse... to select a document.
4. Click Save.

Results:

The attachment appears in the Attachments section of the message template if the size is below or equal to the maximum size allowed for attachments.

Activating a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The message template must have an Inactive or Draft status.

Configuration > **Message Templates**

Here's what to do

In the message template, click Activate.

Results:

The status of the message template is Active and is now available to Recruiting Center users when they send messages.

Sending Messages to a Corporate Email Address

Email messages sent with the Correspondence Manager in the Recruiting Center, the Onboarding (Transitions) Center and Career Sections can be sent to a corporate email address.

Some customers need to send all correspondences to a corporate inbox in order to keep a copy of all the messages that were sent.

A setting was created to allow the configuration of a corporate email address. This corporate email address will automatically be added to the Bcc field of a message template (but will be hidden to users) and a copy of all email messages will be sent to that email address. The correspondences that are archived are those sent to all candidates, internal candidates, and external candidates.

Configuration

To send all email messages to a corporate email address, system administrators must configure this setting by adding an email address.

Setting	Description	Location
Bcc address in Correspondence Manager	Email address added to the Bcc field of all Recruiting, Career Section and Onboarding (Transitions) emails sent through the Correspondence Manager.	Configuration > [Configuration] Settings

When creating a message template, if a value is entered in the Bcc field, the email message will be sent to the Bcc field recipient as well as to the email address entered in the new Bcc setting.

Message Template - Permissions and Settings

The following permissions and settings are used to configure message templates and correspondence.

User Type Permission	Location
Access Correspondence Manager configuration	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration
Send correspondence (using the Send Correspondence action)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Send correspondence (while changing the status of a candidate in a workflow)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Customize messages before sending (using the Send Correspondence action)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Customize messages before sending (while changing the status of a candidate in a workflow)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Send messages created from scratch (using the Send Correspondence action)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Send messages created from scratch (while changing the status of a candidate in a workflow)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View confidential messages	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Allow users to attach documents in message templates	Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Security Management

Setting	Description	Default Value	Location
Correspondence Manager Search Order	When two or more message templates are equally relevant, select the nearest match based on order specified here.	By Job, By Location, By Organization	Configuration > [Recruiting] Settings
Display "Reply To" Field	Indicates whether or not to display the "Reply To" field.	No	Configuration > [Recruiting] Settings
Email Attachment Extension	Used to specify the extensions to be used for email attachments (0=No Attachment, 1=HTML, 2=HTM, 3=HTML +HTM, 4=HTM+HTML).	1=HTML	Configuration > [Recruiting] Settings
Email Type Sent to Users	Determines the type of email type sent to users of Recruiting Center (HTML or plain text).	HTML	Configuration > [Recruiting] Settings
Sender Email Address	Default email address used in the system-generated emails sent to the users.		Configuration > [Recruiting] Settings
Sender Email Address Alias	Name assigned to the email sender. Aliases are multilingual, but if no value is provided in a given language, the English value is used by default.		Configuration > [Recruiting] Settings
Bcc address in Correspondence Manager	Email address added to the Bcc field of all Recruiting, Career Section and Onboarding (Transitions) emails sent through the Correspondence Manager.		Configuration > [Configuration] Settings
Attached File Maximum Number	The maximum number of file attachments per entity record allowed.	10	Configuration > [Configuration] Settings
Attached File Maximum Size	Maximum size of a file attachment (in bytes) allowed.	1 Mb	Configuration > [Configuration] Settings

Message Template - Other Configuration Tasks

Editing the Properties of a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

It is a best practice to deactivate the message template before modifying a message template. When edits are completed, the message template should be reactivated.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. Click Edit next to Properties.
4. Modify the information.
5. Click Save.

Results:

Modifications made to the code, name, description, message format and message header variable(s) used in the message are automatically reflected in messages sent using this template.

Duplicating a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click Duplicate next to the desired message template.
3. Make required changes.
4. Click Save.

Results:

The message template appears in the Message Templates list.

Deactivating a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The message template must have the Active status.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. Click Deactivate.

Results:

The status of the message template is Inactive. The template can no longer be used by Recruiting Center users to send messages, but the template is not permanently deleted from the database.

Deleting a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The message template must have the Draft status.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click Delete next to the desired draft message template.
3. Click Yes.

Results:

The message template is permanently deleted from the database.

Removing an Attachment from a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. Click Remove next to the attachment.

Results:

The attachment no longer appears in the Attachments section of the message template.

Editing a Paragraph in a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

Deactivate the message template before modifying a paragraph.

Note that any edits will affect all templates that use the paragraph, so edit with care. User may chose to duplicate the paragraph and then edit the new version only.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click Edit next to the paragraph.
4. Modify the information in the fields.
5. Click Save.

Previewing a Paragraph in a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

You must be in the active language of the message template.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. Click Preview.

Activating a Paragraph in a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The paragraph must have the Inactive status.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click the paragraph.
4. Click Activate.

Results:

The status of the paragraph is Active and is now available for selection when adding a paragraph in a message template.

Deactivating a Paragraph in a Message Template

Before you start

The *Access Correspondence Manager configuration* user type permission is required.

The paragraph must have the Active status.

Configuration > **Message Templates**

Here's what to do

1. Click Message Templates.
2. Click a message template.
3. In the Paragraphs section, click a paragraph.
4. Click Deactivate.

Results:

The status of the paragraph is Inactive and the paragraph can no longer be selected in a template. The paragraph is not permanently deleted from the database.

Adding a Variable

Before you start

Configuration > **Message Templates**

Configuration > **[Product] Message Templates**

Here's what to do

1. Select a message template.
2. To add a variable in the To, Cc, Bcc, and Subject fields, click Edit next to Properties.
3. To add a variable in a paragraph, click a paragraph.
4. Scroll the list of variables to find the desired variable.

   To display a short list of variables matching a specific keyword, you can enter the keyword in the Available Variables field. For example, entering candidate would display all variables containing the word candidate.

   To display the complete list of variables, simply remove the keyword you entered.
5. In the list of variables, select the variable (including curly braces) with your cursor.
6. Drag the variable in the desired location.

Results:

When sending the message, the variable is replaced by contextual data.

The system may be unable to replace a variable because:

- The data is missing; the variable place holder will be left blank.
- The variable is invalid in the context; the variable will be replaced by a blank for automatically sent messages.
- For manually sent messages, the variable will be left blank.

Uploading Company Logos for Message Templates

Before you start

The logo must respect the following criteria:

- Must be a .GIF file.
- Must have the desired size as it will not be resized by Oracle. Maximum size allowed is 300 KB.
- A maximum of 30 logos can be uploaded.
- After upgrading to version 13A, the current logos will not show in the settings themselves but they are still available in the zone.

Configuration > **[General Configuration] Settings**

Here's what to do

1. In the Refine by list, select Category, then Corporate Branding, and click Refresh.
2. Select one of the Custom Correspondence Logo setting.

   For example, Custom Correspondence Logo 01.
3. Click Edit.
4. Click Browse to select an image.
5. Click Save.

Results:

The company logo is now available to be added in message templates. To preview your logo after it has been uploaded, access this link and replace ZONENAME by the proper zone name and XX by the actual logo id (01 to 30): http://zonename.taleo.net/custom/images/company_logo_XX.gif

When changing an existing company logo, the logo is updated everywhere, including past offer letters. In an offer letter, the logo is saved as a link to the logo. As a result, changing the logo will also update the logo in past offer letters. A workaround would be to upload a new logo using another Custom Correspondence Logo setting instead of changing an existing logo setting.

Adding a Company Logo in a Message Template

Before you start

Configuration > **Message Templates**

Configuration > **[Recruiting] Message Templates**

Here's what to do

1. Select a message template.
2. To add a company logo in a paragraph, click on a paragraph.
3. Click Edit next to Properties.
4. Scroll the list of variables to locate the variables called {Other.CompanyLogos}. There are 30 variables for logos.
5. Select the variable (including curly braces) with your cursor.

For example, select {Other.CompanyLogos1}.

6. Drag the variable in the desired location in the Text box.
7. Click Save.

Results:

When the message is sent, the variable is replaced by the company logo that was uploaded in one of the Custom Correspondence Logo setting.

Allowing Candidates to Reply Directly to a Message

Before you start

The *Access Correspondence Manager* and *Message templates* user type permissions are required.

The *Display "Reply To" Field* setting must be enabled (Recruiting Settings).

Configuration

Here's what to do

1. Click Message Templates for the desired product.
2. Click Edit.
3. In the Reply To field, enter the email address of the recipient that you want to allow to reply to the message.

   Alternatively, you can copy a variable from the Variables list and paste it into the Reply To field.
4. Click Save.

Results:

The Reply To field is displayed in the Correspondence Wizard in the Recruiting Center. If users have the permission to edit messages, they can edit the address displayed in the Reply To field. When candidates receive the email message, they have the option of clicking Reply in their email reader and the message is sent to the address you indicated in the Correspondence Manager.

Notifications

Notification

A notification is an e-mail message automatically sent by the system to notify Recruiting Center and eShare users of key workflow events affecting the recruiting and hiring cycle.

The system administrator can choose whether to send or not send an e-mail for a given triggering event. For example, notifications can be sent for:

- Job posting
- Approval process
- End of sourcing

- Candidate selection (when a candidate applies, starts or completes an interview step, when an offer is made, etc.)
- Requisition being closed
- Requisition being put on hold

When the system administrator chooses to send a notification, the system automatically chooses the message template with the corresponding triggering event.

eShare approval request (offers and requisitions) e-mails have an expiration date of 30 days. This date cannot be changed, but permitted users can resend a stalled approval request.

Job Posting Notification

In the Recruiting Center, in the requisition file Posting and Sourcing tab, when the **Email this job posting to matching candidates** option is selected, the system matches all the candidates that have the Required criteria to the requisition being posted. Candidates who have all the Required criteria will receive an email inviting them to apply on the job that is posted.

To receive this Job Posting Notification, the candidate must:

- Have selected "Please email job postings" in the candidate profiler.
- Have a valid email address.
- Have not yet applied on the requisition.
- Have not yet been invited to apply on the requisition.
- Match the selections marked as required in the requisition.

If the requisition is posted on a least one external career section (whether or not it is posted on an internal career section), all the candidates who match the Required criteria will receive a Job Posting Notification.

If the requisition is posted only on an internal career section, only the internal candidates will receive a Job Posting Notification.

Workflow Event Notification

Workflow Event Notifications (WEN) are typically sent when the status of a requisition changes, during an approval process, or when there is a new applicant on a requisition. This notification is sent to the Recruiter, the Recruiter Assistant, the Hiring Manager and the Hiring Manager Assistant. Note that a user who is both the Recruiter and the Hiring Manager of a requisition may receive duplicate notifications for a given candidate.Workflow Event Notifications (WEN) are configured under Configuration > Recruiting Administration > Notifications. See the *list of workflow event notifications*.

For security reasons, the candidate file is not attached to the notification e-mails. Instead, these e-mails can be configured to include a "deep link" variable that gives deep link access to the candidate file. (Note that no configuration is required for newer customer implementations because the Workflow Event Notification message template already includes the variable).

The {Candidate.CandidateSubmissionUrl} variable can be added to the standard Workflow Event Notification message template or other message templates if desired. When receiving the notification, users must click the hyperlink contained in the message to access the candidate file (note that users must be authenticated, either by signing in or with Single Sign-On). The candidate file is no longer included in the message. The variable is available for use in any message template; however, if placed in a context where there can be no referenced job submission, the link will not work.

Note that if users have the required permission, they can control via the My Setup feature if they want to be kept informed of workflow events by email.

New Entry Event Notifications (NEEN)

New Entry Event Notifications (NEEN) are configured in a specific step or status of a Candidate Selection Workflow (CSW) to notify the recipient(s) when a new candidate enters this specific step or status. This notification is sent to the Recruiter Assistant and/or Hiring Manager Assistant if they exist, otherwise to the Recruiter and/or Hiring Manager. Note that two notifications can be received by a single recipient if it is configured at both the step and the status level reached by a candidate.

Notification - Settings

The following settings are used to configure notifications.

Setting	Description	Default Value	Location
Workflow Event Notification	Keep the user informed of workflow events by email.	By Job, By Location, By Organization	Configuration > [General Configuration] Settings
Job Posting Notification (Internal Candidates)	Email job postings to matching internal candidates.	No	Configuration > [Recruiting] Settings

User Account General Preference	Description	Default Value	Location
Workflow Event Notifications	For the Workflow Event Notifications feature to be available to Recruiting Center users, the system administrator must activate it in the user account's general preferences. Once activated, users with access to the My Setup feature in the Recruiting Center can update their preferences and override the value selected by the system administrator.	Yes	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences

Workflow Event Notifications

The following table presents the criteria under which a workflow event notification can be triggered.

These criteria are available under Recruiting Administration > Notifications.

Notification	Usage
Approval Process Notification	
Send notification about the approval process • Every time an approval event (decision or termination) occurs o But not if the user chooses to pass • Only when final (the status changes to Approved or Rejected) • But not if the approval is granted	Notifications for a requisition approval event
Posting Notification	
Send notification about new postings • Only for the first posting • For every new posting	Notifications for a sourcing event
End of Sourcing Notification	
Send notification when sourcing ends • But only if it has expired Send notification when posting is about to expire	Notification for a sourcing event Notification for an expired posting Notification for a posting about to expire
Candidate Selection Notification	
Send notification when candidates apply • But only if they have all the required criteria • But only if they are an ACE candidate • Do not notify users to whom an ACE candidate alert is sent Send notification when a candidate starts or completes an Interview step Send notification when an offer is made Send notification when a candidate is hired	Notifications for a workflow event
Requisition Closing Notification	
Send notification when a requisition closes • But only if it is canceled	Notifications for a sourcing event

Notification	Usage
Requisition On Hold Notification	
Send notification when a requisition is put on hold or reactivated • But only if it was posted	Notifications for a sourcing event

Activating a Notification

Before you start

Configuration > **[Recruiting] Administration** > **Notifications**

Here's what to do

1. Select the desired notifications and related options.
2. Click Save.

   For notifications configured in the Notifications feature of the Recruiting Administration menu, the user account preference must indicate if the user wishes to receive workflow notifications. For all other correspondence messages configured within the correspondence manager, the user will receive messages regardless of the configured notifications preference.

Results:

The notifications are enabled. E-mails will be sent automatically by the system when selected notifications and options are met.

What to do next

In SmartOrg, activate the user preference in user accounts entitled *Workflow Events Notification*. E-mails will be sent automatically when selected notifications and options are met.

Including a Deep Link Variable in a Workflow Event Notification

Before you start

Configuration > **[Recruiting]** > **Message Templates**

Here's what to do

1. Locate the Workflow Event Notification message template.
2. In the Paragraphs section, click on the paragraph entitled Standard notification for a workflow event.
3. Click Edit next to Properties.
4. In the Available Variables field, locate the {Candidate.CandidateSubmissionUrl} variable.

5. Convert the variable into a hyperlink.
    a. Select the text that will contain the hyperlink to the file.
    b. Click the Insert or Edit Link icon.
    c. Select URL in the Link Type field, select Other in the Protocol field, "and type {Candidate.CandidateSubmissionURL} in the URL field.
    d. Click OK.

Results:

The paragraph now contains the hyperlink that will take the recipient directly to the candidate's submission.

What to do next

You can follow the same steps to add the variable to other paragraphs.

Sensitivity Level of Messages and Notifications

Setting the Sensitivity Level of Messages and Notifications

Notifications and email messages sent by Oracle Taleo Enterprise Edition can be set to a specific sensitivity level. This feature applies to messages sent from the Recruiting Center, Onboarding (Transitions), Career Section, Evaluation Management, Performance and SmartOrg.

Notifications and email messages can contain sensitive data that only the intended recipient should see. Notifications and email messages can be configured as Private. When customers client email servers (such as Microsoft Outlook) are configured to respect message sensitivity, this can help ensure unintended recipients do not see the content of messages flagged as private.

Four levels of mail sensitivity are available, corresponding to those in Microsoft Outlook:

- Confidential
- Normal
- Personal
- Private

The default setting is Normal, meaning when a person receives an email, its sensitivity level is Normal. If the mail sensitivity configuration is set to Private, when a person receives an email, its sensitivity setting is Private. By default, all messages are set to the same level of sensitivity, as configured by a global setting. However, the system administrator can override the global setting value by configuring the sensitivity level of specific email messages. The system will detect the sensitivity level specified in configuration and provide it to the Correspondence Manager, which will send out messages with the appropriate sensitivity. In environments where message sensitivity levels are respected by the client email server, only the intended recipients will be able to receive and view the contents of messages marked as private. For this feature to work the customer's email client must be configured to respect these mail sensitivity settings.

For example, a company has set the sensitivity level of a message to Private. A user outside the company shares their Microsoft Outlook inbox with an administrator. The user applies to jobs inside the company using their current email address. A recruiter in the company uses the system to contact the user regarding a position they applied for. Because the sensitivity level of the message is set to Private, the administrator will not be able to see the message the

company recruiter sent to the user through the system. In Microsoft Outlook the sensitivity level set for Taleo messages is indicated to the user in the Info bar. For example, "Please treat this as Private."

Configuration

A global setting controls the sensitivity level of messages sent by Oracle Taleo Enterprise Edition products. This setting provides the sensitivity levels supported by Microsoft Outlook (Confidential, Normal, Personal, Private).

Setting	Description	Default Value	Location
Mail Sensitivity	Sensitivity of email messages sent from the system. Possible values are: • Confidential • Normal • Personal • Private	Normal	Configuration > [General Configuration] Settings

System administrators can override the Mail Sensitivity global setting by configuring the sensitivity level of specific email messages. This is done via the message template editor, by using the "Sensitivity" drop-down menu. Five sensitivity levels are available:

- Default
- Personal
- Confidential
- Normal
- Private

Selecting the "Default" sensitivity level means that email messages sent using this message template will use the sensitivity level defined in the "Mail Sensitivity" global setting.

Message Center

Secure Message Delivery

Customers who wish to have increased control over the information sent to Career Section users via email may choose to enable the Secure Message Delivery feature. When enabled, all messages are delivered to a secure Message Center accessible from any of the customer's Career Sections. Message recipients are directed to the Message Center to retrieve their messages.

The Secure Message Delivery feature applies only to messages sent to Career Section users, that is candidates, agents, and referrers. It does not impact Recruiting Center users or messages sent with other Oracle Taleo Enterprise Edition products.

If a message is sent via email (whether it is an automated message or the sender selected to send it via email), rather than receiving the actual message via email the message recipient receives a notification of message delivery containing a deeplink. To receive a notification of message delivery, message recipients must have a valid email address on file and the notification template message must be active.

> **Note:** All messages sent to a single email address will be accessible from any Secure Message Center that is linked to that email. This may cause candidates to see one another's message content, just as though they were receiving messages via a shared inbox. If this is not desired, then the Email Uniqueness setting should be changed (Configuration > [Recruiting] Settings).

To access the Message Center, the message recipient clicks the deep link in the message and enters a user name and password. If the user does not yet have an account, the user must create one prior to be able to access messages. Alternatively, the Message Center can be directly accessed via any active Career Section by clicking the My Messages tab.

Once in the Message Center, the message recipient can read messages, delete them, and download the files attached to the messages in order to view them. Before accessing an attachment, the recipient must accept a download agreement. Messages are displayed in a print friendly format should Career Section users wish to print a message using the browser's print functionality.

When viewing a specific message, the recipient can navigate from one message to the next without returning to the list view by using the Previous or Next links. The message may also be deleted. Clicking Back returns the user to the message list.

For Career Section users who do not have an email address, the message sender can still send them messages and these users can access their messages from within the Message Center. For example, a candidate exists in the system and did not supply an email address. A recruiter will still be able to send an email message to the candidate using the Recruiting Center correspondence feature.

The Message Center

The Message Center has the same look and feel as the Career Section; it adopts the theme and branding of the Career Section. Messages inside the Message Center retain the formatting attributes of the message template.

The Message Center language matches the language from where the Message Center was originally accessed. If the user is coming from a Career Section, the Message Center is presented in the same language as the Career Section. If coming from the deeplink contained in the notification, the Message Center is presented in the same language as the notification sent to the user. Messages inside the Message Center are in the language used to transmit the message.

Help text is displayed in the right-hand side of the Message Center. Default universal help text, which can be edited via TexTool, is provided by Oracle. If desired, the text can be customized by a Career Section administrator using the Career Portal Page user-defined labels feature. This text change only affects the Message Center on that particular Career Section.

The Message Center stores messages sent within the past 6 months to a maximum of 100 messages. If more than 100 messages have been delivered, only the most recent 100 messages are accessible.

Messages that do not have a subject cannot be opened from the Message Center.

> **Note:** When the Message Center is enabled, the "To", "Cc", and "Bcc" fields in the message header are not available when sending correspondence; therefore, Recruiting Center users cannot edit the message recipients. Also, Recruiting Center users cannot add additional recipients while manually sending a correspondence.

Note: When Recruiting Center users are resending messages from the candidate file History tab, the system will replicate the method of delivery used for the original message. If a message was sent prior to enabling the Message Center, when the user chooses to resend such a message, the system will not deliver the resent message to the Message Center, it will send the message to the original email address.

Configuring the Secure Message Delivery Feature

The configuration of the secure message delivery feature consists of enabling a setting and configuring message templates.

System administrators may choose to disable the "Email me a copy" link displayed on the Summary page of individual Career Sections. This can be done at any time while the Career Section is not active. If this option is not disabled before the Message Center is enabled, then the full email version of the candidate submission may be delivered via email, it is not sent to the Message Center.

Career Section Property	Default Value	Location
Display the "Email me a copy" link in the Summary page	No	Configuration > [Career Section] Administration > Career Sections > Properties

The *Secure Message Delivery Enabled* setting allows customers to choose if they want to send messages to Career Section users via email or via the secure Message Center.

- When set to Yes, the Message Center is enabled and messages to Career Section users are delivered via the Message Center. Career Section users receive a notification of delivery and need to access the Message Center to view the content of their messages.
- When set to No, there are no changes in the way the system sends messages. Career Section users will receive messages by email.

Setting	Description	Default Value	Location
Secure Message Delivery Enabled	Indicates whether the secure message delivery feature is activated in the system.	No	Configuration > [Recruiting] Settings

Three message templates are available. They are used to inform Career Section users that they have received a message and that they can view it by clicking a deeplink giving access to the Message Center. A unique message exists by recipient audience. These message templates are active by default. They can be configured just like any other message templates. System administrators can customize the message body and include tokens. Note that the following tokens containing the OR logic will resolve as follows:

- {Candidate.EmailOrOperatorEmail}: message sent to the candidate's Message Center, never to the operator.
- {Agent.EmailOrBlank}: looks for an agent email. However, if blank it means that there is no agent. In this case, there is no Message Center to send it to and the email address will resolve to be blank.

Message Template	Location
Message Center Delivery Notification, Agent	Configuration > [Recruiting] Message Templates
Message Center Delivery Notification, Candidate	Configuration > [Recruiting] Message Templates
Message Center Delivery Notification, Referrer	Configuration > [Recruiting] Message Templates

The following messages are delivered directly to the candidate via email regardless of the Message Center being enabled or not:

- Forgot User Name
- Forgot Password
- Candidate Account Locked
- Job Specific Referral - New Candidate
- Job-Specific Capture Resume Acknowledgment - New Candidate
- Unsolicited Capture Resume Acknowledgment
- Unsolicited Referral - New Candidate
- Resume Parsing Service Unavailable - Candidate
- Unsolicited Email Application Acknowledgment - Candidate
- Standard notification for a self-registration
- All messages sent to Recruiting Center user accounts

Appendix - List of Variables

List of Variables

For the most current list of variables, you can go to the Paragraphs feature in the Recruiting Administration menu.

Variable Type	Variable
Agency	{Agency.Name}
Agent	{Agent.Email}
Agent	{Agent.EmailOrBlank}
Agent	{Agent.Fax}
Agent	{Agent.FirstName}
Agent	{Agent.FullName}
Agent	{Agent.HomePhone}

Variable Type	Variable
Agent	{Agent.LastName}
Agent	{Agent.MobilePhone}
Agent	{Agent.PagerPhone}
Agent	{Agent.WorkPhone}
Application	Application.CandidateFullName}
Application	{Application.CompletedOrCreationDate}
Application	{Application.Date}
Application	{Application.EsignDateSigned}
Application	{Application.RequisitionInfo}
Application	{Application.Status}
Application	{Application.Certifications[1].DateReceived}
Application	{Application.Certifications[1].ExpirationDate}
Application	{Application.Certifications[1].Location}
Application	{Application.Certifications[1].Name}
Application	{Application.Certifications[1].NumberId}
Application	{Application.Certifications[1].Organization}
Application	{Application.Certifications[10].DateReceived}
Application	{Application.Certifications[10].ExpirationDate}
Application	{Application.Certifications[10].Location}
Application	{Application.Certifications[10].Name}
Application	{Application.Certifications[10].NumberId}
Application	{Application.Certifications[10].Organization}
Application	{Application.Certifications[2].DateReceived}
Application	{Application.Certifications[2].ExpirationDate}
Application	{Application.Certifications[2].Location}
Application	{Application.Certifications[2].Name}
Application	{Application.Certifications[2].NumberId}
Application	{Application.Certifications[2].Organization}
Application	{Application.Certifications[3].DateReceived}
Application	{Application.Certifications[3].ExpirationDate}
Application	{Application.Certifications[3].Location}

Variable Type	Variable
Application	{Application.Certifications[3].Name}
Application	{Application.Certifications[3].NumberId}
Application	{Application.Certifications[3].Organization}
Application	{Application.Certifications[4].DateReceived}
Application	{Application.Certifications[4].ExpirationDate}
Application	{Application.Certifications[4].Location}
Application	{Application.Certifications[4].Name}
Application	{Application.Certifications[4].NumberId}
Application	{Application.Certifications[4].Organization}
Application	{Application.Certifications[5].DateReceived}
Application	{Application.Certifications[5].ExpirationDate}
Application	{Application.Certifications[5].Location}
Application	{Application.Certifications[5].Name}
Application	{Application.Certifications[5].NumberId}
Application	{Application.Certifications[5].Organization}
Application	{Application.Certifications[6].DateReceived}
Application	{Application.Certifications[6].ExpirationDate}
Application	{Application.Certifications[6].Location}
Application	{Application.certifications[6].Name}
Application	{Application.Certifications[6].NumberId}
Application	{Application.Certifications[6].Organization}
Application	{Application.Certifications[7].DateReceived}
Application	{Application.Certifications[7].ExpirationDate}
Application	{Application.Certifications[7].Location}
Application	{Application.Certifications[7].Name}
Application	{Application.Certifications[7].NumberId}
Application	{Application.Certifications[7].Organization}
Application	{Application.Certifications[8].DateReceived}
Application	{Application.Certifications[8].ExpirationDate}
Application	{Application.Certifications[8].Location}
Application	{Application.Certifications[8].Name}

Variable Type	Variable
Application	{Application.Certifications[8].NumberId}
Application	{Application.Certifications[8].Organization}
Application	{Application.Certifications[9].DateReceived}
Application	{Application.Certifications[9].ExpirationDate}
Application	{Application.Certifications[9].Location}
Application	{Application.Certifications[9].Name}
Application	{Application.Certifications[9].NumberId}
Application	{Application.Certifications[9].Organization}
Application	{Application.DisqualificationQuestions[1].Question}
Application	{Application.DisqualificationQuestions[1].Result}
Application	{Application.DisqualificationQuestions[10].Question}
Application	{Application.DisqualificationQuestions[10].Result}
Application	{Application.DisqualificationQuestions[2].Question}
Application	{Application.DisqualificationQuestions[2].Result}
Application	{Application.DisqualificationQuestions[3].Question}
Application	{Application.DisqualificationQuestions[3].Result}
Application	{Application.DisqualificationQuestions[4].Question}
Application	{Application.DisqualificationQuestions[4].Result}
Application	{Application.DisqualificationQuestions[5].Question}
Application	{Application.DisqualificationQuestions[5].Result}
Application	{Application.DisqualificationQuestions[6].Question}
Application	{Application.DisqualificationQuestions[6].Result}
Application	{Application.DisqualificationQuestions[7].Question}
Application	{Application.DisqualificationQuestions[7].Result}
Application	{Application.DisqualificationQuestions[8].Question}
Application	{Application.DisqualificationQuestions[8].Result}
Application	{Application.DisqualificationQuestions[9].Question}
Application	{Application.DisqualificationQuestions[9].Result}
Application	{Application.Experiences[1].BeginDate}
Application	{Application.Experiences[1].CurrentEmployer}
Application	{Application.Experiences[1].Employer}

Variable Type	Variable
Application	{Application.Experiences[1].EndDate}
Application	{Application.Experiences[1].JobFunction}
Application	{Application.Experiences[1].NameWhileEmployed}
Application	{Application.Experiences[1].PermissionToContact}
Application	{Application.Experiences[1].Responsibility}
Application	{Application.Experiences[1].Supervisor}
Application	{Application.Experiences[1].SupervisorEmail}
Application	{Application.Experiences[1].SupervisorPhone}
Application	{Application.Experiences[1].SupervisorTitle}
Application	{Application.Experiences[10].BeginDate}
Application	{Application.Experiences[10].CurrentEmployer}
Application	{Application.Experiences[10].Employer}
Application	{Application.Experiences[10].EndDate}
Application	{Application.Experiences[10].JobFunction}
Application	{Application.Experiences[10].NameWhileEmployed}
Application	{Application.Experiences[10].PermissionToContact}
Application	{Application.Experiences[10].Responsibility}
Application	{Application.Experiences[10].Supervisor}
Application	{Application.Experiences[10].SupervisorEmail}
Application	{Application.Experiences[10].SupervisorPhone}
Application	{Application.Experiences[10].SupervisorTitle}
Application	{Application.Experiences[2].BeginDate}
Application	{Application.Experiences[2].CurrentEmployer}
Application	{Application.Experiences[2].Employer}
Application	{Application.Experiences[2].EndDate}
Application	{Application.Experiences[2].JobFunction}
Application	{Application.Experiences[2].NameWhileEmployed}
Application	{Application.Experiences[2].PermissionToContact}
Application	{Application.Experiences[2].Responsibility}
Application	{Application.Experiences[2].Supervisor}
Application	{Application.Experiences[2].SupervisorEmail}

Variable Type	Variable
Application	{Application.Experiences[2].SupervisorPhone}
Application	{Application.Experiences[2].SupervisorTitle}
Application	{Application.Experiences[3].BeginDate}
Application	{Application.Experiences[3].CurrentEmployer}
Application	{Application.Experiences[3].Employer}
Application	{Application.Experiences[3].EndDate}
Application	{Application.Experiences[3].JobFunction}
Application	{Application.Experiences[3].NameWhileEmployed}
Application	{Application.Experiences[3].PermissionToContact}
Application	{Application.Experiences[3].Responsibility}
Application	{Application.Experiences[3].Supervisor}
Application	{Application.Experiences[3].SupervisorEmail}
Application	{Application.Experiences[3].SupervisorPhone}
Application	{Application.Experiences[3].SupervisorTitle}
Application	{Application.Experiences[4].BeginDate}
Application	{Application.Experiences[4].CurrentEmployer}
Application	{Application.Experiences[4].Employer}
Application	{Application.Experiences[4].EndDate}
Application	{Application.Experiences[4].JobFunction}
Application	{Application.Experiences[4].NameWhileEmployed}
Application	{Application.Experiences[4].PermissionToContact}
Application	{Application.Experiences[4].Responsibility}
Application	{Application.Experiences[4].Supervisor}
Application	{Application.Experiences[4].SupervisorEmail}
Application	{Application.Experiences[4].SupervisorPhone}
Application	{Application.Experiences[4].SupervisorTitle}
Application	{Application.Experiences[5].BeginDate}
Application	{Application.Experiences[5].CurrentEmployer}
Application	{Application.Experiences[5].Employer}
Application	{Application.Experiences[5].EndDate}
Application	{Application.Experiences[5].JobFunction}

Variable Type	Variable
Application	{Application.Experiences[5].NameWhileEmployed}
Application	{Application.Experiences[5].PermissionToContact}
Application	{Application.Experiences[5].Responsibility}
Application	{Application.Experiences[5].Supervisor}
Application	{Application.Experiences[5].SupervisorEmail}
Application	{Application.Experiences[5].SupervisorPhone}
Application	{Application.Experiences[5].SupervisorTitle}
Application	{Application.Experiences[6].BeginDate}
Application	{Application.Experiences[6].CurrentEmployer}
Application	{Application.Experiences[6].Employer}
Application	{Application.Experiences[6].EndDate}
Application	{Application.Experiences[6].JobFunction}
Application	{Application.Experiences[6].NameWhileEmployed}
Application	{Application.Experiences[6].PermissionToContact}
Application	{Application.Experiences[6].Responsibility}
Application	{Application.Experiences[6].Supervisor}
Application	{Application.Experiences[6].SupervisorEmail}
Application	{Application.Experiences[6].SupervisorPhone}
Application	{Application.Experiences[6].SupervisorTitle}
Application	{Application.Experiences[7].BeginDate}
Application	{Application.Experiences[7].CurrentEmployer}
Application	{Application.Experiences[7].Employer}
Application	{Application.Experiences[7].EndDate}
Application	{Application.Experiences[7].JobFunction}
Application	{Application.Experiences[7].NameWhileEmployed}
Application	{Application.Experiences[7].PermissionToContact}
Application	{Application.Experiences[7].Responsibility}
Application	{Application.Experiences[7].Supervisor}
Application	{Application.Experiences[7].SupervisorEmail}
Application	{Application.Experiences[7].SupervisorPhone}
Application	{Application.Experiences[7].SupervisorTitle}

Variable Type	Variable
Application	{Application.Experiences[8].BeginDate}
Application	{Application.Experiences[8].CurrentEmployer}
Application	{Application.Experiences[8].Employer}
Application	{Application.Experiences[8].EndDate}
Application	{Application.Experiences[8].JobFunction}
Application	{Application.Experiences[8].NameWhileEmployed}
Application	{Application.Experiences[8].PermissionToContact}
Application	{Application.Experiences[8].Responsibility}
Application	{Application.Experiences[8].Supervisor}
Application	{Application.Experiences[8].SupervisorEmail}
Application	{Application.Experiences[8].SupervisorPhone}
Application	{Application.Experiences[8].SupervisorTitle}
Application	{Application.Experiences[9].BeginDate}
Application	{Application.Experiences[9].CurrentEmployer}
Application	{Application.Experiences[9].Employer}
Application	{Application.Experiences[9].EndDate}
Application	{Application.Experiences[9].JobFunction}
Application	{Application.Experiences[9].NameWhileEmployed}
Application	{Application.Experiences[9].PermissionToContact}
Application	{Application.Experiences[9].Responsibility}
Application	{Application.Experiences[9].Supervisor}
Application	{Application.Experiences[9].SupervisorEmail}
Application	{Application.Experiences[9].SupervisorPhone}
Application	{Application.Experiences[9].SupervisorTitle}
Application	{Application.Experiences[1].UDF_XXXX
Application	{Application.Questions[1].Question}
Application	{Application.Questions[1].QuestionResult}
Application	{Application.Questions[10].Question}
Application	{Application.Questions[10].QuestionResult}
Application	{Application.Questions[2].Question}
Application	{Application.Questions[2].QuestionResult}

Variable Type	Variable
Application	{Application.Questions[3].Question}
Application	{Application.Questions[3].QuestionResult}
Application	{Application.Questions[4].Question}
Application	{Application.Questions[4].QuestionResult}
Application	{Application.Questions[5].Question}
Application	{Application.Questions[5].QuestionResult}
Application	{Application.Questions[6].Question}
Application	{Application.Questions[6].QuestionResult}
Application	{Application.Questions[7].Question}
Application	{Application.Questions[7].QuestionResult}
Application	{Application.Questions[8].Question}
Application	{Application.Questions[8].QuestionResult}
Application	{Application.Questions[9].Question}
Application	{Application.Questions[9].QuestionResult}
Application	{Application.References[1].Company}
Application	{Application.References[1].Country}
Application	{Application.References[1].Email}
Application	{Application.References[1].FirstName}
Application	{Application.References[1].LastName}
Application	{Application.References[1].MiddleInitial}
Application	{Application.References[1].Phone}
Application	{Application.References[1].ReferenceType}
Application	{Application.References[1].Relationship}
Application	{Application.References[1].RelationshipLength}
Application	{Application.References[1].Title}
Application	{Application.References[10].Company}
Application	{Application.References[10].Country}
Application	{Application.References[10].Email}
Application	{Application.References[10].FirstName}
Application	{Application.References[10].LastName}
Application	{Application.References[10].MiddleInitial}

Variable Type	Variable
Application	{Application.References[10].Phone}
Application	{Application.References[10].ReferenceType}
Application	{Application.References[10].Relationship}
Application	{Application.References[10].RelationshipLength}
Application	{Application.References[10].Title}
Application	{Application.References[2].Company}
Application	{Application.References[2].Country}
Application	{Application.References[2].Email}
Application	{Application.References[2].FirstName}
Application	{Application.References[2].LastName}
Application	{Application.References[2].MiddleInitial}
Application	{Application.References[2].Phone}
Application	{Application.References[2].ReferenceType}
Application	{Application.References[2].Relationship}
Application	{Application.References[2].RelationshipLength}
Application	{Application.References[2].Title}
Application	{Application.References[3].Company}
Application	{Application.References[3].Country}
Application	{Application.References[3].Email}
Application	{Application.References[3].FirstName}
Application	{Application.References[3].LastName}
Application	{Application.References[3].MiddleInitial}
Application	{Application.References[3].Phone}
Application	{Application.References[3].ReferenceType}
Application	{Application.References[3].Relationship}
Application	{Application.References[3].RelationshipLength}
Application	{Application.References[3].Title}
Application	{Application.References[4].Company}
Application	{Application.References[4].Country}
Application	{Application.References[4].Email}
Application	{Application.References[4].FirstName}

Variable Type	Variable
Application	{Application.References[4].LastName}
Application	{Application.References[4].MiddleInitial}
Application	{Application.References[4].Phone}
Application	{Application.References[4].ReferenceType}
Application	{Application.References[4].Relationship}
Application	{Application.References[4].RelationshipLength}
Application	{Application.References[4].Title}
Application	{Application.References[5].Company}
Application	{Application.References[5].Country}
Application	{Application.References[5].Email}
Application	{Application.References[5].FirstName}
Application	{Application.References[5].LastName}
Application	{Application.References[5].MiddleInitial}
Application	{Application.References[5].Phone}
Application	{Application.References[5].ReferenceType}
Application	{Application.References[5].Relationship}
Application	{Application.References[5].RelationshipLength}
Application	{Application.References[5].Title}
Application	{Application.References[6].Company}
Application	{Application.References[6].Country}
Application	{Application.References[6].Email}
Application	{Application.References[6].FirstName}
Application	{Application.References[6].LastName}
Application	{Application.References[6].MiddleInitial}
Application	{Application.References[6].Phone}
Application	{Application.References[6].ReferenceType}
Application	{Application.References[6].Relationship}
Application	{Application.References[6].RelationshipLength}
Application	{Application.References[6].Title}
Application	{Application.References[7].Company}
Application	{Application.References[7].Country}

Variable Type	Variable
Application	{Application.References[7].Email}
Application	{Application.References[7].FirstName}
Application	{Application.References[7].LastName}
Application	{Application.References[7].MiddleInitial}
Application	{Application.References[7].Phone}
Application	{Application.References[7].ReferenceType}
Application	{Application.References[7].Relationship}
Application	{Application.References[7].RelationshipLength}
Application	{Application.References[7].Title}
Application	{Application.References[8].Company}
Application	{Application.References[8].Country}
Application	{Application.References[8].Email}
Application	{Application.References[8].FirstName}
Application	{Application.References[8].LastName}
Application	{Application.References[8].MiddleInitial}
Application	{Application.References[8].Phone}
Application	{Application.References[8].ReferenceType}
Application	{Application.References[8].Relationship}
Application	{Application.References[8].RelationshipLength}
Application	{Application.References[8].Title}
Application	{Application.References[9].Company}
Application	{Application.References[9].Country}
Application	{Application.References[9].Email}
Application	{Application.References[9].FirstName}
Application	{Application.References[9].LastName}
Application	{Application.References[9].MiddleInitial}
Application	{Application.References[9].Phone}
Application	{Application.References[9].ReferenceType}
Application	{Application.References[9].Relationship}
Application	{Application.References[9].RelationshipLength}
Application	{Application.References[9].Title}

Variable Type	Variable
Application	{Application.Skills[1].Name}
Application	{Application.Skills[1].Result}
Application	{Application.Skills[10].Name}
Application	{Application.Skills[10].Result}
Application	{Application.Skills[2].Name}
Application	{Application.Skills[2].Result}
Application	{Application.Skills[3].Name}
Application	{Application.Skills[3].Result}
Application	{Application.Skills[4].Name}
Application	{Application.Skills[4].Result}
Application	{Application.Skills[5].Name}
Application	{Application.Skills[5].Result}
Application	{Application.Skills[6].Name}
Application	{Application.Skills[6].Result}
Application	{Application.Skills[7].Name}
Application	{Application.Skills[7].Result}
Application	{Application.Skills[8].Name}
Application	{Application.Skills[8].Result}
Application	{Application.Skills[9].Name}
Application	{Application.Skills[9].Result}
Application	{Application.Status}
Application	{Application.Studies[1].Gpa}
Application	{Application.Studies[1].GpaRange}
Application	{Application.Studies[1].Graduated}
Application	{Application.Studies[1].GraduationDate}
Application	{Application.Studies[1].GraduationDateProjected}
Application	{Application.Studies[1].InstitutionCity}
Application	{Application.Studies[1].InstitutionLocation}
Application	{Application.Studies[1].InstitutionName}
Application	{Application.Studies[1].NameAttending}
Application	{Application.Studies[1].ProgramName}

Variable Type	Variable
Application	{Application.Studies[1].StartDate}
Application	{Application.Studies[1].StudyLevel}
Application	{Application.Studies[10].Gpa}
Application	{Application.Studies[10].GpaRange}
Application	{Application.Studies[10].Graduated}
Application	{Application.Studies[10].GraduationDate}
Application	{Application.Studies[10].GraduationDateProjected}
Application	{Application.Studies[10].InstitutionCity}
Application	{Application.Studies[10].InstitutionLocation}
Application	{Application.Studies[10].InstitutionName}
Application	{Application.Studies[10].NameAttending}
Application	{Application.Studies[10].ProgramName}
Application	{Application.Studies[10].StartDate}
Application	{Application.Studies[10].StudyLevel}
Application	{Application.Studies[2].Gpa}
Application	{Application.Studies[2].GpaRange}
Application	{Application.Studies[2].Graduated}
Application	{Application.Studies[2].GraduationDate}
Application	{Application.Studies[2].GraduationDateProjected}
Application	{Application.Studies[2].InstitutionCity}
Application	{Application.Studies[2].InstitutionLocation}
Application	{Application.Studies[2].InstitutionName}
Application	{Application.Studies[2].NameAttending}
Application	{Application.Studies[2].ProgramName}
Application	{Application.Studies[2].StartDate}
Application	{Application.Studies[2].StudyLevel}
Application	{Application.Studies[3].Gpa}
Application	{Application.Studies[3].GpaRange}
Application	{Application.Studies[3].Graduated}
Application	{Application.Studies[3].GraduationDate}
Application	{Application.Studies[3].GraduationDateProjected}

Variable Type	Variable
Application	{Application.Studies[3].InstitutionCity}
Application	{Application.Studies[3].InstitutionLocation}
Application	{Application.Studies[3].InstitutionName}
Application	{Application.Studies[3].NameAttending}
Application	{Application.Studies[3].ProgramName}
Application	{Application.Studies[3].StartDate}
Application	{Application.Studies[3].StudyLevel}
Application	{Application.Studies[4].Gpa}
Application	{Application.Studies[4].GpaRange}
Application	{Application.Studies[4].Graduated}
Application	{Application.Studies[4].GraduationDate}
Application	{Application.Studies[4].GraduationDateProjected}
Application	{Application.Studies[4].InstitutionCity}
Application	{Application.Studies[4].InstitutionLocation}
Application	{Application.Studies[4].InstitutionName}
Application	{Application.Studies[4].NameAttending}
Application	{Application.Studies[4].ProgramName}
Application	{Application.Studies[4].StartDate}
Application	{Application.Studies[4].StudyLevel}
Application	{Application.Studies[5].Gpa}
Application	{Application.Studies[5].GpaRange}
Application	{Application.Studies[5].Graduated}
Application	{Application.Studies[5].GraduationDate}
Application	{Application.Studies[5].GraduationDateProjected}
Application	{Application.Studies[5].InstitutionCity}
Application	{Application.Studies[5].InstitutionLocation}
Application	{Application.Studies[5].InstitutionName}
Application	{Application.Studies[5].NameAttending}
Application	{Application.Studies[5].ProgramName}
Application	{Application.Studies[5].StartDate}
Application	{Application.Studies[5].StudyLevel}

Variable Type	Variable
Application	{Application.Studies[6].Gpa}
Application	{Application.Studies[6].GpaRange}
Application	{Application.Studies[6].Graduated}
Application	{Application.Studies[6].GraduationDate}
Application	{Application.Studies[6].GraduationDateProjected}
Application	{Application.Studies[6].InstitutionCity}
Application	{Application.Studies[6].InstitutionLocation}
Application	{Application.Studies[6].InstitutionName}
Application	{Application.Studies[6].NameAttending}
Application	{Application.Studies[6].ProgramName}
Application	{Application.Studies[6].StartDate}
Application	{Application.Studies[6].StudyLevel}
Application	{Application.Studies[7].Gpa}
Application	{Application.Studies[7].GpaRange}
Application	{Application.Studies[7].Graduated}
Application	{Application.Studies[7].GraduationDate}
Application	{Application.Studies[7].GraduationDateProjected}
Application	{Application.Studies[7].InstitutionCity}
Application	{Application.Studies[7].InstitutionLocation}
Application	{Application.Studies[7].InstitutionName}
Application	{Application.Studies[7].NameAttending}
Application	{Application.Studies[7].ProgramName}
Application	{Application.Studies[7].StartDate}
Application	{Application.Studies[7].StudyLevel}
Application	{Application.Studies[8].Gpa}
Application	{Application.Studies[8].GpaRange}
Application	{Application.Studies[8].Graduated}
Application	{Application.Studies[8].GraduationDate}
Application	{Application.Studies[8].GraduationDateProjected}
Application	{Application.Studies[8].InstitutionCity}
Application	{Application.Studies[8].InstitutionLocation}

Variable Type	Variable
Application	{Application.Studies[8].InstitutionName}
Application	{Application.Studies[8].NameAttending}
Application	{Application.Studies[8].ProgramName}
Application	{Application.Studies[8].StartDate}
Application	{Application.Studies[8].StudyLevel}
Application	{Application.Studies[9].Gpa}
Application	{Application.Studies[9].GpaRange}
Application	{Application.Studies[9].Graduated}
Application	{Application.Studies[9].GraduationDate}
Application	{Application.Studies[9].GraduationDateProjected}
Application	{Application.Studies[9].InstitutionCity}
Application	{Application.Studies[9].InstitutionLocation}
Application	{Application.Studies[9].InstitutionName}
Application	{Application.Studies[9].NameAttending}
Application	{Application.Studies[9].ProgramName}
Application	{Application.Studies[9].StartDate}
Application	{Application.Studies[9].StudyLevel}
Application	{Application.Studies[1].UDF_XXXX
Application	{Candidate.ShiftGrid}
Application	{Other.RequestMoreInfoData}
Approver	{Approvers.Names}
Approval	{Approval.ApprovalDate}
Approval	{ApprovalObject.Name}
Approval	{Approval.Status}
Candidate Profile	{Candidate.Address}
Candidate Profile	{Candidate.Address2}
Candidate Profile	{Candidate.Availability}
Candidate Profile	{Candidate.BirthDate}
Candidate Profile	{Candidate.CandidateSubmissionUrl}
Candidate Profile	{Candidate.City}

Variable Type	Variable
Candidate Profile	{Candidate.Country}
Candidate Profile	{Candidate.Email}
Candidate Profile	{Candidate.EmailOrOperatorEmail}
Candidate Profile	{Candidate.EmployeeNumber}
Candidate Profile	{Candidate.ExpectedHourlyPayRate}
Candidate Profile	{Candidate.Fax}
Candidate Profile	{Candidate.FirstName}
Candidate Profile	{Candidate.FirstNameOrCandidateEmail}
Candidate Profile	{Candidate.FullName}
Candidate Profile	{Candidate.FullNameOrCandidateEmail}
Candidate Profile	{Candidate.HireStartDate}
Candidate Profile	{Candidate.HomePhone}
Candidate Profile	{Candidate.IdentificationNumber}
Candidate Profile	{Candidate.LastName}
Candidate Profile	{Candidate.LastNameOrCandidateEmail}
Candidate Profile	{Candidate.MiddleName}
Candidate Profile	{Candidate.MobilePhone}
Candidate Profile	{Candidate.PagerPhone}
Candidate Profile	{Candidate.Prefix}
Candidate Profile	{Candidate.PrimaryNumber}
Candidate Profile	{Candidate.Region}
Candidate Profile	{Candidate.SecurityCode}
Candidate Profile	{Candidate.ShiftGrid}
Candidate Profile	{Candidate.SocialSecurityNumber}
Candidate Profile	{Candidate.State}
Candidate Profile	{Candidate.Suffix}
Candidate Profile	{Candidate.Travel}
Candidate Profile	{Candidate.Username}
Candidate Profile	{Candidate.WeeklyHoursPreferred}
Candidate Profile	{Candidate.WeeklyHoursWilling}
Candidate Profile	{Candidate.WillWorkHolidays}

Variable Type	Variable
Candidate Profile	{Candidate.WillWorkWeekends}
Candidate Profile	{Candidate.WorkPhone}
Candidate Profile	{Candidate.Zipcode}
Candidate Profile	{Candidate.UDF_XXX}
Career Section	{CareerSection.AgentJobDescriptionUrl}
Career Section	{CareerSection.AgentJobListUrl}
Career Section	{CareerSection.AgentReferralUrl}
Career Section	{CareerSection.CareerSectionUrl}
Career Section	{CareerSection.ChangePasswordUrl}
Career Section	{CareerSection.ExternalServiceQuestionnaireUrl}
Career Section	{CareerSection.JobDescriptionUrl}
Career Section	{CareerSection.JobIsiUrl}
Career Section	{CareerSection.JobRmiUrl}
Career Section	{CareerSection.JobUrl}
Career Section	{CareerSection.MyAccountAccess}
Career Section	{CareerSection.MySavedSearchesUrl}
Career Section	{CareerSection.OfferViewURL}
Career Section	{CareerSection.ProfilerUrl}
Career Section	{CareerSection.SecureMessageListURL}
Career Section	{CareerSection.UnsubscribeNowUrl}
Career Section	{CareerSection.UserForgotPwdUrl}
Career Section	{CareerSection.UserWebtopSuiteUrl}
Company	{Other.CompanyLogos0}
Company	{Other.CompanyLogos1}
Company	{Other.CompanyLogos2}
Company	{Other.CompanyLogos3}
Company	{Other.CompanyLogos4}
Company	{Other.CompanyLogos5}
Company	{Other.CompanyLogos6}
Company	{Other.CompanyLogos7}
Company	{Other.CompanyLogos8}

Variable Type	Variable
Company	{Other.CompanyLogos9}
Company	{Other.CompanyLogos10}
Company	{Other.CompanyLogos11}
Company	{Other.CompanyLogos12}
Company	{Other.CompanyLogos13}
Company	{Other.CompanyLogos14}
Company	{Other.CompanyLogos15}
Company	{Other.CompanyLogos16}
Company	{Other.CompanyLogos17}
Company	{Other.CompanyLogos18}
Company	{Other.CompanyLogos19}
Company	{Other.CompanyLogos20}
Company	{Other.CompanyLogos21}
Company	{Other.CompanyLogos22}
Company	{Other.CompanyLogos23}
Company	{Other.CompanyLogos24}
Company	{Other.CompanyLogos25}
Company	{Other.CompanyLogos26}
Company	{Other.CompanyLogos27}
Company	{Other.CompanyLogos28}
Company	{Other.CompanyLogos29}
Company	{Other.CompanyLogos30}
Company	{Other.CompanyName}
Company	{Other.CompanyStaticPage}
Company	{Other.FullCompanyName}
Department	{Department.UDF_XXXXX}
Document Shared	{DocumentShared.ShareSender}
Document Shared	{DocumentShared.SharedPDFLink}
Document Shared	{DocumentShared.SharedPDFLinkExpirationDate}
Electronic Signature	{ElectronicSignature.DateSigned}

Variable Type	Variable
Electronic Signature	{ElectronicSignature.DocumentIdentifier}
Electronic Signature	{ElectronicSignature.IpAddress}
Enterprise	{Enterprise.SelfAssignedTaskListURL}
Meeting	{Meeting.Attendees}
Meeting	{Meeting.Comments}
Meeting	{Meeting.DateAndTime}
Meeting	{Meeting.Location}
Meeting	{Meeting.Organizer}
Meeting	{Meeting.SharedInformationAccess}
Meeting	{Meeting.Subject}
Offer	{Offer.ActualStartDate}
Offer	{Offer.ActualStartTime}
Offer	{Offer.AfterApprovalSuccess}
Offer	{Offer.AnnualBonus}
Offer	{Offer.ApprovalComments}
Offer	{Offer.ApprovalPathTable}
Offer	{Offer.ApprovalRequestedBy}
Offer	{Offer.CarAllowance}
Offer	{Offer.CommissionAmount}
Offer	{Offer.CommissionType}
Offer	{Offer.CreationDate}
Offer	{Offer.EshareURL}
Offer	{Offer.ExpenseAccount}
Offer	{Offer.ExpiryDate}
Offer	{Offer.ExpiryTime}
Offer	{Offer.ExtendDate}
Offer	{Offer.LastApprover}
Offer	{Offer.MobileURL}
Offer	{Offer.Options}
Offer	{Offer.OptionsType}
Offer	{Offer.OtherBonus}

Variable Type	Variable
Offer	{Offer.OtherCompensation}
Offer	{Offer.Pay}
Offer	{Offer.PayBasis}
Offer	{Offer.RelocationAmount}
Offer	{Offer.RelocationType}
Offer	{Offer.Salary}
Offer	{Offer.SalaryCurrency}
Offer	{Offer.SignOnBonus}
Offer	{Offer.StatusDescription}
Offer	{Offer.StockAmount}
Offer	{Offer.StockType}
Offer	{Offer.TargetStartDate}
Offer	{Offer.Vacation}
Offer	{Offer.VacationUnit}
Other	{Other.CurrentDate}
Other	{Other.JobToFriendComments}
Other	{Other.JobToFriendDescription}
Other	{Other.JobToFriendQualifications}
Other	{Other.ListOfAgents}
Other	{Other.MaximumAttachments}
Other	{Other.MaximumAttachmentSize}
Other	{Other.OriginalMessageSentDate}
Other	{Other.OriginalMessageSubject}
Other	{Other.PageBreak}
Other	{Other.ProductName}
Other	{Other.ReferralValidityPeriod}
Other	{Other.RegularCareerSectionURL}
Other	{Other.SupportedAttachmentFormat}
Other	{Other.TimeZone}
Other	{Other.UserEmail}
Other	{Other.UserFirstName}

Variable Type	Variable
Other	{Other.UserFullName}
Other	{Other.UserLastName}
Other	{Other.UserMiddleName}
Other	{Other.UserPassword}
Other	{Other.UserUsername}
Owner	{Owner.CorrespondenceEmail}
Owner	{Owner.FirstName}
Owner	{Owner.FullName}
Owner	{Owner.LastName}
Passport	{PassportResult.accuratebackground:AdjudicationResult} {PassportResult.accuratebackground:DetailsUrl} {PassportResult.accuratebackground:Discrepancies} {PassportResult.accuratebackground:PercentComplete} {PassportResult.accuratebackground:ProviderReferenceId} {PassportResult.accuratebackground:ProviderStatus} {PassportResult.accuratebackground:Screenings} {PassportResult.accuratebackground:SummaryText} {PassportResult.choicepoint:AdjudicationResult} {PassportResult.choicepoint:DetailsUrl} {PassportResult.choicepoint:Discrepancies} {PassportResult.choicepoint:ProviderStatus} {PassportResult.choicepoint:Screenings} {PassportResult.choicepoint:SummaryText} {PassportResult.choicepoint_drugtesting:AdjudicationResult} {PassportResult.choicepoint_drugtesting:DetailsUrl} {PassportResult.choicepoint_drugtesting:Discrepancies} {PassportResult.choicepoint_drugtesting:ProviderStatus} {PassportResult.choicepoint_drugtesting:Screenings} {PassportResult.choicepoint_drugtesting:SummaryText} {PassportResult.cswaction:ResultField} {PassportResult.cswaction:someAction}

Variable Type	Variable
	{PassportResult.ddi:PROGRESSIONDECISION}
	{PassportResult.ddi:STATUS}
	{PassportResult.ddi:SUMMARYSCORE}
	{PassportResult.ddi:SUMMARYTEXT}
	{PassportResult.ddiassessment:BAND}
	{PassportResult.ddiassessment:DETAILS}
	{PassportResult.ddiassessment:DETAILSLINK}
	{PassportResult.epredixscreening:BAND}
	{PassportResult.epredixscreening:DETAILS}
	{PassportResult.epredixscreening:GROUPREPORTLINK}
	{PassportResult.epredixscreening:PASSED}
	{PassportResult.epredixscreening:PROFILE}
	{PassportResult.epredixscreening:SCORE}
	{PassportResult.epredixscreening:SUBJECTREPORTLINK}
	{PassportResult.epredixselection:BAND}
	{PassportResult.epredixselection:DETAILS}
	{PassportResult.epredixselection:GROUPREPORTLINK}
	{PassportResult.epredixselection:PASSED}
	{PassportResult.epredixselection:PROFILE}
	{PassportResult.epredixselection:SCORE}
	{PassportResult.epredixselection:SUBJECTREPORTLINK}
	{PassportResult.firstadvantage:AdjudicationResult}
	{PassportResult.firstadvantage:DetailsUrl}
	{PassportResult.firstadvantage:Discrepancies}
	{PassportResult.firstadvantage:ProviderStatus}
	{PassportResult.firstadvantage:Screenings}
	{PassportResult.firstadvantage:SummaryText}
	{PassportResult.hireright:AdjudicationResult}
	{PassportResult.hireright:DetailsUrl}
	{PassportResult.hireright:Discrepancies}
	{PassportResult.hireright:PercentComplete}
	{PassportResult.hireright:ProviderReferenceId}

Variable Type	Variable
	{PassportResult.hireright:ProviderStatus}
	{PassportResult.hireright:Screenings}
	{PassportResult.hireright:SummaryText}
	{PassportResult.itax:FederalCredits}
	{PassportResult.itax:FormsLink}
	{PassportResult.itax:StateCredits}
	{PassportResult.itax:SummaryText}
	{PassportResult.kroll:AdjudicationResult}
	{PassportResult.kroll:DetailsUrl}
	{PassportResult.kroll:Discrepancies}
	{PassportResult.kroll:ProviderReferenceId}
	{PassportResult.kroll:ProviderStatus}
	{PassportResult.kroll:Screenings}
	{PassportResult.kroll:SummaryText}
	{PassportResult.rsassessmentjobspecific:BAND}
	{PassportResult.rsassessmentjobspecific:DETAILS}
	{PassportResult.rsassessmentjobspecific:DetailsUrl}
	{PassportResult.rsassessmentjobspecific:EXCEPTIONAL}
	{PassportResult.rsassessmentjobspecific:PASSED}
	{PassportResult.rsassessmentjobspecific:ProviderStatus}
	{PassportResult.rsassessmentjobspecific:SCORE}
	{PassportResult.rsassessmentjobspecific:webAddress}
	{PassportResult.rsassessmentrmi:BAND}
	{PassportResult.rsassessmentrmi:DETAILS}
	{PassportResult.rsassessmentrmi:DetailsUrl}
	{PassportResult.rsassessmentrmi:EXCEPTIONAL}
	{PassportResult.rsassessmentrmi:PASSED}
	{PassportResult.rsassessmentrmi:ProviderStatus}
	{PassportResult.rsassessmentrmi:SCORE}
	{PassportResult.rsassessmentrmi:webAddress}
	{PassportResult.taleoschedulingcenter:Appointment}

Variable Type	Variable
	{PassportResult.taleoschedulingcenter:Appointment10}
	{PassportResult.taleoschedulingcenter:Appointment2}
	{PassportResult.taleoschedulingcenter:Appointment3}
	{PassportResult.taleoschedulingcenter:Appointment4}
	{PassportResult.taleoschedulingcenter:Appointment5}
	{PassportResult.taleoschedulingcenter:Appointment6}
	{PassportResult.taleoschedulingcenter:Appointment7}
	{PassportResult.taleoschedulingcenter:Appointment8}
	{PassportResult.taleoschedulingcenter:Appointment9}
	{PassportResult.taleoschedulingcenter:AppointmentStatus1}
	{PassportResult.taleoschedulingcenter:AppointmentStatus10}
	{PassportResult.taleoschedulingcenter:AppointmentStatus2}
	{PassportResult.taleoschedulingcenter:AppointmentStatus3}
	{PassportResult.taleoschedulingcenter:AppointmentStatus4}
	{PassportResult.taleoschedulingcenter:AppointmentStatus5}
	{PassportResult.taleoschedulingcenter:AppointmentStatus6}
	{PassportResult.taleoschedulingcenter:AppointmentStatus7}
	{PassportResult.taleoschedulingcenter:AppointmentStatus8}
	{PassportResult.taleoschedulingcenter:AppointmentStatus9}
	{PassportResult.taleoschedulingcenter:DetailsUrl}
	{PassportResult.taleoschedulingcenter:HiddenDetailsUrl}
	{PassportResult.taleoschedulingcenter:SchedulingError}
	{PassportResult.taleoschedulingcenter:SchedulingStatus}
	{PassportResult.taleoschedulingcenter:ShowNoShowStatus}
	{PassportResult.taleoschedulingcenter:Summary}
	{PassportResult.taleoschedulingcenter:webAddress}
	{PassportResult.taleoschedulingcenterproctored:Appointment}
	{PassportResult.taleoschedulingcenterproctored:Appointment10}
	{PassportResult.taleoschedulingcenterproctored:Appointment2}
	{PassportResult.taleoschedulingcenterproctored:Appointment3}
	{PassportResult.taleoschedulingcenterproctored:Appointment4}
	{PassportResult.taleoschedulingcenterproctored:Appointment5}

Variable Type	Variable
	{PassportResult.taleoschedulingcenterproctored:Appointment6}
	{PassportResult.taleoschedulingcenterproctored:Appointment7}
	{PassportResult.taleoschedulingcenterproctored:Appointment8}
	{PassportResult.taleoschedulingcenterproctored:Appointment9}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus1}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus10}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus2}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus3}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus4}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus5}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus6}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus7}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus8}
	{PassportResult.taleoschedulingcenterproctored:AppointmentStatus9}
	{PassportResult.taleoschedulingcenterproctored:DetailsUrl}
	{PassportResult.taleoschedulingcenterproctored:HiddenDetailsUrl}
	{PassportResult.taleoschedulingcenterproctored:SchedulingError}
	{PassportResult.taleoschedulingcenterproctored:SchedulingStatus}
	{PassportResult.taleoschedulingcenterproctored:ShowNoShowStatus}
	{PassportResult.taleoschedulingcenterproctored:Summary}
	{PassportResult.taleoschedulingcenterproctored:webAddress}
	{PassportResult.transitiontestpartner:DetailsUrl}
	{PassportResult.transitiontestpartner:FederalCredits}
	{PassportResult.transitiontestpartner:InternationalCredits}
	{PassportResult.transitiontestpartner:KioskLink}
	{PassportResult.transitiontestpartner:LastError}
	{PassportResult.transitiontestpartner:ProviderStatus}
	{PassportResult.transitiontestpartner:StateCredits}
	{PassportResult.transitiontestpartner:SummaryText}
	{PassportResult.transitiontestpartner:webAddress}
	{PassportResult.transitiontestpartnerevent:DetailsUrl}

Variable Type	Variable
	{PassportResult.transitiontestpartnerevent:FederalCredits} {PassportResult.transitiontestpartnerevent:InternationalCredits} {PassportResult.transitiontestpartnerevent:KioskLink} {PassportResult.transitiontestpartnerevent:LastError} {PassportResult.transitiontestpartnerevent:ProviderStatus} {PassportResult.transitiontestpartnerevent:StateCredits} {PassportResult.transitiontestpartnerevent:SummaryText} {PassportResult.transitiontestpartnerevent:webAddress} {PassportResult.verifiedperson:AdjudicationResult} {PassportResult.verifiedperson:DetailsUrl} {PassportResult.verifiedperson:Discrepancies} {PassportResult.verifiedperson:ProviderStatus} {PassportResult.verifiedperson:Screenings} {PassportResult.verifiedperson:SummaryText} {PassportResult.XXXXX}
Referrer	{Referrer.Email}
Referrer	{Referrer.FirstName}
Referrer	{Referrer.LastName}
Referrer	{Referrer.MiddleName}
Requisition	{CareerSection.JobRmiUrl}
Requisition	{Requisition.AfterApprovalSuccess}
Requisition	{Requisition.AnnualBonus}
Requisition	{Requisition.ApprovalPathTable}
Requisition	{Requisition.Approver}
Requisition	{Requisition.ApproverDecision}
Requisition	{Requisition.CarAllowance}
Requisition	{Requisition.ClosingDate}
Requisition	{Requisition.Comments}
Requisition	{Requisition.Commission}
Requisition	{Requisition.CommissionType}
Requisition	{Requisition.ContactEmailExternal}

Variable Type	Variable
Requisition	{Requisition.ContactEmailInternal}
Requisition	{Requisition.ContactNameExternal}
Requisition	{Requisition.ContactNameInternal}
Requisition	{Requisition.ContestNumber}
Requisition	{Requisition.DepartmentName}
Requisition	{Requisition.DepartmentNumber}
Requisition	{Requisition.EducationLevel}
Requisition	{Requisition.EmployeeReferralBonus}
Requisition	{Requisition.EmployeeStatus}
Requisition	{Requisition.EshareURL}
Requisition	{Requisition.EventDate}
Requisition	{Requisition.ExpenseAccount}
Requisition	{Requisition.HighQuartileSalary}
Requisition	{Requisition.HmgrAsstEmail}
Requisition	{Requisition.HmgrAsstEmailOrHmgrEmail}
Requisition	{Requisition.HmgrAsstName}
Requisition	{Requisition.HmgrAsstNameOrHmgrName}
Requisition	{Requisition.HmgrAsstPhone}
Requisition	{Requisition.HmgrAsstPhoneOrHmgrPhone}
Requisition	{Requisition.HmgrEmail}
Requisition	{Requisition.HmgrName}
Requisition	{Requisition.HmgrPhone}
Requisition	{Requisition.JobDescriptionExternal}
Requisition	{Requisition.JobDescriptionInternal}
Requisition	{Requisition.JobfieldStructure}
Requisition	{Requisition.JobGrade}
Requisition	{Requisition.JobLevel}
Requisition	{Requisition.JobQualificationsExternal}
Requisition	{Requisition.JobQualificationsInternal}
Requisition	{Requisition.JobSchedule}
Requisition	{Requisition.JobShift}

Variable Type	Variable
Requisition	{Requisition.JobTitle}
Requisition	{Requisition.JobType}
Requisition	{Requisition.LocationStructure}
Requisition	{Requisition.LowQuartileSalary}
Requisition	{Requisition.MaximumSalary}
Requisition	{Requisition.MidpointSalary}
Requisition	{Requisition.MinimumSalary}
Requisition	{Requisition.MobileURL}
Requisition	{Requisition.No}
Requisition	{Requisition.Number}
Requisition	{Requisition.OpeningDate}
Requisition	{Requisition.OrganisationStructure}
Requisition	{Requisition.OtherBonus}
Requisition	{Requisition.OtherCompensation}
Requisition	{Requisition.PostedBy}
Requisition	{Requisition.PostedJobCloseDate}
Requisition	{Requisition.PublicReferralBonus}
Requisition	{Requisition.RecruiterAsstEmail}
Requisition	{Requisition.RecruiterAsstEmailOrRecruiterEmail}
Requisition	{Requisition.RecruiterAsstName}
Requisition	{Requisition.RecruiterAsstNameOrRecruiterName}
Requisition	{Requisition.RecruiterAsstPhone}
Requisition	{Requisition.RecruiterAsstPhoneOrRecruiterPhone}
Requisition	{Requisition.RecruiterEmail}
Requisition	{Requisition.RecruiterName}
Requisition	{Requisition.RecruiterPhone}
Requisition	{Requisition.Relocation}
Requisition	{Requisition.RelocationType}
Requisition	{Requisition.RequestedBy}
Requisition	{Requisition.Shares}
Requisition	{Requisition.SharesType}

Variable Type	Variable
Requisition	{Requisition.SignOnBonus}
Requisition	{Requisition.StockOptions}
Requisition	{Requisition.StockOptionsType}
Requisition	{Requisition.TargetStartDate}
Requisition	{Requisition.Vacation}
Requisition	{Requisition.VacationType}
Requisition	{Requisition.UDF_XXX} (Offer UDF)
Requisition	{Requisition.UDF_XXX} (Requisition UDF)
Task	{Task.AssigneesNames}
Task	{Task.AssignmentDate}
Task	{Task.Comments}
Task	{Task.CreationDate}
Task	{Task.DueDate}
Task	{Task.Name}
Task	{Task.OwnerCorporateEmailAddress}
Task	{Task.OwnerFirstName}
Task	{Task.OwnerFullName}
Task	{Task.OwnerLastName}
Task	{Task.OwnerPersonalEmailAddress}
Task	{Task.OwnerPreferredEmailAddress}
Task	{Task.OwnerTelephone}
Task	{Task.PriorityType}
Task	{Task.Status}
Task	{Task.Type}
User	{Other.OperatorEmail}
User	{Other.OperatorName}
User	{Other.OperatorPhone}
User	{UsersWithoutAccess.Names}
Work Conditions	{WorkConditions.Currency}
Work Conditions	{WorkConditions.HoursPreferred}
Work Conditions	{WorkConditions.HoursWillingWork}

Variable Type	Variable
Work Conditions	{WorkConditions.PayRate}
Work Conditions	{WorkConditions.WorkHoliday}
Work Conditions	{WorkConditions.WorkWeekend}

13 Source Tracking

Sources and Events

A source is a medium or event through which a candidate has heard about a job.

Sources may be as diverse as Internet job boards, job fairs, magazines, specialized trade publications, newspapers, professional associations, mailing lists, recruiting agencies, etc. Events are used to track down which event, banner, or campaign are attracting the most candidates to career sections. An event can be a specific advertisement in a trade magazine, a recruiting event on a university campus (job fair), or a special recruiting event at an organization.

In the Recruiting Center, sources are displayed in the requisition Posting and Sourcing tab. When users create a requisition, only the sources that have the same Organization-Location-Job Field structure as the requisition are displayed in the Sources list. Users can modify the list of sources associated to the requisition. If event tracking was enabled, users can access the list of events related to a source. Once in the Events list, users can add, modify and delete events in the requisition.

Source Tracking

Source tracking allows Recruiting Center users to know how a candidate has heard about a job.

There are three levels of source tracking:

Level	Element	Description	Example
1	Source Type	General source	Newspaper
2	Source	Specific source	Boston Globe
3	Event	Timely event for a source	An add in the Boston Globe on Sunday

Whether for budgeting purposes or to make better decisions as to where to post jobs, data on the performance of each source is crucial. Your organization needs to know, among other things, how many candidates applied through each source.

Configuring Source Tracking

The configuration of the source tracking feature consists of the following steps.

1. *Creating a source.*
2. *Creating an event.*
3. *Adding the Source Tracking block in the candidate file.*

4. *Adding the Source Tracking block in the career section application flow.*
5. *Hiding the Source Tracking block if it is pre-filled.*

Creating a Source

Before you start

Before creating a source, check if it is not already available in the database.

Only user-defined sources can be created.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Sources tab, click New...
2. Complete the fields by following the instructions of the Source Creation tool.
   For details on the fields, see *Source Properties*.
3. Click Finish.

Results:

The source is displayed in the Corporate Sources list. It is available to candidates when they apply for a job.
Agencies and agents appearing in the Corporate Sources List are created via the Agencies feature in the Recruiting Administration menu.

Creating an Event

Before you start

The source must be created.

The *Tracking Mode* setting must be set to Event.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Click New...
3. Complete the fields.
   If using the event for an online campaign and wanting to have it automatically default in for the candidate, the ID info needs to be put into the URL.
4. Click Done.

Results:

The event appears in the Events list of the source. Candidates will be able to select this event in the Career Sections.

Adding the Source Tracking Block in the Candidate File

Before you start

The user-defined file must have the inactive or draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file of type Candidate File.
2. Click Edit next to Section Ordering.
3. Enter the name of the Source Tracking section in the Add a Section field.
4. Click Create Section.
5. Select the Source Tracking block in the Available Blocks section, and drag and drop it to the Source Tracking section you created.
6. Click Save.

Adding the Source Tracking 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 Source Tracking section in the Add a Page field.
4. Click Create a Page.
5. Select the Job Sourcing Tracking in the Available Blocks section, and drag and drop it to the Source Tracking section you created.
6. Click Save.

Hiding the Source Tracking Block if Pre-Filled

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. In the Page Ordering section, click the Source Tracking block.
3. Click Edit next to Properties.
4. Select Yes next to "Hide the "Source Tracking" block if it is pre-filled".
5. Click Save.
   The Source Tracking block will be hidden and candidates will not be able to override the content.

Source Properties

Element	Description	Location
Source Type	Source types are provided by Oracle. System administrators cannot add any additional source types, but they can change the Display Name of any of the source types. For a list of available source types, see *Source Types*.	Configuration > [Recruiting] Sources
Origin - System	System-defined sources are provided by Oracle and cannot be deleted from the database. However, they can be removed by system administrators. A source that has been removed from the sources list can be added again as it remains available in the database. If a source is removed from the sources list, it no longer appears to users in the Recruiting Center, unless users can access Oracle sources directly because they have been granted the *Select Taleo system sources in selector window* user type permission. The use of a system-defined source can be modified by system administrators, that is if the source is used in the profiler, in a requisition, in both, or in none.	Configuration > [Recruiting] Sources
Origin - User	User-defined sources are created by system administrators. A user-defined source can be permanently deleted from the sources list, provided it is not being used. If a user-defined source is in use, deleting it will only inactivate it. The properties of a user-defined source as well as the Organization-Location-Job Field structure associated to it can be modified by system administrators even if the source is in use.	Configuration > [Recruiting] Sources
Visibility	The visibility of a source can be set to internal or public. An internal source can be viewed only by Recruiting Center users. A public source can be viewed by candidates in Career Sections and by Recruiting Center users. The private setting "Display Internal Source on Internal Career Sections" allows customers to decide if they want the internal visibility sources to display on internal career sections. Contact Oracle Support for details on this setting.	Configuration > [Recruiting] Sources
Use - In profiler or In requisition	A source can be used in a requisition source list (in requisition) and/or in a general profile source list (in profiler). If the use of a source is not defined, then the source will not automatically default into the source list for the requisitions or the general profiles. However, via the Recruiting Center, a user can still add the source to a specific source list. The use of a source can be modified after it has been created.	Configuration > [Recruiting] Sources

Element	Description	Location
Organization-Location-Job Field classification	A source can be associated to organizations, locations, and/or job fields. If a source is to be available to all requisitions, no Organization-Location-Job Field structure needs to be associated to the source. However: • When creating a requisition, only the sources that have the same Organization-Location-Job Field structure as the requisition are displayed in the Sources list. • When a candidate applies on a job (requisition), only the sources that have the same Organization-Location-Job Field structure as the requisition on which the candidate is applying on, are displayed in the Sources list. • When candidates complete their profile without actually applying on a job, all sources that are active and set to "In Profiler" will display, no matter what the Organization-Location-Job Field structure is set for on the source. The reason for this is that the source tracking block can be placed before or after the Organization-Location-Job Field block and therefore the system is just set to not look at the Organization-Location-Job Field when defining what sources to display.	Configuration > [Recruiting] Sources

Source Tracking - Other Configuration Tasks

Adding a Source

Before you start

The Add option is used to select sources that are coming from a pre-defined list already linked to a source type and visibility.

The *Access Source Tracking configuration* user type permission is required.

Configuration > [Recruiting] Administration > Sources

Here's what to do

1. In the Corporate Sources tab, clear the Show Sub-folder Contents option located in the left panel.
2. Click Refresh.
3. In the Corporate Sources tab, click Add…
4. Select a source.
5. Click Done.

Results:

The source is displayed in the Corporate Sources list and is available in the Recruiting Center. Once the source is added, you can only modify the In Profiler and In Requisition options available in the Source Properties.

Removing a Source

Before you start

Only system sources can be removed.

The source must not be used in a requisition or candidate profile.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Sources tab, select a source.
2. Click Remove.

Results:

The source is removed from the Corporate Sources list. Recruiting Center users can no longer use the source.

Deleting a Source

Before you start

Only user-defined sources can be deleted.

The source must not be used in a requisition or candidate profile.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Sources tab, click on a source.
2. Click Delete.

Results:

If the deleted source was being used, it will only be deactivated. If the deleted source was not being used, then it is permanently deleted.

Reactivating a Source

Before you start

The *Access Source Tracking configuration* user type permission is required.

The source must be inactive.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Sources tab, select an inactive source.
2. Select Reactivate.

Editing the Properties of a Source

Before you start

The source must not be used in a requisition or candidate profile.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Source tab, click on a source.
2. Click Edit next to Source Properties.
3. Indicate where the source is used, either In Profiler or In Requisition.
4. Click Done.
5. If you selected In Requisition, you are asked if you want to add this newly added source to the list of requisitions that are Open or On Hold. If selecting No, then the source will not be added to existing requisitions, but will be added on any new requisitions where applicable.

Results:

The use of a source is modified, i.e. if a source is required by users when creating a requisition or by candidates when entering their profile in a career section.

Editing the Organization-Location-Job Field of a Source

Before you start

The source must be a user-defined source.

The source must not be used in a requisition or candidate profile.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. In the Corporate Source tab, click a source.
2. Click Edit next to Organization-Location-Job Field Classification.
3. Click Add to add Organization-Location-Job Field elements.
4. Click Remove or Remove All to remove Organization-Location-Job Field elements.
5. Click Done.

Results:

When a source is contextualized to an Organization, Location, or Job Field, then the source will only default into the source list of requisitions that match the OLF contextualization.

Editing an Event

Before you start

The source must be created.

The properties of an event can be modified even if the event is used in a requisition or in a general profile.
The *Tracking Mode* setting must be set to Event.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Click an event.
3. Modify the information as needed.
4. Click Done.

Removing an Event

Before you start

The source must be created.

The *Tracking Mode* setting must be set to Event.

The *Access Source Tracking configuration* user type permission is required.

Configuration > **[Recruiting] Administration** > **Sources**

Here's what to do

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Select an event.
3. Click the Delete icon.
4. Click Yes to confirm your choice.
5. Click Done.

Results:

The event no longer appears in the Events list of the source. Candidates will no longer be able to select this event in the Career Sections.

Source Tracking - Permissions and Settings

User Type Permission	Description	Location
Access source tracking configuration	A user must have this permission to configure the Source Tracking feature.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration
Access Posting and Sourcing	Gives Recruiting Center users access to the Posting and Sourcing tab in requisitions.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Select Taleo system sources in selector window	Allows Recruiting Center users to select Taleo system sources for a requisition.	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Sourcing

Note: Currently, if users do not have the "Select Taleo system sources in selector window" permission, they cannot add any sources to the list for the requisition. If they have the permission, they can add all sources, zone specific and system sources.

Setting	Description	Default Value	Location
Already Answered Source Tracking Question	Ask applicant source only once within the same session. If set to Yes and the candidate has specified the source tracking in the session, then the candidate is not asked to specify the source a second time in the same session and the same source is used for subsequent submissions in the same session. If the browser closes or the candidate is logged off, the candidate needs to answer the source tracking question again.	Yes	Configuration > [Recruiting] Settings
General Profile Source Tracking	At every submission, update candidate profile with new source information. If set to Yes, the candidate's General Profile source is updated with submission source after each new submission.	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	If set to No, each new submission source will only be at the submission level and the candidate's General Profile source will stay as it is, whether that is blank or a specific source.		
Tracking Mode	Enables the display of events in Source Tracking. If set to Event, events can be created for each source. In the Corporate Sources list, an Event column is available. If set to Source, no events are available.	Event	Configuration > [Recruiting] Settings
Source Tracking Questions Mandatory	If set to Yes, source tracking questions are mandatory in the Career Section.	No	Configuration > [Recruiting] Settings
Source Tracking List Presented	Show the source type while capturing a source. If set to Yes, the Source Type is asked first, followed by the list of sources for the type that is selected. If set to No, only the sources are displayed.	Yes	Configuration > [Recruiting] Settings
Display Internal Sources on Internal Career Sections	When activated, the internal sources are displayed on the internal Career Sections. If set to Yes, any source that has the Internal visibility will be displayed on all Internal Career Sections. If set to No, only sources with the Public visibility will be displayed on all Career Sections.	No. This is a Private setting that can only be activated by Oracle Support.	Configuration > [Career Section] Settings

When is the Source Filled for Candidates

There are two reasons why a source would automatically default in for a candidate.

- The candidate has already entered a source in a same session and the *Already Answered Source Tracking Question* setting is set to Yes. If the candidate logs out and logs back in again, then this would be considered a different session and therefore no matter what the setting is set to, the candidate would need to answer the source tracking question again.
- The candidate is sent to the career section via a URL that has a valid source or event ID pre-populated. As long as the candidate does not navigate away from the career section, then the source will default in. (In this case, the source does not have to be part of the Requisition Source list. It just must be an active source.)

If none of the above situation is true and the Source Tracking block is part of the application flow, then the candidate will be presented with the source tracking question.

Example 1: First submission in a session

A new or returning candidate accesses a career section. The candidate is presented with the Source Tracking block. The configuration of these settings will affect what is presented to the candidate:

- If the *Source Tracking Questions Mandatory* setting is set to Yes, the candidate must select a source type.
- If the *Source Tracking List Presented* setting is set to Yes, the candidate will select the source type first, then be presented with the sources for the selected source type.
- If the source or event ID was not embedded in the URL, the candidate must select the source or event.

Example 2: Subsequent submission in the session

The candidate applies on a second requisition during the same session.

- If the *Already Answered Source Tracking Question* is set to Yes, the candidate is not asked for the source a second time in the same session.

How is the Source List Content Determined

The list of sources displayed in candidate files, candidate job submissions, requisition files and career sections will differ depending on how a source is configured.

Recruiting Center - Requisition File

Sources configured as follows are displayed in requisition files:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Requisition.
- The requisition Organization-Location-Job Field matches the source Organization-Location-Job Field.

If a new source is created using the above configuration, the system administrator can decide to add the newly created source to all Open and On Hold requisitions.

Recruiting Center users can modify the list of sources in a requisition (via the Posting and Sourcing tab).

Recruiting Center - Create a Candidate - General Profile

Sources configured as follows are displayed in candidate general profiles:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Profile.

Recruiting Center - Create a Candidate - Job Submission

Sources configured as follows are displayed in candidate job submissions:

- Status: Active.
- Visibility: Internal and Public.
- Sources as configured in the Source List for the requisition or sources with the In Profile option.

Recruiting Center - Edit a Candidate - General Profile

Sources configured as follows are displayed in candidate general profiles:

- Status: Active.
- Visibility: Internal and Public.
- Use: In Profile.

Recruiting Center - Edit a Candidate - Job Submission

Sources configured as follows are displayed in candidate job submissions:

- Status: Active.
- Visibility: Internal and Public.
- Sources as configured in the Source List for the requisition. If there are no sources in the list, then the sources with the In Profile option are displayed.

Internal Career Section - Job Submission

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Internal and Public if the *Display Internal Sources on Internal Career Sections* setting is enabled.
- Sources as configured in the Source List for the requisition.

External Career Section - Job Submission

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Public.

- Sources as configured in the Source List for the requisition.

Internal Career Section - General Profile

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Internal and Public if the *Display Internal Sources on Internal Career Sections* setting is enabled.
- Use: In Profile.

External Career Section - General Profile

Sources configured as follows are displayed to candidates:

- Status: Active.
- Visibility: Public.
- Use: In Profile.

Source Types

Standard Source Types
Agency
Agent
Billboards
Broadcast
Career Fair
Direct Mail
Direct Sourcing
Job Board
Magazines and Trade Publications
Mailing List
News Group
Newspapers
Other
Our Web Site
Professional Associations
Referral

Standard Source Types
Social Network
Taleo Performance
University Recruiting
Unsolicited

14 Agency

Staffing Agencies

Staffing Agency and Agent

Agents can refer candidates for jobs available in your organization. Each agent must belong to an agency and each agent is linked to a specific career section Agency Portal.

A staffing agency can be used for the following services:

- Staffing: Agency that provides full headhunter/recruiting services. The agency may recruit, prescreen and submit a candidate for a requisition via the agency portal.
- Media placement: Agency posting a requisition on electronic media such as newspapers, magazines, billboards.
- Internet mining: Agency searching the internet for candidates and resumes for a specific requisition.
- Sourcing strategy: Agency providing services to prepare a job ad.

The following business rules apply to agencies and agents:

- An agency cannot be linked to an agency portal. Only agents (associated to an agency) are linked to agency portals.
- An agent can only be associated to one agency. The agency must offer staffing services.
- An agent has access to only one agency portal.
- An agent can be associated to an Organization-Location-Job Field structure. When a user wishes to invite agents to refer candidates for a job, the structure associated to the agents displayed by the system will correspond to the one of the requisition. If an agent is associated to more than one Organization-Location-Job Field, the requisition/agent mapping must satisfy all associated structures of the requisition to appear on the list.

Details regarding agent ownership

In previous releases, candidates could be referred on multiple jobs by a single referrer only. The referral ownership was kept at the candidate profile level, encompassing all job submissions done through all means by all actors. Since version 13C, a candidate can have multiple referrers (agents and employees) and candidate information is shared between multiple referrers.
Agents can:

- Refer candidates who already exist in the database.
- Refer an already referred candidate at the job submission level.
- See candidate information entered by other referrers.
- Have a maximum number of job submissions referred per requisition.

For details on how to configure ownership for agent referrals, see *Configuring Candidate Referrals*.

Requisition Posting via Staffing Agents

Posting a requisition via staffing agents involves many actions such as the creation of the agency portal, application flows, agencies and agents, as well as many actors such as the system administrator, the user, the agent, and the candidate.

Agency portals (or career sections of type Agency) provide a fully integrated solution that enables organizations to deal directly with staffing agencies. This feature helps ensure the privacy of the organization's candidates and jobs by providing an agency-dedicated application flow within one or multiple agency portals.

The posting of a requisition via posting agents involves the following.

After creating a requisition, a recruiter can decide to use staffing agents to find candidates for the job. The list of agents available is dependent on the organization, location, and job field selected for the requisition. The recruiter can select one or several staffing agents who will post the requisition on their job list, then determine the start and end time when candidate referrals will be allowed. This process can take place after the requisition is opened but before it is posted to internal or external career sections as agents will be accessing the requisition through their own career section (agency portal).

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 a candidate. Depending on granted permissions, the staffing agent can refer candidates who already exist in the database or refer an already referred candidate at the job submission level.

> **Note:** When changing the agent who referred a candidate, if you want to reselect the original referring agent and the original ownership is expired, the change will not take effect unless a different agent is first selected and then another modification is made to reselect the original agent.

Candidates being referred receive an email informing them that they were referred by an agent for a job and inviting them to review the profile information submitted by the agent.

Later, when searching through the candidate database, the recruiter can easily identify candidates referred by an agent with the Referred by Agent icon. The tracking tab of the candidate file also displays the name of the agency and that of the agent who referred the candidate. Candidates referred by an agent are considered agent-owned candidates. However, the user can remove the agent-ownership. The user has the possibility to perform a duplicate check to see if the candidate already exist in the database.

Creating a Staffing Agency

The creation of a staffing agency consists of the following steps.

1. Creating a career section of type Agency Portal and selecting an application flow of type Agency. This is done via the Career Section Administration menu.
2. *Creating the staffing agency.*
3. *Selecting preferred agencies.*
4. *Defining a referral ownership period.*

Creating an Agency

Before you start

The career section of type Agency Portal and the agency application flows must be created. This is done via the Career Section Administration menu. For details, refer to the Career Section Configuration Guide.

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agencies tab.
2. Click New...
3. In the Properties tab, complete the fields.
    a. Enter the name of the agency and translate the name in all available languages. Use the same name for the agency and the career section Agency Portal.
    b. Select the visibility of the source. An internal source will appear to Recruiting Center users. A public source will appear to Recruiting Center users and candidates.
    c. Enter the agency email address. The same email address cannot be used for an agency and an agent.
    d. Select the Staffing option under Services. Staffing must be selected if you want to designate this agency as an agency portal and if you want to attach agents to this agency. Also, when you select Staffing, Sourcing Strategy, Internet Mining, and Media Placement are automatically included.

       The Contingent Staffing option is used for contingent staffing which may include part-time, temporary and contractor work. MWBE means Minority Women Business Owned. This is a flag available when exporting the agency information to an external system where billing occurs.
    e. Click Save.
4. Click the Agents tab.
5. Click New...
6. Complete the Identity tab.
    a. Enter the agent information.
    b. Select a preferred language of correspondence.
    c. Specify the name of the agency to which the agent belongs.
    d. Select the visibility of the source. If selecting Internal, the agent's name will appear to Recruiting Center users. If selecting Public, the agent's name will appear to Recruiting Center users and candidates.
    e. Click Save.
7. Complete the Login tab.
    a. Select a portal. If you do not select a portal, the agent will be considered inactive and recruiters will not be able to invite this agent to refer candidates.
    b. Enter the email address for the agent.
    c. Provide a password for the agent. Enter the password a second time to validate the password.
    d. Click Save.
8. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency. When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all requisitions regardless of the requisition Organization-Location-Job Field structure.
9. Click Done.

Selecting a Preferred Agency

Before you start

The agency must be created.

Configuration > [Recruiting] Administration > Agencies

Here's what to do

1. Click Options...
2. Click the Preferences tab.
3. Select your preferred agency for each type of posting.
4. Click Done.
5. Click Save

Results:

The selected agency for each type of posting will be displayed by default when recruiters post a requisition.

Defining a Referral Ownership Period

Before you start

The Agent Ownership Delay recruiting setting must be enabled.

Configuration > [Recruiting] Administration > Agencies

Here's what to do

1. Click Options...
2. Click the Candidate Referral tab.
3. Specify the number of days during which agents own rights over referrals. Select Unlimited if you want agents to own the referral for an unlimited or undetermined period of time.
4. For contingent staffing, specify the number of days during which agents own rights over referrals. Select Unlimited if you want agents to own the referral for an unlimited or undetermined period of time.
5. Click Done.

Results:

Once the duration period has expired, the agent no longer owns the candidate, therefore the agent will not receive any compensation if the candidate is hired on a requisition; however, the candidate file will indicate referral ownership with an expired status.

Filtering Agencies and Agents

The lists of agents and agencies in the Agency Management page can be filtered based on specific criteria.

In the Agencies and Agents tabs, a Show filter is available. System administrators can filter the list of agencies to only show agencies that match these specific criteria:

- Name: Name of the agency.
- Email address: Email address of the agency.
- Services: Services provided by the agency, that is Contingent Staffing, Internet Mining, Media Placement, Sourcing Strategy, Staffing.

System administrators can filter the list of agents to only show agents who match these specific criteria:

- Name: Name of the agent.
- Email Address: Email address of the agent.
- Agency: Name of the agency to which an agent belongs.

It is possible to combine multiple criteria to filter the list of agencies or agents. When filtering by multiple criteria, system administrators can decide if all specified criteria must be met for an agency or agent to be displayed (All Criteria (And)) or if at least one of the criteria must be met for an agency or agent to be displayed (Any Criteria (Or)).

When using a filter where a value must be typed (such as the Name filter), system administrators must enter at least one character for the filtering to be performed.

The lists of agencies and agents continue to be displayed across multiple pages if the number of items to display exceeds the number of items that can be displayed per page. Also, the ability to sort the lists has been preserved.

Agency Gateways

Agency Gateways

Besides traditional staffing agencies using an agency portal, there are other agency designations that can be set up to display as selections in the requisition Posting and Sourcing tab.

There are three links in the requisition Posting and Sourcing tab that relate to agency setup:

- Non-Electronic Media (for ad placement agencies)
- Internet Mining
- Sourcing Strategy Request

Creating a Media Placement, Internet Mining or Sourcing Strategy Agency

Before you start

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agencies tab.
2. Click New...
3. In the Properties tab, complete the fields.
    a. Enter the name of the agency and translate the name in all available languages. Use the same name for the agency and the career section Agency Portal.
    b. Select the visibility of the source. An internal source will appear to Recruiting Center users. A public source will appear to Recruiting Center users and candidates.
    c. Enter the agency email address. The same email address cannot be used for an agency and an agent.
    d. Select Media Placement, Internet Mining or Sourcing Strategy under Services.
    e. Click Save.
4. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency. When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all requisitions regardless of the requisition Organization-Location-Job Field structure.
5. Click Done.

Agency - Permissions and Settings

The following permissions and settings are used to configure staffing agencies and agency gateways.

User Type Permission	Location
Post to staffing agents/agencies	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Sourcing
Request Internet mining by specialized agencies	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Sourcing
Request sourcing strategy by specialized agencies	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Sourcing

Setting	Description	Default Value	Location
Agent Ownership Delay	Period during which agents own rights over referrals	0 day	Configuration > [Recruiting] Settings
Contingent Staffing Agent Ownership Delay	Period during which contingent staffing agents own rights over referrals.	0 day	Configuration > [Recruiting] Settings
Accept Referrals from Employees for Known Candidates or Submissions	Determines if employees can refer candidates or candidate submissions that already exist in the database.	No	Configuration > [Recruiting] Settings

Agency - Other Configuration Tasks

Creating an Agent

Before you start

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agents tab.
2. Click New...
3. Complete the Identity tab.
    a. Enter the agent information.
    b. Select a preferred language of correspondence.
    c. Specify the name of the agency to which the agent belongs.
    d. Select the visibility of the source. If selecting Internal, the agent's name will appear to Recruiting Center users. If selecting Public, the agent's name will appear to Recruiting Center users and candidates.
    e. Click Save.
4. Complete the Login tab.
    a. Select a portal. If you do not select a portal, the agent will be considered inactive and recruiters will not be able to invite this agent to refer candidates.
    b. Enter the email address for the agent.
    c. Provide a password for the agent. Enter the password a second time to validate the password.
    d. Click Save.
5. Click the Organization, Location and/or Job tabs if you want to assign structure elements to the agency. When recruiters will ask agencies to find candidates, only the agencies corresponding to the Organization-Location-Job Field of the requisition will be displayed. Otherwise, the agency will be available for all requisitions regardless of the requisition Organization-Location-Job Field structure.
6. Click Done.

Deleting an Agent

Before you start

Referrals must be transferred to another agent.

System must be in maintenance mode.

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agencies tab.
2. Click on the agency name.
3. In the Agents tab, select the agent.

4. Click the Delete icon.
5. Click Done.

Results:

Users can no longer ask this agent to refer candidates. The information of the agent is permanently deleted from the system.

Deactivating an Agent

Before you start

The agent must be created in order to deactivate it.

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agents tab.
2. Click the name of the agent.
3. In the Login tab, select Not Specified in the Portal drop-down list.
4. Click Done.

Results:

Recruiters can no longer ask this agent to refer candidates. The information on the agent is still available in the system.

Deleting an Agency

Before you start

Agents associated to the agency must first be deleted.

Referrals of the agents must be transferred to another agent.

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agencies tab.
2. Select the agency.
3. Click the Delete icon.

Results:

The agency is no longer available in the Agencies list of the Agency Management page.

Transferring Referrals

Before you start

Referrals should be transferred to an agent from the same agency. Selecting an agent outside the agency is correct as long as the agencies are compatible (staffing can be transferred to staffing (or staffing and contingent), contingent can be transferred to contingent (or staffing and contingent) while staffing and contingent must be transferred to agents supporting staffing and contingent.

Configuration > **[Recruiting] Administration** > **Agencies**

Here's what to do

1. Click the Agents tab.
2. Click on the desired agent.
3. In the Login tab, click Transfer Referrals...
4. Browse to select an agent.
5. Click OK.

15 Job Posting and Job Boards

Requisition Posting

Requisition posting consists of publishing a requisition to have candidates applying on the job.

When a requisition has been created and approved, the next step is to post it. Here is a basic posting and sourcing process. System administrators create a Source Tracking list which is used by recruiters and candidates. Recruiters post requisitions to Career Sections. Recruiters can post to additional sources such as job boards, agencies and also use gateways to send out requests for sourcing help. Candidates apply to jobs and complete the Source Tracking information. Some tracking is automated if the candidates are coming from certain job boards. They can also put in event ID's from advertisements. Once the source of the candidate is tracked, recruiters then can view the information in the candidate file.

Accessing the Posting and Sourcing feature

There are several ways to access the Posting and Sourcing feature:

- When a requisition is ready for posting or already posted, you can click the Status Detail link in the requisitions list and you will be taken to the Posting and Sourcing tab of the requisition.
- From the More Actions menu within the requisition file.
- From the Posting and Sourcing tab within the requisition file.
- From the Contextual Action menu in the requisitions list.
- From the Tasks channel, the Ready for Sourcing link will take you directly to a list of requisitions that need to be posted.

Places and services to post requisitions

Depending on what your organization has activated and your permissions, the Posting and Sourcing feature provides several services to post requisitions:

- Internal or external career sections.
- Mobile career sections: Customers can specify if a career section can be accessed from mobile devices. When candidates receive a message on their mobile device regarding a new job opening and decide to take a look at the job while using their mobile device, candidates are automatically redirected to the mobile career section and are able to view and apply for the job. System administrators specify if the career section is a mobile career section and then link the standard career section to a mobile career section. When a requisition is posted to a standard career section, the system automatically posts the requisition to the mobile career section to which the standard career section is linked. In the Recruiting Center, when posting a requisition, the mobile career section to which a standard career section is linked is not displayed in the Career Sections list. This is to prevent users from posting requisitions directly to a mobile career section.
- eQuest job boards: Recruiters can post their requisitions to multiple job boards through the eQuest job distribution portal. Recruiters must post a requisition on a career section before posting the requisition to a job board. A requisition can be posted as many times as required but it cannot be posted twice on the same job board account. All job board accounts to which a requisition is already posted will be unavailable in the Sourcing

Manager page. The requisition must be posted on an external company career section for at least the same time as on eQuest job board account.

- Certified job posting distribution suppliers: Recruiters can select a certified job posting distribution supplier (other than eQuest) that will distribute job postings through job boards. A new type of Oracle Validated Integration (OVI) has been put in place to allow integrations with job posting distribution suppliers. Recruiters must post a requisition on a career section that is external and public before posting the requisition to a job board.
- Staffing agents: Users can ask an advertising agency to post an ad.
- Non-electronic media such as newspapers, magazines and trade publications, billboards and broadcasting. A list of preferred non-electronic media can be created in My Setup, under Preferences.
- Gateways such as internet mining.

Important information about Mobile career sections

When posting a requisition, the system dynamically calculates the posting start date and end date for the mobile career section. The posting start date and end date on the mobile career section are based on the dates of the standard career section to which the mobile career section is linked.

- If the mobile career section is linked to a single standard career section, the posting start date and end date of the standard career section are used.
- If the mobile career section is linked to multiple standard career sections, the earliest start date among the standard career sections is used; the latest end date among the standard career sections is used.

When posting a requisition to a standard career section, the requisition is simultaneously posted to the mobile career section to which the standard career section is linked (if applicable). However, when a standard career section is linked for the first time to a mobile career section, all requisitions currently posted on the standard career section will be posted to the mobile career section. This posting process is set up to start a few minutes after the two career sections are linked and the duration required to post the requisitions will depend on the volume of postings available on the standard career section.

Requisition Posting Permissions

Permissions are granted to Recruiting Center users so they can post requisitions.

User Type Permission	Description	Location
Access Posting and Sourcing	Provides access to the requisition Posting and Sourcing tab.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Post requisitions	Allows users to post requisitions to career sections and job boards. When a user receives a Ready for Sourcing task, the user must have the "Post requisitions" permission to be able to complete the task.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Post to staffing agents/agencies	Allows users to post, unpost and extend the posting of requisitions via staffing agents and agencies.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing

User Type Permission	Description	Location
Request Internet mining by specialized agencies	Allows users to request resume searching services over the Internet.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Invite matching candidates to apply	Allows users to preview, select and request the sending of job posting notifications.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Submit ads to non-electronic media	Allows users to submit a request to post requisitions in non-electronic media.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Prevent and allow posting	Allows users to do the Prevent Posting and Allow Posting actions in order to block or unblock the publication of a requisition.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Extend posting and unpost	Allows users to extend the posting and to unpost requisitions on career sections, job boards and staffing agencies.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Request sourcing strategy by specialized agencies	Allows users to request a sourcing strategy	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Access the posting through social networks feature	Allows users to share the career section url with different social networks.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing
Distribute job postings to job boards	Enables users to post requisitions to job posting distribution suppliers. See *Certified Job Posting Distribution Suppliers*.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing

Job Board Account

Recruiters can post their requisitions to multiple job boards through the eQuest job distribution portal.

eQuest job board accounts are created by the system administrator. These accounts must first have been created in eQuest, with the same user name and password defined by the system administrator. Therefore, job boards available for a specific account are set by eQuest. The system administrator can create as many accounts as needed. However, only one account can be designated as the default account.

A list of core job boards is bundled with the Recruiting Cloud Service subscription. Customers must work with eQuest for additional job boards. This list is subject to change.

- **Monster** - All US and International locations.
- **CareerBuilder** - United States.
- **LinkedIn** - All US and International locations.
- **Workopolis** - Canada.
- **SEEK** - Asia Pacific.
- **Wildcard** - Two additional job boards may be selected from eQuest's current list of electronically supported job boards at inception of their Taleo contract ("Additional Core Board"). eQuest will support a process to allow customers to change their Additional Core Boards up to one time per year following the customer's first anniversary date of contract with eQuest.

In the event that a customer requests the delivery of job postings to a job board that is not in the above list, such request may be referred to eQuest to be managed via a direct contract between eQuest and the customer.

Once the Oracle Taleo Enterprise Edition integration setup is completed for eQuest, eQuest will work directly with the customer to collect appropriate credentials and complete setup to any core job boards or non-core job boards and any related configuration for customer reporting and analytics. eQuest will provide customers with an Activity Report each month listing key data elements associated with each job posting, including date of insertion, recruiter name, requisition number, job title and job location, and total eQuest transactions for the prior month.

Creating a Job Board Account

Before you start

Configuration > **[Recruiting] Administration** > **Job board Accounts**

Here's what to do

1. Click New...
2. Under the Properties tab, select eQuest in the Supplier drop-down list.
3. Enter a name for the account. The name is displayed in the requisition to distinguish the different accounts created with eQuest.
4. In the language drop-down list, select a language. The language drop-down list is used to provide the account name in different languages.
5. Under the Login tab, provide a login name and a password. The login name and password are used to automatically log the user in the job board's system. When clicking Post, the job board's page is opened and the user is already logged in with this account. The login name must be unique for each job board.
6. Under the Permissions tab, indicate if the job board account is the default account.
7. If the job board account was not designated as being the default account, you can associate the job board account with specific organizations, groups or users. When a recruiter is posting a requisition to a job board, job board accounts to which the recruiter user is assigned and those matching at least one of the specified organizations or groups of the requisition will be available for selection.
8. Click Save.

Results:

The newly created job board account appears in the Job Board Accounts list.

Sending Customer City and Zip/Postal Code to eQuest

Organizations can send the customer city and its zip/postal code to eQuest.

The setting **City Location Level for eQuest Posting** allows system administrators to specify the location level that will be considered when posting a requisition to eQuest. Once set, the location sent to eQuest to represent the requisition city will no longer be the reference locations level 3 and its postal code, but the location level specified in this setting. This will allow recruiters to post a requisition to the most precise city location, usually located at level 3 or level 4.

Setting	Description	Possible Value	Location
City Location Level for eQuest Posting	When posting requisitions to eQuest, the level specified here will be considered as the location level for cities.	A number from 1 to 5 based on locations configuration	Configuration > [Recruiting] Settings

In SmartOrg (under Locations Element Management), the Zip/Postal Code field is available for each level of location.

In Recruiting, when associating a Location structure to a requisition, the zip/postal code set for the location in SmartOrg is used by eQuest to post a requisition on a job board at the appropriate location (instead of using the reference locations set by the system), provided the *City Location Level for eQuest Posting* setting has been configured in the administration module.

Requisitions can be associated to any level of company defined locations. When Oracle sends the requisition to eQuest, we always try to send three location values:

- Country: this is derived from the mapping between location and the reference location level 1 done in SmartOrg by the administrator.
- State/Province: this is also derived from the mapping done in SmartOrg between the location and location level 2. This exists only if the requisition has an associated location at least at the state/province level.
- City: by default, this is also derived from the mapping between location and location at level 3, if the requisition is associated to a location with a level 3 mapping. If not, such information is not sent to eQuest, although it is usually required, depending on the country and job board. With the *City Location Level for eQuest Posting* setting, customers can send a more precise location, as defined in SmartOrg, instead of sending the broader location level 3, which represents a region rather than a city. For a large city such as San Francisco, this does not change the situation that much, although you can define a more precise zip/postal code if required. But for a city like Dublin, CA, which does not exist in our list of reference regions, you can now use your own location instead of using the closest region, which would be Hayward on this example, which is about 10 miles away.

Zip/postal codes will be considered by eQuest when posting a requisition only if the zip/postal code is for the US and few other countries, but not all.

Sending Department Code to eQuest

Organizations can send the department code in order to do some reporting in eQuest.

The setting **Send Department Information to eQuest When Posting Requisitions** allows system administrators to specify if the department number will be provided to eQuest when posting requisitions to eQuest. This is not used for posting purposes, but rather to allow reporting at the department level in eQuest.

Setting	Description	Default Value	Location
Send Department Information to eQuest When Posting Requisitions	Send department information to eQuest when posting requisitions. By default, department information is not sent.	No	Configuration > [Recruiting] Settings

Deleting a Job Board Account

Before you start

Configuration > [Recruiting] Administration > Job board Accounts

Here's what to do

1. Select a job board account.
2. Click the Delete icon.

Results:

The job board account no longer appears in the Job Board Accounts list.

The job board account will no longer be displayed in Recruiting Center to users with appropriate permission.

Requisition Posting via Certified Job Posting Distribution Suppliers

A new type of Oracle Validated Integration (OVI) has been put in place to allow integrations with job posting distribution suppliers so that customers can select their suppliers of choice.

Customers first need to sign a contract with their job posting distribution suppliers of choice. The supplier must have worked with Oracle to provide a certified integration. If such an integration is available for the desired supplier, customers can request the integration to be made available on their zone. Then, Recruiting Center users who have the permission to distribute job postings to job boards are able to select these certified job posting distribution suppliers.

Recruiters can select certified job posting distribution suppliers via the Job Boards section, under the requisition Posting and Sourcing tab. To post a requisition to a job posting distribution supplier, recruiters must first post the requisition on a career section that is external and public.

After selecting a supplier and account and clicking the Post button, recruiters are asked to select a language if the integration was configured to distribute requisitions in multiple languages. The requisition content provided to the job posting distribution supplier is provided in the selected language.
Recruiters are then taken to a page where they need to provide different information. The main part of the page is provided by the supplier. Some of the requisition information is automatically provided to the supplier, making it possible to pre-fill some fields requested by the supplier. When recruiters are done completing the information, they are taken back to the Recruiting Center Posting and Sourcing tab and the list of job board postings is updated to show the job boards where the requisition has been posted.

The list of job board postings shows all the job boards on which a requisition is posted, unposted, scheduled to be posted, etc. The following information and actions related to a job posting distribution supplier are available:

- Supplier: Shows the various suppliers that are active on the zone, certified job posting distribution suppliers or eQuest.
- Account: Shows the accounts available to the current user. The Account list is sorted to show the most relevant account for the user (based on the information configured on the user account).

- Job Board: Name of the job board.
- Language: Language in which the requisition was posted on the job board.
- Status: Status of the job board. See below for a complete list of possible statuses.
- Start Date: Requisition posting start date.
- End Date: Requisition posting end date.
- Post: The Post button launches the job distribution process for the requisition. The posting is performed by using the selected supplier and account. It is possible to Post the same requisition using multiple suppliers and/or accounts. This requires the user to repeat the posting process multiple times.
- Unpost: The Unpost button makes it possible to unpost the requisition from individual job boards. An unpost request is sent to the job posting distribution supplier and the requisition is unposted. No further action is required by the user.
- Unpost All: The Unpost All button unposts the requisition from all job boards where it is currently posted. An unpost request is sent to the job posting distribution supplier and the requisition is unposted. No further action is required by the user.
- Refresh Status: The Refresh Status button updates the information displayed in the Job Boards list. The information in this list is not updated automatically (unless an action such as Unpost is performed). Users need to click the Refresh Status button to get the most up to date information.

Possible status values for jobs posted via a job posting distribution supplier are as follows:

- Not posted
- Incomplete
- Authorization required
- Scheduled for posting
- Being processed
- Posting request in process
- Posted
- Posted - User update incomplete
- Posted - Unposting request in process
- Posted - Update request in process
- Posted - Update authorization required
- Unposted
- Expired
- Error

In the requisition file History tab, three different types of events can be created by the job distribution feature:

- Requisition Posting (Job Board): Used when the user clicks on the Post button.
- Requisition Unposting (Job Board): Used when the user clicks on the Unpost or Unpost All button.
- Requisition Posting Status Change: Used when the status displayed for a posting on a job board changes, whatever the status is Posted, Expired, Unposted, Error, etc.

Note: Some customers may have created Private career sections that are not available via their company's Web site. These Private career sections are used primarily to invite specific candidates to provide, via a job specific URL, additional information on their job submission. Private career sections normally display jobs longer than Standard career sections. There may be situations where a requisition is posted to a job posting distribution supplier and candidates are redirected to a Private career section because the job is no longer posted on a Standard career section and the lowest career section sequence was taken into consideration (order in which the system evaluates on which career section to redirect a candidate coming from a job specific URL). A candidate may click on a job and be redirected to a Private career section, the only career section that is still posting the job. This behavior will be enhanced in a coming release. The plan is to automatically redirect candidates to a career section URL that will not consider Private career sections. The career section sequence will continue to be used, but only Public career sections will be considered.

Granting the Job Posting to Job Boards Permission

Before you start

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

Here's what to do

1. Select a user type.
2. Click Recruiting.
3. Click Edit next to Sourcing.
4. Select the permission Distribute job postings to job boards.
5. Click Save.

Configuring the Supplier Service

Before you start

The job posting distribution supplier must work with Oracle in order to be certified.

Once the above is done, system administrators can configure the supplier as a sourcing service. Properties and settings must be specified and the service is then activated. Oracle Support needs to deploy the integration in the zone (after that administrators can activate it).

Configuration > Recruiting Administration > Integration > Candidate Sourcing

Here's what to do

1. Click on the service name.
2. Click Edit next to Properties.
3. Edit the Properties fields as required. For details, see *Job Posting Distribution Supplier Service Properties and Settings*.
4. Define the values for each of the settings. For details, see *Job Posting Distribution Supplier Service Properties and Settings*.
5. Click Save.
6. Click Activate.

What to do next

Once the supplier service has been activated, system administrators can add user accounts to be used for this supplier by using the Job Board Accounts feature in Recruiting Administration. See *Creating the Supplier Account*.

Creating the Supplier Account

Before you start

Configuration > **[Recruiting] Administration** > **Job board Accounts**

Here's what to do

1. Click New...
2. Under the Properties tab, select the certified supplier in the Supplier drop-down list.
3. Enter a name for the account. The name is displayed in the requisition to distinguish the different accounts created with a specific job posting distribution supplier.
4. Select a language in the drop-down list. The language drop-down is used to provide different values to the "Account-specific name". For example, if you select French, you can type in the French account name, then select English and provide the English account name.
5. Under the Login tab, provide a login name and a password. The login name and password are used by Oracle to automatically log the user in the supplier's system. When clicking Post, the supplier's page is opened and the user is already logged in with this account. The login name must be unique for each supplier.
6. Under the Permissions tab, indicate if the supplier account is the default account. Designating a supplier account as the default account makes it available to all users having access to the Job Boards feature.
7. If the account was not designated as the default account, the account can be associated with any number of organizations, groups and users. When a recruiter is posting a requisition to a job board, only the job board accounts having the same organizations, groups and users as those specified in the requisition are displayed for selection.
8. Click Save.

Results:

The newly created supplier account appears in the Job Board Accounts list.

Job Posting Distribution Supplier Service Properties and Settings

Property	Description	Location
Name	Name of the sourcing service.	Configuration > Recruiting Administration > Integration > Candidate Sourcing
Description	Description of the sourcing service.	Configuration > Recruiting Administration > Integration > Candidate Sourcing
Provider Name	Name of the provider.	Configuration > Recruiting Administration > Integration > Candidate Sourcing
Provider Description	Description of the provider.	Configuration > Recruiting Administration > Integration > Candidate Sourcing

Setting	Description	Location
Requisition Posting Language	Possible values are: • Ask user to select language when distributing the requisition • Base language of the requisition • English if exists, else base language of the requisition.	Configuration > Recruiting Administration > Integration > Candidate Sourcing
Highest security level of fields that can be sent when posting requisitions	For example, if a field is marked Confidential and this setting is set to General, the field will not be sent when posting requisitions. Possible values are: • General • Restricted • Confidential	Configuration > Recruiting Administration > Integration > Candidate Sourcing
Location level to be considered as a city when posting requisitions to Multiposting	The number entered in the field represents the location level to be considered as a city.	Configuration > Recruiting Administration > Integration > Candidate Sourcing

16 Merge Forms

Merge Form

A merge form is a PDF document that can be tied to candidate selection workflows, steps, and statuses and that can be generated/filled out at any point on demand by a user.

Merge forms are used during the hiring process. For example, during interviews with candidates, a recruiter may use a PDF form as a template to complete a candidate's "Do not disclose" information. PDF forms are most typically used for various new hire paperwork or to print a candidate submission in a particular, customized format.

Merge forms are first built in Adobe Acrobat. System administrators then add them in the Recruiting Administration. If desired, they can also tie them to candidate selection workflows, steps, and statuses to make them available to users. Merge forms can be printed by a user, then further completed if needed and signed by the candidate. (None of this is tracked in the system).

If a field in the form is confidential to the user, a warning message is displayed and that field is left blank.

Merge forms can be pre-populated with variables retained in the system within the Message Template feature. These variables can be added using the Adobe Acrobat Professional Forms feature. For example, you could take a merge form (such as the I-9 form) and insert variables that will automatically pull information from the candidate file. Instead of typing the name of a candidate, the name would automatically appear in the form.

By default, the maximum file size of a merge form is 2 MB, and the maximum number of documents allowed per merge form (PDF) is 14.

Merge forms may be available in any language. Merged data is available in English only. Most Asian languages are not supported, based on PDF conversion issues with tokens. The merged data will pull what is in the candidates file, so it may not be in English.

Configuring Merge Forms

The configuration of merge forms consists of the following steps.

1. Enabling the Merge Form Activation setting by putting the value to Yes (Configuration > Recruiting > Settings > Merge Form Activation). When the setting is enabled, the Merge Forms feature becomes available in the Recruiting Administration menu, under General Configuration.
2. *Loading a form.*
3. *Inserting variables in the form.*
4. *Associating the form to a workflow, step, status.*

The Fill Out Form feature does not suppress confidential data. That is, if a user is not authorized to view a piece of requisition or candidate data because of permissions (for example, the field is confidential, or the block such as Compensation or Screening Service is not visible), the user may still get access to this data using the Fill Out Form feature. When a user generates a form, all data included in the PDF will render in the file, regardless of the user's permissions. For this reason, customers should not embed fields in PDF forms that they do not want users to be able to access.

Creating a Merge Form

Before you start

The PDF form must first be built in Adobe Acrobat.

Configuration > **[Recruiting] Administration** > **Merge Forms**

Here's what to do

1. Click New...
2. Enter a title and a code.
3. Select a PDF form using the Browse... button.
4. Select Available in the Status list.
5. Click Done.

Results:

The form appears in the Merge Forms page. It is also available in the Forms tab of the Candidate Selection Workflow feature.

Inserting Variables in a Merge Form

Before you start

Adobe Acrobat Professional is required to insert variables.

Variables are available in the Recruiting Administration menu, in the Paragraphs feature (located in the Correspondence section).

Note that this procedure may differ according to the Adobe Acrobat Professional version being used.

Here's what to do

1. In the Recruiting Administration menu, click Paragraphs located in the Correspondence section.
2. Click on a paragraph.
3. Click Edit next to Properties.
4. In the Available Variables selector, locate the desired variable then copy it.
5. Using Adobe Acrobat Professional, open a PDF form.
6. In the Tools menu, select Advanced Editing, then Text Field Tool.
7. Draw a box using your cursor. The Text Field Properties window appears.
8. In the Text Field Properties window, under the General tab, paste the copied variable in the Name field.
9. Enter any other information, such as a tooltip or if the field is required.
10. Click Close.

Results:

The form contains variables that will automatically pull information from the candidate file into the form.

Configuring a Form

Before you start

The form must first be loaded via the Merge Forms feature.

Configuration > **[Recruiting] Administration** > **Candidate Selection Workflow** > **Forms**

Here's what to do

1. Click on the title of a form.
2. Specify if the form is always available or if it is only available when associated to a selected workflow, step, or status.
3. Depending on the above choice, select a workflow, step, or status then click Add. Recruiting Center users will be presented with the form when moving a candidate to the selected workflow/step/status context. Note that it does not restrict the use of that form to the workflow/step/status context when using the "Fill Out Form" action from the More Actions menu.
4. Click Done.

Merge Form - Other Configuration Tasks

Deleting a Merge Form

Before you start

The merge form must not be used.

Configuration > **[Recruiting] Administration** > **Merge Forms**

Here's what to do

1. Select a merge form.
2. Click the Delete icon.

Results:

The merge form no longer appears in the list of merge forms.

Activating a Merge Form

Before you start

You must create the form in the Merge Forms page before you can activate it.

Configuration > **[Recruiting] Administration** > **Merge Forms**

Here's what to do

1. Click a form.
2. Select Available in the Status drop-down list.

3. Click Done.

Results:

In the Merge Forms page, Available appears in the Status column next to the merge form. The form is available when associating a form to a candidate selection workflow, step, or status.

Deactivating a Merge Form

Before you start

The form must be active.

Configuration > **[Recruiting] Administration** > **Merge Forms**

Here's what to do

1. Click a form.
2. Select Not Available in the Status drop-down list.
3. Click Done.

Results:

In the Merge Forms page, Not Available appears in the Status column next to the merge form. The form is no longer available for selection when associating a form to a candidate selection workflow, step, or status.

Adding the Work Shift Availability Grid in a Merge Form

Before you start

Adobe Acrobat Professional is required to insert variables.

For a list of variables used in the work shift availability grid, see *Work Shift Availability Variables*.

This procedure may differ according to the Adobe Acrobat Professional version being used. Also note that the Adobe LiveCycle Designer software cannot be used to insert token field names. To update a form created with Adobe LiveCycle Designer, you must first print the form to create a regular PDF file, and then edit the new PDF file from within Adobe Acrobat.

Here's what to do

1. In the list of variables available for the work shift availability, copy the desired variable.
   For example, {SHIFT_GRID_DAY1_PER1}.
2. Using Adobe Acrobat Professional, open a PDF form.
3. If you want the Work Shift Availability Grid to present availability using Yes or No text:
   a. In the Tools menu, select Advanced Editing, then Text Field Tool.
   b. Draw a box using your cursor. The Text Field Properties window appears.
   c. In the Text Field Properties window, under the General tab, paste the variable in the Name field.
   d. Enter any other information, such as a tooltip or if the field is required.
   e. Click Close.

4. If you want the Work Shift Availability Grid to present availability using checkmarks (a checkmark indicating that the user is available for a shift, no checkmark indicating that the user is not available):
    a. In the Tools menu, select Advanced Editing, then Radio Button Tool.
    b. Draw a box using your cursor. The Radio Button Properties window appears.
    c. In the General tab, paste the variable in the Name field.
    d. In the Appearance tab, set the Fill Color to white, and the Border Color to No color.
    e. In the Options tab, set the Button Style to Check and select the option "Button is checked by default".
    f. Click Close.

Work Shift Availability Variables

These variables are not included in the Paragraphs feature of the Correspondence Manager and can only be used in the Merge Form feature.

Work Shift Availability Variables
Monday_EarlyMorning: {SHIFT_GRID_DAY1_PER1}
Monday_MidDay: {SHIFT_GRID_DAY1_PER2}
Monday_Afternoon: {SHIFT_GRID_DAY1_PER3}
Monday_Evening : {SHIFT_GRID_DAY1_PER4}
Monday_Overnight: {SHIFT_GRID_DAY1_PER
Tuesday_EarlyMorning: {SHIFT_GRID_DAY2_PER1}
Tuesday_MidDay {SHIFT_GRID_DAY2_PER2}
Tuesday_Afternoon: {SHIFT_GRID_DAY2_PER3}
Tuesday_Evening : {SHIFT_GRID_DAY2_PER4}
Tuesday_Overnight: {SHIFT_GRID_DAY2_PER5}
Wednesday_EarlyMorning:{SHIFT_GRID_DAY3_PER1}
Wednesday_MidDay {SHIFT_GRID_DAY3_PER2}
Wednesday_Afternoon: {SHIFT_GRID_DAY3_PER3}
Wednesday_Evening : {SHIFT_GRID_DAY3_PER4}
Wednesday_Overnight: {SHIFT_GRID_DAY3_PER5}
Thursday_EarlyMorning: {SHIFT_GRID_DAY4_PER1}
Thursday_MidDay {SHIFT_GRID_DAY4_PER2}
Thursday_Afternoon: {SHIFT_GRID_DAY4_PER3}
Thursday_Evening : {SHIFT_GRID_DAY4_PER4}
Thursday_Overnight: {SHIFT_GRID_DAY4_PER5}

Work Shift Availability Variables
Friday_EarlyMorning: {SHIFT_GRID_DAY5_PER1}
Friday_MidDay {SHIFT_GRID_DAY5_PER2}
Friday_Afternoon: {SHIFT_GRID_DAY5_PER3}
Friday_Evening : {SHIFT_GRID_DAY5_PER4}
Friday_Overnight: {SHIFT_GRID_DAY5_PER5}
Saturday_EarlyMorning: {SHIFT_GRID_DAY6_PER1}
Saturday_MidDay {SHIFT_GRID_DAY6_PER2}
Saturday_Afternoon: {SHIFT_GRID_DAY6_PER3}
Saturday_Evening : {SHIFT_GRID_DAY6_PER4}
Saturday_Overnight: {SHIFT_GRID_DAY6_PER5}
Sunday_EarlyMorning: {SHIFT_GRID_DAY7_PER1}
Sunday_MidDay {SHIFT_GRID_DAY7_PER2}
Sunday_Afternoon: {SHIFT_GRID_DAY7_PER3}
Sunday Evening : {SHIFT_GRID_DAY7_PER4}
Sunday_Overnight: {SHIFT_GRID_DAY7_PER5}

Merge Form - Permissions and Settings

The following permissions and settings are used to configure merge forms.

The fields contained in a form obey to the following permissions granted to users:

User Type Permission	Location
Security level for requisitions (in view mode)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Security level for external candidates (in view mode)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Security level for internal candidates (in view mode)	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Setting	Description	Default Value	Location
Merge Form Activation	Activates the Merge Forms feature in the Recruiting Administration menu.	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
Maximum Number Merge Forms in List	Determines the maximum number of pages per merge form.	14	Configuration > [Recruiting] Settings
Maximum Merge Form Size	Determines the maximum size (in bytes) of a single merge form.	512000 bytes	Configuration > [Recruiting] Settings

17 Contingent Hiring

Contingent Hiring

Contingent hiring is used to hire people when needed and for a limited period of time from a third party agency specialized in submitting pre-qualified workers. Contingent hiring may include part-time, temporary and contractor work.

The Contingent Hiring solution is meant to support the first sourcing part of the typical contingent process, where specific requisitions are created and invitations to refer candidates are performed. Once the candidate submitted by an agent is selected for a limited term, there is usually a time sheet and billing process involved, not done within the Recruiting Center.

When the Contingent Hiring feature is activated and configured by the system administrator, users can start acquiring contingent workers. When creating a requisition, users can choose a Contingent requisition type which offers specific contingent functionalities like a candidate selection workflow built for contingent hiring, a Contingent Terms section, supplier invitation to submit candidates using the agency portal, confirmation of availability and specific candidate ownership rules, different from the rules associated with other agent submitted candidates. Once the candidate is hired, the system does not provide additional support like time sheet and billing. To feed such systems, integration with worker information, billing rate and suppliers (agents) can be done upon hiring.

Contingent Hiring Configuration

The configuration of Contingent Hiring by a system administrator is an extensive task and numerous aspects have to be taken into consideration.

The following describes the tasks to be done in a logical order. The order can slightly be changed, but it needs to respect some logic, like, for example, creating the agent portal before associating the agent to the portal.

Activation of the Contingent Hiring Feature

Once the Contingent Hiring feature has been purchased, the module must be activated by Oracle Support. This is done by setting the *Contingent Functionality Activation* setting to Yes.

Setting	Description	Default Value	Location
Contingent Functionality Activation	Activates Contingent functionalities.	No	Configuration > [Recruiting] Settings

For a list of impacts on features when enabling or not the *Contingent Functionality Activation* setting, see *Impacts on Features when Enabling the Contingent Hiring Feature*.

Configuration of User Type Permissions

The system administrator must grant the contingent staffing type to the users who will do contingent hiring.

User Type Permission	Location
Allow access to contingent requisitions	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions

The permission allowing the creation of contingent requisitions using a template must also be granted.

User Type Permission	Location
Create requisitions - Only from a requisition template (contingent recruitment)	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions

Configuration of Settings

The system administrator also enables the following settings.

Setting	Description	Default Value	Location
Contingent Staffing Agent Ownership Delay	Period during which contingent staffing agents own rights over referrals.	0	Configuration > [Recruiting] Settings
Offer Default Start Date Hour	Default employee start time on the start date.	8 a.m.	Configuration > [Recruiting] Settings
Calculator Default Hourly	In the salary calculator, assumes that employees work X hours per day.	8 hours	Configuration > [Central Configuration] Settings
Calculator Default Daily	In the salary calculator, assume that employees work X days per week.	5 days	Configuration > [Central Configuration] Settings

Activation of the Contingent Requisition Type

A contingent requisition type is available. The system administrator must activate it. Once activated, the contingent requisition type becomes available when users are creating a requisition or requisition template in Recruiting.

For details, see *Activating a Requisition Type*.

Configuration of Requisition Field Visibility

All requisition standard fields and user-defined fields are available for contingent usage, but they are not all suitable.

The system administrator can decide which fields are made available for contingent hiring by using the field exception feature. It is possible for the system administrator to remove a field from the contingent view, or make it optional while being mandatory for another staffing type. For example, the Description - Internal field can be configured in the file, but cannot be displayed to agents since the agency portal is by definition an external site. We recommend to deactivate such field via a contingent staffing type exception.

For details, see Creating a Field Exception.

A table presents requisition fields meant to be used for contingent purposes and that should be activated by the system administrator. While they are meant to serve the purpose of contingent hiring, these fields can be activated for any staffing type. See Requisition Fields to be Used for Contingent.

Configuration of Requisition and Requisition Template Files

Requisition templates are important for the contingent hiring process. While it is not required to create a contingent requisition using a template, this is definitely the recommended practice.

The requisition should contain the Contingent Terms block where contingent specific standard fields are located. Two important fields should contain default values:

- Maximum Hourly Rate: Defines the maximum hourly rate allowed for the current requisition. It limits the requested hourly rate amount and also controls the maximum rate an agent can ask while submitting a candidate.
- Requested Hourly Rate: This is the requested hourly rate used to inform the agent about what should be submitted.

These two other fields are also important:

- Estimated Labor Cost: Hourly rate paid to the agency multiplied by the estimated number of hours per days, times the number of estimated days. This is only an estimation based on a fix number of hours per day and a fix number of days per week.
- Estimated Labor Cost and Expenses: Total estimated cost by adding the expenses to the estimated labor cost, when the expenses are reimbursable.

When one of the above two fields is present in the requisition, the Calculate option is displayed. When the Calculate button is pressed, the system calculates the value of those fields. This is based on the number of days the worker is hired based on the start date and end date, using the number of days per week (*Calculator Default Daily* setting), multiplied by the number of hours per day (*Calculator Default Hourly* setting). This number of hours is then multiplied by the requested hourly rate for the Estimated Labor Cost and will add the expense to this into the field Estimated Labor Cost and Expenses if the Expenses Reimbursable field is checked.

User-defined fields can be added into the form used within the Contingent Terms block, or anywhere else within the file. Ideally, the system administrator will also need to configure the system such that the Internal Description field is removed from the Contingent requisition file, since it is not displayed to the agent who is viewing requisitions through an external agency portal.

Association of the Requisition User-defined File to the Contingent Staffing Type

Once the user-defined file is created, the system administrator associates it to the Contingent Staffing type, where needed. Since there are other variations between contingent and other staffing type file format, it is recommended to have a file created specifically for contingent staffing type. This is also true for requisition templates.

For details, see Associating a Requisition File to a Staffing Type.

Configuration of Candidate Field Visibility

All candidate standard fields and user-defined fields are available for contingent usage, but they are not all suitable.

The system administrator can decide which fields are made available for contingent hiring by using the field exception feature. It is possible for the system administrator to remove a field from the contingent view, or make it optional while being mandatory for another staffing type.

Note: While it is possible to do field level configuration for contingent fields, this is not recommended. We recommended instead to use the candidate file creation feature and to create a specific file to be used for contingent hiring using the Requisition File Setup feature available in the Recruiting Administration menu.

For details, see Creating a Field Exception.

A table presents candidate fields meant to be used for contingent purposes and that should be activated by the system administrator. While they are meant to serve the purpose of contingent hiring, these fields can be activated for any staffing type. These fields are only available within the submission context and cannot be placed within the general profile. See Candidate Fields to be Used for Contingent.

Note: Contingent specific fields do not have their counterpart in the offer module. The offer module can be used for contingent purpose, but contingent fields listed under the requisition specific Contingent Terms block are not available into the offer module.

Association of the Candidate User-defined File to the Contingent Staffing Type

It is possible to configure a candidate file for contingent using the same approach as for requisition files. Unlike requisition files, the system administrator can only specify one candidate file for each configuration profile. But these files can have exceptions defined. In this case, it is possible to define the exception file used for contingent staffing type submissions.

For details, see Associating a Candidate File to a Staffing Type.

Creation of the Candidate Selection Workflow

This step is important because some of the candidate selection workflow steps are in theory managed directly by the supplier. The system will not require the system administrator to configure a Contingent Candidate Selection Workflow, but it is recommended to use a specific one to be aligned with realistic scenarios.

In a Contingent Candidate Selection Workflow, there is less prescreening, interview, or background check done for contingent workers when they are prequalified by the agent who will submit them. A scenario of how a customer would use the contingent solution may include a step to allow the online confirmation from the agent and one to automatically move the candidate to the next step. In order for this scenario to occur, the customer must configure such confirmation request, based on the step and status triggering the confirmation link to display in the Agency Portal. To inform the agent to come back and use the confirmation page, a message template must be associated to the Contingent Candidate Selection Workflow and the triggering step and status.

When building the candidate selection workflow, try to keep the contingent flow as simple as possible and note where in the selection process you want to invite the agent to confirm price and availability of the worker you want to select. The offer module is available for Contingent recruiting although contingent-specific fields are not available.

When creating the Contingent Candidate Selection Workflow, it is a good practice to create a CSW for contingent not associated to any OLF, to serve as the default CSW for contingent.

For details, see *Building a Candidate Selection Workflow*.

Creation of an Agency Portal

The creation of the Agency Portal is done via the Career Section Administration module. When the system administrator creates the career section, the Agency Portal type must be selected. For details, refer to the *Career Section Configuration Guide*.

There is no rule preventing the sharing of a portal with contingent agents and other agents. However, it is recommended to use a contingent-specific agency portals for the following reasons:

- The job specific application flow might differ between contingent candidates and other candidates submitted by other agencies. As for candidate selection workflows, the focus is usually different and contingent

candidates will be prescreened by the agencies, thus the pages related to background check or prescreening might not be part of the flow at all.

- The flow should also contain the contingent specific block, where the agent will be able to provide the agency bill rate and even the internal worker ID or requisition number, in order to use those unique IDs later during integration processes.
- Tier 2 and tier 3 agencies might be supported by delayed default posting. Since default posting duration, start and end, are defined at the portal level, creating few portals with different default values will help posting to tier1 agencies first, tier2 with a small delay and potentially tier3 with a longer delay. Such configuration has been requested few times in the past.
- Use the same portal for all agents of the same agency, in order to have a unique default posting duration value while selecting an agency.

The forgot username process, although an available option in the career section properties, should not be used since users are forced to log using their email address. Because it is activated by default, we recommended to deactivate it. (Configuration [Career Section] Administration > Career Sections > Security Settings).

Creation of the Agency Providing Contingent Services

The creation of a contingent agency is similar to the creation of professional agencies. Only agencies with the contingent staffing type will be available while inviting agents to submit candidates to contingent requisitions. The system administrator creates an agency, select the contingent type and decide whether or not this agency is MWBE, which means Minority Women Business Owned. This is a flag available when exporting the agency information to an external system where billing occurs. It has no functional impact in the recruiting application but might be required while exporting supplier information to an external system.

For details, see *Creating an Agency*.

Association of Agents to the Agency

The system administrator needs to add agents to the agency and associate each agent to a portal in order to be able to invite agents to submit candidates. Each agent requires a valid email address. This address will define where the invitations to refer will be sent. It is also used as the agent's username. This is why we recommended to deactivate the forgot username setting in the career section properties.

When the recruiter will invite agencies to submit candidates, to avoid notifying too many agents at once, two options are available:

- Create agencies with a small number of agents.
- Define specific OLF for each agent.Such OLF contextualization will drive which agents are invited for each selected agency.

For details, see *Staffing Agencies and Agents*.

Configuration of the Agent Confirmation Request

The system administrator can configure the Agent Confirmation Request to send a request to the agent to confirm a candidate's availability.

The Agent Confirmation Request is an important step of the contingent hiring process. It is optional, but highly recommended. At some point in the candidate selection process, the system administrator may want to allow the agent who submitted a candidate to confirm the candidate's availability. This is how the agent can interact with the candidate selection process and move the candidate forward automatically. The Agent Confirmation Request can be added to any status of a step of a candidate selection workflow. The system administrator can also decide the status the candidate automatically reaches based on the answer sent by the agent. Yes the candidate is available, or no the candidate is not

available. The email sent to the agent requesting a confirmation contains the text included in the Agent Confirmation Question (multilingual).

The Agent Confirmation Request is configured in the Career Section Administration module. For details, refer to the *Career Section Configuration Guide.*

Configuration of the Agent Confirmation Email

The system administrator may decide to send an email message to agents asking them to confirm the candidate's presence. The system administrator may duplicate the Contribution Request, Agent message template as a starting point. The message should be configured as follows:

- Recipient: Agent.
- Delivery Type: Automatic.
- Triggering Event: Candidate Selection Workflow Context.
- Variable of interest: {CareerSection.AgentReferralUrl}.
- Workflow, Step, Status: The Workflow, Step and Status must be aligned with the Agent Confirmation Request configured earlier so the agent is invited at the same time the link appears in the agency portal.

Contingent Requisition Ownership Rules

For contingent requisitions, the ownership between a submitted candidate and the submitting agent differs from employee or agent referral rules on all other requisition types.

First, there is a contingent specific ownership period used only for contingent submissions.

Second, there is a set of rules that differ from how ownership behaves on all other requisition types:

- Contrary to all other requisition types, ownership can change over time from agent to agent once expired.
- The original ownership is kept at the submission level even after it is expired at candidate level or replaced at candidate level by another agent, to maintain the relationship with the same agent for a specific job. This means users can see a different ownership from requisition to requisition.
- Ownership at the submission level can be modified by the end user. For all other staffing types, ownership is modifiable centrally and impacts all submissions, since there is only one ownership by candidate.

> **Note:** Ownership can exist at the candidate submission level for contingent workers. Once the general ownership is expired, another agent can submit the same candidate again on a new requisition. But while manually changing the agent in the candidate or submission file in the Recruiting Center, the referring agent is changed everywhere, impacting existing requisitions where another agent submitted the same candidate originally. Customer should not change the agent for candidates being active on at least one requisition with another agent.

Since the same agent can be used on both contingent and other staffing types agency referral scenarios, it is not the agent that will determine the ownership but rather the type of candidate submission in play. If the candidate submission that initiates the ownership is a contingent requisition, the contingent setting applies; if the candidate submission initiating the ownership is not contingent, then the standard setting applies. Contingent ownership periods are typically smaller.

Contingent Hiring - Exceptions to Standard Behavior

Important information regarding the behavior of specific features if used with contingent hiring.

Feature	Exception
Sourcing and posting	For contingent requisitions, sourcing is achieved exclusively through invitations sent to agents. There is no direct posting to career sections. This is because contingent hiring process relies on the association between a worker and an agent, and such association is requested at all time to correctly support contingent. To be able to invite an agent, the agent must be associated to an agency portal.
Matching candidates	Although matching candidates is allowed, matching a non-contingent candidate to a contingent requisition will generate a worker without an associated agent. This situation, which is probably an exception, can be corrected by adding the agent once the candidate is matched. Matching a contingent worker to a non-contingent requisition is also allowed, but can generate surprises to those workers since they might start to receive direct correspondences if they have an email in their candidate file (for example, invitations to complete their file and overwrite values entered originally by the agent). This should be considered carefully to avoid generating surprises to candidates. This might also look as an attempt to bypass the agent if this was not discussed previously.
Number of positions	For a contingent requisition, the start date and end date are managed within the requisition. As such, all positions of a single requisition will always have the same rate boundaries and start and end dates. If different boundaries are needed, different requisitions must be created.
Resume parsing	Resume parsing can be used within the agency portal. It can also be used by sending attachments through emails. However, if the agent sending the email is associated to a portal without a general profile flow, the system will not be able to parse the attachment. This is because all email based parsing is profile based and never for a specific job. This is why there is a standard message template that informs agents associated to a portal without a profile flow that if they ever send a resume to the zonename@resumeparsing.taleo.net address, the email parsing is not supported for them. If a profile flow is active, then all standard parsing responses might be triggered. The message template is named *Resume Parsing Service Unavailable to Agents*. This message is triggered when the profile flow is not activated in the agency portal associated with the agent.
Offer module	The offer module can be used with contingent hiring, although conceptually, the interaction between the organization and the candidate is done by the agent, thus the offer module, meant to serve as a contractual agreement between the candidate and the organization, is not the natural path. While most standard fields and user-defined fields can be made available for contingent specific offers, the contingent-specific fields such as Start Date, End Date, Start Time, End Time and Staffing Agency Hourly Rate are not available in the offer module. This aligns to the original design of contingent and is the current expected behavior.

Feature	Exception
Agency with both Staffing and Contingent Staffing services	When both the Staffing and Contingent Staffing services are selected for a specific agency, the system will act as contingent or not based on the requisition where the candidate is submitted. But if the agents associated to such agencies are submitting new candidates as general profiles - through either a profile flow or resume parsing by email - then the system will consider those candidates as non-contingent candidates. It is recommended to have only job-specific application flows when agencies serving both contingent and non contingent are required. If an agent associated to a contingent only agency is submitting a candidate profile, then the ownership delay of the contingent definition will be applied.
Hiring contingent candidates	In order to hire a candidate on a contingent requisition, the candidate must be associated to an agent. All candidates submitted through the agency portal will get such association. However, candidates created manually, matched to a contingent requisition or imported might not have such agent association at first and it must be added before being able to hire the candidate on any contingent requisition.

Impacts on Features when Enabling the Contingent Hiring Feature

Feature	Contingent Functionality Activation setting is enabled	Contingent Functionality Activation setting is not enabled
List Formats	No impact.	No impact.
Fields	Contingent staffing type is available.	Contingent staffing type is not available.
Selection Lists	No impact.	No impact.
Candidate User-defined Files	Contingent staffing block is available.	Contingent staffing block is available, but not displayed in the Recruiting Center.
Requisition and Requisition Template User-defined Files	Contingent Terms block is available	Contingent Terms block is available, but not displayed in the Recruiting Center.
Candidate File Setup	Contingent staffing type is available.	Contingent staffing type is not available.
Requisition File Setup	Contingent staffing type is available.	Contingent staffing type is not available.
Requisition User-defined Forms	Contingent Terms form is available.	Contingent Terms form is available.
Candidate Search Page	No impact.	No impact.
Candidate Selection Workflow	Contingent option is available under Context Display tab.	Contingent option is not available under Context Display tab.
Matching Configuration	No impact.	No impact.

Feature	Contingent Functionality Activation setting is enabled	Contingent Functionality Activation setting is not enabled
Message Templates	No impact.	No impact.
Agencies	Contingent option is available	Contingent option is not available.
Department List	No impact.	No impact.
Position List	No impact.	No impact.
Merge Forms	No impact.	No impact.
Notifications	No impact.	No impact.
Regional Settings	No impact.	No impact.
Requisition Types	Contingent Type available.	Contingent Type is not available.
Center Stage	No impact.	No impact.
Source Tracking	No impact.	No impact.
Integration (Job Board Accounts and Screening Services)	No impact.	No impact.
Automated Tasks	No impact.	No impact.
Product Resources	No impact.	No impact.
Career Section > Application Flows > Job Specific Agency flow	Contingent Staffing block is available.	Contingent Staffing block is available.
Career Section Setup	No impact.	No impact.
Career Section > Statements	No impact.	No impact.

Requisition Fields to be Used for Contingent

Field	Block/Form Where Available	Rules
Start Date	Profile	Mandatory by default, but it can be made optional.
Start Time	Profile	The Recruiting setting *Offer Default Start Date Hour* defines the value of this field. Default is 8 a.m.
Target End Date	Profile	Mandatory by default, but it can be made optional.
End Time	Profile	The Recruiting settings *Offer Default Start Date Hour* and *Calculator Default Hourly* define the value of this field. Default is 8 a.m and 8 hours per day.
Estimated Expenses	Contingent Terms	Represents expenses that can be added in order to calculate the total estimated cost.
Estimated Labor Cost	Contingent Terms	This is a read-only calculated field and it cannot be configured as an input field. The cost is a result of the number of hours per day

Field	Block/Form Where Available	Rules
		(*Calculator Default Hourly* setting) and the number of days the requisition is open, based on the difference between the end date and the start date and the number of days per week, defined in the setting *Calculator Default Daily*, with 5 days a week being the default. Since it is a calculated field, this field cannot be configured by the system administrator.
Estimated Labor Cost and Expenses	Contingent Terms	This is a calculated field, and will include the Estimated Labor Cost plus the Estimated Expenses, if the Expenses Reimbursable field is checked. Since it is a calculated field, this field cannot be configured by the system administrator.
Expenses Reimbursable	Contingent Terms	This check box field is used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the calculation option or saving the requisition.
Maximum Hourly Rate	Contingent Terms	Configure the field such that it is read only for managers – do not allow editing of this field by managers. Defines the maximum hourly rate allowed for the current requisition. This value should in theory come from the template if possible, since it serves to limit the requested hourly rate amount. It also controls the maximum rate an agent can ask while submitting a candidate.
Requested Hourly Rate	Contingent Terms	This is the requested hourly rate used to inform the agent about what should be submitted.

Candidates Fields to be Used for Contingent

Field	Default Field Visibility
Staffing Agency Hourly Rate	Career Section (not relevant to recruiters, for integration purpose only).
Sales Tax must be charged	Career Section, Taleo Recruiting.
Hourly Rate Paid to the Worker	Career Section (not relevant to recruiters, for integration purpose only).
Agency Requisition Number	Career Section (not relevant to recruiters, for integration purpose only).
Worker ID	Career Section (not relevant to recruiters, for integration purpose only).
Worker Type	Career Section, Taleo Recruiting.

18 Pipeline Management

Pipeline Management

Pipeline Management provides the ability to distinguish between contacts and candidates and to build a pipeline of contacts who can be tracked and managed separately.

The Talent acquisition process includes the development of contacts, which are individuals who have never been considered for a job, but have the skills, background, and experience an organization is looking for. Pipeline Management provides customers with a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition.

The system now differentiates requisitions as follows: job requisitions used to hire candidates, and Pipeline Requisitions to build a pipeline of candidates.

Two Pipeline requisition types are available:

- Pipeline - General
- Pipeline - Executive

Configuring Pipeline Management

The configuration of the Pipeline Management functionality consists of the following steps.

1. Activate the Candidate Pipeline Functionality Activation recruiting setting.
2. *Activating Pipeline requisition types.*
3. *Creating a CSW step of type Pipeline.*
4. *Creating a candidate selection workflow of type Pipeline.*
5. *Granting Pipeline Management user type permissions.*
6. Optional: *Configuring the "Threshold to Collect EEO information (USA)" setting* to display the Diversity block in the Career Section in order to collect EEO information.

Activating Pipeline Requisition Types

Before you start

Configuration > **[Recruiting] Administration** > **Requisition Types**

Here's what to do

1. In the Available Requisition Types list, select Pipeline - General and/or Pipeline - Executive.

2. Click Add.
3. Click Done.

Results:

The requisition types are available to Recruiting Center users when they create a requisition.

Creating a CSW Step of Type Pipeline

Before you start

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

Here's what to do

1. Click the Steps tab.
2. Click New...
3. Complete the name, short name (appears on the Step tab in the Recruiting Center Candidates list), code, and comments.
4. Complete the Step Information field if you want to create custom instructions for the step.
5. Select Pipeline in the Reference Model field.
6. Complete the fields in steps 3, 4, and 5 in all available languages.
7. In the Statuses Usage tab, add statuses to the step.

   You can only add statuses that have a reference model of type Pipeline, Rejected, Declined, or Inactive or statuses that do not have any reference model. Note that the Rejected and Declined statuses are selected by default; you can remove them if desired.
8. In the Actions Usage tab, select actions for the step.
9. Click Done.

Results:

The step appears in the Steps page and can be used in a candidate selection workflow.

Creating a Candidate Selection Workflow of Type Pipeline

Before you start

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

Here's what to do

1. Click the Workflows tab.
2. Click New...
3. Enter a name, code, comments, and description.
4. Complete the fields in step 3 in all available languages.

5. Select Available to make the workflow available in the Recruiting Center.
6. Optional: Select Default Workflow to make this workflow the default workflow in the Recruiting Center.
7. In the Steps Usage tab, add one step of type Pipeline.
    a. Click Add...
    b. Select a step.
    c. Click Add.

   Only a step with a reference model of type Pipeline can be added to a pipeline candidate selection workflow.
8. In the Display Context tab, under Requisition Type, select a Pipeline requisition type and click Add.
9. Click Done.

Results:

The Pipeline candidate selection workflow can be used by Recruiting Center users in Pipeline requisitions.

Granting Pipeline Management Permissions

Before you start

The *Manage user types* user type permission is required.

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

Here's what to do

1. Click a user type.
2. Click the Recruiting functional domain.
3. Click Edit next to Requisitions.
4. In the Requisition types section, select the Pipeline permissions:
    - Allow access to pipeline - general requisitions
    - Allow access to pipeline - executive requisitions
5. Click Save.

Configuring the Setting to Collect EEO Information (USA)

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. In the Refine by list, select Category, then Equal Employment Opportunity (EEO), and click Refresh.
2. Click the setting name Threshold to Collect EEO information (USA).
3. Click Edit.
4. Set the value to Never.

5. Click Save.

Results:

In the case of Pipeline requisitions, the Pipeline reference model is before the NEW status. When the setting is set to Never, it means that there is no threshold applied and the Diversity block in the Career Section will display in order to collect EEO information.

Pipeline Management - Other Configuration Tasks

Adding the Requisition Type Column in Requisitions List

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Requisition tab.
2. In the Show list, select a variation and click Refresh.
3. Click an item in the list.
4. In the Columns in this Context tab, click Add...
5. Select the Requisition field group.
6. Select Requisition Type in the Available Fields list.
7. Click Add.
8. Click Done.

Results:

The Requisition Type column appears in the Columns in this Context tab. The column is available to Recruiting Center users when they customize their list formats.

Activating the Self-assigned Task Action Inside a Step

Before you start

The Self Assigned Task action must be available (Candidate Selection Workflow / Actions tab)

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

Here's what to do

1. In the Actions tab, click the Self Assigned Task.

2. Select Available.
3. Click Done.
4. In the Steps tab, click the step where you want to add the action.
5. In the Actions Usage tab, click Add...
6. Select the Self Assigned Task action.
7. Click Done.
8. Click Done.

Results:

The action is added to the selected step. When a candidate gets to the step where the Self-assigned Task action was added, Recruiting Center users have the ability to select the Create a self-assigned task option in the Change Step and Status window or Bypass window. If the option is selected, users have to provide a name, due date, description, and comments for the self-assigned task. The task then becomes available under the Tasks tab.

Adding the Most Advanced Progression Status in Candidates List

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate tab.
2. In the Show list, select a variation and click Refresh.
3. Click an item in the list.
4. In the Columns in this Context tab, click Add...
5. Select the All field group.
6. Select Most Advanced Progression Status in the Available Fields list.
7. Click Add.
8. Click Done.

Results:

The Most Advanced Progression Status column appears in the Columns in this Context tab. This column is available to Recruiting Center users when they customize their list formats.

Making the Most Advanced Progression Status Field Available for the Advanced Search

Before you start

The Candidate Search option available in the Properties page of the Most Advanced Progression Status field must be selected.

Configuration > [Recruiting] Administration > Candidate Search Page

Here's what to do

1. In the Field Group field, select Basic Profile.
2. In the Available Fields list, select the Most Advanced Progression Status field.
3. Click Add.
4. Click Save.

Results:

The field appears in the Selected Fields list. It is available to Recruiting Center users when they customize the advanced candidate search form provided they have access to the advanced search.

Pipeline Management - Permissions and Settings

The following permissions and settings are used to configure the Pipeline Management functionality.

User Type Permission	Description	Location
Allow access to pipeline - general requisitions	Allows Recruiting Center users to create Pipeline requisitions for any type of requisition except executive.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to pipeline - executive requisitions	Allows Recruiting Center users to create pipeline requisitions for executives.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Setting	Description	Default Value	Location
Candidate Pipeline Functionality Activation	Activates Pipeline requisition types (General & Executive) as well as an additional workflow step (Pipeline).	Off	Configuration > [Recruiting] > Settings

19 Evaluation Management

Evaluation Management

Evaluation Management allows organizations to electronically capture, review, and analyze an evaluator's input obtained during a screening process.

Several participants are involved in the evaluation process:

- The Library Manager creates evaluation categories, evaluation questions, evaluation skills, and skill rating scales.
- The Library Manager creates evaluation questionnaires and adds questions and skills to them.
- The Library Manager adds evaluation questionnaires to requisition templates.
- Recruiters add evaluation questionnaires to requisitions.
- Recruiters ask evaluators to evaluate candidates.
- Evaluators provide feedback on candidates they interview.
- Recruiters view evaluation questionnaires completed by evaluators.
- Recruiters create interviews.
- Recruiters view interviews and evaluations details.
- Interview participants respond to interview invitations.

Configuring Evaluation Management

The configuration of Evaluation Management consists of the following steps.

1. *Enabling the Evaluation Questions and Questionnaires Activation setting* to make Evaluation Management available in the Recruiting Center.
2. *Granting Evaluation Management permissions* to allow users to use Evaluation Management in the Recruiting Center and administrators to set up the feature.
3. *Adding Evaluation Management columns in list formats.* These columns are available in the Recruiting Center when users customize list formats.
4. *Creating skill rating scales* to allow users to evaluate candidates' skills using simple rating scales.
5. *Configuring Evaluation Management message templates*. These are used to send notifications and reminders throughout the interview process.
6. *Configuring the system to automatically send notifications.*
7. *Configuring Evaluation Management time zones.*
8. *Selecting Evaluation Management languages.*

Enabling the Evaluation Questions and Questionnaires Activation Setting

Before you start

Configuration > [Recruiting] Settings

Here's what to do

1. Refine the settings list using the Interview Evaluations category.
2. Click the Evaluation Questions and Questionnaires Activation setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Results:

When this setting is enabled, Recruiting Center users have access to the following:

- Evaluation Questions Library
- Evaluation Questionnaires Library
- Evaluation Categories Library
- Evaluation Skills Library
- Evaluation Skill Rating Scales Library
- Interviews tab in requisition templates
- Requisitions and candidate submissions provided they also have the proper user type permissions

If you enable the Evaluation Questions and Questionnaires Activation setting, it is recommended to turn off the Interview Management Activation setting *(Configuration > [Recruiting] Settings)* to avoid confusion for users. These are two separate and distinct features and neither functionality works with the other.

Granting Evaluation Management Permissions

Grant the following Evaluation Management permissions to users.

Permission	Description	Location
Manage questionnaires, questions, skills and categories	Users can access the following libraries in the Recruiting Center: • Evaluation Categories • Evaluation Questions • Evaluation Questionnaires • Evaluation Skills	Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Prescreening and Electronic Feedback > Interviews and Evaluation Questionnaires
Manage skill rating scales	This permission controls the display of the Skills Rating Scales link in the Evaluation Management Administration page.	Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Prescreening

Permission	Description	Location
	Administrators can create, edit, and deactivate Skill Rating Scales library content.	and Electronic Feedback > Interviews and Evaluation Questionnaires
Manage Microsoft Exchange and Active Directory integrations	Users can create, edit and deactivate integrations for Microsoft Exchange and Active Directory using the Evaluation Management Administration menu.	Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Prescreening and Electronic Feedback > Interviews and Evaluation Questionnaires
Access interview information	Users can access the Interviews tab in requisitions they can view. The Add and Remove buttons are controlled by the Add and remove participants permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Interviews and evaluation questionnaires in requisitions
Add and remove questionnaires	Users can access the Interviews tab in requisitions and also add and remove questionnaires.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Interviews and evaluation questionnaires in requisitions
Add and remove participants	Users can add and remove participants in requisitions.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Interviews and evaluation questionnaires in requisitions
Access interview information	Users can access the Interviews tab in requisition templates they can view.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Interviews and evaluation questionnaires in requisition templates
Add and remove questionnaires	Users can access the Interviews tab in requisition templates and add and remove questionnaires.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Interviews and evaluation questionnaires in requisition templates
Access interview information	Users can access the Interviews tab in candidate submissions to which they have access.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Interviews and evaluation questionnaires in candidate submissions
Remove completed questionnaires	Users can remove any completed feedback questionnaires in candidate submissions to which they have access. The ability to remove completed evaluations from the requisition is also managed by this permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Interviews and evaluation questionnaires in candidate submissions
Add and remove participants	Users can add and remove evaluators in candidate submissions.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Interviews and evaluation questionnaires in candidate submissions
Manage interviews	Users can create interview events in the Recruiting Center. Users who do not have this permission can only view details of interview events. The ability to edit and cancel interviews at the requisition level is also managed by this permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Interviews and evaluation questionnaires in candidate submissions
Manage evaluation expirations	This permission controls which Evaluation Management users (recruiters, hiring managers, interview coordinators) have the ability to manage the default expiration date when making standalone feedback requests. By default, evaluation expirations are calculated based on the value set in the Evaluation	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Interviews and evaluation questionnaires in candidate submissions

Permission	Description	Location
	Expiration setting available in the Evaluation Management Administration page. Users can renew a request, which will send the evaluator a link to complete the evaluation. The Renew Request button will become visible.	

Adding and removing evaluators in candidate submissions and requisitions

When users only have the permission to add evaluators in candidate submissions, the evaluators are only linked to candidate submissions.

When users have the permission to add evaluators in requisitions or both in requisitions and candidate submissions, the evaluators are linked to the requisitions and all associated candidate submissions.

When users only have the permission to remove evaluators in requisitions, the evaluators are removed from requisitions only. All previously created candidate submissions are not affected. However, new candidate submissions created after an evaluator has been removed will not have that evaluator.

When users only have the permission to remove evaluators in candidate submissions, the evaluators are removed from candidate submissions only.

When users have the permission to remove evaluators in requisitions as well as in candidate submissions, the evaluators are removed from requisitions as well as from candidate submissions that do not have any requests or completed feedback from the removed evaluator. If a request has been made or an evaluation has been completed, the evaluator is removed from the list of evaluators for that candidate submission and can no longer be sent feedback requests (unless that evaluator is added to the Evaluators section again).

Adding Evaluation Management Columns in List Formats

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Columns in this Context tab, click Add...
5. Select these two fields:
    - Completed Questionnaires: displays the number of completed questionnaires out of the total number of requested questionnaires.
    - Questionnaire Average Score: displays the average question score of all completed questionnaires.
6. Click Add.
7. Click Done.

Results:

The columns appear in the Columns in this Context tab. The columns are available to Recruiting Center users when they customize list formats. In the Recruiting Center, the name of the two columns are: Q'naire Avg Score, Completed Q'naires.

Creating Skill Rating Scales

Skill based rating questions are available in Evaluation Management. Recruiters can evaluate candidates' skills using simple rating scales and they can compare candidates against each other and the desired skill level for the position. Charts provide users with a visual means of reviewing results and comparing responses.

In the Evaluation Management Administration page, the Skills Rating Scales link directs system administrators to the Skills Rating Scales library where they have the ability to create rating scales if they were granted the Manage rating scales permission.

The Skills Rating Scales library provides quick filters to filter and search skill ratings according to the following criteria:

- Name of the skill rating scale.
- Status (Active, Inactive, Draft, All).
- Category: categories available in the Evaluation Categories library.
- Scale value: the number of rating values in the rating scale. For example, the rating scale "Needs Development-Meets Expectations-Exceeds Expectations" would have a scale value of three.

Quick filter criteria can be used individually, or several criteria can be used together. Once the skill rating scales are filtered, sorting can also be performed on the list by clicking on the column header.

Creating a Skill Rating Scale

Before you start

Configuration > **[Evaluation Management] Administration** > **Skills Rating Scales**

Here's what to do

1. Click Create.
2. Complete the fields. See *Skill Rating Scale Properties*.
3. Click Save.

Skill Rating Scale Properties

Property	Description
Skill Rating Scale	The name of the skill rating scale. For example: Hourly Employee Scale.
Short Label	Limited to 30 characters. The short label is not required. However, it is recommended to define one if using the functionality with an iPad.

Property	Description
Select the scale to be applied to ratings	The numerical value selected determines the number of scale labels (text input fields) for that rating scale.
Rating Value and Rating Label	The rating value represents the number of labels in the rating scale. The rating label represents the choices displayed to users. For example: Skill Rating Scale: Hourly Employee Scale Rating Values and Rating Labels: • 1: Needs development • 2: Meets expectations • 3: Exceeds expectations
Status	Skill rating scales can have one of three statuses: • Draft • Active • Inactive When creating a new rating scale, you can only choose between Draft and Active. A rating scale must be saved in the Active status for the Inactive status to become available for selection. Once a rating scale is in the Active status, it cannot be edited.
Activated Languages	While creating a new skill rating scale, translations can be created through the Activated Languages drop-down. Languages that have translated content are displayed in blue in the list. Translations should be entered prior to saving the rating scale as active.
Category	The category can be used to classify the skill rating scale. It is optional.

Configuring Evaluation Management Message Templates

Evaluation Management message templates are available to support evaluation and interview notifications and reminders and to keep everyone more informed throughout the interview process.

Evaluation Management message templates are available in the Evaluation Management Administration page. They are provided by default with the system and can be customized by system administrators. When changes are made to a message, it is possible to go back to the message original version by clicking **Revert to Default**.

Message Template	Recipient
Accepted Interview Invitation	Interview creator.
Cancellation of Request to Complete an Evaluation, Evaluator	Interview participant or person asked to complete an evaluation questionnaire via an evaluation feedback request.
Declined Interview Invitation	Interview creator.
Evaluation Completed, Evaluation Requester	Interview creator (if it included questionnaires) or person who created the evaluation feedback request.
Evaluation Completed, Evaluator	Interview participant or person asked to complete an evaluation questionnaire via an evaluation feedback request.

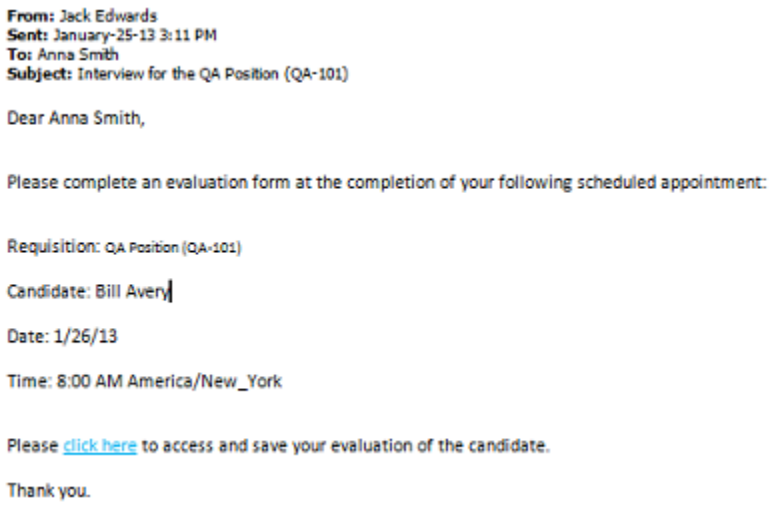
Message Template	Recipient
Evaluation Expiry Reminder, Evaluation Requester	Interview creator (if it included questionnaires) or person who created the evaluation feedback request.
Evaluation Expiry Reminder, Evaluator	Interview participant or person asked to complete an evaluation questionnaire via an evaluation feedback request.
Evaluation Expiry, Evaluation Requester	Interview creator (if it included questionnaires) or person who created the evaluation feedback request.
Final	Person asked to complete an evaluation questionnaire via an evaluation feedback request (this template can be selected when creating a feedback request).
Follow-up	Person asked to complete an evaluation questionnaire via an evaluation feedback request (this template can be selected when creating a feedback request).
General	Person asked to complete an evaluation questionnaire via an evaluation feedback request (this template can be selected when creating a feedback request).
Initial	Person asked to complete an evaluation questionnaire via an evaluation feedback request (this template can be selected when creating a feedback request).
Interview Cancellation	Interview participant.
Interview Confirmation	Interview participant.
Interview Details Changed	Interview participant.
Interview Invitation	Interview participant.
Interview Reminder	Interview participant.
Interview Rescheduled	Interview participant.
Prescreen	Person asked to complete an evaluation questionnaire via an evaluation feedback request (this template can be selected when creating a feedback request).
Request to Reschedule an Interview	Interview creator.

Note: In version 13B, the character limit for the message template Text field was expanded to accept a considerably larger amount of content. With the increased limit, some impacts to the user experience could potentially be encountered. The issue is only experienced when more than 100,000 characters are pasted into the Text field. When saving the message template, a validation message is displayed warning that the maximum 100,000 character limit has been exceeded. In an effort to prevent browser performance issues, the previously entered, large amount of data is not stored and would need to be reentered and adjusted to fit within the 100,000 character limit.

Displaying the Feedback Request URL as Text in Message Templates

When configuring Evaluation Management message templates, system administrators can put a URL token in the body of the message and to have the URL displayed as text instead of the entire URL string.

When evaluators receive a feedback request, the URL in the message appears as an hyperlink. When evaluators click the link, they are redirected to the appropriate questionnaire form.



From: Jack Edwards
Sent: January-25-13 3:11 PM
To: Anna Smith
Subject: Interview for the QA Position (QA-101)

Dear Anna Smith,

Please complete an evaluation form at the completion of your following scheduled appointment:

Requisition: QA Position (QA-101)

Candidate: Bill Avery

Date: 1/26/13

Time: 8:00 AM America/New_York

Please click here to access and save your evaluation of the candidate.

Thank you.

Displaying the Feedback Request URL as Text

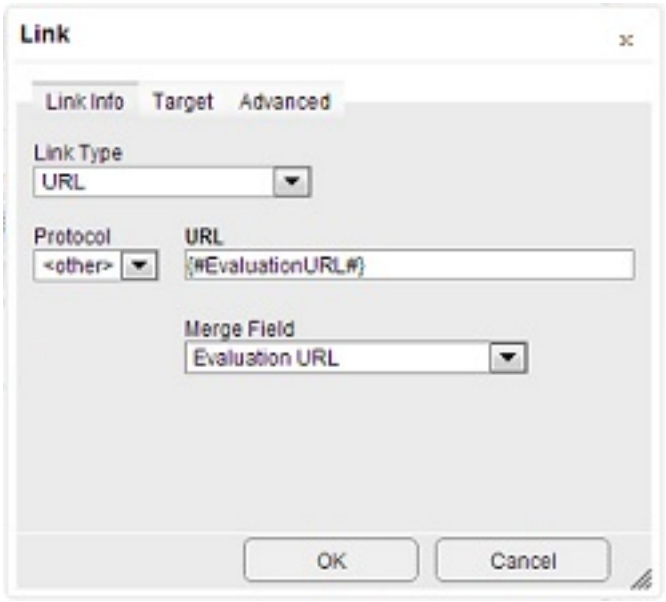
Before you start

Configuration > [Evaluation Management] Message Templates

Here's what to do

1. Click on a message template.
2. In the Text field, add the wording where the URL will appear. For example, you could type "Please click here to access the evaluation form."
3. Select the text you want to display as a hyperlink. For example, you could select the words "click here" in the above example.
4. Click the Insert/Edit Link link icon.

5. In the Link Info tab:
    a. Select URL in the Link Type drop-down.
    b. Select <other> in the Protocol drop-down.
    c. Select Evaluation URL in the Merge Field drop-down (which only appears after selecting <other>). The URL field will then display the following value: {#EvaluationURL#}.



6. Click OK.
7. Click Save.

Configuring the System to Automatically Send Reminders

System administrators can configure the system to automatically send notifications to interview participants and evaluators to remind them that an interview is approaching or an evaluation will be expiring.

The following message template settings are available. Notifications can be sent 1, 2, 6, 12, 24, or 48 hours before the interview or evaluation expiry. By default, these notifications are configured to be sent 1 hour before the interview or evaluation expiry.

Path: Configuration > Evaluation Management > Administration > Message Template Settings

Message Template	Trigger Notification
Interview Reminder	Prior to interview
Evaluation Expiry Reminder, Evaluator	Prior to expiration
Evaluation Expiry Reminder, Evaluation Requester	Prior to expiration

Interviewer Notification with Attachments

Interview participants can get candidate artifacts as attachments instead of an unsecured link. The security is enhanced because it prevents unauthorized sharing of candidate artifacts and its corresponding indexing in search engines.

Use the setting Interviewer Notification with Attachment and sent it to Yes (Path: Configuration > Evaluation Management > Administration > Settings)

When the feature is enabled and interviews are being rescheduled, interview participants will get candidate artifacts as attachments. Previous emails with links to attachments will not be accessible. Web forms continue to be available through a link.

Selecting Evaluation Management Time Zones

Evaluation Management time zones are configured in the Evaluation Management Administration page. Time zones must be configured correctly to send evaluation requests.

There are two time zone settings in the Evaluation Management Administration page:

- Time Zones: Select which time zones are available for use in Evaluation Management. Recruiters will have access to these time zones when sending feedback requests.
- Default Time Zone: Select a default time zone for Evaluation Management. The default time zone is used when sending feedback requests.

By default, the system displays the user's preferred time zone (defined under *Recruiting Center > Resources > My Setup > Preferences > Time Zone* and also under *Configuration > [SmartOrg] Administration > User Accounts > General Preferences > Time Zone*). That default time zone must be activated in Evaluation Management (*Configuration > [Evaluation Management] Administration > [Display] Time Zones*) to properly reflect this setting in Evaluation Management.

If the user's time zone is not defined in Recruiting or SmartOrg, the system will display the default time zone set in Evaluation Management.

If the default time zone set in Evaluation Management does not match the time zone set in Recruiting or SmartOrg setting, the Recruiting or SmartOrg default time zone will be reflected in Evaluation Management.

> **Note:** The default time zone set in the Career Section Administration menu (*Configuration > [Career Section] Settings*) and the one set in the Evaluation Management Administration menu (*Configuration > [Evaluation Management] Administration > [General Configuration] Default Time Zone*) should be identical. Also, the user's preferred time zone is not taken into account (*Configuration > General Configuration > Settings > Time Zone*).

Selecting Evaluation Management Time Zones

Before you start

Configuration > **[Evaluation Management] Administration**

Here's what to do

1. Click Time Zones.
2. Select the desired time zones.
3. Click Save.

Selecting a Default Evaluation Management Time Zone

Before you start

Configuration > **[Evaluation Management] Administration**

Here's what to do

1. Click Default Time Zone.
2. Select a time zone.
3. Click Save.

Selecting Evaluation Management Languages

Evaluation Management languages are configured in the Evaluation Management Administration page.

System administrators can select which languages are available in Evaluation Management.

Note: Evaluation Management is using a different approach to manage languages.

- The application language in Evaluation Management (the language used to display UI labels) aligns with the application language usage in Recruiting.
- The content language (the language used to display the content in requisitions and candidate submissions) is preserved during navigation. For example, if a user changes the language of a requisition, the language of the evaluation questions in the requisition will be adjusted accordingly.
- Content languages defined within Evaluation Management must be manually aligned with content languages activated in the Organization Content Languages setting *(Configuration > Career Section Administration > Settings)*.
- The base language in Evaluation Management aligns with the base language usage in Recruiting. The base language of an entity is aligned with the user preferred language. However, please note these differences in Evaluation Management:
  - The base language cannot be modified since no language configuration tool is available.
  - The base language is displayed in the list of evaluation questions.
  - The word (Base) does not appear next to the base language in the language drop-down list.
  - Additional languages do not have statuses but are automatically made available upon saving.
  - Languages for which a translation was provided are displayed in blue.

Selecting Evaluation Management Languages

Before you start

Configuration > **[Evaluation Management] Administration**

Here's what to do

1. Click Languages.
2. Select the desired languages.
3. Click Save.

Configuring Microsoft Office 365 and Azure Active Directory Integration

If your organization wants to integrate Microsoft Office 365 and Azure Active Directory (Azure AD) in Evaluation Management, perform the following configuration steps.

1. *Enabling the Evaluation Interview Integrations Activation setting* to display the Integrations menu in the Evaluation Management Administration page and configure the integration.
2. *Granting the Manage Microsoft Exchange and Active Directory integrations permission* to grant set up privileges.
3. *Registering Oracle Taleo Enterprise Edition on Microsoft Azure portal.*
4. *Configuring Microsoft Office 365.*
5. *Configuring Azure Active Directory.*

This integration allows interview coordinators to view free / busy calendar information of interviewers on Microsoft Office 365. The interview coordinator can browse Microsoft Office 365 directory to add participants to an interview. Once the desired participant is added and a target date and time is set for the interview, the interview coordinator can view the free / busy availability grid to determine the optimal time to schedule an interview with the interviewer.

Prerequisites for integrating Microsoft Office 365:

- Oracle Taleo Enterprise Edition release 17.5.2 or later.
- Active subscriptions to Microsoft Office 365 and Azure AD.
- Seamless integration of Azure AD with Microsoft Office 365.
- Renewal of Azure AD symmetric key when the subscription expires or when moving to a different subscription.
- Secure access to Microsoft Office 365 from Oracle Taleo Enterprise Edition.
- Registration of Oracle Taleo Enterprise Edition on Azure AD portal.
- Creation of user in Microsoft Office 365 which is used by Oracle Taleo Enterprise Edition to pull free / busy calendar information.

Other considerations:

- It is the customer's responsibility to have Microsoft Office 365 and Azure AD properly connected. Oracle does not support issues related to Microsoft Office 365 and Azure AD interconnection.
- It is the customer's responsibility to choose and activate the correct integration options in Oracle Taleo Enterprise Edition. Oracle does not support integration between products such as Microsoft Office 365 with on-premises Active Directory or Azure AD with Exchange server.
- It is the customer's responsibility to enable single sign-on to Microsoft Office 365.

Note: Taleo Evaluation Management supports OAuth 2.0 for authentication and authorization.

Enabling the Evaluation Interview Integrations Activation Setting

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Refine the settings list using the Interview Evaluations category.
2. Click the Evaluation Interview Integrations Activation setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Results:

When this setting is enabled, the Integrations menu in the Evaluation Management Administration page becomes available.

Registering on Microsoft Azure Portal

For Recruiting to communicate with Azure Active Directory, you must register Oracle Taleo Enterprise Edition on the Azure Cloud portal to create a secure connection between Recruiting and Azure Active Directory. This will generate a key that you must copy in Oracle Taleo Enterprise Edition.

1. Go to the Azure portal and log in to your Azure Account.
2. Select Azure Active Directory in the left menu.
3. Select App registrations.
4. Select New application registration.
5. Enter the following information:
    - Name: Choose a name for the application.
    - Application type: Select Web app/ API.
    - Sign-on URL: Enter the URL pointing to the Oracle Taleo Enterprise Edition zone of your choice. For example: https://customer.taleo.net.
6. Click Create. The Client ID and Symmetric Key are generated. These are required when configuring Active Directory for Microsoft Office 365.
7. Click Settings.
8. Click Required Permissions.
9. Select the option Read Directory Data.
10. Click Save.
11. Click the Grant Permissions button.
12. Click Keys.
13. Add a description and duration for the key.
14. Copy the key displayed and paste it on a document. You will not be able to see it again later.

Configuring Microsoft Office 365

Before you start

You must have a user created in Microsoft Office 365 with the ability to read calendars.

Configuration > [Evaluation Management] Administration

Here's what to do

1. Click Integration Configuration.
2. Click Create next to Exchange Integrations.
3. Enter a name for the integration.
4. Enter the Microsoft Office 365 domain name. This information is provided by Microsoft when subscribing to Office 365.
5. Set the status to Active.
6. Select Office365 for the version.
7. Enter the Exchange Web Services URL. The default value is https://outlook.com/EWS/Exchange.asmx.
8. Enter the user name of the registered Office 365 user. If you use a vanity domain, use this domain. Example: john.doe@vanity.com.
9. Enter the password provided for the Office 365 user.
10. Click Save.

Configuring Active Directory for Microsoft Office 365

Before you start

Oracle Taleo Enterprise Edition must be registered on the Microsoft Azure portal.

Configuration > [Evaluation Management] Administration

Here's what to do

1. Click Integration Configuration.
2. Click Create next to Active Directory Integrations.
3. Enter a name for the integration.
4. Enter the Active Directory domain name. This information is provided by Microsoft when subscribing to Office 365. Use the full domain name with onmicrosoft.com. Do not use the vanity domain.
5. Set the status to Active.
6. Set the active directory type to Cloud AD to enable the supported AD configuration with Microsoft Office 365.
7. Set the authentication method to NA - Cloud AD.
8. The Active Directory URL is defaulted to Microsoft's graph API's URL for Cloud AD.
9. Enter the Client ID. The Client ID is generated when registering Oracle Taleo Enterprise Edition on the Azure AD portal. Ask Azure administrator to provide you with the value.
10. Enter the symmetric key. The symmetric key is generated when registering Oracle Taleo Enterprise Edition on the Azure AD portal. Ask Azure administrator to provide you with the value.
11. Click Save.

20 Reporting

Daily Recruiting Report

The daily recruiting report is an e-mail message that contains statistics on one or more requisitions.

The daily recruiting report is configured in the requisition Reports tab. Recruiting Center users can indicate that a requisition will be included in the report and select the people who will receive the e-mail message with statistics on the requisition.
Statistics available in the daily recruiting report are:

- Global statistics: new applications, candidates in the database and the number of requisitions in the various stages of the hiring cycle.
- Statistics on requisitions assigned to you (as the recruiter or owner): number of new candidates and number of posted requisitions.
- Details on requisitions for which you are a recipient or interested team member: requisition title and status, number of candidates by status, and opening and closing posting dates.

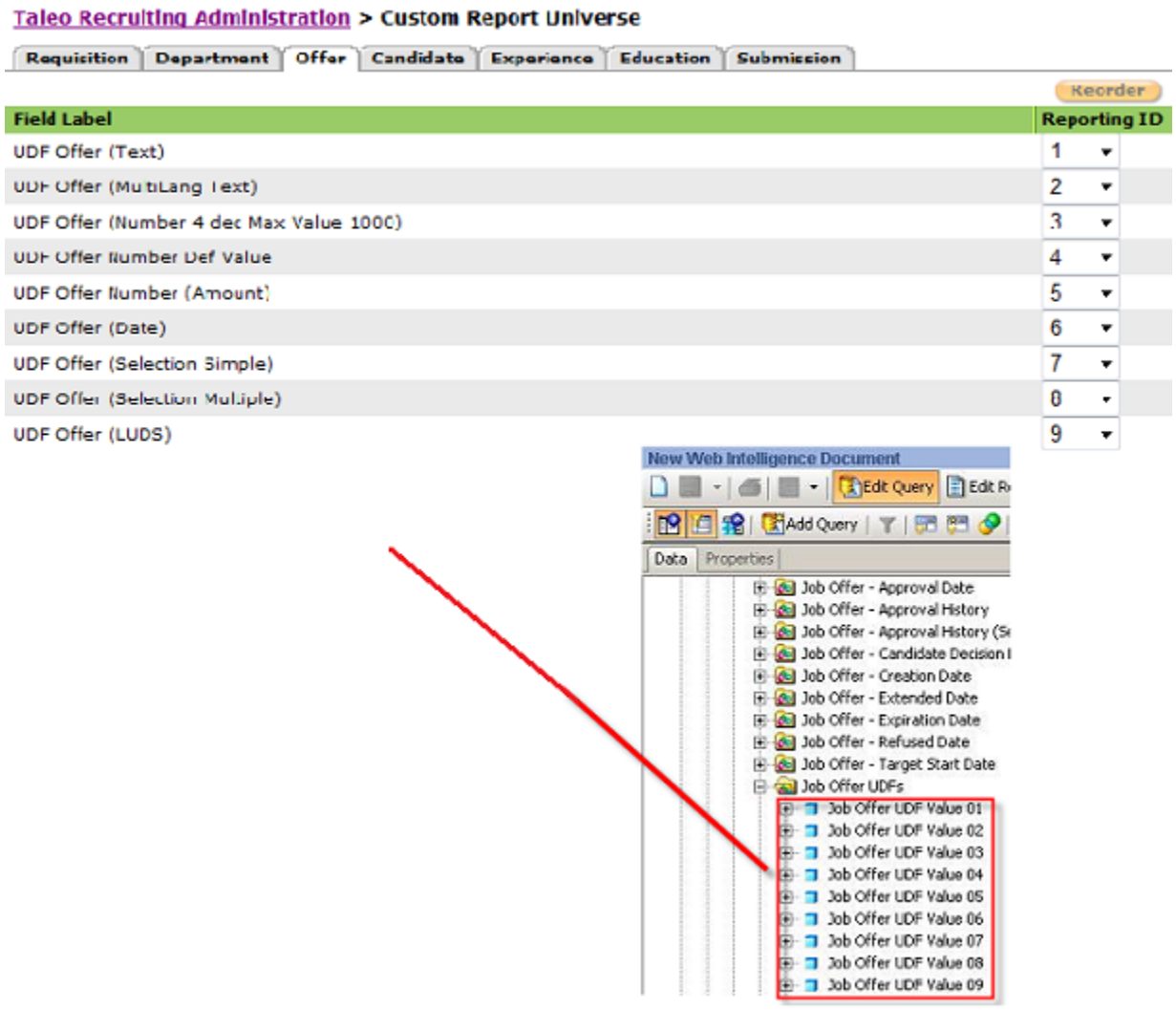
Configuration

User Type Permission	Location
View and manage the daily recruiting report	Configuration > [SmartOrg] Administration > User Types > Recruiting > Requisitions

Custom Report Universe

The Custom Report Universe is a tool that allows system administrators to view user-defined fields available in reports and to assign IDs for each field in the report.

The Custom Report Universe page displays user-defined fields that have been tagged to appear in reports. Fields are organized into categories that is Requisition, Department, Offer, Candidate, Experience, Education, and Submission. System administrators can assign a Reporting ID to up to 250 UDFs, making those UDFs available to be included in reports created with OBI or OAS Reporting.



Note: In the Custom Report Universe configuration page, if one of the UDFs for a field category (Requisition, Department, Offer, Candidate, Experience, Education, Submission) has its Reporting ID set to 250, the following error message will be displayed when trying to make another UDF available in reporting: "The maximum number of user-defined fields has been reached for the Custom Report Universe". This message will be displayed even if other Reporting IDs are still available to be assigned to a UDF. This is a known issue. As a workaround, we recommend not assigning the Reporting ID number 250 until all other Reporting IDs have been assigned to other UDFs.

Configuring a Custom Field for Reports

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. In the Recruiting Administration menu, click on a field category.
2. In the fields page, click Show User-defined Fields.
3. Click on a user-defined field.
4. Click Edit Field Availability next to Properties.
5. Select the option Custom Report Universe.
6. Click Save.

Results:

The user-defined field appears in the Custom Report Universe page and can be assigning a Reporting ID to be used in reports.

Organizing Custom Fields in Reports

Before you start

Configuration > **[Recruiting] Administration** > **Custom Report Universe**

Here's what to do

1. In the Custom Report Universe page, under each tab, select the position of the field by selecting a number in the Reporting ID list.
2. Click Reorder.

Results:

In the report, fields will be displayed in the specified order.

Embedded Reporting

Recruiting customers can use the Oracle Analytics (OAS) Publisher technology to create reports on all their recruiting data. End-users are able to import, customize and run reports directly in the Recruiting Center.

In the Recruiting Center, the navigation bar displays a **Reports** link to users who have been granted permissions to access and generate reports. The Reports link gives access to:

- Generated Reports
- Scheduled Reports

Configuring Embedded Reporting

Recruiting customers can use Oracle Analytics (OAS) Publisher technology to create reports on all their recruiting data. End-users are able to import, customize and run reports directly in the Recruiting Center.

With this feature, the Embedded Reporting server interacts with Oracle Analytics (OAS) subject areas to extract reporting data, and with Oracle BI Publisher to execute and render pixel perfect reports. Report writers have the ability to create and deploy new reports for end users, and reports are viewed in Recruiting.

Different roles are involved to configure embedded reporting in Recruiting:

- Oracle Support enables Embedded Reporting in the customer zone.
- The system administrator configures and assigns user type permissions to users.
- The report writer builds new data models and also develops, configures and deploys reports.

The main tasks when configuring Embedded Reporting are:

1. *Enabling the Embedded Reporting feature.*
2. *Granting permissions to users.*
3. *Creating a report definition category* to group report definitions.
4. *Creating a data model definition* which consists in the following tasks:
    a. *Defining the properties of the data model.*
    b. *Defining a data set for the data model.*
    c. *Creating a list of values for the data model.*
    d. *Defining parameters for the data model.*
    e. *Validating the data model definition.*
    f. *Activating the data model definition.*
5. *Producing the report with Oracle BI Publisher.*
6. *Creating a report definition.*

This table shows a high level development process for reports.

1. Develop Data Model	2. Develop Report	3. Configure Report	4. Deploy Report
Create queries.	Import XML data into report plugin.	Upload reports.	Test report in Recruiting.
Define query relationships.	Configure report tables and charts.	Associate report with data model.	Validate group and data security.
Create lists of values and prompts.	Format the reports.	Set report category.	Validate prompts work properly.
Validate data model by exporting data samples.	Define additional logic as needed.	Set report group security.	Validate fidelity various export formats.
Activate data model for use.	Validate report.	Set available export formats	Test using different users.
		Activate report (publishes it to Recruiting).	

Important Information

This first release of the Recruiting Embedded Reporting feature is intended to set the foundation for the feature and to support conversion of content via 3rd party partners. The content development features are functional but new

and complex, so intended towards early adopter users who are familiar with Oracle Analytics (OAS) Publisher or Native Reporting report development only.

Enabling Embedded Reporting

To enable the Embedded Reporting feature, contact Oracle Support. Once the feature is enabled, a section called Embedded Reporting becomes available in the Recruiting Administration menu.

Granting Permissions for Embedded Reporting

The system administrator is responsible for granting the following reporting user type permissions.

Permission	Description	Location
Access Embedded Reports	Users with this permission can access the Reports tab in the Recruiting Center.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other
Access Embedded Reporting Management	Users with this permission can access the Embedded Reporting Administration page available in the Recruiting Administration menu.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration
Access Subject Area – Recruiting (Legacy)	Users with this permission can build reports using the converted Recruiting subject area. The Recruiting (Legacy) subject area is only available to clients who currently have BO.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence
Access Subject Area – Recruiting	Users with this permission can build reports containing recruiting data.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence
Access Subject Area – Administration	Users with this permission can build reports using the converted Administration subject area.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence
Access all reportable data for Recruiting	Users with this permission can access all reportable data without being hampered by row level security restrictions.	Configuration > [SmartOrg] Administration > [Users] User Types > Report Data
Perform Administration Tasks	The BI administrator has all of the rights of the BI author.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence
Author Content (BI Developer)	The BI developer has full fledged report, dashboard and agent authoring capabilities.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence
View Reports and Dashboards	Users with this permission can view, refresh, and export content. No authoring rights exist.	Configuration > [SmartOrg] Administration > [Users] User Types > Reporting and Analytics > Oracle Business Intelligence

The following permissions should be granted to report writers:

- Author Content (BI Developer)
- Access Subject Area – Administration - (optional)
- Access Subject Area – Recruiting (Legacy) - (optional)
- Access Subject Area – Recruiting - (optional)
- Access Embedded Reporting Management
- Access Embedded Reports

The following permissions should be granted to report viewers:

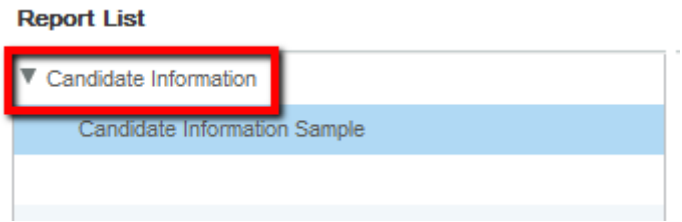
- View Reports and Dashboards
- Access Subject Area – Administration - (optional)
- Access Subject Area – Recruiting (Legacy) - (optional)
- Access Subject Area – Recruiting - (optional)
- Access Embedded Reports

Creating a Report Definition Category

Categories are used to group report definitions.

Report definition categories are created by clicking the Report Definition Categories link in the Embedded Reporting Administration page (*Configuration > Recruiting Administration > Embedded Reporting Administration > Report Definition Categories*).

When creating a report definition category, the report writer provides a unique name. Report definition categories can be duplicated, edited, activated, deactivated, and deleted by the report writer. A category can have the Active or Inactive status. Once a category is Active, it can be used to group report definitions. An Active category cannot be deactivated if report definitions are associated to it.
In the Recruiting Center, report definition categories appear in the Report List.



Creating a Report Definition Category

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Report Definition Categories.
2. Click Create.
3. Provide a unique name for the category.
4. Click Save.
5. Click Activate.

Results:

The report category is displayed in the Report Definition Categories list and its status is Active.

Creating a Data Model Definition

A data model definition contains a set of instructions to retrieve structured data to generate reports. It contains a list of parameters and data sets (or collection of reportable fields).

Data model definitions are created by clicking the Data Model Definitions link in the Embedded Reporting Administration page (*Configuration > Recruiting Administration > Embedded Reporting Administration > Data Model Definitions*).

Several steps are required to create a data model definition:

- *Defining the properties of the data model.*
- *Defining a data set for the data model.*
- *Creating a list of values for the data model.*
- *Defining parameters for the data model.*
- *Validating the data model definition.*
- *Activating the data model definition.*

Defining the Properties of the Data Model Definition

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click Create.
3. Provide a name and a description for the data model.

Defining a Data Set

The report writer defines data sets which are used for providing objects to insert into a report (report definition). A data set contains a SQL query which represents the logic to retrieve data from a single data source. The data set can use parameters in its logic.

When creating a data set, the report writer defines a name for the data set, selects the query type (logical or physical), writes the query, then validates the accuracy of the query before saving it. The intent of the validation is to make sure the query is executed by the system.

Note: When creating data sets, logical SQL is the recommended SQL type over physical SQL.

Note: When creating data sets using logical SQL, OBI or OAS Answers can be used as a reference to learn the syntax and save time. Logical SQL is generated automatically in OBI or OAS Answers. The syntax is the same between OBI or OAS Answers and BIP except for the way prompts are managed. If you leave the column aliases created by OBI or OAS (s1, s2, s3, etc), those aliases will be used in the xml. It is recommended to remove or rename the aliases created in OBI or OAS. The syntax for the parameter is a colon followed by the parameter name. For example when writing a where clause utilizing a parameter named req_id the syntax is as follows: WHERE("Requisition Identification"."Req. Identifier" = (:req_id)

Defining a Data Set

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click on the desired data model definition.
3. Click Edit next to Data Sets.
4. Click the + icon located on the right.
5. Use the input text field on the left to search for objects.

   You can enter any alphanumeric characters in the input text field. Also, the following wildcards are accepted:

   - "*" matches one or many characters.
   - "$" matches only one character.
   - "\" is the escape character; the following character is not taken into account for any wildcards.
6. Provide a name to the data set.
7. Selects the query type (logical or physical).
8. Write the query.

9. Validate the accuracy of the query.
10. Click Save.
11. Click Save.

Creating a List of Values

The report writer creates a list of values that will appear in a selection list or drop-down list.

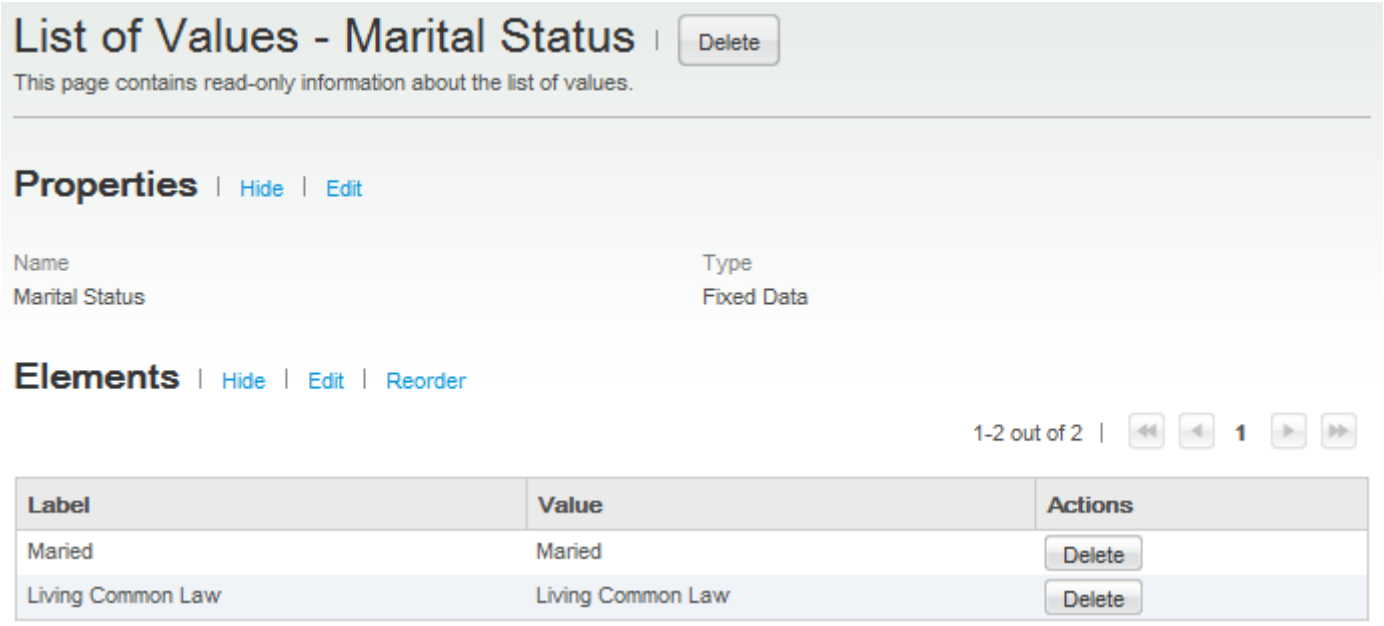
Two types of values are available:

- SQL Query: This will provide a dynamic list of values. The query will fetch the list from the database. For instance, if you want a selection list of requisition ID's, you would create a SQL query to get the list of requisition ID's.
- Fixed Data: This will create a static list of values that is not data dependent. For instance, marital status.

If selecting SQL Query, the report writer provides a name for the query, selects between a logical or physical query, writes the query, then validates the accuracy of the query before saving it. The intent of the validation is to make sure the query is executable by the system.

> **Note:** Oracle Analytics (OAS) creates logical SQL which can be used to create SQL statements to fit your data model needs.

If selecting Fixed Data, the report writer provides a name then creates the different list elements that will be used in the query. The label is the name that appears in the Recruiting Center while the value is used in the query execution.



Creating a List of Values of Type SQL Query

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click on the desired data model definition.
3. Click Create next to List of Values.
4. Provide a name.
5. Select SQL Query.
6. Click Save.
7. Click Edit next to Query.
8. Select a subject area.
9. Selects the query type (logical or physical).
10. Write the query.
11. In the Search Alias field, define the alias that will be used as a search criterion.

    The Search tool is available to users in the Recruiting Center if the Search Alias field has been defined in the List of Values of a data model definition. The search should be enabled when there is a possibility that there will be more than 999 possible values. The Search Alias is only available for a list of values using an SQL query.

12. Validate the accuracy of the query.
    When you click the Validate query button, the system validates the accuracy of the query. If the query is accurate, the system will, as a second step, verify if the search alias is valid and if it can be used to search values.
13. Click Save.
14. Click Save.

Creating a List of Values of Type Fixed Data

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click on the desired data model definition.
3. Click Create next to List of Values.
4. Provide a name.
5. Select Fixed Data.
6. Click Save.
7. Click Edit next to Elements.
8. Enter a label and a value.
9. Click Add to create other elements.
10. Click Save.
11. Click Save.

Defining Parameters

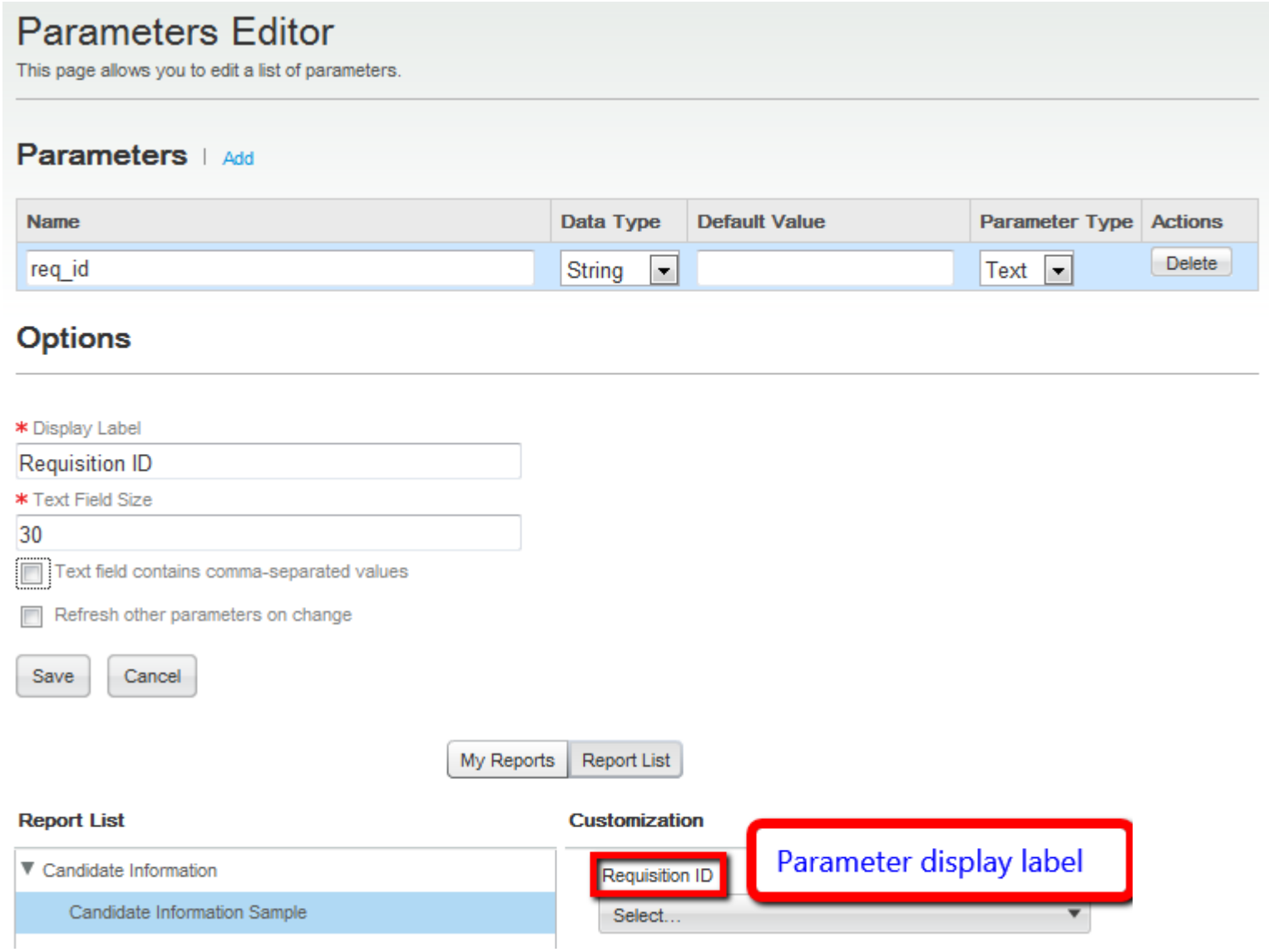
The report writer defines parameters that are used for customizations. Parameters are used as constraints to filter data for the report.

As an example, in order to avoid having the whole list of submissions from the system, the report writer could only have submissions done in Canada. In that case, there would be a parameter named Location from which to select Canada. When creating parameters, the report writer defines a name for the parameter, a data type, a default value (optional), a parameter type, and a display label (label appearing in the Recruiting Center Report List).

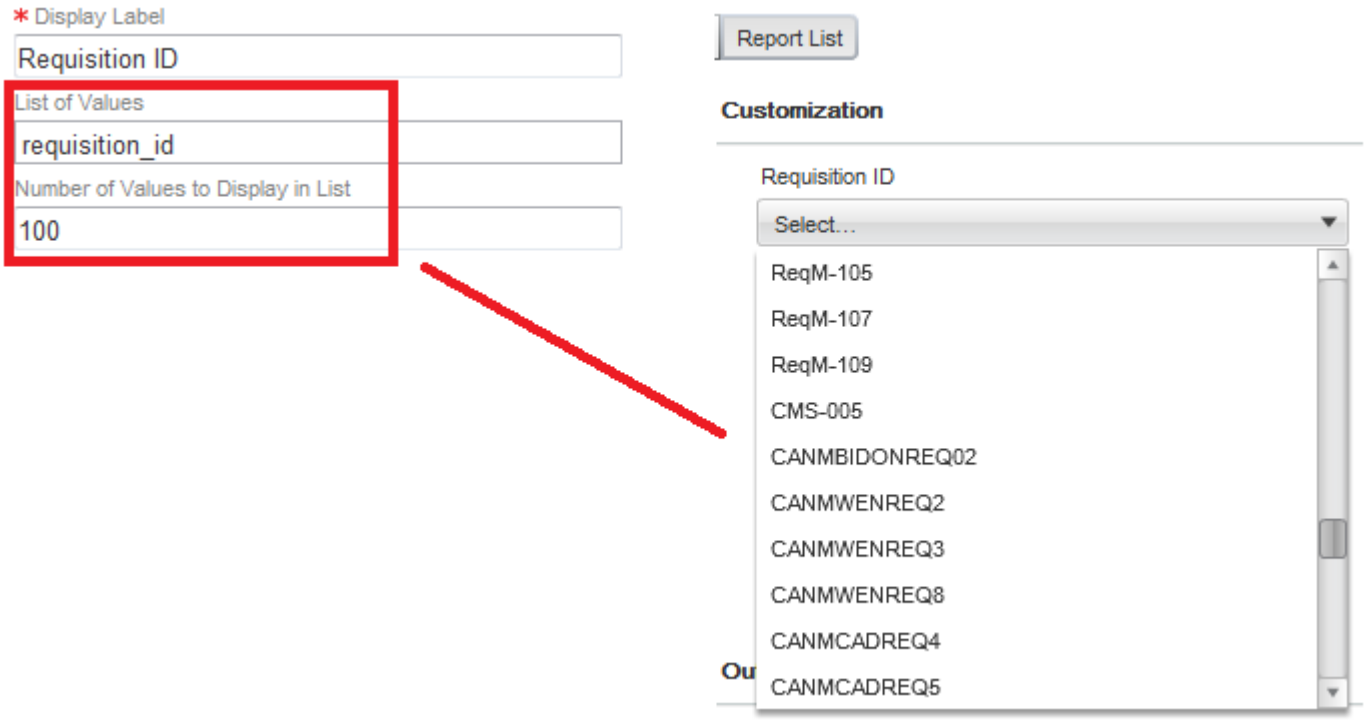
Data type	• String • Integer • Float • Boolean • Date
Parameter type	• Menu

	• Text • Date

Depending on the data type and parameter type selected, the report writer may have other fields to complete.



Note: When selecting the Menu parameter type, the display of the list values in the Recruiting Center Report List will be limited to the value entered in the "Number of Values to Display in List" field. For short list of values, the menu will work fine. However, for large list of values such as requisition IDs, only the first 100 element will be displayed.



Defining Parameters

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click on the desired data model definition.
3. Click Edit next to Parameters.
4. Provide a name.
5. Select a data type. Possible values are: String, Integer, Float, Boolean, Date.
6. Provide a default value.
7. Enter a type of parameter. Possible values are: Menu, Text, Date.
8. Enter a display label. This label appears in the Recruiting Center Report List.
9. Enter the text field size.
10. In the Options section, provide any other required information.
11. Click Save.

Validating the Data Model Definition

The report writer validates the data model definition by getting a sample of the data model definition.

Report writers can get sample data directly from inside the Data Model Definition page and from the Data Model Definitions list by clicking the Get Sample button. (*Configuration > Recruiting Administration > Embedded Reporting Administration > Data Model Definitions*).

Two formats are available:

- XML sample
- HTML sample

When report writers select the HTML sample, data is presented in an HTML table which allows report writers to easily understand the data. In the HTML table, all the dataset attributes are always described in the first dataset. Connected datasets appear below each table. Each set of tables is unique to the first dataset records.

Samples of predefined sizes are available (10, 100, 1000, all records). The report writer must fill in any required parameter value before the sample is produced.

> **Note:** When retrieving a sample, you must press the Refresh button to see if the sample is complete and ready for download. The page will not refresh automatically.

Activating the Data Model Definition

When the report writer is satisfied with the report, the data model definition is activated.

Activating the Data Model Definition

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Data Model Definitions.
2. Click on the desired data model definition.
3. Click Activate next to the name of the data model definition.

Results:

The status of the data model definition is changed to Active.

Producing the Report with Oracle BI Publisher

The report writer is responsible for gathering reporting requirements and building the report template. This is where the report writer gets to be creative and methodical to produce pixel-perfect reports for users.

The report writer uses the Oracle BI Publisher plug-in for Microsoft Word to build reports. This plug-in enables the report writer to import sample XML, view reports that are generated with data from the sample XML, and modify and create report templates directly inside of Microsoft Word. The Rich Text Format (RTF) also supports advanced formatting commands and layout options. RTF templates support a variety of output types, including: HTML, PDF, RTF and XLS.

> **Note:** Before deploying a report to user population, we recommend to deploy it to a test group so that only a limited set of users can see it from Recruiting. When the report is fully validated in Recruiting, remove the testing group restriction.

Oracle BI Publisher can be downloaded at the Oracle BI Publisher download page. (*http://www.oracle.com/technetwork/middleware/bi-publisher/downloads/index.html*)

The Oracle Fusion Middleware Report Designer's Guide for Oracle Business Intelligence Publisher is a useful guide to learn design reports. Refer to these chapters to obtain relevant information: "Creating RTF Templates Using the Template Builder for Word" and "Extended Function Support in RTF Templates". (*http://docs.oracle.com/cd/E23943_01/bi.1111/e22254/toc.htm#BEGIN*)

Another source of information is the Oracle XML Publisher Report Designer's Guide available on the Knowledge Exchange. Refer to sections 1, 2 and 5 to obtain relevant information. *(http://knowledgeexchange.taleo.com/docs/DOC-5680)*

> **Note:** The Oracle XML Publisher Report Designer's Guide is intended solely as a reference. Not all functionalities available in the guide are enabled in our implementation of BI Publisher.

Creating the Report Definition

A report definition is the association of a data model definition with one or many templates in order to describe the delivery of a report and its content. A report definition also provides a list of available format for output.

A report definition is created by clicking the Report Definitions link in the Embedded Reporting Administration page (*Configuration > Recruiting Administration > Embedded Reporting Administration > Report Definitions*).

When creating a report definition, the report writer provides a name and a description, selects a report definition category (optional) and a data model. The report definition must be linked to at least one template which consists of an RTF file containing the layout of the generated report (the template created with Oracle BI Publisher). The report writer must also select one or several available formats for the report definition: PDF, XSLX, RTF, HTML, EXCEL, XML, CSV. Supported file formats are summarized in the table.

	RTF	XLS (Excel)	XSL (XSL-FO)
PDF	Yes	No	Yes
RTF	Yes	No	Yes
XLSX	Yes	No	Yes
CSV	Yes	Yes	Yes
XML	Yes	Yes	Yes
Excel (mhtml)	Yes	Yes	Yes
HTML	Yes	No	Yes

When creating report definitions, report writers should validate selected output formats according to the type of uploaded templates. If a report definition contains at least one template of XLS type, report writers should be prohibited from selecting any other output formats except Excel (mhtml), XML, and CSV.

The report writer can define the availability of a report definition based on user groups so that only desired users can access published reports.

Creating the Report Definition

Before you start

The *Access Embedded Reporting Management* user type permission is required.

Configuration > **Recruiting Administration** > **Embedded Reporting Administration**

Here's what to do

1. Click Report Definitions.
2. Click Create next to Report Definitions.
3. Provide a name and a description.
4. Select a category where you want to put the report.
5. Select a data model.
6. Select a template file. This is the RTF file containing the layout of the generated report (the template created with Oracle BI Publisher).
7. Select one or several formats for the report.
8. Select a user group so that only desired users can access published reports.
9. Click Save.
10. Click Activate.

Importing Reports and Data Models

The Import Reports and Data Models feature provides customers with the ability to import 3rd party converted reports into the system.

This feature is intended to be utilized by 3rd party vendors who assist in Business Objects (BO) to Oracle Analytics (OAS) conversions. It provides the client with an xdrz file that can import data models and report definitions.

Monitoring Scheduled Reports

System administrators can monitor reports that were scheduled to run to see if the reports have been executed or are still in the process queue and to make modifications to scheduled reports.

The Scheduled Reports Monitoring feature available under Recruiting Administration > Embedded Reporting allows you to see all scheduled reports. You can search for a particular scheduled report using these criteria:

- Job Name: name of the job running the scheduled report.
- Job Status: the job status can either be active or inactive.
- Owner: user who scheduled the report.
- Execution Status: possible values are Error, In Progress, Interrupted, Ready.
- Executed After: reports executed on or after a certain date.

You can change the priority of a scheduled job by selecting Low, Medium or High on the Priority menu. You can deactivate existing jobs to stop any request that is currently executing and to prevent any further execution (note that a report inactivated by the system administrator cannot be activated). You can also delete existing jobs if you wish to remove the job from the system. Note that when a job is deleted, the history of the job is also deleted. You can consult the history of executed jobs and assign a higher priority to some jobs.

Monitoring Report Activities

System administrators can monitor report activities to get information when reports are run and to get detailed error information when reports fail.

In Recruiting, under Reports > Generated Reports > My Reports, the report user can click the Error link next to a report to obtain the Error ID. The user then provides the Error ID to the system administrator or Oracle Support so that they can obtain additional information about the failure.

In Recruiting Administration, under Embedded Reporting > Activity Monitoring, the system administrator or Oracle Support can enter the Error ID provided by the report user and view details about the report that failed.

Exporting Reports

Report developers can export reports for future reference.

In Recruiting Administration, under Embedded Reporting > Export Reports and Data Models, you can choose report definitions. The data model used in the report definition is automatically selected for the export. You can also choose individual data models. After clicking the Export button, an export.xdrz file is created and you can either open it or save it for future reference.

21 Recruiting Fundamentals

Candidate

Configuring Candidate File Tabs

In the candidate file, tabs presented to users are governed by permissions and features configuration.

Candidate File Tab	Description	Permission and Configuration Required
Job Submission/General Profile	Contains information on prescreening, resume, employment preferences, EEO, etc. The contents of both the job submission and general profile are configured and activated by the system administrator as candidate files in the Recruiting Administration module. Depending on the candidate card side being viewed, this tab will be either specific Job Submission OR the General Profile.	Always displayed.
Attachments	Contains resume and other attachments provided by the candidate and attachments provided by the user. Attachments are added with the Add Attachment icon. Job specific attachments are clearly identified from other attachments, and the name of the person who attached the file is also indicated. All attachments are managed centrally from this tab and when a user uploads an attachment, he/she will be able to specify if it will also be visible to the candidate.	Access Attachments tab (Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates) View other attachments (Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates) For any attachments originally created as being only visible by the recruiter (not visible to the candidate), users will only see attachments to the extent that they have been granted access to the submission relating to the attachment. If users are not authorized to view the job submission then they will not be able to view the attachment. For information on attachments, see *Attachment*.
Tasks	Contains a list of tasks to perform regarding the candidate. Tasks are self-assigned by users to remind them to complete a future activity.	This tab only appears from the Candidate Submission card side. To be displayed, the feature must be activated and users must also have been granted the permission to manage self-assigned tasks.
Offers	Contains offers submitted to the candidate, offers from competitors, candidate expectations and requisition offer information. The Offers tab and offer content are always job specific and visible only from the job submission view.	Displayed if offer management is used. The Offers tab is displayed on a candidate submission once an offer is created. The Offers tab and offer content are never displayed when viewing a candidate's general profile.

Candidate File Tab	Description	Permission and Configuration Required
	• Competitive offers and current jobs are linked to the candidate and are thus shared between submissions for this candidate. Context based permission ownership is applied based on the owners of any requisition this candidate has applied to. • Candidate job offers and expectation offers are linked to the submission and can only be viewed by users who can view that submission.	
Offer Approvals	Contains the most recent offer approval information.	Displayed if offer management and approvals are used. The Offer Approvals tab is displayed once an offer approval request is generated. The Offer Approvals tab is visible for any user who can view offers for the candidate submission.
Referrer	Contains both employee/candidate referral and agency referral information and actions.	Always displayed if the user can view the candidate's general profile or job submission. Fields in the Referrer tab can be specifically controlled by the field level security configurability. Fields in the Referrer tab are controlled by the same configuration done on these fields when used in the main tab of the candidate file because the data model for these fields is shared. Example: The candidate fields First Name and Last Name are also used for the Referrer's first name and last name. Therefore: • If the user's field security level permissions allow him/her to see the first name or last name for internal and external candidates, the user will see those fields in the Referrer tab. • If the user's field security level permissions allow him/her to see the first name and last name for internal and external candidates, the user will see the referrer name in the History tab. • If the user's field security level permissions do not allow him/her to see the first name and last name for internal and external candidates, the user will not see those fields in the Referrer tab. • If the user's field security level permissions do not allow him/her to see the first name and last name for internal and external candidates, the user will not see the referrer name in the History tab.
History	Contains a log of all actions performed on the candidate file, including the date and the name of the user who performed the action.	Always displayed. However, it only allows users to view history tracking related to submissions they are authorized to view. The Attachments tracking category is visible to users who have these two permissions:

Candidate File Tab	Description	Permission and Configuration Required
		• Access Attachments tab • View other attachments (Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates) The Offer history tracking is visible to users who have the following permission: • View offers (Configuration > [SmartOrg] Administration > User Types > Recruiting > Offers) Note that if users navigate into the view of a submission they can view but are not authorized to view the offer tab of that submission, then the offer history tracking data will be hidden. All offer history of all types will be hidden – not just "offer" but also the supplementary offer data as well. For more details on the candidate file History tab, see *Candidate File History Tab*.

Configuring the Candidate Duplicate Check Feature

The Check for Duplicate action allows Recruiting Center users to verify if a candidate already exists in the database.

When selecting the Check for Duplicates action, the system performs a duplicate check against a duplicate check condition created by the system administrator. Candidates matching the condition are displayed in a Quick Search Results list. If two candidate files are duplicates, Recruiting Center users then have the ability to merge the files using the Merge Candidate Files icon.

The configuration of the candidate duplicate check feature consists of the following steps:

1. *Creating a duplicate check condition.*
2. *Granting permission for the duplicate check.*

Creating a Duplicate Check Condition

A duplicate check condition is created to find duplicate candidates in the database.

By default, the following duplicate check condition is provided:

First Name AND Last Name AND Phone Numbers OR Email Address OR Social Security Number

To create a duplicate check, standard fields, user-defined fields, and operators are used.

Standard Fields	User-defined Fields	Operators
Address (Line 1)	To use a user-defined field, the field must be made available as a search criterion by selecting the Candidate Search option in the user-defined field properties (Recruiting Administration > Fields > Show User-defined Fields > Edit Field Availability). Note that once a user-defined field is being used in the duplicate check condition, it cannot be deleted from the Fields list nor can it be made unavailable for the candidate search.	AND
Address (Line 2)		OR
City		(
Date of Birth		)
Email Address		
First Name		
Last Name		
Phone Numbers		
Place of Residence		
Social Security Number		
Zip/Postal Code		

Note: The Email Address field is useful only for customers not enforcing email uniqueness (Configuration > [Recruiting] Settings > Email Uniqueness). It is a best practice to use email uniqueness to prevent duplicate entries rather than trying to merge duplicates during the review process.

If the condition has been modified, clicking **Reset** restores the default.
In the example below, the following candidates would be displayed in the results list if the default condition was used.

Condition=First Name AND Last Name AND Phone Numbers OR Email Address OR Social Security Number

First Name	Last Name	Phone Number	Email Address	Social Security Number	Is this a Duplicate File?
Denis	Smith	111 234-5678	dsmith@gmail.com	123 456 789	Yes
Denis	Smith	111 234-5678	dsmith@gmail.com		Yes

First Name	Last Name	Phone Number	Email Address	Social Security Number	Is this a Duplicate File?
Denis	Smith	111 234-5678	dsmith@hotmail.com		Yes
Denis	Smith	111 234-1234	dsmith@gmail.com		No

To create a duplicate check condition

Before you start

Configuration > [Recruiting] Administration > [General Configuration] Duplicate Check

Here's what to do

1. To add a field in the condition, click on the field located in the **Available Fields** box, then click **Add**.
   The field appears in the **Condition** box.
2. To add an operator in the condition, click on the operator located in the **Available Operators** box, then click **Add**.
   The operator appears in the **Condition** box.
3. To remove a field from the condition, click on the field located in the **Condition** box, then click **Remove**.
   The field no longer appears in the **Condition** box.
4. To remove an operator from the condition, click on the operator located in the **Condition** box, then click **Remove**.
   The operator no longer appears in the **Condition** box.
5. To move an item in the condition, click on the item then use the left and right arrows.
6. Click **Save**.

Granting the Permission to Perform a Duplicate Check

To use the Check for Duplicates action in the Recruiting Center, users must be granted the *Merge candidate files* permission.

User Type Permission	Location
Merge candidate files	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Configuring the Candidate File Merge Feature

Recruiting Center users have the ability to combine several candidate files into one file.

When using the Check for Duplicate action, or when in a candidates list, or after performing a quick search or advanced search, Recruiting Center users can select from two to ten candidate files and merge them using the Merge Candidate Files icon. To verify if the selected candidate files are duplicate files, the system performs a duplicate check against a *duplicate check condition* created by the system administrator. Once the duplicate check is done, the system suggests a master candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.

The configuration of the candidate file merge feature consists of granting this user type permission.

User Type Permission	Location
Merge Candidate files	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Configuring the Candidate Comparison Feature

Recruiting Center users have the ability to display candidate files side by side for comparison purposes.

From a requisition-specific candidate list, a user can select two or more candidate files and invoke the Compare action in the More Actions list.

The configuration of the candidate comparison feature consists of enabling a setting and granting a user type permission.

Setting	Description	Default Value	Location
Candidate Compare Feature Enabled	Enables the candidate compare feature.	No	Configuration > [Recruiting] Settings

User Type Permission	Location
Use candidate compare	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Configuring the Internal Candidate Job Submission Viewing Feature

The viewing of internal candidate job submissions is controlled by a permission.

User Type Permission	Constraints	Location
View internal candidate job submissions	Only if this user is an owner of the requisitions Only if this user is an owner of the requisitions or a collaborator Without restriction	Configuration > [SmartOrg] Administration > User Types > Recruiting > Candidates

User Type Permission	Constraints	Location

If a candidate is an internal candidate, all of his job submissions will or will not be displayed according to the above permission. The system does not look at each submission to see if it is internal or not. It looks at the profile level to determine if the candidate is internal; if it is internal, the candidate will receive the treatment of this permission.

If a user is granted the *View internal candidate job submissions* permission, the user will be able to see internal job submissions that he/she owns, that he/she owns or collaborates on, or all internal job submissions depending on the constraint enabled.

If a user is not granted the permission, he/she will not be able to see job submissions linked to internal candidates.

If a user can view an internal candidate job submission, he/she can view the entire submission, including the History tab. Therefore, the History tab on a submission will never be hidden from a user that can view a submission.

Note that this permission does not affect the user from being able to see an internal candidate's general profile. General profiles are the initial candidate viewing page for search results and folders. If an internal candidate is placed in a user's folder, a user will be able to view him regardless of what is set on this permission. When performing an advanced search, a user will be able to return general profiles of internal candidates if authorized based on the search permission "Access Internal/External Candidate Criteria".

Candidate Sharing

The Candidate Share functionality allows Recruiting Center users to share one or several candidate files with people via email. When sharing a candidate file, the system generates a PDF file containing candidate data.

The Share action is available in the candidates list and the candidate file toolbar.

> **Note:** Sharing more than 50 candidate files is not recommended. If more than 50 candidate files are shared, the information shared will be limited to the Personal Information block. Sharing more than 50 candidate files can also affect system performance lengthening considerably the time required to complete the sharing action.

Two sharing modes are available (based on specific setting values):

- The legacy mode where one PDF is generated for each candidate being shared.
- The new mode where a single PDF containing the consolidated data and attachments of all shared candidates is generated and stored on the cloud.

The legacy Candidate Share mode
When the legacy Candidate Share mode is used:

- A PDF is generated for each candidate being shared.
- A separate email is sent to each recipient, for each candidate being shared.
- The "Share Candidate Notification" message template is used and contains the PDF as well as the attachments.

The new Candidate Share and Print mode (Flipbook)

When the new Candidate Share and Print mode is used:

- A single PDF containing the consolidated data and attachments of all shared candidates is generated and stored in the cloud.
- A single email is sent to each recipient (instead of one email per shared candidate).
- The message template called "Share Candidate Notification - Link to Access Shared Candidate Information" is used and contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email). Token variables such as {Candidate.FullName} can be added to this message template but they will not be populated if more than one candidate is being shared. In such a case, there is only one message for several candidates.
- The generated PDF contains a Table of Contents so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF displays the Table of Contents.
- If an attachment cannot be converted, a link to access it directly in the cloud is included in the PDF. A conversion log containing all conversion errors for all selected candidates is inserted at the beginning of the PDF. A "place holder" page is placed in PDF where the conversion file was to be located.
- While many common fonts are supported by the PDF converter used to generate PDFs,the system does not support all possible fonts candidates may decide to use as part of the documents they submit during their application.

Note: The Candidate Share and Print mode converts submission attachments as a PDF file. However, the PDF file may not be a pixel perfect representation of the original attachments. As a result, there will be formatting differences between the original document and the converted PDF version of the document. Starting version 13C MP7, the new Candidate Share and Print mode (Flipbook) embeds links to the original attachments shared. The links to these attachments are provided at the beginning of each candidate section. Users can click these links to open the original attachments. This allows users to download and view shared submission attachments. Users do not need to log in to access these attachments. The PDF conversion process for the new Candidate Share and Print mode supports UTF-8 encoding.

Note: The generated PDF contains links to the original attachments. When sharing candidates, users do not require authentication. The download starts as soon as the user clicks a link. However, when using batch printing to print the PDF, users will require authentication prior to being able to download attachments for security purposes.

Note: The Recruiting setting "Share Other Attachments" does not prevent users from printing a PDF including other attachments. When using bulk printing or when sharing multiple candidates/submissions, users will not see a difference when selecting chosen segments. However, the output will differ if the setting is enabled. For example, the printed document will include other attachments not flagged as relevant to the submission.

Attachments in the generated PDF

Attachments can be included when sharing a candidate file. Three options are available:

- Most recent flagged resume
- Visible by candidate (Excludes flagged resume)
- Not visible by candidate (Excludes flagged resume)

History Tracking in the Share Candidate Feature

The history can be included when sharing a candidate file.

If the History option is selected, the tracking events of the shared candidate is included. When sharing a general profile, only the related general profile history is shared. When sharing a job submission, only the history related to that job submission is shared.

Offer history information is included in the file if:

- The user sharing the file has the View offers permission.
- The user selects the Offer option in the Share Candidate assistant.
- The candidate file contains offer data. Offer data is not available when sharing multiple candidates.

Candidate Sharing Behavior

When a user is sharing a candidate:

- Only the content that the user is allowed to access or that a company allows to share is available.
- The candidate file content that can be shared is defined by what the user can view. If a section is available to view, it will be available to share.
- Attachments can be shared depending on the user's ability to see attached files.
- Offer content can be selected for sharing if:
  - The user can view offer content.
  - The file being shared is a job submission.
  - The file contains offer data.
- Referrals can be shared.
- The history tracking can be shared.
- Tasks are never available to share.
- Approvals are never available to share.

When a recipient receives the shared candidate file:

- Sections that contain no data are removed from the shared file even if they were selected. Screening Services, eSignature and Regulation sub-sections are never included even if they are within a section of the candidate file that was included by the share sender when sending the share file.
- Shared files follow a restricted profile for field level security. Fields with a Confidential security level are never shared, and fields with the General or Restricted security level are always shared, regardless of the sharing user's permissions. As a result, the shared candidate file may include or exclude content that a user is otherwise able to see while in the Recruiting Center.
- Tasks are never included.
- Approvals are never included.

Sharing Candidate Files - Permissions and Settings

The following permissions and settings are used to configure the candidate file sharing feature.

Setting	Description	Default Value	Location
Candidate and Job Submission Sharing Configuration	Determines the method used for sharing candidate and job submission information, including attachments, with recipients. When sharing using a link to an online PDF, a single PDF containing the consolidated data and attachments of all shared candidates is generated and stored on the cloud; an email is sent to each recipient and contains a link to access the PDF and attachments in the cloud; the information remains accessible online for 15 days after the date the information was shared. When sharing by email, one PDF is generated for each candidate being shared and an email containing the PDF and attachments is sent to each recipient.	Share using a link to an online PDF	Configuration > [Recruiting] Settings
Configuration of Sections in the Job Submission/General Profile for the Print and Share Functionalities	Enables the ability to configure the sections in the candidate general profile and job submission, including attachments, that can be printed or shared. This setting applies to all users who have the permissions to use the print or share functionality. Available values are: • All sections can be selected • Only the Job Submission/ General Profile section and the Attachments section can be selected	All sections can be selected	Configuration > [Recruiting] Settings
PDF Retention Period for Shared Candidate Information	Specifies the number of days that candidate information will be retained in the system and available online. After the specified period, the candidate information will no longer be available. The maximum retention period is 15 days. This setting only applies when sharing candidate information via a link. Note that the limit is set to 60 days. Even if the setting is set higher than 60 days, files will not be retained longer than that.	15	Configuration > [Recruiting] Settings
Share Other Attachments	When enabled, users will be able to include "other attachments" in the "Candidate Share" or "Interview Request" actions. "Other attachments" equates to any attachment not directly related to the job submission from which the action is being taken as well as all attachments when sharing from the candidate general profile. The **Share Other Attachments** setting has been added as a safeguard for	Yes	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	companies that are concerned by users gaining access to "other" attachments. Because it is the share sender's security permission that determines what can be shared, this setting safeguards the security of the data from the share recipients where this extra protection is desired. When the setting is enabled, the "Visible by candidates" option in the "Share Candidate" assistant will display other attachments, i.e., attachments visible by the candidate which are not linked to the current submission.		
Disable External Candidate Sharing	Confine candidate sharing to members of the groups to which a user belongs. To be a recipient of a shared candidate file, certain rules apply. Candidate share recipients presented in the selection tool are affected by the **Disable External Candidate Sharing** setting. When the setting is set to Yes, it is not possible to share the candidate file with external users by typing an email address in the "Share with External Recipients" field. Recipients can only be selected amongst the users displayed in the assistant. To appear in the list of available users, the following conditions must all be met: • The user must be active. • The user must be able to access the Recruiting Center. • The user must belong to at least one user group matching the user group of the user sharing the candidate file. • If a submission is being shared, the user must have access to the staffing type of the requisition. When the setting is set to No, it is possible to share the candidate file with external users by typing their email address. The list of users in the assistant will contain all active users with access to the Recruiting Center.	No	Configuration > [Recruiting] Settings

User Type Permission	Description	Location
Share Candidates	This permission is required to share candidates.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

User Type Permission	Description	Location
Access Attachments tab	Attachments can be included when sharing a candidate file.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View other attachments	Attachments can be included when sharing a candidate file.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Message Template	Description	Location
Share Candidate Notification	Message template used for the legacy Candidate Share mode. The message template contains the PDF as well as the attachments.	Configuration > [Recruiting] Message Templates
Share Candidate Notification - Link to Access Shared Candidate Information	Message template used for the new Candidate Share mode. The message template contains a link to access the PDF and attachments in the cloud (instead of attaching the PDF file and attachments to the email). Note that token variables such as {Candidate.FullName} can be added to this message template but they will not be populated if more than one candidate is being shared. In such a case, there is only one message for several candidates.	Configuration [Recruiting] Message Templates

Candidate Interview

A candidate interview is a formal meeting to evaluate the qualifications and work experience of a candidate.

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

Here is how the candidate interview scheduling feature basically works.

A recruiter wants to interview a candidate for a job. For that, the candidate must be at the right interview step/status. From the Candidates list or the requisition-specific candidate list, the recruiter selects the candidate file and chooses the Schedule an Interview action in the More Actions list. The recruiter invites the candidate and can also invite other attendees to the interview meeting. The hiring manager of the requisition is invited by default. However, if the meeting organizer is the hiring manager, the recruiter is invited instead. Non-Recruiting Center users can also be invited to the meeting via their email address.

A default interview invitation message is proposed by the system. The most appropriate message template is pre-selected based on the requisition's Organization-Location-Job Field structure and the application language. However, it is possible to select another message.

If the recruiter has the appropriate permission, the recruiter can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

When all the interview details are entered, the recruiter sends the interview meeting invitation.

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, the interview organizer can print the invitation and send it to the candidate by fax or regular mail.

After the interview meeting has been scheduled, the recruiter can view interview scheduling information in the candidate list Interview column and in the candidate file History tab. The Interview column must have been activated and added to the candidate list by the system administrator.

The recruiter also has the ability to update the interview meeting by changing the attendees, the schedule or other information, and also cancel the interview.

The candidate interview feature generates iCalendar entities that can then be integrated with any mail system that supports this specification, including Microsoft Outlook. Events occurring in MS Outlook calendar or any iCalendar system are not managed by Recruiting. For example, if an interview meeting is modified in Outlook, the new information will not appear in Recruiting.

MS Outlook 2000 and higher are supported. Other calendar products may be functional but are not officially supported.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

A candidate can only have one interview scheduled per application at a time. If a candidate has no email address, users can still schedule an interview; they simply need to print the interview invitation and send it to the candidate by fax or regular mail.

> **Note:** When scheduling or updating a 1st interview, the meeting organizer will not be able to add the appointment to the Outlook calendar using the ics link contained in the interview meeting invitation he will receive. This is a Microsoft Office issue that occurs with Outlook 2007 and Outlook 2010 (version 14). This issue is happening to meeting organizers only.

Candidate Interview - Permissions and Settings

The following permissions and settings are used for the candidate interview feature.

Setting	Description	Default Value	Location
Interview Management Activation	Activate interview management functionality. The Schedule an Interview action is then available in the More Actions list	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
Confine Meeting Attendees to User Group	Allow meeting requests to be sent only to the members of the groups to which a user belongs	No	Configuration > [Recruiting] Settings
Meeting Scheduling Sharing Mode	Indicates how the candidate file and requisition file are shared with attendees in scheduling interviews. Possible values for this settings are: • Via Taleo eShare Center: candidate and requisition files (if included) and any candidate attachments are linked in the eShare Center. • Via email: candidate and requisition files (if included) and any candidate attachments are included in the message as attached files. All interviewers receive the same candidate and requisition file view, regardless of the value selected for the **Meeting Scheduling Sharing Mode** setting or permissions to view information in the system. As a rule, sections in the file are those the user sending the request is authorized to see, sections include General and Restricted fields (never Confidential fields), the Compensation block is never included in the requisition file, and Regulations and Screening Services blocks are never included in the candidate file. All recipients, including the candidate, will get the same email message. In the message body, tokens for Restricted and General fields are resolved (Confidential fields are never resolved). Any files attached directly to the message template are sent via email, regardless of the value selected for the **Meeting Scheduling Sharing Mode** setting. Candidates will never receive either the attached files or an eShare link, regardless of the value selected for the **Meeting Scheduling Sharing Mode** setting. A user can be selected as an interviewer and receive related requisition and candidate information even if he/she cannot access such information in the system.	Via Taleo eShare Center	Configuration > [Recruiting] Settings
Share Other Attachments	When enabled, users will be able to include "other attachments" in the "Candidate Share" or "Interview Request" actions. "Other attachments" equates to any attachment not directly related to the job submission from which the action is being taken as well as all attachments when sharing from the candidate general profile.	Yes	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	All candidate facing and non-candidate facing attachments linked directly to the job submission are included. Candidate facing "other" attachments are also included, unless the setting **Share Other Attachments** is set to No.		

User Type Permission	Description	Location
Manage interviews		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Send candidate files and requisitions to attendees		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Access Attachments tab	Attachments can be included in a candidate file if the user sending the interview request has access to the Attachments tab.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

File Attached to an Interview Invitation

Users can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

The candidate file attached to the interview meeting never contains the Regulations block and Screening Services results. Blocks available in the candidate file do not display confidential information. Files attached to the candidate file (for example, a resume) are not included in the interview invitation.

The requisition file attached to the interview meeting never contains the Compensation block. Blocks available in the requisition file do not display confidential information.

User type permissions grant users access to the content of the candidate and requisition files. Depending on the user type permissions granted to the user scheduling the interview, some attendees may not have access to information they normally would have. The candidate will not receive the candidate file nor requisition file.

When the candidate file and requisition file (or other candidate attachments) are included in the interview meeting invitation, these do not follow in the Calendar meeting.

Attachments Sent with the Interview Request

Share Other Attachments setting	View Other Attachments permission	Job-Specific			General Profile	
		Candidate Facing	Non-Candidate Facing	Offer	Candidate Facing: linked to a different submission or directly to the general profile	Non-Candidate Facing: linked directly to the general profile
* The Schedule an Interview action is available for a single candidate job submission. In the situations described above, the user requesting the interview must have the permission to access the Attachments tab in the candidate file or else no attachments can be included.						
Yes	Yes	All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.	All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request	Not available	All candidate facing "other attachments" and candidate facing attachments linked to the general profile are included if candidate files are selected to be sent by the user sending the interview request.	Not Available
	No	All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.	All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.	Not available	Not available	Not available
No	Yes	All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.	All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the user sending the interview request.	Not available	Not available	Not available
	No	All candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the	All non-candidate facing attachments linked directly to the job submission are included if candidate files are selected to be sent by the	Not available	Not available	Not available

Share Other Attachments setting	View Other Attachments permission	Job-Specific			General Profile	
		Candidate Facing	Non-Candidate Facing	Offer	Candidate Facing: linked to a different submission or directly to the general profile	Non-Candidate Facing: linked directly to the general profile
		user sending the interview request.	user sending the interview request.			

Candidate Interview and Candidate Selection Workflow

The candidate interview feature can be configured in the candidate selection workflow for proper candidate selection tracking.

Candidate selection workflows can be configured by the system administrator so that when users schedule an interview, the candidate's status automatically changes to a preset value. To automatically change the candidate's status, the system administrator must activate the *Interview Scheduling Behavior* option for the statuses in question, that is 1st, 2nd and 3rd interview statuses (available in the Statuses Usage tab of a step).

Example:

A recruiter uses a candidate selection workflow containing the 1st, 2nd and 3rd Interview steps. All three steps have the following statuses:

- To be scheduled
- Scheduled
- Passed

The *Interview Scheduling Behavior* option is activated for the Scheduled status. The candidate is currently at the 1st Interview step and the To be Scheduled status.

The recruiter schedules an interview for the candidate. When the recruiter sends the interview invitation to the attendees, the status of the candidate automatically changes from To be Scheduled to Scheduled.

The candidate attends the interview as scheduled. The recruiter wants to invite the candidate to a second interview. The recruiter has to perform the following steps:

- Change the status of the 1st Interview step to Passed.
- Move the candidate to the 2nd Interview step and set the status to To be scheduled.
- Schedule a new interview.

Since the Scheduled status is also configured for the 2nd Interview step, the candidate's 2nd Interview status automatically changes to Scheduled once the interview is sent to the attendees.

When using this functionality, a best practice is to configure the Interview steps with a completion status that indicates the successful completion of the interview (for example, Passed, Successful). This helps to ensure that an interview that is past due is not simply forgotten.

Referring Candidates

A candidate can be referred by several referrers (agents and/or employees) and referral ownership can be set at the candidate profile level, the job submission level, or at both levels.

In previous releases, candidates could be referred on multiple jobs by a single referrer only. The referral ownership was kept at the candidate profile level, encompassing all job submissions done through all means by all actors. Now, a candidate can have multiple referrers (agents and employees) and candidate information is shared between multiple referrers.

How it Works for Agents	How it Works for Referrers (Usually Employees)	How it Works for Referred Candidates	How it works for Recruiters
Agents can: • Refer candidates who already exist in the database. • Refer an already referred candidate at the job submission level. • See candidate information entered by other referrers. • Have a maximum number of job submissions referred per requisition.	Referrers can: • Refer previously referred candidates. • Refer an already referred candidate at the job submission level. • See candidate information entered by other referrers.	Candidates can: • Receive emails from multiple referrers.	Recruiters can: • See various referrers for the same candidate. • Might not always know there are referrers associated to a candidate. The fact that no agent is displayed in the candidate profile Referral tab does not mean that no agent referred the candidate. The referral might exist at the job submission level. • See only the candidate profile referrer in search list and folder list.

Configuring Candidate Referrals

Several settings are available to configure the referral of candidates.

To allow the referrals of candidates who already exist in the database, the following settings are available.

Setting	Description	Default Value	Location
Accept Referrals from Agents for Known Candidates or Submissions	Determines if agents can refer candidates or candidate submissions that already exist in the database.	No	Configuration > [Recruiting] Settings
Accept Referrals from Employees for Known Candidates or Submissions	Determines if employees can refer candidates or candidate submissions that already exist in the database.	No	Configuration > [Recruiting] Settings

A referrer can be the owner of a candidate job submission and also the owner of the candidate general profile. To support this candidate ownership mode, the following setting are available.

Setting	Description	Default Value	Location
Ownership Configuration for Agent and Employee Referrals	Determines the ownership mode for agent and employee referrals. Three modes of ownership are available. See below for details.	Candidate Ownership	Configuration > [Recruiting] Settings

Three modes of ownership are available:

- **Candidate Ownership:** The referrer is the owner of the candidate. Regardless of where the referral occurs (general profile or job submission), there is only one owner.
- **Submission Ownership:** The referrer is the owner of the candidate job submission. The ownership is limited to where the job submission occurs. If the referral is done at the job submission level, the referrer will only get ownership of this job-specific submission. Referring a candidate general profile is possible, but not recommended.
- **Submission and Candidate Ownership:** The referrer is the owner of the candidate job submission and the candidate general profile. The ownership is taken on the job-specific submission where it has been done, but also taken on the candidate, if the candidate is not already owned by a referrer.

In the Recruiting Center, when the Candidate Ownership mode is enabled, the candidate submission referrer is displayed in the candidate submission Referral tab. If there is no submission referrer, the candidate referrer is displayed. A submission-specific referrer can only exist if the "Ownership Configuration for Agent and Employee Referrals" setting was changed to the Submission and Candidate Ownership mode or the Submission Ownership mode and was reverted to the Candidate Ownership mode.

In the Recruiting Center, when the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, only the local referrer is displayed in the candidate submission. If a candidate submission has no referrer, the candidate submission Referral tab is empty even if the candidate has been referred at the profile level.

In the Career Section, under the Referrals tab, the display rules are always the same, regardless of the ownership mode selected.

In the Career Section, a referred candidate submission with an active link is always displayed, regardless of the setting enabled or the ownership mode selected. A non-referred candidate submission is only displayed if the candidate was referred. Candidate referrals are created for all referrals when the Candidate Ownership mode or the Candidate and Submission Ownership mode is enabled (they are not created when the Submission Ownership mode is enabled).

In the Career Section, if a referred candidate applied on a job by himself/herself, the referrer can see that referral in the My Referrals tab if the "Display to the referrer submissions for which candidates applied by themselves" property is set to Yes. (*Configuration > [Career Section] Administration > Career Sections > Career Portal Pages > My Referrals*).

Important Information

> **Note:** When matching a candidate to a requisition, if the Candidate Ownership mode is enabled, there will be no job-specific ownership created. If the Submission Ownership mode or the Candidate and Submission Ownership mode is enabled, the current ownership is carried over.

Note: When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled, there are job-specific submissions with various or no referrer. As such, the referrer ownership is only visible in the context where it applies and might not be visible in another context, like a non-referred job submission or a non-referred profile.

Customers can limit the number of candidate submissions a single agent can submit for a specific requisition. To support such a limit, the following setting was created. When an agent reaches the limit set by the setting, this message is displayed to the agent: "You cannot refer this candidate because you have reached your maximum number of referrals for this requisition."

Setting	Description	Default Value	Location
Maximum number of candidate submissions that an agent can refer per requisition	Limits the number of candidate submissions a single agent can submit on a specific requisition. Zero means unlimited submissions.	0	Configuration > [Recruiting] Settings

Best Practices

- Require the email address of the referrers and candidates to prevent duplicate candidates.
- Enable the **Email Uniqueness** setting to prevent duplicate candidates (*Configuration > Recruiting Settings*).
- Enable the **Activate the identification of potentially duplicate candidates** setting for agency and referral flows (*Configuration > Career Section Administration > Application Flows > Candidate Personal Information Block*).
- When the Submission Ownership mode or the Submission and Candidate Ownership mode is enabled for a single candidate, make sure the functionality is well known by users. A training may be necessary.
- If activating different ownership modes per job-specific submissions, deactivate the general profile flow (*Configuration > Career Section Administration > Application Flows*).
- Once a referred candidate has been hired and the referrer has been remunerated, the referral link should no longer be displayed to hide future candidate submissions from the original referrer.

ACE Candidate Alert

The ACE candidate alert allows Recruiting Center users to set a threshold to identify the ideal candidates and to send an email to specific recipients to inform them that ACE candidates were found.

The ACE candidate alert allows the system to identify the candidates who achieve or exceed the ACE alert threshold for a job offer. It identifies top candidates based on their responses to the competencies and questions in the Prescreening section of the requisition file. The ACE candidate alert is based on Required and Asset criteria. Candidates are divided into three groups to help users determine which candidate files to review first:

- ACE candidates: Consider these candidates first because they meet all Required criteria and some Asset criteria.
- Minimally qualified candidates: Consider these candidates after the ACE candidates because they meet all Required criteria but not Asset criteria.

- Other candidates: Do not consider these candidates because they do not meet any Required criteria.

Note: A best practice is to always have the ACE candidate alert activated.

When setting the ACE candidate alert, the options presented in the following table are provided:

Option	Description
A candidate meeting all the required criteria achieves a result of at least x% (0/0)	This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates. Do not use the percentage weighting option if you do not use the Weight criterion in the Prescreening section of the requisition file. If you utilized weighting on some of the questions you could, if you wish, incorporate into the ACE candidate alert setting as well. For a simple approach, you can start by using 75% weight result and then eventually align that % with your own approach and utilization of weighting that works best for you.
A candidate meeting all the required criteria has at least x assets out of y	This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Identify a candidate as an ACE when either condition is met	This option is used to identify ACE candidates using the result or asset condition.
Identify a candidate as an ACE when both conditions are met	This option is used to identify ACE candidates using the result and asset conditions.

When setting the ACE candidate alert, Recruiting Center users have the option to send an email to notify specific recipients that an ACE candidate was found. To be an ACE Candidate Alert recipient, a user must meet all these criteria:

- The user must be active.
- The user must have access the Recruiting Center or eShare Response Center.
- The user has access to the requisition type of the requisition.
- The user belongs to the user group of the requisition.

Recruiting Center users can be set up as an ACE Candidate Alert recipient even if they have limited access to information on the candidate file.

All ACE Candidate Alert recipients receive the same candidate file, regardless of permissions to view candidate information in the system. When an ACE Candidate Alert is set, the recipient receives an email with an attached PDF file that contains data from the candidate file. Sections of the candidate file that contain no data do not appear. All PDF files display information as follows regardless of the user's permissions:

- Fields with the General or Restricted security level are displayed. Fields with the Confidential security level are not displayed.
- Labels in the candidate file are displayed in the Recipient's language if there is only one recipient; otherwise labels are displayed in the requisition's base language.
- Values entered in the candidate file are displayed in the job submission language.
- The Regulations block is not included.
- Screening Services results are not included.
- Candidate attachments are not included.

ACE Candidate Alert - Permissions and Settings

The following permissions and settings are used for the ACE Candidate Alert functionality.

The requisition file Alert Tab is visible only if users have one of the following permissions:

User Type Permission	Location
View and manage ACE threshold and alert recipients	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
View and manage the "Request More Information" alert	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Setting	Description	Default Value	Location
Delay ACE alert	Review candidate files and check for potential ace candidate alert every X hours (0: never check).	4 hours	Configuration > [Recruiting] Settings
ACE Alert Option Default	Determines which ACE Alert Option to set by default when creating a requisition. Has a dependency on the setting "Submission Scoring Activation".	Ace Alert based on requirements and assets	Configuration > [Recruiting] Settings
ACE Alert Score Default	Default score for the "Ace Alert" when creating a requisition. The values must be greater or equal to 0 and less than 100.	60	Configuration > [Recruiting] Settings

Candidate File History

The History tab in the candidate file contains a log of all actions performed on the candidate file.

When a candidate file is modified, either by the candidate or a user, an event to track this action is generated and is displayed in the candidate file History tab. The name of the user who performed the action is displayed as well as the date and details on the event. Candidate file tracking events belong to one of the following categories:

- Agent and referrer
- Attachments
- Candidate file update
- Candidate information
- Candidate progression
- Comments
- Correspondence
- Questions and competencies

- Regulation
- Resume
- Screening services
- Offer

Comments relating to an event can be added and edited in the History tab if users have the required permissions.

The Correspondence event category allows users to view previously sent correspondence. A user type permission allows users to resend the correspondence directly from the History tab.

Users can see attachments and offer history tracking if they have the required permissions.

A permission allows Recruiting Center users to view the content of deleted attachments in the History tab. When candidates submit attachments as part of their job application, your organization can remove these attachments. Your organization may decide to not provide access to these deleted attachments which are still visible in the History tab. If you have been granted the permission, you can click the attachment link in the History tab and view the content of deleted attachments. If you do not have the permission, you can see and click the attachment link but the system will display a message indicating that you do not have the permission to view the content of the deleted attachment.

Modifying the Date of an Event

Users can modify the date of an event and specify when an action on a candidate's file really took place, provided the feature has been activated and they have the required permissions. The use of the actual date enables reports to more accurately reflect user activity in the selection process. There might be a number of reasons why users would want to change certain dates in a candidate's file.

Example. If a candidate had an interview on September 15, but that user was only able to enter this information in the system on September 20, the event date would indicate September 20. The user could then change this date to September 15, which would be more accurate. If the date and time related to an event can be edited, they appear as a hyperlink. The event date can only be between the application creation date and the current date.

Hiding Confidential Information

When the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file Tracking tab. In Recruiting, fields configured with a Confidential security level can be hidden from users who do not have the permission to view confidential fields. If the value of a confidential field is modified, users who do not have the permission to view confidential fields will not see any tracking event in the candidate file History tab regarding that change. If later on, the security level of that confidential field is changed to General or Protected, users will still be unable to see the change in the Tracking tab.

Candidate File History - Permissions and Settings

The following permissions and settings are used to configure the display of elements in the candidate file History tab.

Setting	Description	Default Value	Location
Default History Event Categories	Indicates the history event categories shown by default.	Attachments, Comments.	Configuration > [Recruiting] Settings
Display Incomplete Application	Display incomplete submissions in candidate list and in candidate search	Yes	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	results. This setting does not apply to the Candidate Quick Search. If the *Display Incomplete Application* setting is not activated, incomplete submissions will be hidden from view.		
UDF Tracking Activation	This is a Protected setting. Activates the tracking of changes made to custom candidate fields relating to the personal information, work experience and education. For details, see Field Availability.	20	Configuration > [Recruiting] Settings
View history events on candidates and submissions for actions by other users. (A user can always view history events for their own actions)	When this permission is enabled, you're able to view all events in the Submissions History tab and its corresponding print screens, as well as all events in the General Profile History tab and its corresponding Print screens. When disabled, only the events for users own actions display in the Submissions History tab and the General Profile History tab with their corresponding Print screens.	Enabled	
Include the History section when using the Share Candidate action	When this permission is enabled, you're able to view all events in the Submissions History tab and its corresponding print screens, as well as all events in the General Profile History tab and its corresponding Print screens. When this permission is disabled, you aren't able to include the History section in the Layout Editor when using the Share Candidate functions in Submissions and General Profiles.	Enabled	

User Type Permission	Description	Location
Edit comments in history summary	Users with this permission can modify comments in the candidate file History tab.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View deleted attachments content from tracking history	Users with this permission can view the content of deleted attachments in the History tab. When candidates submit attachments as part of their job application, your organization have the ability to remove these attachments. Your organization may decide to not provide access	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > Candidate Information

User Type Permission	Description	Location
	to these deleted attachments which are still visible in the History tab. If a user has been granted the permission, he/she can click the attachment link in the History tab and view the content of deleted attachments. If a user does not have this permission, he/she can see and click the attachment link but the system will display a message indicating that the user does not have the permission to view the content of the deleted attachment.	
Access Attachments tab	Users must have the **Access Attachments tab** permission AND the **View other attachments** permission to be able to view the Attachments section of any History tab. If users have the **Access Attachments tab** permission but not the **View other attachments** permission, they will not see the Attachment category and associated history items, but they will have access to the Attachments tab showing the job specific attachments. If users have the **View other attachments** permission but not the **Access Attachments tab** permission, they will not see the Attachment category and associated history items, and they will not have access to the Attachments tab. If users do not have the **Access Attachments tab** permission nor the **View other attachments** permission, they will not see the Attachment category and associated history items, and they will not have access to the Attachments tab.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View other attachments	For details, see the description for the Access Attachments tab permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View offers	The **View offers** permission and the **View and manage offers** permission are contextual and a user can have varying levels of access depending on their relationship to the offer. The system will review both permissions and whichever permission grants the greatest access to information will determine whether the Offer history section will appear for the user. For example, a user can view offers without restriction, but can view and manage only offers he owns. The user will see the Offer history on submissions without restriction because this is the highest level access across these two permissions. If users have the **View offers** or **View and manage offers** permission and they are on a requisition that matches the sub-option permission, they will see the Offer category and associated history items.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers

User Type Permission	Description	Location
	If users have the **View offers** or **View and manage offers** permission, but they are on a requisition that does not match the sub-option permission, they will not be able to see the Offer category and associated history items. If users do not have the **View offers** and **View and manage offers** permission, they will not be able to see the Offer category and associated history items.	
View and manage offers	For details, see the description for the View offer permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers
Access requisition-specific candidate lists	In the Recruiting Center, the Show History for list can present information on all job submissions, on job submissions in selection process, or on a specific job submission. When users select the **Submissions in selection process** or **All submissions** option, the list will only include history tracking related to submissions that users are authorized to view. The following permissions and settings will affect the behavior: If users do not have the **Access requisition-specific candidate lists** permission, all candidate submission files and requisition-specific candidate lists will be blocked from the users' view. These users can still access lists of candidates from candidate search and candidate folders but from these contexts can never navigate to see anything other than the candidate's general profile while inside the candidate file.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View candidates in steps whose security level is "Restricted"	Users will need this permission to be able to see a candidate that is in a Candidate Selection Workflow step that is restricted. If this permission is not granted, the candidate submission and associated history will not be visible to users.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View internal job submissions	Users will only be able to see internal candidate job submissions if they are granted this permission. If a candidate is internal at the profile level, then any job submission related to the candidate can be protected from view based on the following permission.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

Candidate Onboarding

Employee onboarding is the process of integrating a new employee into an organization.

Onboarding begins when a person accepts a position; it can include orientation, communication, filling out forms, getting equipment such as a laptop.

New Hire Onboarding - Permissions and Settings

The following permissions and settings are used to configure the employee onboarding feature.

Setting	Description	Default Value	Location
Legacy Onboarding Activation	Activates Legacy Onboarding functionalities. This is a protected setting.	No	Configuration > [Recruiting] Settings

User Type Permission	Location
Initiate a legacy onboarding process for a new resource	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other
Cancel a legacy onboarding process in progress	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

Automatic Candidate Pooling

The Automatic Candidate Pooling feature allows customers to add autopooling criteria to a requisition or requisition template to find candidates in the database who are available and qualified for a job. Managers can then access the autopool results with a single click.

The Automatic Candidate Pooling feature is typically used in decentralized hiring environments, for example in high volume retail and hourly hiring where managers may have to quickly identify candidates on their own without the assistance of recruiters.

For the Automatic Candidate Pooling feature to be available, the feature must be enabled by the system administrator. Users creating or defining autopooling criteria must be granted the required user type permissions, but no permission is required to access the autopool results.

Autopooling criteria can be added to a requisition via the Autopooling Criteria tab (if autopooling criteria were added to a requisition template, they will be inherited by the requisition). This is like a saved search that managers can use to find candidates who are both available and qualified. The following autopooling criteria may include any criteria from the Advanced Search, plus an additional set of basic criteria. For example:

- Exclude candidates in selection process
- Candidate's general profile language must match the requisition language
- Exclude expired job submissions (selected by default)
- Exclude rejected candidates - Within the last x days
- Exclude hired candidates - Within the last x days (selected by default)
- Candidate's place of residence - Within a radius of x kilometers/miles from the primary location of the job opening

- Submissions must match the following organization-location-job field structure

As a best practice, when defining autopooling criteria:

- Define autopooling criteria in requisition templates so criteria are inherited as requisitions are created.
- Define the widest possible set of candidates from the database that would be both qualified and available. This way, no time is wasted on unqualified or unavailable candidates. For example:
  - Set Organizations, Locations and Job Fields to only include candidates from other jobs with overlapping skills and/or who applied to nearby locations. Filter by Organization and Location if appropriate (specific country, specific division, etc.).
  - Exclude candidates being considered in another requisition, who were recently hired, whose submissions have expired.
  - Use the parameter to limit results to candidates who live within X kilometers/miles of the primary location of the requisition.

Once autopooling criteria have been defined and enabled, the system will automatically generate a list of candidates matching the criteria anytime on demand. Only candidates who have applied on another requisition will be considered. This list of candidates is accessible in the requisition-specific candidate list or in the requisition file via the Autopooling icon. A maximum of 300 candidates can be displayed. The user then has the ability to:

- View candidate files.
- Match candidates to the current job opening (candidates are moved from the autopool results list to the requisition-specific candidate list, and they can then be moved along the workflow like any other candidate).
- Match candidates to the current job opening and reject them in a single action (which will remove undesired candidates from continuing to appear in the candidate pool for this requisition; by default this option is disabled).
- Filter the list of candidates using quick filters defined by the system administrator.
- Sort the list of candidates by clicking a column heading.

When viewing a candidate file, the user may be able to view the other job applications that the candidate has submitted, depending on the permissions granted.

The user is able to match a candidate to the requisition via the autopooling feature even if the permission to match candidates to a requisition in general was not granted.

The user may also be able to match and reject candidates in one action if the permission was granted. When rejecting a candidate, the manager must specify the qualifiers (motives) and provide comments as required by the workflow.

If configured by the system administrator, the Automatic Candidate Pooling feature may also provide the ability to create optional repooling rules which automatically set a candidate's submission to an Inactive status after X days of inactivity. If the autopooling criteria for other jobs include the criteria to exclude candidates who are in a selection process, candidates who are automatically set to an inactive status will no longer be excluded and thus will be included in pool results.

Configuring the Automatic Candidate Pooling

Before you start

Configuration > **[Recruiting] Administration**

Here's what to do

1. Under Recruiting Settings, enable the *Automatic Candidate Pooling Enabled* setting.
2. Under List Formats, configure the candidate list format context entitled *List of automatically pooled candidates*.
    a. Select columns for the list format.
    b. Put columns in the right sequence.
    c. Set column sorting criteria.
    d. Configure quick filters. This list format allows the use of the same quick filters as the Advanced Search list format, plus the Shift Availability filter.
    e. Activate the list format.
3. Under SmartOrg Administration > User Types > Recruiting > Requisitions, grant the following user type permissions:
    - View autopooling criteria
    - Edit autopooling criteria
    - Perform the "Reject" action from the candidate autopooling list
4. You can define repooling rules within the Candidate Selection Workflow to automatically return candidates to the pool after X days of inactivity:
    a. Under Recruiting Settings, enable the *Inactivate Job Submissions Feature* setting.
    b. Under Candidate Selection Workflow/Statuses tab, create an inactive status and select Inactive in the Reference Model list.
    c. Under Candidate Selection Workflow/Steps tab, add this inactive status to each candidate selection workflow step in which you want to repool candidates.
    d. Within each desired candidate selection workflow, in the Steps Usage tab, click on the step, select the *Inactivate Job Submissions* option and indicate the number of days. Note that different steps may have different durations or none at all.

Talent Pool

Talent pools created in Taleo Performance are available in the Recruiting Center.

A talent pool is a list of people nominated by pool collaborators. In Taleo Performance, talent pools can be created at anytime for any purpose, providing the flexibility to track unlimited groups of employees, such as high-potential employees, future leaders, and successors.

In the Recruiting Center, authorized users are able to see talent pools and match employees and candidates to their requisitions, file them into folders for additional pooling functionalities, or contact them directly.

The Talent Pool tab is available in the left panel of the Candidates list.

From the Talent Pool tab, users can select a talent pool to display the candidates and employees included in the pool. Users can also use quick filters (Internal, Referred, In selection process, Employer, Program) and advanced filters to filter the list down to relevant information. An advanced filter of interest is the Employee Potential which allows users to display candidates or employees with a low, medium, or high potential.

As with any other lists, actions can be performed on employees and candidates included in the talent pool using actions in the menu bar, in the More Actions list, and in the contextual action menu. Users can also select another list format or create a personalized list format.

Configuring the Talent Pool Feature

The configuration of talent pools consists of the following steps.

Note: Talent pools are created and managed directly in Taleo Performance.

1. Configure the **All Candidates / By Talent Pool** list format context. This list format context is available to display candidates and employees included in a talent pool. You can use the default Contact Information list format, you can edit it, or you can create a new list format from scratch.
2. Grante the following Talent Pool permission.

User Type Permission	Description	Location
View - If this user is the pool owner or a pool user	When the **View** permission is granted, all pools are displayed to the user. When the **View - If this user is the pool owner or a pool user** is granted, only the corresponding subset of pools are displayed. If no permission is granted, the Talent Pool tab in the Recruiting Center is not displayed.	Configuration > [SmartOrg] Administration > [Users] User Types > Common > Pools

Employee Metrics

Recruiting Center users are able to see employee metrics directly in the Candidates list and candidate file, to use employee metrics fields as advanced filters, and to search employee metrics.

The following key employee metrics are available in the Candidates list and candidate file. For these fields to be available, they must be configured and added in the candidate file user-defined form and in the candidates list format. If included, they are available to anyone based on field level confidentiality definition. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.

Employee metrics in the Candidates list and candidate file are:

- Competency Rating
- Employee Potential
- Employee Risk of Loss
- Goal Rating
- Last Review Rating

- Promotability Readiness
- Reassignment Candidate

The following key employee metrics are available in the Advanced Candidate Search page. For these fields to be available in the Advanced Candidate Search page, they must have been configured and added by the system administrator. Once added, they are available to anyone authorized to search internal candidates.

Employee Metrics in the Advanced Candidate Search	Available Values
Last Review Rating	Greater than or equal to a % between 0 and 100.
Potential	Low, Medium, High, Not Specified, Does Not Matter.
Reassignment Candidate	Yes, No, Not Specified, Does Not Matter.
Readiness for Promotion	Ready Now, Ready in 6 months, Ready in 1-2-3-4-5 years, Not Specified, Does Not Matter.
Risk of Loss	Low, Medium, High, Not Specified, Does Not Matter.

Note: The Last Review Rating is expressed as a % in the Recruiting Center; in Taleo Performance, it is expressed differently and it is a customizable scale.

Configuring Employee Metrics in the Candidates List

To have employee metrics available in the Recruiting Center Candidates list, the following configuration steps are required.

1. *Making employee metrics fields available in the Recruiting Center.*
2. *Adding employee metrics columns in candidate list formats*: Once employee metrics fields have been made available in the Recruiting Center, they can be added as columns in candidate list formats. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.
3. *Setting the security level on field content:* This is done with the following user type permissions: "Security level for internal candidates (in view mode)", "Security level for external candidates (in view mode)".

Making Employee Metrics fields Available in the Recruiting Center

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.

4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

What to do next

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

Adding a Column in a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

Granting Security Level Permissions for Candidates

Before you start

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

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Configuring Employee Metrics in the Candidate File

To have employee metrics available in the Recruiting Center candidate file, the following configuration steps are required.

1. *Making employee metrics fields available in the Recruiting Center.*
2. *Creating an Employee Metrics user-defined form.* You can create the form from scratch or you can use the default form provided with the system. Employee metrics fields that have been made available in Taleo Recruiting can be added to the form.
3. *Adding the Employee Metrics user-defined form to a candidate file.*
4. *Setting the security level on field content:* This is done with the following user type permissions: "Security level for internal candidates (in view mode)", "Security level for external candidates (in view mode)".

Making Employee Metrics fields Available in the Recruiting Center

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.
4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

What to do next

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

Candidate Email Address Verification

Recruiters can verify whether candidate email addresses entered in the system are valid. Knowing that candidates have not validated their email address, recruiters can use alternate communication channels to send communications.

When administrators enable the feature, candidates are sent a message asking them to validate their email address. The message contains a link to the career section. Once candidates click the link, they are taken to the career section login page. On successful login, candidates see the message “Email successfully verified”. If the validation fails, candidates see the message "Email verification failed" with a generic explanation. If the email address was already validated, candidates see the message "Email verification failed" with an explanation that their email address was already validated.

In Recruiting Center, recruiters can see that a candidate's email address was validated. The Email Validated icon appears in the candidates list. It also appears on the candidate card when viewing the general profile or submission of a candidate. The verification is done once per candidate unless the email address is changed.

A quick filter is also available to display candidates who have validated their email address.

> **Note:** For existing candidates whose email address is yet to be validated, the email address validation message is sent if the candidate is active and when the candidate reaches the step as configured in the setting.

Configuring the Candidate Email Address Verification

The configuration of candidate email address verification consists of the following steps.

1. Set a threshold for sending the email validation message. When candidates' job submissions reach a specific step of the candidate selection workflow, candidates who have not yet validated their email address receive the message. Use the following setting: Threshold to Send Email Validation Notification to Candidate (Path: Configuration > [Recruiting] Settings)
2. A message template is available for the email address validation: Email Address Validation Invitation. You can edit it as needed.
3. A column is available to add to list formats: Email Validated Icon.
4. A quick filter is available to add to list formats: Email Validated.

Confirmed Candidate Accounts

Recruiters can know which candidates have viewed and confirmed their profile. This feature ensures that candidates had an opportunity to verify their profile content when their profile was sourced through recruiters, referrals, third party applications, or agencies.

When candidates get to the career section Thank You page, the system automatically marks their profile as being confirmed by the candidate. Recruiters are then able to know which candidates have confirmed their profile by viewing the Candidate Confirmed Account icon next to the candidate name.

Configuring the Confirmed Candidate Account

The configuration of candidate email address verification consists of the following steps.

Before you start

Here's what to do

A column is available to add to all candidate list formats: Candidate Confirmed Account Icon.

Results:

What to do next

Creating a User-defined Form

Before you start

Configuration > [Recruiting] Administration > User-defined Forms

Here's what to do

1. Click Create.
2. Select a file type and click Next.
3. Select a form type and click Create. Or, if you want to use the default fields in the form type, select *Use the default template*.
4. Provide a code, a name, and a description.
5. Add rows, columns and sections using the Toolbox features.
6. In the Field Chooser list, select fields, then drag and drop them in the desired sections.
7. Edit the field properties. Select a field and scroll to the Selected Element Properties section at the bottom of the form.
8. Click Save.

Results:

The form appears in the User-defined Forms list and is available when creating user-defined files.

Adding a Block in a User-defined File

Before you start

The user-defined file must have the Inactive or Draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click a user-defined file.
2. Click Edit next to Section Ordering.
3. In the Available Blocks section, select a block.
4. Drag and drop the block in the section.
5. Click Save.

Granting Security Level Permissions for Candidates

Before you start

Configuration > [SmartOrg] Administration > User Types

Here's what to do

1. Click on a user type.
2. In the Recruiting functional domain, click Edit next to Candidates.
3. Select the permission Security level for internal candidates (in edit mode).
4. Set the desired security level.
5. Select the permission Security level for internal candidates (in view mode).
6. Set the desired security level.
7. Select the permission Security level for external candidates (in edit mode).
8. Set the desired security level.
9. Select the permission Security level for external candidates (in view mode).
10. Set the desired security level.
11. Click Save.

Configuring Employee Metrics in the Advanced Search Page

To have employee metrics available in the Recruiting Center Advanced Search Page, the following configuration steps are required.

1. *Making employee metrics fields available in the Recruiting Center.*
2. *Adding employee metrics to the advanced search page.*

Making Employee Metrics fields Available in the Recruiting Center

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click Candidate.
2. In the Show Fields drop-down list, select Employee Metrics.
3. Click a field.
4. Click Edit Field Availability.
5. Select Taleo Recruiting.
6. Click Save.

What to do next

As with any other fields, employee metrics fields are assigned a security level. Organization, Location, and Job Field contextualization and staffing type exceptions are also honored. Note that the Content Required option only displays the Not Required value because employee metrics fields are read-only in the Recruiting Center.

Customizing the Advanced Candidate Search Form

Before you start

The Candidate Search option in the Properties page of a field must be selected for a field to appear in the Available Fields list.

When customizing the advanced candidate search form, be sure to only include fields in the form that you want Recruiting Center users to use. If a user has the permission to perform an advanced candidate search, he/she will have the ability to use any fields that you have included in the form regardless of viewing permissions for the fields. When search results are displayed, if the user is not allowed to view internal and/or external candidates, the field will appear in the list if the column is present and the word "Confidential" will appear instead of the data in situations where the user cannot view the data

Configuration > **[Recruiting] Administration** > **Candidate Search Page**

Here's what to do

1. Select a field in the Available Fields list.
2. Click Add.
3. Click Save.

Results:

The field appears in the Selected Fields list. It is available to Recruiting Center users when customizing the advanced candidate search form provided they have access to the advanced search.

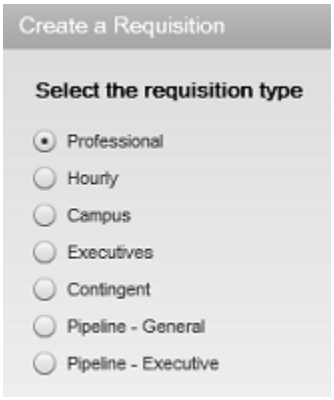
Requisition

Configuring the Create Requisition Assistant

When Recruiting Center users create a requisition, the Create a Requisition assistant guides them through the creation. Fields displayed in the assistant depend on several elements configured by system administrators.

Screen 1: Requisition Type

Recruiting Center users may have the ability to select a requisition type when creating a requisition. The following requisition types may be displayed: Professional, Hourly, Campus, Executives, Contingent, Pipeline - General, and Pipeline - Executive.



The “Select the requisition type” window is visible if there is more than one requisition type available to the user. If only one requisition type is available, it is selected by default and the “Select the requisition type” window is not displayed.

To allow users to select a requisition type, you must:

1. *Activate requisition types* under Configuration > [Recruiting] Administration > Requisition Types. Requisition types are displayed to users in the order you activated them.
2. Grant users permissions to give them access to different requisition types. The “Select the requisition type” window displays only the requisition types to which users have access according to these permissions.

User Type Permission	Location
Allow access to professional requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to hourly requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to campus requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to contingent requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to executive requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to pipeline - general requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions
Allow access to pipeline - executive requisitions	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

If the Contingent Functionality Activation setting is set to No, the Contingent requisition type will not be displayed in the “Select the requisition type” window.

If the Candidate Pipeline Functionality Activation setting is set to No, the Pipeline - General and Pipeline - Executive requisition types will not be displayed in the “Select the requisition type” window.

Screen 2: Requisition File

The “Select a requisition file” window is visible only if more than one requisition file variation is selected in the user's configuration profile (Configuration > [SmartOrg] Administration > [Users] Configuration Profiles > Requisition File Creation).

Screen 3: Requisition Template, Hiring Manager, Department, Position, Job Role

There are a number of combinations of fields you can choose to display to Recruiting Center users after they select the requisition type. For example, these combinations may include Requisition Template only, meaning the user will select an existing requisition template, like Accounting, and then some of the fields will automatically be completed, based on how the requisition template was set up. Requisition Template and Hiring Manager so even more information can be automatically completed on the new requisition.

The Create a Requisition Assistant will present Recruiting Center users one or two fields based on the following preference sequence:

- Job Role* (if activated) else Position (if activated) else Requisition Template
- Department (if activated) else Hiring Manager (if activated) else nothing

Note: If Requisition Template is mandatory, Job Role is not present because it is not associated to a template. Position might indirectly become mandatory in the Create a Requisition Assistant.

To enable these fields, you must either enable a setting or make the field available to Recruiting Center users.

Field in the Create Requisition Assistant	Enabled by
Position	Enable Position setting (Configuration > [Recruiting] Settings) Position field (Configuration > [Recruiting] Administration > Fields > Requisition)
Department	Enable Department setting (Configuration > [Recruiting] Settings) Department Autofill Activation setting (Configuration > [Recruiting] Settings)

Field in the Create Requisition Assistant	Enabled by
	Department field (Configuration > [Recruiting] Administration > Fields > Requisition)
Hiring Manager	Hiring Manager field (Configuration > [Recruiting] Administration > Fields > Requisition) Note that the Hiring Manager field will be prefilled automatically if the user has selected a Default Hiring Manager " in his/her user preferences (Resources > My Setup > Preferences).
Job Role	Job Role field (Configuration > [Recruiting] Administration > Fields > Requisition)
Requisition Template	Nothing to configure

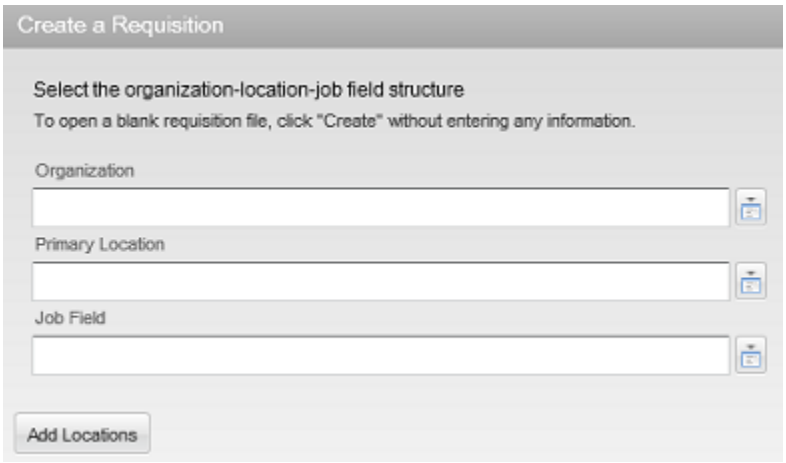
Depending on which settings and fields are enabled, fields in the Create a Requisition Assistant are displayed accordingly.

Fields Displayed in the Assistant	"Enable Position" setting	"Enable Department" setting	"Hiring Manager" field	"Job Role" field
Requisition Template	No	No	No	No
Requisition Template and Hiring Manager	No	No	Yes	No (or if template mandatory)
Requisition Template and Department	No	Yes	Irrelevant	No (or if template mandatory)
Position and Hiring Manager	Yes	No	Yes	No
Position and Department	Yes	Yes	Irrelevant	No
Job Role and Department	Irrelevant	Yes	Irrelevant	Yes
Job Role and Hiring Manager	Irrelevant	No	Yes	Yes

* Note that if Template is mandatory, Job Role is not present because it is not associated to a template. Position might indirectly become mandatory in the Create a Requisition Assistant.
The Hiring Manager field may be automatically filled if configured as such.

Screen 4: Organization-Location-Job Field

The last set of fields presented in the Create a Requisition Assistant are Organization, Location, and Job Field. The Location and Job Field fields are always visible. The Organization field is visible only if the Structure block in the requisition file has the property “Display the Organization fields”.



Note that Location or Organization can be defaulted to the department value and made read-only based on the following settings:

Setting	Description	Default Value	Location
Link Requisition Location to Department Location	This is a protected setting that can be activated by Oracle Support. If the setting is set to Yes, if there is a department selected for the current requisition, then the location of the requisition will be changed for that of the department, and the Location field will be read-only. If the setting is set to Yes, when a department is selected for the current requisition, if this department has NO location specified, then the requisition location will stay unchanged and will be editable.	No	Configuration > [Recruiting] Settings
Link Requisition Organization to Department Organization	This is a protected setting that can be activated by Oracle Support. If the setting is set to Yes, if there is a department selected for the current requisition, then the organization of the requisition will be changed for the one of the department, and the Organization field will be read-only. If the setting is set to Yes, when a department is selected for the current	No	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	requisition, if this department has NO organization specified, then the requisition location will stay unchanged and will be editable.		

Other Information Regarding the Create a Requisition Assistant

In the Create a Requisition Assistant, the Default Hiring Manager field may be filled automatically if the user has selected a default hiring manager in his/her preferences (Resources > My Setup > Preferences).

Screens 3 and 4 may be deactivated if the Requisition File Automatic Filling setting is enabled in the user's configuration profile. However, it is recommended to not activate this setting because the content of the requisition form depends on the selections made in screens 1, 2, 3, and 4 of the assistant.

Setting	Default Value	Location
Requisition File Automatic Filling	Yes	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

Create Requisition Action - Required Permissions

To create requisitions in the Recruiting Center, users must have the following permissions.

User Type Permission	Location
Create requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
View requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > General
Allow access to n requisitions Note: For a requisition type currently active.	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions > Requisition Types

Configuring Requisition File Tabs

In the requisition file, tabs presented to users are governed by permissions and configurations.

Requisition File Tab	Description	Permission and Configuration Required
Requisition	Contains all the details of the job based on what has been configured and activated by the system administrator as the requisition file in the Recruiting Administration module.	Always displayed. For details on the Requisition tab content, see *Content Displayed in the Requisition Tab*.
Alerts	Allows you to set the ACE candidate alert to be informed when the ideal candidate is found.	Displayed only if the requisition file has a Prescreening section. One of the following permissions must be granted: View and manage ACE threshold and alert recipients (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions) View and manage the "Request More Information" alert (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions)
Attachments	Contains attachments for the requisition.	The Attachments requisition field must be configured as available in Recruiting (Configuration > [Recruiting] Administration > Fields > Requisition). Users authorized to view the Attachments field based on their field level security permission will be able to view the Attachments tab (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions > Security level for requisitions). When the Attachments tab is displayed, users can view the attachments contained in the tab.
Approvals	Displayed when an approval request has been generated. The tab appears for all users that can view the requisition. When no approval request has been generated, the Approvals tab is hidden. This tab provides an easy means to access and review the most recent approval information for the requisition. Authorized users can also modify or resend approval requests from this page.	Displayed only if an active approval path has been defined. Once the first approval path is created, it will always appear for anyone who has access.
Posting and Sourcing	Provides access to posting and sourcing features such as career section posting, job board distribution through eQuest, staffing agents, non-electronic media.	Access Posting and Sourcing (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Sourcing)
Autopooling Criteria	Contains autopooling criteria.	View Autopooling criteria (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions)
History	Contains a log of all actions performed on the requisition file, including the date and the user who performed the action.	Always displayed, but you can limit who has access to certain history events by disabling the *View history events on requisitions for actions by other users. (A user can always view history events for their own actions)* user type permission (Configuration > SmartOrg Administration > User Type > Recruiting > Requisitions > General)

Requisition File Tab	Description	Permission and Configuration Required
		.
Reports	Allows users to define if a daily recruiting report will be sent to individuals regarding the status of the requisition's progress.	View and manage the daily recruiting report (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions)

Configuring the Content Displayed in the Requisition Tab

The Requisition tab in the requisition file is always displayed. However, the content presented to users is configurable and fields or sections may be hidden or not configured for inclusion.

Content	Configuration
The user's configuration profile is used to define which file is to be used for viewing or editing a requisition.	View or Edit Requisition File (Configuration > [SmartOrg] Administration > Configuration Profiles) Note that if a configuration profile was not defined for a user, Requisition File 1 is used.
Field configuration is used to define field behavior that is, if the field is available or not, if content is required for the field, the confidentiality level of the field, the OLF contextualization, the staffing type exception.	Configuration > [Recruiting] Administration> Fields > Requisition
File configuration is used to include sections, sub-sections, and fields according to the file linked and defined to be Requisition File 1, 2 or 3. To minimize complexity in the system, the following fields must always be visible to the user, even if they are not editable. In other words, these fields will always be considered as "general" in view mode even if their security level states otherwise. • Requisition ID • Title • Primary Location • Organization • Job Field • Recruiter • Hiring Manager • Status • Status Details	Configuration > [Recruiting] Administration> Requisition File Setup Configuration > [Recruiting] Administration> User-defined Files Configuration > [Recruiting] Administration> User-defined Forms Configuration > [Recruiting] Administration> Fields

Content	Configuration
• Activated Languages • Requisition Type	
Fields included in the file are displayed based on the field security level permission. .	Security level for requisitions (in view mode) (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions)
Sections of information are displayed based on permissions.	Access Prescreening Information (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions) View Compensation section in requisitions (Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions).

Configuring Requisition/Staffing Type

The requisition/staffing type configuration consists of the following steps:

1. *Activating requisition types.*
2. *Adding the Requisition Type column in the requisition list format context*. This is a best practice for customers using multiple requisition types.
3. Granting one or several of the following user type permissions to that Recruiting Center users have access to different requisition types and indirectly, different pools of candidates.

User Type Permission	Location
Allow access to professional requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions
Allow access to hourly requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions
Allow access to campus requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions
Allow access to contingent requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions
Allow access to executive requisitions	Configuration > [SmartOrg] Administration> User Types > Recruiting > Requisitions

Activating a Requisition Type

Before you start

Configuration > [Recruiting] Administration > Requisition Types

Here's what to do

1. Select a requisition type in the Available Requisition Types list.

2. Click Add.
3. Use the up and down arrows to order the requisition types in the list.
   The order you select here will be reflected in the Recruiting Center when users select a requisition type in the requisition creation tool.
4. Click Done.

Results:

The requisition type is available to Recruiting Center users when creating a requisition.

Adding a Column in a List Format

Before you start

Configuration > **[Recruiting] Administration** > **List Formats**

Here's what to do

1. Click the Candidate or Requisition tab.
2. Select a variation in the Show list.
3. Click the name of a context.
4. In the Formats for this Context tab, click a list format.
5. Select the check box next to a column.
6. Click Done.

Reopening Requisitions

The Reopen Requisition action allows Recruiting Center users to reopen a requisition previously filled or canceled, with the option to cancel the current hiring or to add new openings.

The Reopen Requisition action provides two options:

- Add Openings: Users can enter a specific number of additional openings or select Unlimited to have an unlimited number of openings.
- Cancel the Hiring of Candidates: This option will be displayed only if there is at least one hired candidate for the requisition.

Configuring the Reopening Requisition Action

The configuration of the Reopen Requisition action consists in configuring specific settings and permissions.

The Reopen Requisition action is available to users if:

- The **Ability to Reopen Requisitions** setting is set to Yes.
- The **Reopen a filled or cancelled requisition** permission was granted to users.

- The requisition status is Filled or Canceled.

When a user is doing the Reopen Requisition action from a canceled requisition, if the **Restart Approval Process After "Cancel" Step** setting is set to Yes, the status of the requisition will be changed to Draft and the Request Approval action will be triggered. Note that this action does not apply to requisitions that were only draft then cancelled.

When a user is doing the Reopen Requisition action from a filled requisition, if the **Restart Approval Process After "Fill" Step** setting is set to yes, the status of the requisition will be changed to Draft and the Request Approval action will be triggered.

Setting	Description	Default Value	Location
Ability to Reopen Requisitions	Allow the reopening of filled and canceled requisitions.	No	Configuration > [Recruiting] Administration > Settings
Restart Approval Process After "Cancel" Step	Restart the approval process when reopening a requisition after it has been canceled	No	Configuration > [Recruiting] Administration > Settings
Restart Approval Process After "Fill" Step	Restart the approval process when reopening a requisition after it has been filled	No	Configuration > [Recruiting] Administration > Settings

User Type Permission	Location
Reopen a filled or cancelled requisition	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Requisitions

Automatically Rejecting Candidate Submissions When Requisitions are Filled and/or Canceled

The auto-rejection of candidate submissions can be set for canceled requisitions and filled requisitions.

System administrators determine when candidate submissions will be automatically rejected:

- When a requisition has been filled.
- When a requisition has been canceled.
- When a requisition has been filled or canceled.
- In neither case.

Recruiters can choose to override the auto-rejection behavior set by the system administrator. In the requisition file Candidate Selection Workflow section, recruiters can select these options:

- Automatically reject all submissions when the requisition is filled
- Automatically reject all submissions when the requisition is canceled

When viewing the History tab of candidate submissions, recruiters can determine the cause of the auto-rejection. The event "Status changed to Rejected" is displayed for both types of rejections, but the details will indicate if the rejection was due to the requisition being canceled or filled.

Configuration

The setting "Automatically Reject Candidates when Closing a Requisition" allows system administrators to enable the auto-rejection independently for canceled requisitions and filled requisitions.

Setting	Description	Default Value	Location
Automatically Reject Candidates when Closing a Requisition	When a requisition is filled and/or canceled, all candidate submissions are automatically rejected. Possible values are: • No • Filled requisitions only • Canceled requisitions only • Filled and canceled requisitions	No	Configuration > Recruiting Settings

Offer

Offer Configuration

The configuration of offers consists of the following steps.

1. *Configuring offer fields.*
2. *Configuring the offer form.*
3. *Adding the RSOffer step in the candidate selection workflow.*
4. *Configuring offer letters.*
5. *Configuring the Offer channel.*

Configuring Offer Fields

The configuration of offer fields is done in the Offer Fields feature in the Recruiting Administration menu.

When editing or creating an offer field, system administrators specify the following:

- The availability of the offer field in the Recruiting Center which is done by selecting the Taleo Recruiting option.
- The content required for the offer field, that is whether the content is not required or required for saving.
- The security level of the offer field, that is General, Restricted or Confidential.
- The Organization-Location-Job Field structure associated to the offer field, if any.
- The exceptions based on staffing types being used.

For details on how to create and edit offer standard fields, see Modifying Standard Fields.

It is possible to filter fields in the Offer Fields list. The Show Fields filter contains the following filtering criteria:

- All Offer Types
- Offer Terms
- Competitive Offer
- Expectations
- Requisition

When configuring requisition fields in the Recruiting Administration menu, all offer user-defined fields that are part of "offer terms" appear in the listing. Offer user-defined fields are displayed because they are available for use in the requisition context. The configuration of the fields is intermixed. That is, if an offer field is configured in the requisition area, that configuration will impact that field and how it is configured in the offer area as well.

This table provides explanations on certain requisition offer fields.

Field	Mapped to	Notes
Currency - Compensation Section	Mapped to the Currency field in the requisition file Compensation section. Also mapped to the Currency field in the offer grid (job submission Offers tab).	This field is offer related.
Currency	Mapped to the currency field in the requisition file Contingent section.	This field is not offer related.
Currency - Bonus Section	Mapped to the Currency - Bonus Section field in the requisition file Budget section.	This field is not offer related.
Currency - Budget Section	Mapped to the Currency - Budget Section field in the requisition file Budget section.	This field is not offer related.
Maximum Salary	Mapped to the Annualized Salary field in the offer grid (job submission Offers tab).	
Minimum Salary	Mapped to the Salary (Pay Basis) field in the offer grid (job submission Offers tab).	The Salary (Pay Basis) field is updated by two actions (besides manual edits): 1) When copying the minimum requisition pay to this field within the offer grid. 2) When the user calculates compensation by pay basis.

The following offer fields are available in the offer form. They have calculation relationships and it is recommended that the *offer form layout* be configured to group them together:

- Annualized Salary
- Salary (Pay Basis)
- Pay Basis

When configuring requisition offer fields, both standard and user-defined fields, a distinct configuration of the Content Required attribute is done for the requisition and the offer context. All other contextualization of these fields (that is Security Level) is shared between requisition and offer field configurations.

Configuring the Offer Form

The configuration of the offer form is done in the Offer Field Layout feature in the Recruiting Administration menu.

System administrators specify in which section of the offer grid the field will be displayed (Top Section, General Terms, Bonuses, Details, Other Terms) and the row where it will appear.

The name of the offer form sections can be customized to better align with a company's terminology. To customize the name of offer form sections, a Service Request to Oracle Support to modify TextTool resources is required. Below are the resource IDs of the section names:

- Top Section: 4661357
- General Terms: 4661351
- Bonuses: 4661345
- Details: 4661348
- Other Terms: 4661354

Adding a Field to the Offer Form

Before you start

Offer fields must first be created.

Configuration > **[Recruiting] Administration** > **[Fields] Offer Field Layout**

Here's what to do

1. Click Add...
2. Select a field to include in the form.
3. Click Add.
4. Click Done.

Results:

The field appears in the Field Layout - Offer page.

Positioning Fields in the Offer Form

Before you start

Both standard and custom offer fields can be positioned in the offer form.

For custom fields to appear in the Field Layout - Offer page, you must first create them.

Configuration > **[Recruiting] Administration** > **[Fields] Offer Field Layout**

Here's what to do

1. In the Field Layout - Offer page, for each field select a value under Category to specify in which section of the form the field will be placed.
2. Select a number under Line to specify on which line in the section the field will be placed.
3. Click Apply.

Adding the RSOffer Step in the Candidate Selection Workflow

The RSOffer step is a step that can be included in a candidate selection workflow to allow users to use the offer management module.

The RSOffer step is different than the regular Offer step. It must be included in the candidate selection workflow to trigger the Offer Management dynamic action buttons in the Recruiting Center.

The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

The RSOffer step has the following statuses:

RSOffer Step Available Status	Description
Offer to be made	Initial status of the Offer step.
Draft	Offer terms have been started and saved, but not approved.
Cancelled	A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.
Approval in progress	Offer has been routed for approval.
Approval rejected	Offer has been rejected.
Approved	Offer has been approved.
Extended	Offer has been extended to the candidate.
Rescinded	After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.
In negotiation	Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either recapture the candidate response (accept or refused) or status them as Rejected or Has Declined.
Refused	Offer was extended to the candidate. The user marked the candidate as refusing the offer. A new offer can be created at this point.
Accepted	Offer was accepted by the candidate.
Reneged	After the candidate has accepted the offer, the candidate refuses the offer (goes back on his or her word).
Rejected	After the offer has been rescinded to a candidate, the user should status the candidate as Rejected in the Offer step. This will allow another offer to be created and extended.
Has declined	After the offer has been refused or reneged by the candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended

Adding a Step to a Candidate Selection Workflow

Before you start

The step must be activated in order to add it to the candidate selection workflow.

There is no limit on the number of steps that can be used in a candidate selection workflow.

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

Here's what to do

1. Click the Workflows tab.
2. Click a candidate selection workflow.
3. Under the Steps Usage tab, click Add...
4. Select a step.
5. Click Add.
6. Click Done.

Configuring Offer Letters

Offer letters are created via the Message Templates feature in the Recruiting Administration menu.

There are a number of message templates and paragraphs related to offers. You may want to examine these to see what your organization will use and see if you want to create additional templates and paragraphs.

Configuring the Offer Channel

If your organization is using the Offer Management module and wants the Offer channel activated on the Recruiting home page, you will need to contact Oracle Support.

Adding Channels and Links to a Center Stage

Before you start

The center stage must be in the inactive or draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Add next to Channels and Links.
4. Select channels and links.

5. Click Select.
6. Click Save.

Results:

When a user associated to that center stage will access the Recruiting Center, the channels and links will appear.

What to do next

Ordering channels and links as well as columns in the center stage.

Offer - Permissions and Settings

The following permissions and settings can be used to configure offers.

User Type Permission	Description	Location
Offer-related permissions are available in the Recruiting - Offers functional domain.		Configuration > [SmartOrg] Administration > [Users] User Type > Recruiting > Offers
Create Offers	The *Create offers* permission gives users the ability to create offers. The Create Offer action is available to users who have the following permissions: • Create offers • View and manage offers • Change submission status • Mark candidates has having reach the offer process	Configuration > [SmartOrg] Administration > [Users] User Type > Recruiting > Offers
View and manage offers	The *View and manage offers* permission gives a user the ability to edit an existing offer.	Configuration > [SmartOrg] Administration > [Users] User Type > Recruiting > Offers
View offers	The *View offers* permission allows users to see offers but not to create or edit them.	Configuration > [SmartOrg] Administration > [Users] User Type > Recruiting > Offers

Setting	Location
Many offer settings are available. To easily access these settings, it is possible to refine the list by using the Offer category filter.	Configuration > [Recruiting] Settings

Offers and Candidate Selection Workflows

Candidate selection workflows may be configured to contain an Offer step or an RSOffer step.

Candidate Selection Workflow and Offer step

Using the Offer step is a simplified way to track offer activity in a candidate hiring process without enabling the entire Offer Management module functionality. Placing this step in a workflow will not enable the use of the Offers tab and Offer Approvals tab. A candidate selection workflow containing an Offer step allows users to move candidates from one step to another using standard actions (Change Step/Status, Move, Revert).

When adding the Offer step to a candidate selection workflow, the following actions are available to users via the More Actions list.

- Make an offer.
- Reject candidates.
- Candidate has declined.

Candidate Selection Workflow and RSOffer step

The RSOffer step is a special candidate selection workflow step created for the Offer Management module. The Offer Management module provides the tools for the creation of offers, offer approval, offer extension to the candidate, and capture of the candidate response. Users are also be able to capture competitive offer information as well as candidate current and future expectations.

With this type of workflow, instead of moving candidates using standard actions (Change Step/Status, Move, Revert), specific offer-related actions are presented in the More Actions list as they become an appropriate next activity in the Offer process.

System administrators are responsible for adding the RSOffer step in the appropriate candidate selection workflows. The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

When adding the RSOffer step to a candidate selection workflow, authorized users are able to:

- Create offers.
- Extend offers verbally, in writing, and electronically.
- Send offers.
- Capture a candidate response.
- Capture a candidate expectations.
- Capture a candidate current job terms.
- Capture competitive offer information.
- Approve offers.
- etc.

Extending More Offers than Positions Available

Recruiters may have the ability to create and extend multiple offers for a single position.

Your organization may choose to activate the Extend More Offers than Positions feature globally, for all requisitions. This is done by enabling the recruiting setting "Extend More Offers than Positions". When this setting is not enabled, recruiters can only extend one offer per position.

You may also activate this feature at the requisition level, by including it as a field in requisitions. This is done by activating the requisition field called "Extend more offers than positions available". You then need to add the field to a requisition form and then include the form in a requisition file for use in the Recruiting Center. Once activated, recruiters will see the option "Extend more offers than positions available" is available in requisitions.

Extending an Offer Electronically (E-Offer)

Recruiting Center users can extend offers electronically so that candidates can view and respond to these offers on line.

Two E-Offer options are available:

- The *standard electronic offer* using Recruiting.
- The *advanced electronic offer* that requires Onboarding (Transitions). There can only be one Advanced E-Offer process in use at a time for each zone.

Configuring the Standard Electronic Offer

The configuration of the standard electronic offer feature consists of the following steps.

1. *Enabling the Electronic Offers setting.*
2. *Granting the Extend Offers Electronically permission.*
3. *Configuring Electronic Offer message templates.*

For details on how to configure the advanced electronic offers using Onboarding (Transitions), refer to the *Onboarding (Transitions) Configuration Guide*.

Enabling the Electronic Offers Setting

Before you start

Configuration > **[Recruiting] Settings** >

Here's what to do

1. Refine the settings list using the **Offer** category.
2. Click the **Electronic Offers** setting.
3. Click **Edit**.
4. Select **Standard Electronic Offer**.
5. Click **Save**.

Results:

Recruiters can extend offers electronically if they have the required user type permission, and candidates will access the career section Offers tab to accept or refuse the offer.

Granting the Extend Offers Electronically Permission

Before you start

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

Here's what to do

1. Select a user type.
2. Click **Recruiting**.
3. Click **Edit** next to Offers.
4. Select **Extend Offers Electronically**.
5. Click **Save**.

Results:

Recruiters can select the E-Offer option when extending offers to candidates, and candidates will access the career section Offers tab to accept or refuse the offer.

Configuring Electronic Offer Message Templates

Configure message templates created for electronic offers.

Message Template	Description	Location
EOffer Candidate Invitation	Standard notification for candidates when they have been extended an electronic offer. This message template can be modified. When configuring the message template, you can enter any email address of the candidate in the TO line. You can put more than one recipient in the TO line, but only the candidate will be able to access the career section. A new token is available to redirect the candidate to the career section Offers tab: {CareerSection.OfferViewURL}	Configuration > [Recruiting] Message Templates
EOffer Response Notification	Standard notification for recruiters when candidates acted on electronic offers (accept / refuse). The message gets sent as soon as the candidate responds. By default, the candidate response notification only goes to the recruiter assigned to the requisition. This message template can be modified. A new token is available for the subject line to display the offer status: {OfferHeader.StatusDescription}.	Configuration > [Recruiting] Message Templates

Message Template	Description	Location
	A new token is also available to display the candidate response in the message body: {Offer.StatusDescription}.	

Note: When changing an existing company logo, the logo is updated everywhere, including past offer letters. In an offer letter, the logo is saved as a link to the logo. As a result, changing the logo will also update the logo in past offer letters. A workaround would be to upload a new logo using another Custom Correspondence Logo setting instead of changing an existing logo setting.

Standard Electronic Offer using Recruiting

Customers can use the Standard Electronic Offer feature to extend offers electronically to candidates. Candidates will then access the career section to respond to the offer on line.

To send offers electronically, the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the candidate selection workflow must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. Recruiters select the Extend Offer action in candidate submissions with the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, the Extend in writing option is selected by default. In the Send Offer Letter window, the E-Offer option is selected by default. When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates receive an email notification inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Offers tab where 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. The electronic signature is mandatory but it is not validated and therefore any data can be entered.

Note: The Full Name and Unique Identifier labels can be changed by customers.

When candidates accept an offer, the time and date of their e-signature is displayed at the bottom of the accepted offer page, along with the full name of the candidate who signed it. The unique identifier or specific other data which candidates entered is not displayed on the page.

When candidates accept an offer, the offer remains visible in the career section for future reference. When candidates refuse an offer, the offer disappears from the career section. When candidates have multiple concurrent offers, for example a candidate could be hired for a summer job and a long-term permanent position, the career section Offers tab lists all the offers, that is offers that still need a response and offers that were accepted. If an offer has an expiration date and that date is reached and the candidate has not yet responded to the offer on line, the offer disappears from the career section. If the candidate has accepted the offer before the expiration date, then the accepted offer remains visible in the career section for future reference. If the candidate refuses the offer before the expiration date, then the offer disappears from the career section.

As soon as candidates respond to the offer, recruiters receive an email notification. This notification is a configurable message template which contains the candidate's response. This notification can be modified to provide any other

information and can also be sent to additional recipients like the Hiring Manager. Depending on the candidate's response, the candidate status is automatically changed to Offer - Accepted or Offer - Refused, and recruiters can then move the candidate to the next step in the candidate selection workflow.

> **Note:** It is not possible to build auto-progression rules that would bring candidates forward in the candidate selection workflow beyond the next step. The email notification sent to recruiters could instruct them to do so manually for each candidate.

Recruiters can capture the offer response on behalf of candidates after they have extended the offer. For example, if a candidate contacts the recruiter to give a response before responding to the offer on line, then the recruiter can capture the response. This can give recruiters the opportunity to capture decline motives or to put the offer into the In Negotiation status. If the response entered by the recruiter is Accepted, then the offer will continue to be displayed in the career section for the candidate to view, just like any accepted electronic offers. The offer will show as being accepted but it will not show the full name of the candidate at the bottom of the offer letter page because the candidate did not enter an electronic signature. If the response entered by the recruiter is Refused, then the offer will disappear from the career section just like when candidates refuse an offer themselves.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible on line in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

> **Note:** In standard electronic offers, users can adjust the offer and then extend/send it again. The mere act of adjusting the offer will require that the user rescind the already-accepted offer and create a new offer so that it can be extended again.

Advanced Electronic Offer using Onboarding (Transitions)

Customers who have more complex electronic offer requirements can configure advanced electronic offer workflows in Onboarding (Transitions) for use in Recruiting.

Some customers might require additional eSignatures, notifications extended to include additional people, calls to partner services, different tasks for executives. Clients like those who have more complex requirements might consider using the "Onboarding (Transitions) version" of electronic offers because offer workflows in this version can be configured to accommodate a wide variety of needs.

To send offers electronically using Onboarding (Transitions), the Electronic Offers setting must be set to the proper value, users must be granted the permission to extend offers electronically, and the Candidate Selection Workflow (CSW) must contain the RSOffer step.

The E-Offer process starts as soon as an offer is ready to be extended. Recreuiters select the Extend Offer action in candidate submissions with the status Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). In the Extend Offer window, the Extend in writing option is selected by default. In the Send Offer Letter window, the E-Offer option is selected by default. When an offer is extended electronically, a tracking event is created in the candidate file History tab indicating that an electronic offer was extended.

Candidates may receive an email notification (if the Onboarding (Transitions) process was configured like that) inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Tasks tab where 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 complete any mandatory fields which may include an electronic signature.

As soon as candidates respond to the offer, the system task that must be configured into the process will then change the candidate status to Offer - Accepted or Offer – Refused, depending on the candidate's response. This adds a line to the History of the candidate's submission in the Recruiting Center, capturing the candidate's response. Then, recruiters or any other assignees can receive a configurable email notification (if the process is configured like that), which can contain the candidate's response, any e-signature information if desired, and any other data fields. The recruiters can then move the candidate to the next step in the CSW, while the rest of the Onboarding (Transitions) process can also continue automatically in parallel.

It is also possible for recruiters to send an offer again once the offer has been extended. For example, an offer was extended in writing via email or printed letter and the recruiter wants to also send it by E-Offer to make it visible on line in the career section. Similarly, if an offer has already been extended and sent as an E-Offer, recruiters can still send it again via email or printed letter.

As before, recruiters still retain the ability to capture the offer response on behalf of candidates after they have extended the E-offer, and before the candidates respond to it online themselves. This changes the status in the CSW to Offer - Accepted or Offer - Refused, depending on the candidate's captured response.Capturing this response in the Recruiting Center has no immediate effect on the offer letter that is still displayed to the candidate in the Career Section. However, the candidate's electronic response will not change the CSW status because the offer response was already inputted by the recruiter, and the offer is no longer in the Extended status. The offer letter will continue to be displayed in the Tasks tab as long as the process is running.

Just as recruiters can track any process, they can also track the progression of the E-Offer process in the Onboarding (Transitions) Center. They can also view their current tasks regarding an E-Offer process in the Onboarding (Transitions) Center. Recruiters might receive an email notification (if such notification is configured) as soon as candidates respond to an advanced E-Offer.

Comparison of the Standard Electronic Offer and the Advanced Electronic Offer

	Standard Electronic Offer	**Advanced Electronic Offer**
Where do offers appear in the career section?	In the Offers tab. Several offers can appear in the tab.	In the Tasks tab. Several Onboarding (Transitions) processes can appear in the tab.
When is the candidate invited?	When the offer is sent by the Recruiting Center user, either at the moment the offer gets extended or when an extended offer is sent again.	Whenever, as configured within the E-Offer process.
Is the e-signature mandatory?	Yes.	It is configurable.
Is it possible to capture several e-signatures?	Two e-signatures on a single form for candidate.	Unlimited different e-signatures can be configured to appear on any number of forms assigned to any participants.

	Standard Electronic Offer	Advanced Electronic Offer
Is it possible to validate the e-signature?	No, the two e-signatures are not validated but they are mandatory.	Yes, by specifying the electronic signature method (first name, last name, birth date, SSN last 4 digits, etc.).
Is it possible to send different notifications or tasks per OLF?	No	Yes, by configuring different steps, targeted per OLF or per any field, within the E-Offer process. Only one Onboarding (Transitions) process of type "E-Offer" can be created (not several based on OLF).
Is it possible to send reminders?	No	Yes, for the candidate E-Offer form and for any task as it approaches or passes its due date.
When is the status updated in the candidate selection workflow?	Immediately when the electronic offer is submitted by the candidate on the career section.	Whenever desired within the E-Offer process, at the point when the system task gets triggered for this purpose.
Can recruiters capture the offer response manually?	Yes, the candidate selection workflow gets updated but the candidate can no longer e-sign the offer in the career section. The candidate will still see the accepted offers in the career section.	Yes, the candidate selection workflow gets updated and the process can continue. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
Is it possible to configure auto-progression of the candidate selection workflow, after receiving candidate response to an E-Offer?	No	No
Do offers remain available in the career section when candidates refuse it?	No	Yes, all submitted forms including the E-Offer form remain visible in read-only for the duration of the E-Offer process, until the candidate/new hire process reaches 100% completion (or gets cancelled or suspended).
Do offers remain available in the career section after candidates accept them?	Yes, the offer remains visible until the candidate/offer information gets archived or purged.	Yes, all submitted forms including the E-Offer form remain visible in read-only for the duration of the E-Offer process, until the candidate/new hire process reaches 100% completion (or gets cancelled or suspended).
If the candidate accepts the E-Offer while the start date is still tentative, will the system	No	No

	Standard Electronic Offer	Advanced Electronic Offer
automatically create a task telling the recruiter to finalize it?		
When the candidate accepts the E-Offer, will the system automatically create a task telling the recruiter to confirm the employee's presence on their start date?	No	No
Can recruiters rescind an electronic offer?	Yes, an electronic offer can be rescinded just like any other offer in the Extended status.	Yes, an electronic offer can be rescinded just like any other offer in the Extended status.
What happens when recruiters cancel a requisition containing an electronic offer?	The requisition cannot be cancelled until any extended offers have first been rescinded.	The requisition cannot be cancelled until any extended offers have first been rescinded.
What happens when the expiration date is reached?	Candidates can no longer respond to the electronic offer, but recruiters can still respond for them.	No effect, the process can continue.
What happens when recruiters mark an electronic offer as being accepted before the candidates give their own response on the career section?	The candidate selection workflow gets updated (status is Accepted) but the candidate can no longer e-sign the offer in the career section. No e-signature will be visible at the bottom of the accepted offer on the career section because the candidate did not e-sign it. The candidate will still see the accepted offer in the career section.	No effect; the process can continue. The candidate selection workflow gets updated (status is Accepted) and the process can continue. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
What happens when recruiters mark an electronic offer as being refused before the candidates give their own response on the career section?	The candidate selection workflow gets updated (status is Refused) and the electronic offer disappears from the career section.	No effect; the process can continue and the candidate selection workflow gets updated by the recruiter to status Refused. The candidate can still e-sign the offer. However, if the candidate's response is different, the response that was first captured by the recruiter will be considered.
What happens when recruiters mark an electronic offer as being in negotiation?	No effect. The status of the offer is changed and a row is written into History as usual, but the candidate can still view and respond to the E-Offer as usual.	No effect. The status of the offer is changed and a row is written into History as usual, but the candidate can still view and respond to the E-Offer as usual.

Viewing E-Offer Letter PDFs

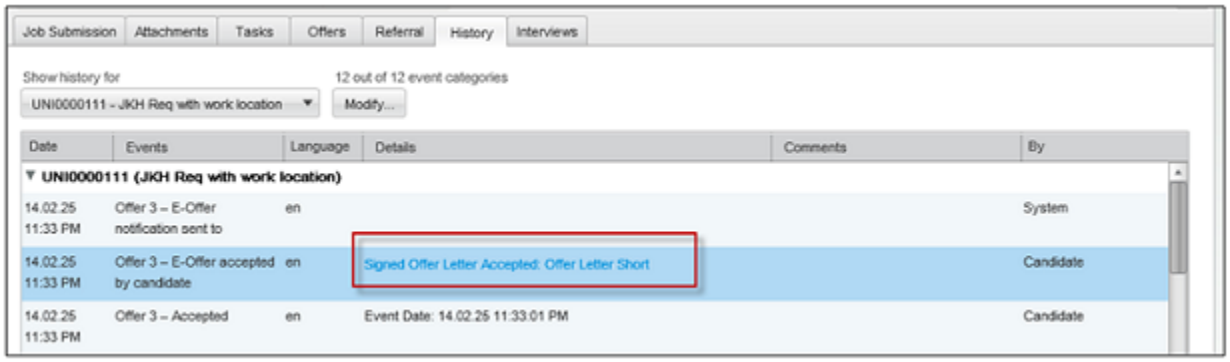
Recruiting Center users can view and print offer letter PDFs that are electronically accepted or refused by the candidate or employee

This feature is available for both the standard E-Offer in Recruiting and the advanced E-Offer in Onboarding (Transitions). For details, on the advanced E-Offer, refer to the Onboarding (Transitions) documentation.

Recruiters can use the *Standard Electronic Offer* feature in Recruiting to extend offers electronically to candidates. Once the offer is extended to the candidate, the candidate accesses the career section Offers tab to respond to the offer on line. Depending on the candidate's response, the candidate status is automatically changed to Offer - Accepted or Offer - Refused, and the recruiter can then move the candidate to the next step in the candidate selection workflow. The recruiter, if granted the proper permissions, can view and print the PDF of the completed E-Offer letter in:

- the candidate file History tab, by clicking the hyperlinked name of the offer letter template shown in the Details column.
- the offer grid for the current offer, by clicking the Print icon.

Note: The Print icon is available only for the current offer. In the case where the offer is no longer current, the icon is not available. If the offer was rescinded by the Recruiting Center user or reneged by the candidate, the offer grid will no longer display the icon to access the completed offer letter. However, the entry in the History tab will always remain available to access all past E-Offer PDFs, even those rescinded or reneged.



The E-signature information is displayed at the end of each E-Offer letter PDF:

- Acceptance or refusal of the offer.
- Time and date of the candidate e-signature (in the timezone of the recruiter who extended the offer).
- IP address.
- Full name of the candidate who signed the E-Offer.

Note: Recruiters can view accepted and refused offers that were electronically signed in version 12C and beyond. The candidate file History tab displays a clickable link to view the PDF of these E-Offers.

Configuring the Access to Offer Letter PDFs

Several elements must be configured to provide users access to Offer Letter PDFs and their content.

1. *Granting the View offers permission*. The View offers permission allows users to view offer information for their requisitions. You must grant this permission so users can access the Offers tab and view the offer grid in candidate submissions.
2. *Setting the security level of Offer fields*. The security level of offer fields can be defined to restrict their access. You can define how sensitive each offer field is by assigning the General, Restricted or Confidential security level. Offer fields appear in the offer grid. Offer fields can also appear within the offer letter. If the paragraphs of the offer letter are configured to contain any offer tokens, these fields will be printed in the offer letter. Setting the security level of offer fields does not control whether or not these fields are displayed to viewers of the offer letter PDFs.
3. *Setting the security level of the "Letter Used" Offer field*. You can also define how sensitive offer letters are. This is done by assigning the General, Restricted or Confidential security level to the Letter Used field. This field controls the display of the offer letter link in the offer grid Letter Used field and also the display of the offer letter link in the candidate submission History tab.
4. *Granting the Security Level for Offers (in view mode) permission*. You must grant users the Security level for offers (in view mode) permission to define if they have a general, restricted or confidential access to offer fields displayed in the offer grid.

Below are examples of how the system will behave depending on the above permissions and elements are configured.

Example 1: Prevent users from viewing E-Offer PDFs

In this example:

- Recruiter Jane Smith has the permission to view offers for requisitions that she owns ("View offers - Only if this user is an owner of the requisitions").
- Recruiter Jane Smith has the permission to view offer fields that are marked General ("Security level for offers (in view mode) - General").
- The Letter Used field is marked Restricted.

For requisitions she owns, Recruiter Jane Smith:

- Can see the Offers tab and offer grid in the candidate submissions.
- Cannot see the offer letter name (Letter Used field) in the offer grid.
- Cannot see the name of the offer letter in the candidate submission's History tab and thus cannot click it to view the PDF.
- Cannot view the Print signed offer letter icon on the current offer in the offer grid, and thus cannot open the PDF.
- Cannot see the name of the offer letter in the offer grid, neither for the current offer nor for any past offers.

Example 2: Allow users to view E-Offer PDFs

In this example:

- Recruiter Jane Smith has the permission to view offers for requisitions that she owns ("View offers - Only if this user is an owner of the requisitions").

- Recruiter Jane Smith has the permission to view offer fields that are marked Restricted ("Security level for offers (in view mode) - Restricted").
- The Letter Used field is marked Restricted.

For requisitions she owns, RecruiterJane Smith:

- Can see the Offers tab and offer grid in the candidate submissions.
- Can see the name of the offer letter in the candidate submission's History tab.
- Can see the name of the offer letter in the offer grid and click the link to view the offer letter content.

Note: Make sure that the security level of the Letter Used field is as secure as the fields contained in the offer letter. Users who have the permission to view offers can view the whole content of the offer letter, regardless of how sensitive some fields may be. Specific fields such as Salary can be marked Confidential. But all fields that are configured to appear in the offer letter will be displayed in the offer letter, regardless of their security level. So even if the Letter Used field is marked Restricted, the more-sensitive Salary field marked Confidential will still appear in it. Thus users who cannot see Confidential data such as Salary can still see the offer letter which is Restricted, and this offer letter can reveal the value of the Salary field. The offer letter containing the salary is less secure than the salary field itself.

Granting the View Offers Permission

Before you start

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

Here's what to do

1. Select a user type.
2. Click **Recruiting**.
3. Click **Edit** next to Offers.
4. Select **View offers**.
5. Click **Save**.

Setting the Security Level of Offer Fields

Before you start

Configuration > [Recruiting] Administration > Fields

Here's what to do

1. Click the Offer field category.
2. Click an offer field.
3. Click Edit Field Availability next to Properties.
4. Specify the security level of the field, that is General, Restricted, or Confidential.
5. Click Save.

Setting the Security Level of the "Letter Used" Offer Field

Before you start

Configuration > **[Recruiting] Administration** > **Fields**

Here's what to do

1. Click the Offer field category.
2. In the Show Fields drop-down list, select Offer Terms.
3. Click the Letter Used field.
4. Click Edit Field Availability next to Properties.
5. Specify the security level of the field, that is General, Restricted, or Confidential.
6. Click Save.

Granting the Security Level for Offers (in view mode) Permission

Before you start

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

Here's what to do

1. Select a user type.
2. Click **Recruiting**.
3. Click **Edit** next to Offers.
4. Select **Security level for offers (in view mode)**.
5. Select a security level, that is General, Restricted or Confidential.
6. Click **Save**.

Offer Statuses

An offer can go through different statuses.

Status	Description
Offer to be made	Initial status of the Offer step.
Draft	Offer terms have been started and saved, but not approved. If offer approvals are not required, the offer may be extended at this point.
Cancelled	A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.
Approval in progress	Offer has been routed for approval.
Approval rejected	Offer approval request has been rejected.

Status	Description
Approved	Offer approval request has been approved and the offer is ready to be extended to the candidate.
Extended	Offer has been extended to the candidate.
Rescinded	After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.
In negotiation	Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either recapture the candidate response (accept or refused) or status them as Rejected or Has Declined.
Refused	Offer was extended to the candidate. The user or the candidate marked the candidate as refusing the offer. A new offer can be created at this point.
Accepted	Offer was accepted by the candidate.
Reneged	After the candidate has accepted the offer, the candidate refuses the offer.
Rejected	After the offer has been rescinded to a candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Rejected in the Offer step. This will allow an offer to another candidate be created and extended.
Has declined	After the offer has been refused or reneged by the candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended.

Hourly Hiring

Hourly Manager Home Page and Center Stage

Oracle Taleo Enterprise Edition supports managers doing self-service hiring and managers working in a decentralized environment. This includes options to use one or more simple home page configurations for various populations of users.

Home pages are configured via the SmartOrg Configuration Profiles feature. A pre-defined Hourly Manager configuration profile is provided with the application and this profile references a pre-defined Hourly Manager center stage. Both provides a reasonable set of default settings which customers can use as a starting point and modify to meet their needs.

The configuration of the Hourly Manager home page consists of the following:

- configuring the Hourly Manager center stage.
- associating the Hourly Manager center stage to the Hourly Manager configuration profile.
- associating the Hourly Manager configuration profile to user accounts.
- configuring the mini requisition list.

Center Stage: The default Hourly Manager center stage uses a channel called the Mini Requisition List. By default, the Hourly Manager center stage also contains the Legacy Onboarding channel and a link to the Performance Management

Suite (both of which only appear if these modules are deployed and available to the user). The Center Stage feature is available in the Recruiting Administration menu. For details, see the Center Stage chapter.

Configuration Profile: Once the center stage is created, the system administrator must associate it to a configuration profile. The system administrator can use the pre-defined Hourly Manager configuration profile. By default, the Hourly Manager center stage is tied to the Hourly Manager configuration profile. If desired, the system administrator can create a new configuration profile. The configuration and creation of configuration profiles are done in the SmartOrg Configuration Profiles feature. For details, see the Configuration Profile chapter.

User Account: To quickly and easily give users to hourly related capabilities, the system administrator only needs to update the user account by associated it to the Hourly Manager configuration profile. This is done in the SmartOrg User Accounts feature, under the Account Information section.

Mini Requisition (or Job Openings) List: This is a center stage widget option created specifically to help support distributed hourly hiring deployments. This list lets users click directly from the center stage channel into a requisition's candidate list without having to first load the Requisition list page. This mini requisition list can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity).

The system administrator configures the mini requisition list (if used) via the List Formats feature available in the Recruiting Administration menu. See List Format Configuration for more details. The mini requisition list is called "Job Openings" to better support continuous hiring scenarios. This name can be edited.

Note that the mini requisition list honors the permissions set by the Show filter (e.g., Show Requisitions I Own, I Collaborate On, etc.), if it is made visible on the home page. However, a typical hourly manager configuration is to define user permissions by Personal Coverage Area (for details, see the Personal Coverage Area chapter). This is done via the configuration profile feature by selecting the *My coverage area* value in the *Show Information For Filter Default* setting and by hiding this filter from the user via the *Show information for Filter Visibility* setting. This will make the user's permissions simple and automatic if you can define them in terms of Organizations, Locations and Job Fields.

Hourly Manager User Type

A default user type configuration has been created to support hourly manager's need for a more simplified user experience.

Although system administrators can create their own personalized user types, the hourly manager user type is designed to help managers in hourly hiring deployments. The Hourly Manager user type is intended to reflect the combination of permissions that will provide a reasonable starting point for customers to use for their managers involved in self-service, continuous and/or high volume hiring scenarios.

Hourly Manager User Type - Permissions Granted	Permissions Not granted
Access to hourly requisitions	Edit candidate information
Access to requisitions that the user owns, is a collaborator on, or are in the user's Personal Coverage Area	Access Professional, Campus, Contingent or Executive requisition
Post requisitions to career sections	Access job boards, staffing agents, internet mining
Access prescreening information	Perform advanced search and save searches

Hourly Manager User Type - Permissions Granted	Permissions Not granted
Add comments to submissions	
Unlock candidate accounts, reset password	
Customize correspondence before sending	

The default Hourly Manager user type may be used as is or an organization may decide to modify the permissions and rename the user type name to meet their organization needs. System administrators should review and modify all default permissions to meet their company's specific needs.

Fifth Level of Location

A fifth level of location can be added to the location structure to support more granular location specification requirements of some customers.

System administrators have the option to update their SmartOrg location structure and add up to 5 levels in this structure. Once the structure is updated, it will be possible to create location elements across all activated levels in the location structure.

This accommodates customers who want to capture more specific location information within their Location tree, especially organizations with thousands of locations in different countries. The location structure could be defined as follows:

- Country
- State/Province
- Metro/Region
- City/District
- Store/Location

With individual worksites part of the Location tree, even for large decentralized operations, locations can be assigned down to the work site level. Customers will also be able to use the lowest level in their structure as work locations. Also, data access can be controlled down to the Location level using either the User Group and/or the Personal Coverage Area feature.

Evergreen Hiring

Evergreen hiring is used in continuous hiring situations such as retail stores where employers want to enable candidates to apply at all times, and also want a ready supply of candidates available to move quickly when a need is identified.

Often such employers will want to implement a definite validity period and expiration for the candidate's submission, with the easy ability for the candidate to re-apply after his/her submission expires. It is not uncommon for workers in the hourly retail world to have held several different jobs within the span of a year. Employers need to ensure they are collecting all of the most recent information regarding a candidate's relevant history. This may also help to limit legal exposures in addition to confirming candidate's continued interest in employment with the employer.

A submission validity period may be enabled for any requisition, before that requisition reaches the Sourcing status. The number of days for the validity period is inherited from a default setting (initially 90 days), but may be changed for specific requisitions by users with sufficient permissions. The Validity Period and Validity Period Enabled fields may also be inherited from a requisition template. The submission validity period must be between 1 and 730 days (2 years).

The validity period starts when a candidate submits his/her completed submission. The candidate submission remains valid for the number of days defined in the requisition. For submissions created when matching or referring a candidate, the period starts on the date that the candidate was matched or referred. If a submission is incomplete and the candidate later completes it, the validity period is restarted.

The Evergreen Hiring feature basically works as follows:

For the Evergreen Hiring feature to be available, the system administrator must make the following two requisition fields available in the Recruiting application:

- Validity Period Enabled
- Validity Period

If desired, the security level can be set for those fields to hide them from some users. Once these fields are activated, the system administrator can add them to the requisition and/or requisition template, in the Identification block. It is necessary to have the Validity Period Enabled field in either the requisition template and/or the requisition file in order to enable submission expiration.

> **Note:** If the expiration for all requisitions is the same (following the default setting), consider to either not display the Validity Period field in the requisition file, or to set the field to read-only. If different validity periods are needed for different jobs, consider adding the Validity Period field in the requisition template where authorized users can set it, but not in the requisition file itself.

In the Recruiting application, when creating a requisition or requisition template, users can use the default validity period set by the system administrator or set a different validity period for the requisition or requisition template being created. The validity period must be set before the requisition is posted. The submission validity period is displayed in the requisition card (located on the left hand side of the requisition), when hovering the mouse over the Submission Expired icon.

Once the requisition is posted, candidates applying on the requisition will be informed of the expiration date of their submission on the Thank You page. Within the Recruiting Center, the submission validity period is displayed in the candidate submission card, when hovering the mouse over the Submission Expired icon.

If the candidate's submission has expired and the requisition is still posted, the Modify link is replaced with the Reapply link on the candidate's My Jobs page. When candidates re-apply for a job:

- The submission's validity period and expiration date are reset.
- A summary of the candidate's current information will be displayed to allow him/her to make any necessary changes.
- Depending on how the zone was configured, the candidate selection workflow of the submission may be reset back to the beginning.
- A tracking history is automatically added in candidate file History tab. If during the reapply process, the system forces the candidate selection workflow to be reset, a second tracking history is added in the History tab stating that.

Once candidates have applied on the requisition, the column in the Requisitions list indicating the candidate count considers if the submission validity period is enabled or not for the requisition. If the validity period is enabled, the count only includes candidate submissions that are not expired.

The system administrator also has the ability to add the following columns in the candidate lists and requisition lists. When these columns are made available in list formats, users can select them to display the desired information:

Candidate List Columns	Description
Submission Expired	This column is represented by the Submission Expired icon. When a submission is expired, the red icon is displayed.
Latest Submission Date	Date when the candidate has submitted his/her submission or has reapplied.
Submission Expiration Date	Date when the candidate submission expires/expired.
Days before Submission Expiration	Displays as a countdown the number of days left before the expiration of the submission.

Requisition List Columns	Description
Submission Validity Period Enabled	This column is represented by the Submission Expired icon.
Submission Validity Period	Number of days of the validity period.

The *Hide expired submissions* quick filter can be added to Candidates list to let users show or hide expired candidate submissions. Expired submissions are hidden by default. This filter is only available for requisition-specific candidate list formats.

The system administrator can also enable a setting to determine under which conditions the Candidate Selection Workflow (CSW) is reset to the initial step/status after a candidate re-applies for the same requisition (after submission expiration). Note that the CSW will never change if the submission has reached the *Offer* step or if an interview has been scheduled.

Configuration

Setting	Description	Default Value	Location
Default Submission Validity Period	When enabling the submission validity period on a newly created requisition, the default number of days before a submission shall be considered "Expired". Must be between 1 and 730 days.	90	Configuration > [Recruiting] Settings
Reset Candidate Selection Workflow after Candidate Re-applies	Reset the candidate selection workflow to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the "Offer" step or if an interview has been scheduled.	If the submission has reached the status Hired, Inactive or Withdrawn	Configuration > [Recruiting] Settings

Configuring the Evergreen Hiring Feature

Before you start

Configuration > [Recruiting] Administration

Here's what to do

1. Under Recruiting Settings, set the validity period of the *Default Submission Validity Period* setting.
2. Under Fields/Requisition:
    a. Make the *Validity Period Enabled* field available to be used in Recruiting. Note that the *Validity Period* field is automatically enabled when the *Validity Period Enabled* field is activated.
    b. You can set the security level of the *Validity Period Enabled* and *Validity Period* fields.
3. Under User-defined Forms, add the *Validity Period*, *Validity Period Enabled*, and *Number of Openings* fields in the Identification user-defined form.
4. Under User-defined Files, add the Identification user-defined form to a requisition template or requisition file.
5. Under Requisition File Setup, associate the requisition file and/or requisition template to a specific purpose.
6. Under User-defined Files, you can select a Prescreening Hourly file and add the Submission Validity Period block.
7. Under Candidate File Setup, associate the candidate file to a specific purpose.
8. Under List Formats, you can add the following columns to a candidate list format:
    - Submission Expired
    - Latest Submission Date
    - Submission Expiration Date
    - Days before Submission Expiration
9. Under List Formats, you can add the following quick filter to a candidate list format:
    - Show unexpired submissions
10. Under List Formats, you can add the following columns to a requisition list format:
    - Submission Validity Period Enabled
    - Submission Validity Period
11. Under Recruiting Settings, enable the *Reset Candidate Selection Workflow after Candidate Re-applies* setting.

    This setting allows users to determine whether the CSW is reset to the 1st step/status after a candidate re-applies for the same requisition (after submission expiration). By default the candidate's status remains the same. The CSW will not change if the submission has reached the *Offer* step or if an interview has been scheduled.

Questions and Competencies

Questions and Competencies - Permissions and Settings

The following permissions and settings are used to configure questions, disqualification questions, and competencies.

User Type Permission	Description	Location
Access the question and competency libraries	Gives Recruiting Center users access to the Questions, Disqualification Questions, and Competencies libraries.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Associate questions and competencies with structure elements	Gives Recruiting Center users the ability to associate questions and competencies to Locations and/or Job Fields.	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Manage disqualification questions	Allows Recruiting Center users to use disqualification questions.	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Remove or delete questions and competencies		Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Edit questions and competencies	Gives Recruiting Center users the ability to modify questions and competencies in the Libraries.	Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Add and remove competencies		Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback
Create questions		Configuration > [SmartOrg] Administration> [Users] User Types > Recruiting > Prescreening and Electronic Feedback

Setting	Description	Default Value	Location
Differentiate Internal and External Candidates in Prescreening Forms	When creating requisitions, differentiate prescreening for internal and external candidates. Recruiting Center users will see drop-down menus on the requisition Prescreening tab.	No	Configuration > [Recruiting] Settings
Differentiate Internal and External Questions	Allows the questions and skills visibility for candidates to be set. If you use profilers, this setting allows you to create different profiler questions for internal and external candidates.	No	Configuration > [Recruiting] Settings
Enable Disqualification Questions	Enables candidate disqualification questions.	No	Configuration > [Recruiting] Settings
Explanation in Disqualification Questions	Enables an explanation for disqualification question specific answers. Candidates are then required to provide explanations for specific answers. This feature provides candidates a greater opportunity to accurately explain their qualifications and it also reduces the need for users to	Yes	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
	make follow-up contact with candidates to obtain details regarding their responses.		
Skill Assessment Format	System administrators can define if competency proficiency levels can be selected by users when creating a requisition. Three configurations are available: • Detailed: When this option is selected, Recruiting Center users can select the minimum proficiency level of a competency as well as the minimum years of experience required when they create a requisition. • Simple: When this option is selected, Recruiting Center users cannot select the minimum proficiency level of a competency when they create a requisition. • Detailed or Simple: When this option is selected, Recruiting Center users must select the option "Modify the minimum requirements of proficiency and experience" before being able to select a minimum proficiency level of a competency and the minimum years of experience required.	Detailed	Configuration > [Recruiting] Settings
Skill Experience Level	Indicates the baseline for the years of experience. This setting is set globally for the entire organization. Possible values are: • Less than 1 year • 1-3 years • 3-5 years • 5 years or +	1-3 years	Configuration > [Recruiting] Settings
Skill Proficiency Level	Expresses proficiency collected via simple skills format in terms of the selected minimum level. It indicates the baseline for proficiency level. This setting is set globally for the entire organization. Possible values are: • Novice • Intermediate • Expert • Guru	Intermediate	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location
Competency Selector Default View in Requisition	Activates this view by default in the competency selector. It determines from which library users will select competencies. Possible values are: • Organization Competencies (competencies resulting from the mapping of your company job fields to the Taleo job fields so that the competencies list contains competencies that are considered relevant for your company). • Taleo Competencies (the complete Taleo competencies library, classified according to generic job fields). • Competency Library (competencies selected by your company among the Taleo competencies library. These competencies are classified according to the location and job fields of your company).	Organization Competencies	Configuration > [Recruiting] Settings

Competency Definitions

Proficiency Level	
None	Candidates have no experience or training regarding the competency.
Beginner	Candidates have received basic training and can perform the competency with some assistance. They received classroom or field training, either as an apprentice or through an internship.
Intermediate	Candidates have completed at least one successful experience. Help from an expert may be required occasionally, but candidates can usually perform the competency themselves.
Advanced	Candidates can perform the competency without any assistance. They are recognized within their company as "the people to ask" regarding the competency. They might be known in the industry as a specialist. They have extensive experience and could teach the subject if they had teaching competencies.
Expert	Candidates can answer all questions about the competency and industry-related questions. They have contributed to developing, defining, or improving the competency. They have published a paper on the subject and advanced people actively seek their advice. They are often offered jobs.

Experience Level	
None	Candidates have no experience or training regarding the competency.
Less than 1 year	Candidates possess between 1 and 11 months of work experience during which they had to perform the competency.

Experience Level	
1 to 3 years	Candidates possess between 12 and 35 months of work experience during which they had to perform the competency.
3 to 5 years	Candidates possess between 36 and 59 months of work experience during which they had to perform the competency.
5 years +	Candidates possess 60 months or more of work experience during which they had to perform the competency.

Last Used Level	
None	Candidates have never performed the competency.
Current	Candidates perform the competency as part of their current employment.
Last Year	Candidates successfully performed the competency within the last 11 months.
1 to 3 years ago	Candidates successfully performed the competency between 12 and 35 months ago.
3 to 5 years ago	Candidates successfully performed the competency between 36 and 59 months ago.

Interest Level	
None	Candidates have absolutely no interest in performing or learning the competency.
Low	Candidates have a lot of experience and key knowledge regarding the competency but have little interest in performing the competency often.
Medium	Candidates would be willing to perform the competency daily in their job.
High	Candidates have a high interest in jobs that require them to perform the competency. Performing the competency is a high source of motivation. They are willing to participate in improving how the competency is performed at the company.

Competency Assessment

A competency is used to gather proficiency level and years of experience of a candidate in order to find the best candidate for a job.

There are two ways to display competency assessment:

- Simple Competency Assessment: Allows candidates to assess their competencies by selecting—using check boxes—the competencies for which they possess a certain level of proficiency and experience.

- Detailed Competency Assessment: Allows candidates to assess their competencies by selecting—from lists or radio buttons—the appropriate level of experience, proficiency, last used, and interest. The process is repeated for each competency.

The format available to candidates depends on a setting enabled by system administrators. Your organization can choose to display both or just one form of competency assessment to candidates. This determination can be made for each different career section your organization maintains.

If using the Simple Competency Assessment display, a minimum baseline needs to be established for the entire organization. This baseline defines the minimum levels of proficiency and experience needed for a candidate to "have" a competency. In career sections, a statement is displayed to candidates explaining what constitutes "having a competency" in terms of your global baseline - there's only a single check box to mark if they "have" that competency.

If using the Detailed Competency Assessment display, candidates are asked to select their proficiency, experience, when the competency was last used, and their interest level in that competency. Explanations of the different choices are displayed to candidates in the career section.

Partner Competencies

Oracle has the ability to partner with competency providers and offer a wide range of competency solutions to customers.

When a third party competency library has been associated with the system, it can be enabled by Oracle Support in the Configuration section. Once enabled, system administrators can configure individual competencies within the library to be displayed or hidden.

The complete feature is described in the Taleo Performance Guide. Below is a summary of this feature in Recruiting.

- Partner competencies can be activated by Oracle Support if bought by a customer.
- Partner competencies appear in the Competencies section under the Global Configuration menu.
- It is possible to rename standard competencies. If a competency is renamed, it is carried through not only in Taleo Performance but also in Recruiting.
- When a partner's competencies are activated for a specific customer, these competencies are visible in Recruiting. In Taleo Performance, these competencies have more details and content like sub-competencies; in Recruiting, a small set of new behavioral competencies are available.

Tasks

Task

A task is an action a user needs to perform regarding a requisition, a candidate file, or an offer.

Tasks are generated by the system and displayed in the Tasks channel (home page) and in the Tasks list.

Tasks Channel

The Tasks channel may display tasks related to requisitions, candidates, offers, and *self-assigned tasks*. Clicking an hyperlink in the Tasks channel gives access to the Tasks list where users can see all tasks in one list view and use quick filters to filter the list. .

Tasks List

The Tasks list presents task information in different *columns* and provides *quick filters*. Columns and quick filters are not configurable.

In the Tasks list, a task can only be executed by the owner of the task or their delegate. A task that can be executed is underlined and clickable. All system-generated tasks show the due date as "blank" and the priority as "normal". These fields are present to support any candidate self-assigned tasks which do have due dates and priority set.

In the Tasks list, when selecting the "I own" filter, tasks related to requisitions the user owns (as a user and user assistant) are displayed. If a system-generated task is assigned to the user, both the user and user's assistant will be able to perform the task. If a system-generated task is assigned to the user assistant, both the user assistant and user will be able to perform the task. In both cases the task will be displayed as a link.

Available Tasks

Tasks are related to requisition files, candidates files, and offers.

Tasks Related to Requisitions	Description
To be completed	Reminds the user that a requisition still has to be completed before it can be posted. The task is generated at the creation of a requisition. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Approve requisition	Reminds the user to approve a requisition.
Ready for sourcing	Reminds the user that a requisition is ready to be posted. The Ready for sourcing task is generated once the requisition is Approved and the completion level is Ready for sourcing. If the requisition is approved by the Save As Open action, the Ready for sourcing task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter. If the requisition is approved by the Request Approval action, the Ready for sourcing task will be assigned to the user specified in the After Approval section of the Request Approval window.
Amend Approval Path	Reminds the user to perform the Amend Approval Path action for a requisition. The Amend Approval Path task is generated when an other user has performed the action Request Approval Path Amendment and selected the user as the assignee.
Sourcing strategy to be defined	Reminds the user that the Posting and Sourcing must be defined for a specific requisition.
Contribute	The Contribute task is the result of the Request Contribution action assigned to the contributor. It reminds the user that a contribution is required for a specific requisition.
To be filled	Reminds the user that a requisition has to be manually filled because it was not automatically filled for some reasons.

Tasks Related to Requisitions	Description
Complete Selection Process	Reminds the user to complete the selection process. The task appears when something is preventing the hire process. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Extend posting	Reminds the user to extend the posting of a requisition.

Tasks Related to Candidate Files	Description
Finalize Start Date	Reminds the user to set as final the start date for the offers accepted with a tentative start date.
Duplicate Check	When a candidate applies on a career section and a duplicate check is not performed immediately, a *Duplicate Check* task is generated. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.
Self-Assigned Task	A *self-assigned task* is a task users create for themselves.

Tasks Related to Offers	Description
Extend Offer	Reminds the user to extend an offer.
Approve Offer	Reminds the user to approve an offer.
Confirm Employee Presence	Reminds the user to set as Hired candidates who have accepted an offer with a non-tentative start date. The task is assigned to the recruiter assistant. If there is none, it is assigned to the recruiter.

Rules Regarding Task Assignment

Tasks are assigned to a user or to the user's assistant according to these rules:

- When a system-generated task is created, the assignee is always the "user's assistant" (if a user assistant is identified). Otherwise, the assignee is always the user. However, the user also has access to these tasks even though they were assigned to the assistant.
- Both the user and the user's assistant can access the linked task regardless to whom (user or assistant) the task was assigned to.
- If a user assistant is identified after a system-generated task was created, the task will remain assigned to the user, but the linked task will be available to both the user and user's assistant.
- If a user assistant was assigned a task and the user assistant was later removed, the task will automatically be re-assigned to the user.

Columns in the Tasks List

The Tasks list presents task information in different columns.

Column	Description
Attention indicator flag	Draws the user's attention to items that they own and that require viewing.
Tasks	Link that brings the user to the activity to be completed. A callout containing the task type, the assignment date and the owner is displayed when hovering the mouse on the task.
Candidate	Link to the associated candidate file. A callout containing phone numbers and email address is displayed when hovering the mouse on the candidate.
Requisition	Link to the associated requisition file. A callout with requisition ID, activated languages and features is displayed when hovering the mouse on the requisition.
Assignee	Person who will perform the task.
Comments	Callout displaying the comment.
Due date	Only relevant for self-assigned tasks.
Priority	Only relevant for self-assigned tasks.
Status	Status of the task.

Quick Filters in the Tasks List

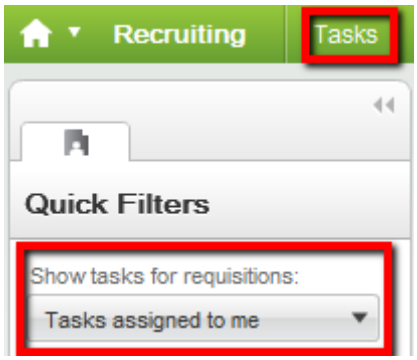
The table presents quick filters available in the Tasks list.

Quick Filter	Description
Requiring attention	Displays tasks that have the Item Requiring Attention icon. Self-assigned tasks are the only type of tasks that do not have an Item Requiring Attention icon because it is always the assignee who creates the task.
Hide completed tasks	Removes tasks that have the Completed status.
Due date	Displays tasks for which the due date matches the selected value (All, Next Week, Today, Overdue). When the option "Exclude task without due date" is selected, tasks without a due date will not appear in the list.
Task type	Displays the type of task selected. If no task type is specified, all task types appear in the list.
Related to Candidate	Displays tasks related to the selected candidate.
Related to Requisition	Displays tasks related to the selected requisition.
Related to Assignee	Displays tasks related to the selected user.

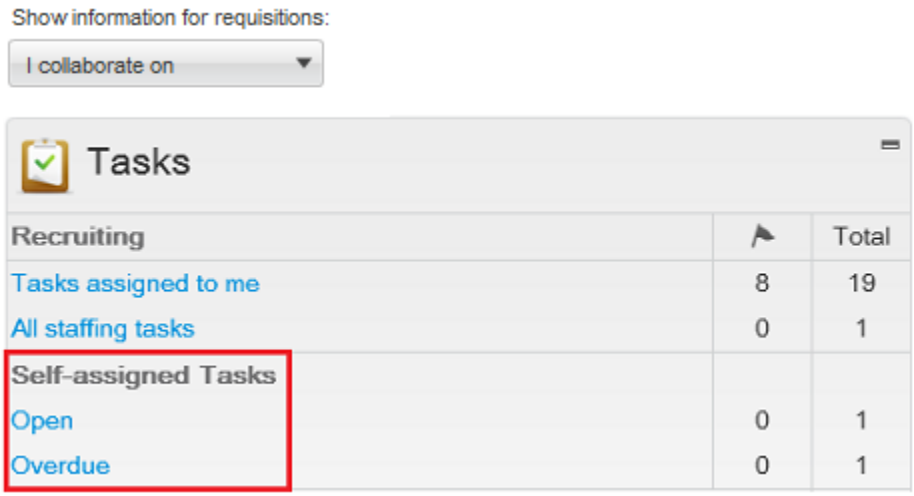
"Tasks assigned to me" filter

The "Tasks assigned to me" filter was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own.

The "Tasks assigned to me" filter is available in the Tasks list and Tasks channel. In the Tasks list, the filter is available in the "Show tasks for requisitions:" drop-down menu. It is the default value when accessing the Tasks list. In the Tasks channel, the "Tasks assigned to me" link brings users to the Tasks list which displays tasks assigned to them.



In the Tasks channel, when a task is clicked under Self-assigned Tasks, users are brought to the Tasks list. The "Tasks assigned to me" value in the Tasks list is selected by default no matter what the "Show the following information" filter on the home page is set to.



In the Tasks channel, when a task is clicked under Requisitions, Candidates, Offers, etc., users are brought to the Tasks list and the value in the "Show tasks for requisitions:" filter is identical to the value selected in the "Show information for requisitions:" filter of the home page. Example: If "I own" is selected in the home page, then "I own" will be selected by default in the "Show tasks for requisitions:" filter of the Tasks list. If a group is selected in the "Show information for requisitions:" filter on the home page, then the same group will be selected in the Tasks list.

Duplicate Check Task

The Duplicate Check task in the Recruiting Center Tasks list can be performed on any potential duplicates found within flows where the duplicate check action is activated, that is agency, referrer, or candidate flows.

When this feature is enabled, if a potential duplicate is found by the system, a Duplicate Check task is sent to the requisition's owner, that is the recruiter assistant. If no recruiter assistant was defined, it is sent to the recruiter. For a duplicate check task performed in a profile context, if a potential duplicate is found, since there is no recruiter the task is redirected to the person defined in a setting configured by the system administrator.

The task assignee runs the Duplicate Check task. Duplicates are displayed in a Quick Search Results list. The task assignee can then merge the duplicate files.

Note: The Duplicate Check Task uses the advanced search indexing, which may create a small delay.

Configuring the Duplicate Check Task

The configuration of the duplicate check task is done in the Recruiting Administration menu as well as in the Career Section Administration menu.

The duplicate check task configuration involves the following steps:

- When configuring a career section application flow, select the **Activate the identification of potentially duplicate candidates** option in the Personal Information block.
- Specify the person who will perform the duplicate check task in the Recruiting Center for candidate general profiles.

Setting	Description	Default Value	Location
General Profile Duplicate Check Task Assignee	Indicates the person responsible for the duplicate check task among the candidate general profiles.		Configuration > [Career Sections] Settings

Self-assigned Task

A self-assigned task is a task users create for themselves.

Recruiting Center users can select a candidate file, create a self-assigned task to act on at a later time, and activate a reminder to ensure the task is completed on time. The self-assigned task feature is also available while changing the step of a candidate.

For example, let say that you want to call the candidate John Doyle by the end of the week to invite him for an interview the following Monday. You need to open John Doyle candidate file, create a self-assigned task (for example "Confirm Monday's Interview") and set a reminder for Friday. On Friday morning, you will receive an email message reminding you to call John to see if he is available for an interview the following Monday. The email message contains a link that you can click in order to access all the information regarding this task. Then, in your list of tasks, click on the task regarding John Doyle to obtain details regarding this task as well as information regarding the candidate and the requisition he applied to. Look at John's phone number in his candidate file and can call him to invite him for the interview. When the task is completed (i.e., you phoned John), you simply need to indicate that the task is completed by selecting the Completed status. The Confirm Monday's Interview task is no longer displayed in the Tasks list.

A self-assigned task can also be created for several candidate files. For example, you could have a pre-filtered lists of candidates that are to be phone screened and create a single self-assigned task to perform an initial phone screen. The system automatically creates a separate self-assigned task for each candidate that was selected.

Self-assigned tasks can only be viewed by their creator. They cannot be redirected to delegates or transferred to a new user taking over.

Reminders are sent daily and users receive them in the morning (according to the appropriate time zone).

Self-assigned tasks are not reportable; reports showing self-assigned tasks cannot be created.

Activating the Self-Assigned Task Feature

Grant the *Manage my self-assigned tasks* user type permission in the SmartOrg User Types feature.

Results:

The Create Self Assigned Task action in available to users in the More Actions list allowing users to create tasks for themselves.

Confirm Employee Presence Task

The Confirm Employee Presence task is used to remind users to set as Hired candidates who have accepted an offer with a non-tentative start date.

The Confirm Employee Presence task is assigned to the recruiter assistant. If there is none, the task is assigned to the recruiter.

The Confirm Employee Presence task is displayed once the offer start date has been reached.
When a user confirms the employee presence at work, the following options may be displayed:

- **Yes, the employee is present:** Confirms the employee presence at work. If the Automatic Hire feature is enabled, the candidate is automatically hired.
- **Yes, the employee is present - Complete the selection process now:** Confirms the employee presence at work. In the Change Step and Status window, if the current status is a completion status, the Move action is offered. Otherwise, the Change Status is offered.

- **No, the candidate could not be present. I want to specify a new Start Date:** The Update Start Date window is displayed and the user can enter a new start date.
- **No, the candidate has reneged the offer:** The Renege Offer window is displayed and the user must enter a comment indicating why the candidate changed his mind and decided to refuse the offer.

The system administrator has the ability to send a reminder to users so they confirm the employee presence at work before the start date of a new hire. This is done by configuring the setting Confirm Employee Presence Reminder and putting a value between 1 and 7 days.

Setting	Description	Default Value	Location
Confirm Employee Presence Reminder	Remind user to confirm employee presence X days before the start date of a new hire.	No Reminder	Configuration > [Recruiting] > Settings

General Features

Attachment

Files can be attached to requisitions and candidate files.

The following file formats are supported by the system. System administrators define which formats are available to users.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format

When attaching a file to a requisition, the attachment appears in the requisition file Attachments tab. The attachment can be shared with approvers and users having access to the requisition.

When attaching a file to a candidate file (general profile or job submission), Recruiting Center users can indicate if the attachment will be visible to the candidate. They can also indicate if the attachment is a candidate resume. The Resume column in the Attachments tab allows users to easily view which attachments are resumes. Once a file is tagged as being a resume, users can remove the Resume tag by clicking the Edit button in the Attachments section and selecting No. Files attached through the resume parsing feature are automatically marked as being resumes.

Recruiting Center users can view candidate attachments of type .docx or .odt directly from a browser without having to download and open the file with a native application. In the candidate file Attachments tab, when users click an attachment of type .docx and .odt files, the attachment is converted into HTML and can be viewed directly from a browser. HTML conversion for these other document types is still supported:

- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)

Attachments in Message Templates

Files can be attached to message templates and correspondence sent to candidates.

Supported file formats are:

- Any File Format (default value)
- Excel (.xls, .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format

Note: The value Any File Format includes all the above file formats as well as any other format.

Using the setting Attachments Format Filter in Correspondence, system administrators select which file formats are supported. The selected file formats will restrict the types of files that can be attached to message templates for both the Recruiting and Onboarding (Transitions) products and also in correspondence sent manually using the Send Correspondence action in Recruiting. After a file is attached, the system validates if the file format is supported. The validation is performed whether the file is attached by the system administrator on a message template or by a recruiter on a correspondence. If the file format is not supported, the system prevents the operation and an error message is displayed listing the supported file formats.

This functionality helps prevent unsafe files from being maliciously or inadvertently sent to candidates. It also helps avoid the use of file formats that are not desired or not supported based on corporate policies or best practices.

Attachment - Permissions and Settings

The following permissions and settings are used to configure the attachment functionality.

Setting	Description	Default Value	Location
Attachment Formats Filter	File formats allowed for the attachments. This setting is used for the entire Oracle Taleo Enterprise Edition suite. • Any File Format • Excel (.xls and .xlsx) • Hypertext Markup Language (.htm and .html) • OpenOffice Writer (.odt) • Portal Document Format (.pdf) • Rich Text Format (.rtf) • Text (.txt) • Word (.doc and .docx) • Word Perfect (.wpd) • Zip Format	Any File Format	Configuration > [General Configuration] Settings
Attachment Formats Filter in Correspondence	List of file attachments formats allowed for correspondences and message templates. • Any File Format • Excel (.xls and .xlsx) • Hypertext Markup Language (.htm and .html) • OpenOffice Writer (.odt) • Portal Document Format (.pdf) • Rich Text Format (.rtf) • Text (.txt) • Word (.doc and .docx) • Word Perfect (.wpd) • Zip Format	Any File Format	Configuration > [General Configuration] Settings
Attached File Maximum Number	This is a Protected setting. Indicates the maximum number of file attachments allowed per entity record. This setting is used for the entire Oracle Taleo Enterprise Edition suite.	10 files	Configuration > [General Configuration] Settings

Setting	Description	Default Value	Location
	See details below regarding attachment size and number of attachments.		
Attached File Maximum Size	This is a Protected setting. Indicates the maximum size of a file attachment (in bytes) allowed. This setting is used for the entire Oracle Taleo Enterprise Edition suite. See details below regarding attachment size and number of attachments.	1048576 bytes (1 MB)	Configuration > [General Configuration] Settings
Block Macros in Attachments	The system will scan attachments for macros. When the setting is set to Yes, macros will be disabled in the uploaded file.	Yes	Configuration > [General Configuration] Settings
Share Other Attachments	When enabled, users will be able to include "other attachments" in the "Candidate Share" or "Interview Request" actions. "Other attachments" equates to any attachment not directly related to the job submission from which the action is being taken as well as all attachments when sharing from the candidate general profile.	Yes	Configuration > [Recruiting] Settings
Candidate maximum attachment updates	Maximum number of possible candidate attachment updates per period. This is a protected setting activated by Oracle Support.	5	Configuration > [Career Sections] Settings
Maximum attempts to attach file period	Period during which the maximum number of candidate attachment attempts apply. This is a protected setting activated by Oracle Support.	30	Configuration > [Career Sections] Settings
Attachments searched by Candidate Keyword Search	Determines the list of attachments searched by the Candidate Advanced Search with keywords. Possible values are: • All Attachments • All Candidate Visible • All Resumes When "All Resumes" is selected, the system will only search attachments tagged as resumes.	All Candidate Visible	Configuration > [Recruiting] Settings

Setting	Description	Default Value	Location

Important Information Regarding Attachment Size and Number of Attachments

The allocated number of attached files, the attached file size limit, and the attached file formats are controlled with one set of settings for the entire Oracle Taleo Enterprise Edition suite. This means that the same rules apply for attachments to candidate files, requisitions, offers, submissions, Onboarding (Transitions) PDFs, etc.

For customers with Oracle Taleo Platform Cloud Service (Basic package offering):

- the attached file maximum size is 1 MB per file
- the maximum number of attached files is of 10 files per entity

Any combination of attachment size multiplied by the number of attachments is allowed as long as it does not exceed 5 MB per file or the package offering options. For example, for the Basic package offering, if the attached file maximum size is 1 MB per file and the maximum number of attached files is of 10 files per entity, the following possibilities would be allowed.

Attachment Size	Number of Attachments	Total	Allowed
2 MB	5	10 MB	Yes
5 MB	2	10 MB	Yes
5 MB	5	25 MB	No. Exceeds the 10 MB limit.

To change the attachment limit values, customers must enter a service request. An Oracle Support representative will validate the request and make sure the combination of attachment size multiplied by the number of attachments does not exceed the package offering option.

For the Attached File Maximum Number setting, a maximum number of attachments is allowed per entity record. Candidate-facing attachments are counted together across all general profiles and job submissions. Recruiter-facing attachments are counted together across all general profiles, but separately per job submission. For example, if the setting is set to 10 attachments, attachments will be counted as follows:

- Offer attachments: they are counted per offer, so 10 attachments would be allowed per offer.
- Candidate-facing attachments: these are files attached by the candidate, or attached by the recruiter and flagged as "Visible by candidate". A total of 10 attachments would be allowed for all general profiles and job submissions of a given candidate.
- Recruiter-facing attachments: these are files attached by the recruiter and not flagged as "Visible by candidate". A total of 10 attachments would be allowed for all general profiles of a given candidate (a candidate can have more than one general profile, one per language for example). Ten additional attachments would be allowed for each job submission

User Type Permission	Description	Location
Access Attachments tab	Attachment visibility in lists reflects the use of the **View other attachments** and **Access Attachments tab** permissions.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
View other attachments	Attachment visibility in lists reflects the use of the **View other attachments** and **Access Attachments tab** permissions.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Remove files attached by other users	To safeguard against users inadvertently removing files attached by other users or candidates, the **Remove files attached by other users** permission was created. This permission defines the rights users have to remove files that they did not themselves directly attach to the candidate file. When this permission is not granted, users are only able to remove files they have uploaded themselves.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates
Attach a file (general).		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > General
Attach a file (on preselected candidates).		Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates > General

Attachment visibility in lists reflects the use of the **View other attachments** and **Access Attachments tab** permissions:

- The Attachments column is always present if configured in the list format, regardless of a user's permissions.
- The Attachments icon appears if a user has the *Access Attachments tab* permission.
- The Attachments icon appears in the search results list and folders list if a user has the *View other attachments* permission.
- The Attachments icon callout displays only candidate facing attachments. The display of attachments respects a user's viewing permissions. If a user has the *View Attachments tab* permission, but not the *View other attachments* permission, attachments that exist may be hidden; the callout will display "Restricted Visibility" if files attached to the candidate file are classified as "other attachments" and the user is not authorized to view them.

Print

The print functionality allows Recruiting Center users to create a PDF version of a requisition file or candidate file and to print the PDF.

The print function is available in the candidates list and requisitions list as well as within candidate files and requisition files. When using the print function, users can decide to print the content in a list format where information is presented in different columns, or they can choose to print the details of the file where content is presented into sections.

- When users are printing the content in a list format, the content of the file is presented in different columns and the content of each file is displayed in a row. The format of the list (that is, the columns used to display the information) is identical to the requisition or candidate list format used. A maximum of 1000 lines can be printed in the list.
- When users are printing the details of the file, all sections of the file or only specific sections can be printed. For example, a user can choose to print from a candidate file only prescreening and basic profile information. Sections selected by a user when using the print function are saved as defaults for the next print action, but blocks selected within the main submission file section are not. Also, sections available to a user are based on how the file is configured and on user permissions. This means, if a system administrator wanted to allow users to more precisely control what is printed, the administrator can do this by increasing the sections in the file layout. For candidate files, a maximum of 50 files can be printed. For requisition files, a maximum of 15 files can be printed.

When printing candidate files:

- Attachment content is included within the generated PDF, along with the candidate information. When clicking the Print icon, users can select the type of attachments they wish to include in the generated PDF. These attachments are part of the generated PDF, along with the candidate information. Three options are available: Most recent flagged resume, Visible by candidate (Excludes flagged resume), Not visible by candidate (Excludes flagged resume).
- A Table of Contents is available in the generated PDF so that users can easily navigate through the candidate files. Clicking the Bookmarks icon in the PDF will display the Table of Contents.
- Print candidate actions are tracked in the candidate file History tab.

When using the print functionality, only fields containing data are visible in the view/print mode; this means fields with no data will not be rendered when printing. The PDF generated by the print function is identical to the data presented to the user for the selected sections while looking at the information in view mode.

When selecting one or several candidate files in a candidates list or requisition-specific candidate list in order to print them, the Submission file is printed. When selecting one or several candidate general profiles in a search results list or folders list, the General Profile file is printed.

Regarding tracking information in the candidate file History tab, the system displays the 1000 most recent tracking items no matter if printing 1 or 50 candidate files. Therefore, if printing one candidate file, the 1000 most recent tracking items are displayed. If printing five candidate files for example, 200 tracking items are displayed per candidate. For a given candidate, when the maximum is reached, the following message is displayed: "The history contains the {0} most recent items".

> **Note:** When printing a candidate file and the Candidate Share mode (Flipbook) is enabled, it is possible to include attachments in the printed document, as long as the user is choosing to print 50 candidates or less. When printing a candidate file and the Candidate Share mode (Flipbook) is not enabled, it is not possible while printing to include the name of candidate facing attached files. Attachments appear in the Attachments tab; they are not part of the candidate file and they are not printed with the file.

Print Function - Settings

The following setting is used to configure the prin functionality.

A setting allows system administrators to select which sections of the candidate job submission or general profile users will be able to print. Two values are available:

- All sections can be selected
- Only the Job Submission/General Profile section and the Attachments section can be selected

Setting	Description	Default Value	Location
Configuration of Sections in the Job Submission/General Profile for the Print and Share Functionalities	Enables the ability to configure the sections in the candidate general profile and job submission, including attachments, that can be printed or shared. This setting applies to all users who have the permissions to use the print or share functionality.	All sections can be selected	Configuration > [Recruiting] Settings

Folder

In the Recruiting Center, folders are used for organizing candidate files and search queries.

Recruiting Center users who have been granted the proper permissions can organize folders in ways that best suit their needs. They can store candidate files as well as candidate search queries in folders. They can create, delete, and rename folders and they can also share folders with other users.

The Folder tab is available in the left panel of the Candidates list and Search Queries list.

Folder - Permissions

The following permissions are used to configure the folder functionality.

User Type Permission	Location
Use personal folders	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Candidates

User Type Permission	Location
Share personal folders	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other
Access shared folders	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

Understanding Languages

Oracle Taleo Enterprise Edition products are available in different optional languages.

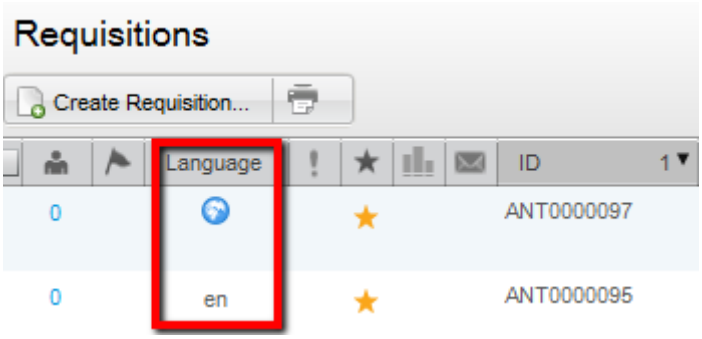
Not all languages are available for all Oracle Taleo Enterprise Edition products. Languages must be activated by the system administrator before they can be used in an application.

There are several concepts around languages:

- The application language is the language used for a product. This is the language selected by the user when signing in the Oracle Taleo Enterprise Edition suite. The language selected defines the language of every UI labels and elements of the product.
- The content language is the language of a specific entity. The content language is selected when creating an entity. For example, it is possible to create a requisition in French even when using the Recruiting Center in English. The content language of a user is set in the user's account by the system administrator. However, a user can change this default content language under My Setup > Preferences > Content Language. The preferred content language is used by the system as the default content language which is the same across all Oracle Taleo Enterprise Edition products. If a product does not support the same set of content languages, it will have its own preference configuration.
- The correspondence language is the language used for email messages. The correspondence language of a user is set in the user's account by the system administrator. However, a user can change this default correspondence language under My Setup > Preferences > Correspondence Language.

In Oracle Taleo Enterprise Edition products, the languages in which an element (for example, a requisition) is available are indicated in the Activated Languages field. When creating or editing an element, the user can choose a base language as well as languages in which the element will be available. The base language of an element is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user's preferred content language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When an element is available in one language, the name of the language is displayed in the list; for example "en". When only one language is used within a company, there is no special indicator. When an element is available in several languages, the Earth icon is displayed. Hovering the mouse over the icon displays the languages in which the element is available.



Languages - Settings and Preferences

The following settings and preferences are used to configure languages.

Setting	Description	Default Value	Location
Application Languages	List of application languages, presented according to the organization's preferences. The application language is the language in which a product can be viewed. This is a private setting. Contact Oracle Support for details.	French, English, German, Spanish	Configuration > [General Configuration] Settings
Correspondence Language	Indicates the correspondence language.		Configuration > [General Configuration] Settings
Content Language	Indicates the content language.		Configuration > [General Configuration] Settings

Preference	Description	Location
Application Language	Allows users who log in using Single Sign-on to change their application language.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup
Correspondence Language	Indicates the preferred correspondence language of a user.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup
Content Language	Indicates the preferred content language of a user.	Configuration > [SmartOrg] Administration > [Users] User Accounts > General Preferences Recruiting Center > Resources > My Setup

Multilingual Deployment

Below are items worty of note for multlingual deployments and system behavior.

Requisition Search: When using the search within a requisition, the system will always try to search using the user's Recruiting Center session language. If a requisition is not translated into the User's Recruiting Center session language, then the search criteria used will be empty and the results will have no bearing on the requisition used to conduct the search. To work past this, users should ensure that requisitions are translated into their application language if they are looking to use the "Search from this requisition" feature.

Language Fallback: Currently, there is no graceful fallback for the data presented to users when it is not available in their preferred language. This will impact customers with multilingual deployments where managers and candidate language preferences are not the same or jobs are created for managers but not in that manager's language preference (extreme edge case).

Here are two examples to illustrate this point as well as guidance on how to resolve it:

Scenario 1: Candidate data presented in PDF to share recipient during share function.

If a candidate applies in Japanese and the share sender's content language preference is English, the share file generated as well as all labels will be in English. Data for the submission file will be unilingual and will render for the user in English for selector fields and Japanese for text fields (this means things like resume text, cover letter text, work experience and education will come through fine). However, any profile based multilingual text and text area fields will not render for the user. This means for example that if the candidate has entered data into a candidate UDFs text field, it will not render to the share recipient if sent by an English content language share sender.
To work past this: If the share sender is sending a Japanese candidate submission and wants the data to be rendered in Japanese to the share recipient, he/she should change his/her content language preference under My Setup to Japanese prior to conducting the share action.

Scenario 2: Offer approval request for offer created in user's preferred correspondence language.

If an offer is created in English but a user's access language for the file is French based on the defined rules, fields which are multilingual text and text area will be missing data when it is routed for approval to that user when conducting an approval via eShare. For example, compensation text fields would be impacted by this.

To work past this: Customers should ensure that the approver's preferred message content language or Recruiting Center logged in language matches the language in which the offer exists (depending on how the user is conducting his/her approval). Users can update their user preference or login using the right language if needed to view offer data and regenerate the PDF if there is a mismatch.

Multilingual Requisition and Requisition Template Behavior

Users can configure multiple languages on a requisition or requisition template.

When editing one of these files in a language other than the Recruiting Center language in use, all labels and drop-down menus will still appear in the language of the Recruiting Center, not the language of the file being edited. Prescreening and text based content will display in the edit view of the file in the language selected. In addition, users can use the language indicator on the left panel to know which language of the file they are working with. Edits can be made to drop-down menus in the file in any language; a value selected in one language will apply to all languages.

Multilingual Behavior with PDFs

To better understand the multilingual behavior of system-generated PDF files used for approvals and other system-generated candidate files and requisition files included in system-generated correspondence in the Recruiting Center, we are providing some clarification of what to expect from a language perspective.

If you are using Oracle Taleo Enterprise Edition in only one language, this section does not apply to your implementation and can be skipped.

PDF files are used throughout the Recruiting Center. The following table shows in which files PDFs are available and for which feature.

Feature	Requisition File	Candidate File	Offer File
Requisition Approval	Yes		
Offer Approval	Yes	Yes	Yes
Interview Request*	Yes	Yes	
ACE Candidate Alert		Yes	
Share Candidate		Yes	

* Interview request file behavior is not outlined yet as it is still being researched.

The following table explains the type of data being translated in a PDF file as well as when a translation is available for each type of data.

	When is it available?	When is it not available?
Container=Field labels and Section headers throughout the file.	If translated by a system administrator, or is a system field and has a system provided language. Note: The candidate file container is always translated into all candidate facing languages. The requisition file container may not always be completely translated into all candidate facing languages because only career section exposed sections need to be translated into all available system languages.	If the field is a custom field that the system administrator has not translated.
Data=Information provided by an end user in the file.	If it was provided by an end user in that language. When the value specified by the end user has an equivalent selection value available in that language. When the field used is unilingual and presented to the user in the same text regardless of language.	If the end user has not provided a value in that language and the field is a multilingual text field (for example, most compensation fields are multilingual text fields).

The following table indicates in which language the PDF content (container and data) is being translated.

	Container	Data
Requisition File • Requisition Approval • Offer Approval	From Tasks: The approver's connected language. From eShare: The approver's preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.	Same as container except there is a fallback if data is not translated into the user's language. Fallback: Requisition base language.
Candidate File • ACE Candidate Alert • Share Candidate	If the recipient is a Recruiting Center user, the recipient's preferred correspondence language is used; otherwise, the eShare sender's content language is used.	Candidate file submission language.
Candidate File • Offer Approval	From Tasks: The approver's connected language. From eShare: The approver's preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.	Candidate file submission language.
Offer File • Offer Approval	From Tasks: The approver's connected language. From eShare: The approver's preferred message language, or if a login to eShare is required, the language specified upon entering the eShare Response Center.	Same as container. No fallback exists in this case.

File recipients will receive files based on the situations outlined. File content will appear in the language(s) specified. When a language is not available in the language specified, the PDF will render but impacted container/data will be absent.

Here are two examples to illustrate this point as well as guidance on how to resolve it:

Scenario 1: Candidate data presented in PDF to share recipient during share function.

If a candidate applies in Japanese and the share sender's content language preference is English, the share file generated as well as all labels will be in English. Data for the submission file will be unilingual and will render for the user in English for selector fields and Japanese for text fields (this means things like resume text, cover letter text, work experience and education will come through fine). However, any profile based multilingual text and text area fields will not render for the user. This means for example that if the candidate has entered data into a candidate UDFs text field, it will not render to the share recipient if sent by an English content language share sender.

To work past this: If the share sender is sending a Japanese candidate submission and wants the data to be rendered in Japanese to the share recipient, he/she should change his/her content language preference under My Setup to Japanese prior to conducting the share action.

Scenario 2: Requisition approval request not translated into the user's specified content language.

If a requisition is created in English but a user's preferred content language is French, if the requisition has not been translated into French and is routed to that user for approval, fields which are multilingual text will be missing data when it is routed for approval to that user. For example, compensation text fields and job description fields would be impacted by this.

To work past this: Customers should ensure that requisitions are translated into all content languages used by approvers on a specific requisition. If a user does happen to receive a requisition approval request and some data does not come through because it was not translated into the user's content language, the user can log into the system and change his content preference to the appropriate language and then go to generate the requisition file again. This time, it will render in the updated language preference specified that contains all of the data.

JavaScript API

A JavaScript API can be used by customers to dynamically extract information from fields displayed in specific pages of the Recruiting Center, send the information to an external system, and capture the information back into the Oracle Taleo Enterprise Edition fields. A JavaScript API can be disabled if the customer is worried about various security threats.

A Recruiting setting is available: Enable JavaScript API. If the setting is set to No and a recruiter creates a method in JavaScript and attempts to run it, the system will see that the JavaScript API is disabled and it will not execute the method. This functionality prevents malicious extraction or insertion of information with scripting from the Recruiting product.

22 Recruiting Center Layout Configuration

General Layout

Home Page and List Elements Configuration

Element	Description	Configuration
Auxiliary Navigation Bar	The auxiliary navigation bar is the bar located at the top right of pages. If enabled, it is available at all times for users to see and access. The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them): • Home • Resources (My Setup, Help, Support, About) • Sign Out	The auxiliary navigation bar is displayed when the *Auxiliary Navigation Bar* setting is set to Yes. (Configuration > [SmartOrg] Administration > [Users] Configuration Profiles). When set to No, the Home and Sign Out links are still displayed. Elements displayed in the auxiliary navigation bar depends on settings that were enabled and on permissions granted to users.
Core Navigation Bar	The Recruiting Center core navigation bar provides access to specific recruiting features. The core navigation bar may contain the following elements (if enabled and if users were granted access to them): • Home • Recruiting • Tasks • Requisitions • Candidates • Offers • Libraries (Templates, Questions, Disqualification Questions, Interview Questions, Competencies)	The core navigation bar is displayed when the *Core Navigation Bar* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). When set to No, only the Recruiting tab is displayed.
My Setup	The My Setup feature is available in the auxiliary navigation bar under Resources. It gives access to the user's personal preferences.	The My Setup link is displayed to users if the *Auxiliary Navigation Bar* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). To modify their preferences, users must be granted the following permissions: • *Access the "Preferences" section in 'My Setup' menu* (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other) • *Update user information* (Configuration > [SmartOrg] Administration > User Types > Configuration > My Setup)

Element	Description	Configuration
Training	The Training link is available in the auxiliary navigation bar under Resources. It gives access to online training materials.	The Training link is displayed to users if the *Training Section URL* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The *Auxiliary Navigation Bar* setting must also be is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).
eLearning	The eLearning link is available in the auxiliary navigation bar under Resources. It gives access to eLearning materials.	The eLearning link is displayed to users if the *eLearning Section URL* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The *Auxiliary Navigation Bar* setting must also be is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).
About	The About link is available in the auxiliary navigation bar under Resources. It provides information regarding service pack, version, legal statement regarding IP protection.	The About link is displayed to users if the *About Link in Auxiliary Menu* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The *Auxiliary Navigation Bar* setting must also be set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).
Web Support	The Web Support link is available in the auxiliary navigation bar under Resources. It gives access to Web Support. This link only works for users who are authorized Web Support users.	The Web Support link is displayed to users if the *Display Web Support Link in Auxiliary menu* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). Furthermore, the Web Support feature must be activated by Oracle Support. If only the above setting is set to Yes, users will not have access to Web Support even though the link will still be present. The *Auxiliary Navigation Bar* setting must also be set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).
Search Widget	This is the search tool allowing users to perform *quick candidate search*, *specific candidate search* and *quick requisition search*.	The search widget is displayed to users if the *Search Widget* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles).
Advanced Search	The Advanced Search link is available at the top right hand corner of pages, just beside the search widget. It allows users to search for candidate files using an array of criteria that are different than the ones used in the quick search function.	The search widget is displayed to users if the *Advanced Search Links* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The *Access advanced search but find external candidates only* permission must be granted (Configuration > [SmartOrg] Administration > User Types > Recruiting > Search).
Search Queries	The Search Queries link is available at the top right hand corner of pages, just beside the search widget. A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other users.	The search widget is displayed to users if the *Advanced Search Links* setting is set to Yes (Configuration > [SmartOrg] Administration > Configuration Profiles). The *Access advanced search but find external candidates only* permission must be granted (Configuration > [SmartOrg] Administration > User Types > Recruiting > Search).

Element	Description	Configuration
Center Stage	A center stage is what users see in the center panel when they first log into the Recruiting Center.	The center stage is configured via the Center Stage feature (Configuration > [Recruiting] Administration > Center Stage).
Page Header	A header text can be displayed at the top of all pages of the application.	The *Recruiting Header Text* setting allows the activation of the page header (Configuration > [SmartOrg] Administration > Configuration Profiles).
Page Footer	A footer text can be displayed on the home page of the application.	The *Center Stage Footer Text* setting allows the activation of the page footer (Configuration > [SmartOrg] Administration > Configuration Profiles).
Welcome Title	The welcome title is displayed to users when they first log in into the application.	The *Center Stage-Welcome Title* setting allows the activation of the welcome title (Configuration > [SmartOrg] Administration > Configuration Profiles).
Separator Line	The line separating the Welcome title from the main content of the center stage.	The *Center Stage-Separator Line* setting allows the activation of the separator line (Configuration > [SmartOrg] Administration > Configuration Profiles).
Communications Channel	The Communications channel is located in the supporting tools panel on the right. The Communications channel allows the display of useful information to users when they first log into the Recruiting Center.	See *Communications Channel Configuration*.
Color Theme	A theme is a set of colors used for body text, headings, links within an application.	The theme color is selected using the *Default Theme* setting (Configuration > [General Configuration] Settings). Users must be granted the *Access the "Preferences" section in 'My Setup' menu* permission to overwrite the theme you selected (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
Logo	A logo can be displayed in the upper left corner of Recruiting and Taleo Performance pages.	The *Organization Logo* setting is used to upload a logo (Configuration > [General Configuration] Settings).
Selected Item Color	This is the color displayed when selecting elements in the user interface.	The selected item color is selected using the *Selected Item Default Color* setting (Configuration > [General Configuration] Settings). Users must be granted the *Access the "Preferences" section in 'My Setup' menu* permission to overwrite the theme you selected (Configuration > [SmartOrg] Administration > User Types > Recruiting > Other).
Online Tour	Short clips describing essential user interface elements. When enabled, these tours are available in the Clips tab, located in the supporting tools panel on the right.	The *Online Clips* setting controls what is displayed as online tours in the Recruiting Center. By default, standard online tours are displayed to users (Configuration> [Recruiting] Settings). The *Online Clips - HTML Customized URL* setting is used to insert the URL for an organization customized online tours. For this setting to work, the *Online Clips* setting must be set to "HTML Customized". (Configuration> [Recruiting] Settings). The *Taleo Recruiting Online Clips URL* setting is used to indicate the URL to access Recruiting online tours. For this setting to work, the *Online Clips* setting must be set to "Taleo Standard (default)". (Configuration> [Recruiting] Settings).

Welcome Center

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.

Taleo Learn in the Welcome Center

Taleo Learn is a platform designed to enable organizations to deliver and track structured curriculum and learning events tied to compliance, regulatory, job role and onboarding requirements. Users can access Taleo Learn via the Welcome Center.

Users can access Taleo Learn directly from the Welcome Center core navigation bar or the Quick Access panel without logging into Taleo Learn. When users want to return to the Welcome Center, they can click Home on any Taleo Learn page.

Access to Learn is granted or rescinded via a user type permission in SmartOrg. Learn user types can be assigned to Oracle Taleo Enterprise Edition users via user type permissions in SmartOrg. See *Welcome Center - Settings and Permissions*.

Prior to Feature Pack 11B, if a user had (Taleo Performance) development plan user permissions and the Learn and Development modules were enabled, the link to Taleo Learn was displayed. Now a specific Learn user permission must be associated with a user before the person can access the My Learn link.

Configuring the Welcome Center

The configuration of the Welcome Center consists of the following steps.

1. *Enabling the Display Welcome Center setting.*
2. *Creating the Welcome Center content which appears in the central panel.*
3. *Specifying which default content and layout to use in the Welcome Center.*
4. *Assigning the Welcome Center content to a configuration profile.*

Enabling the Welcome Center

Before you start

The Manage settings and central configuration user type permission is required.

Configuration > **[General Configuration] Settings**

Here's what to do

1. Locate and click Display Welcome Center.
2. Click Edit.
3. Make a selection by clicking the corresponding radio button.
4. Click Save.

Specifying the Default Welcome Center Content

Before you start

The Manage settings and central configuration user type permission is required.

Configuration > **[General Configuration] Settings**

Here's what to do

1. Locate and click the Welcome Center Content setting.
2. Click Edit.
3. Click Search next to the Value field.
4. Click the radio button next to the item you want to designate as the default Welcome Center content page.
5. Click Select.
6. Click Save.

Results:

The content page you selected is displayed to users who do not have one assigned to their configuration profile.

Creating the Welcome Center Content

Before you start

The Manage settings and central configuration user type permission is required.

Configuration > **Welcome Center Content**

Here's what to do

1. Click Create.

2. Enter values in the various fields.

   In the Content box, you type or paste the text you want to display in the central panel of the Welcome Center.

   To apply a particular format to a word or passage, select the text with the mouse pointer and then click the icon of the corresponding format in the toolbar.

   You can add a static image to Welcome Center content by clicking the Insert or Edit Image icon in the Content toolbar.

3. Click Save.
4. To make the page available for selection, click Activate on the Welcome Center Content page.

Results:

An item corresponding to the content page you created is displayed in the Welcome Center Content Pages list. You can create several content pages. You can then specify which one will be used by default

Assigning Welcome Center Content to a Configuration Profile

Before you start

The following user type permissions are required: *Manage settings and central configuration* and *Manage configuration profile*.

Configuration > **[SmartOrg] Administration** > **Configuration Profiles**

Here's what to do

1. Create a new configuration profile or click the code of an existing configuration profile in the Configuration Profiles list.
2. Click the Welcome Center Content link in the Configuration Profiles list.
3. Click Edit.
4. Click Search and select the radio button that corresponds to the content page you want to display to users who have been assigned the configuration profile.
5. Click Select.
6. Click Save.
7. Return to the Profile page and click Save to save your change.

Results:

The system will show the Welcome Center content you selected to users who have this configuration profile whenever the Welcome Center is displayed.

Welcome Center - Settings and Permissions

The following settings and permissions are used for the Welcome Center functionality.

Setting	Description	Default Value	Location
Display Welcome Center	Controls whether or not the "Welcome Center" is displayed. • If the setting is set to Yes and the user has access to multiple products, the Welcome Center is displayed. If the user has access to only one product, the landing page of the product is displayed rather than the Welcome Center page. • If the setting is set to No and the user has access to multiple products, the table of contents page is displayed (this enables customers who migrate to 11A to maintain the table of contents page if they so desire). If the user has access to only one product, the landing page of the product is displayed rather than the table of contents page. The default value is No but Oracle encourages customers to enable the Welcome Center by setting the value to Always or Yes. • If the setting is set to Always, the Welcome Center is displayed regardless of the number of products to which the user has been granted access.	Yes	Configuration > [General Configuration] Settings
Welcome Center Content	Indicates which customized content and layout to use in the Welcome Center. The setting enables you to specify the content of the Welcome Center panel displayed by default i.e. displayed to users who do not have specific content assigned to their configuration profile. If the Display Welcome Center setting is enabled and you provide no information for the Welcome Center Content, the system displays information provided by Oracle Support.		Configuration > [General Configuration] Settings

User Type Permission	Description	Location
Access Learn as a default user	This provides standard user access to Learn. This enables users to see LearnCenter pages and learning content. All sub permissions (in Learn) except View Course Offline are automatically selected. The user can also use the Com Center.	Configuration > [SmartOrg] Administration > [Users] User Types > Learning > Learn

User Type Permission	Description	Location
Access Learn as a supervisor	This provides Learn supervisor access which typically provides manage access in Learn to users, user communications, completion certificates, assignments, enrollments, development plans, goals, and reports.	Configuration > [SmartOrg] Administration > [Users] User Types > Learning > Learn
Access Learn as an administrator	This provides Learn administrator access, typically enabling users to manage LearnCenter configuration options and set up courses.	Configuration > [SmartOrg] Administration > [Users] User Types > Learning > Learn
Access Learn as user 1, user 2, user 3	These are custom user types, which must be aligned with custom user accounts in Taleo Learn by Oracle Support.	Configuration > [SmartOrg] Administration > [Users] User Types > Learning > Learn

Center Stage

Home Page

The home page is the page that users see when they click the Legacy Recruiting tab.

The home page provides key information and links to underlying functionalities. The home page can be customized by system administrators to meet specific needs. Depending on the user signing in, the information displayed in the home page varies.

There are three default home pages:

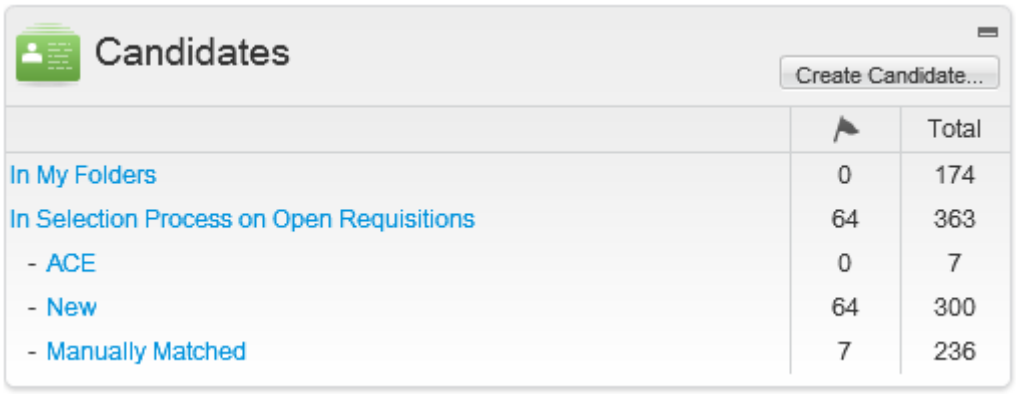
- Recruiter
- Hiring Manager
- Hourly Manager

System administrators can modify these default home pages. They can also create brand new home pages or duplicate existing ones.

The home page can contain channels, links and lists.

Channels display status-oriented data about a user's activities. When clicking the links on the channels, users can access information on requisitions, candidates, or job offers. The following channels can be displayed:

- Candidates
- Offers
- Requisitions
- Tasks
- New Hire
- Pre-Hire



A channel always includes a list of elements as well as the number of items associated to each element. The elements on the list are clickable and bring users to a more detailed area of the application, for example the candidate list, requisition list, etc. The elements on the list are also dependent on the value selected in the "Show information for requisitions" filter.

The number in the following two columns work as follows:

- The number in the Items Requiring Attention column (flag) is specific to you (not to your user groups). It represents the number of items that are new or have been updated by another user since you last viewed them. For example, if you approve your own requisition, a "new" task is added to your Ready for sourcing tasks, and the number in this column for Ready for sourcing element increases by one.
- The number in the Total column represents the total number of items including new, previously viewed, and updated. For example, if you choose your user name in the Show list and Ready for sourcing appears in the Tasks channel, the number in the Total column represents the total number of your requisitions that are ready for sourcing.

Channels are updated immediately after login, or when selecting the "Show information for requisitions" filter, or anytime a user returns to the home page, or when clicking the Refresh button.

Links redirect users to another part of the application. The following links are available:

- Create a Requisition
- Search for candidates
- View Candidates
- View Requisitions
- Onboarding (Transitions)

A mini requisition list can be available in the home page. This mini requisition list allows users to access a candidate list directly from the home page without having to go through the standard requisition list page. This mini requisition list

can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity). This mini requisition list is used by default with the Hourly Manager home page.

The home page displays a Refresh button to allow users to update all the channels with the latest numbers. The Refresh button is only present when there is a channel that needs to be refreshed with dynamic content. For example, if only links are present on the home page, the Refresh button will not be present.

Information in the home page may be displayed as follows:

- Single column: Channels, links, and lists are displayed in one single column.
- Two columns: Channels, links, and lists are displayed in two columns. System administrators can choose which column and the order in which each widget will appear in that column.
- Two columns with header: Channels, links, and lists are displayed in either the header or one of the two columns, as specified by system administrators when placing the widgets.

Configuring the Center Stage

The center stage configuration consists of the following steps.

1. *Creating a center stage.*
2. *Activating the center stage.*
3. *Associating the center stage to a configuration profile.*
4. *Creating a Welcome title in the center stage.*
5. *Adding a separator line in the center stage.*
6. *Adding a footer text in the center stage.*

Creating a Center Stage

Before you start

The Mini Requisition list and the Requisitions channel cannot be put in the same center stage.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click Create.
2. Provide a code and a name.
3. Indicate if you want a single-column layout, a two-column layout, or a two-column layout with header.
4. Click Save.
5. Click Edit next to Channels and Links.
6. Click Add.
7. Select the desired channels and links.
8. Click Select.
9. If necessary, indicate in which columns you want to display the elements.
10. Indicate in which row you want to display the elements.

11. Click Save.

Results:

The newly created center stage appears in the Center Stages list. The information displayed in the central pane of the home page is configured as specified.

What to do next

Activating the center stage.

Activating a Center Stage

Before you start

The center stage must have the inactive or draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Activate.

Results:

The center stage appears as active in the Center Stages list.

Associating the Center Stage to a Configuration Profile

Before you start

The Center Stage must be created.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage Configuration setting.
3. Click Edit.
4. Select a center stage in the Value field.
5. Click Save.

Results:

The center stage is selected for the configuration profile and a configuration profile is tied to each user. Consequently, depending on the user logging in the Recruiting Center, the information displayed in the central pane of the home page will differ.

Creating a Welcome Title

Before you start

Configuration > **[SmartOrg] Configuration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage-Welcome Title setting.
3. Select Yes.
4. Click Save.
5. If you want to have a different Welcome title, contact Oracle Support.
6. In the SmartOrg Configuration Profiles feature, activate the Center Stage-Welcome Title setting.

Results:

The word Welcome followed by the name of the user signing in will be displayed to the user when logging in the Recruiting Center. It is possible to modify the word Welcome; contact Oracle Support for details.

Adding a Separator Line

Before you start

A center stage must be created and activated.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage - Separator Line setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

Results:

A line is added between the Welcome title and the content of the center stage.

Creating a Page Footer

Before you start

You must first submit the desired text to Oracle Support. Text must be supplied for all active languages.

The text area supports up to 50 characters.

You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Configuration > **[SmartOrg] Configuration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage Footer Text setting.
3. Select Yes.
4. Click Save.

Results:

The footer text is displayed on the home page of the Recruiting Center.

Center Stage - Other Configuration Tasks

Deleting a Center Stage

Before you start

The center stage must be inactive.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

Click Delete next to the center stage.

Results:

The center stage is permanently deleted from the database.

Duplicating a Center Stage

Before you start

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Duplicate.
3. Provide a code and a name.
4. Indicate if you want a single-column layout, a two-column layout, or a two-column layout with header.
5. Click Save.
6. Click Edit next to Channels and Links.
7. Click Add.
8. Select th desired channels and links.
9. Click Select.

10. If necessary, indicate in which columns you want to display the elements.
11. Indicate in which row you want to display the elements.
12. Click Save.

Results:

The newly created center stage appears in the Center Stages list.

Deactivating a Center Stage

Before you start

The center stage must have the Active status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of the center stage.
2. Click Deactivate.

Results:

The center stage appears as inactive in the Center Stages list. The center stage is no longer available in SmartOrg when associating a center stage to a configuration profile or user account.

Modifying a Center Stage Properties

Before you start

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Properties.
3. Modify the fields as required.
4. Click Save.

Adding Channels and Links to a Center Stage

Before you start

The center stage must be in the inactive or draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Add next to Channels and Links.

4. Select channels and links.
5. Click Select.
6. Click Save.

Results:

When a user associated to that center stage will access the Recruiting Center, the channels and links will appear.

What to do next

Ordering channels and links as well as columns in the center stage.

Ordering Channels and Links in a Center Stage

Before you start

The center stage must be in the Inactive or Draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Specify the row order of each channel and link.
4. Click Reorder.
5. Click Save.

Results:

When a user associated to that center stage will access the Recruiting Center, the channels and links will be displayed in the new order.

Removing Channels and Links from a Center Stage

Before you start

The center stage must be in the Inactive or Draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Channels and Links.
3. Click Remove next to the channels and links to be removed.
4. Click Save.

Results:

The channels and links will no longer appear in the Center Stage page. When a user associated to that center stage will access the Recruiting Center, the removed channels and links will no longer be displayed.

Setting the Layout of a Center Stage

Before you start

The center stage must be in the Inactive or Draft status.

Configuration > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. Click on the name of a center stage.
2. Click Edit next to Properties.
3. Select the desired layout.
4. Click Save.

Results:

The center stage is laid out in one or two columns, or in two columns with a header.

Organizing a Multicolumn Center Stage

Before you start

The center stage must be in the Inactive or Draft status.

Configuration > > **[Recruiting] Administration** > **Center Stage**

Here's what to do

1. In the Center Stage Configuration page, click on the name of a center stage.
2. In the Center Stage page, click Edit next to Channels and Links.
3. In the Channel and Link Editor page, select a value in the Section drop-down list.
4. Click Save.

Results:

Channels and links appear in the home page either on the right or left hand side of the page.

Creating Custom Instructions for a Center Stage Channel

The text appearing under the name of a channel in the center stage can be customized. For example, for the View Candidates channel, the following text could be modified: "View detailed information about your candidates". Although no default text is supplied with the application, system administrators can send the text to Oracle Support who will then activate the text for the zone. For details, contact Oracle Support.

Communications Channel

Communications Channel

The Communications tool allows the display of useful information to Recruiting Center users.

The Communications tool is available in the supporting tools panel in the right-hand side of the home page. The Communications tool provided by default contains three sections, each being expandable and collapsible.

- Documentation Center: Contains a link to the latest What's New which provides information on new features. A link to Customer Connect is also available.
- Resource Center: Contains a link giving access to information about the hiring cycle, articles, research content, and more.
- Support: Contains information to contact Oracle Support.

Configuring the Communications Channel

Many options exist to display or not the Communications channel to Recruiting Center users. For each configuration profile, customers can define the appropriate approach to take.

By deploying the Communications channel, you can display different information at different levels of customization to different user populations, depending on the level of information that needs to be shared with the groups of users.

Communications channel - Disabled

The Communications channel can be disabled and therefore not displayed in the Recruiting Center. Note that the online help and online tours still appear. For details, see *Disabling the Communications Channel*.

Communications channel - Default

The Communications channel can be displayed in the standard format which contains the following sections:

- Support: Displays text to contact Oracle Support.
- Documentation Center: Contains text as well as a Documentation link giving access to supporting information such as the latest release notes.
- Resource Center: Contains text as well as a Resource Center link giving access to information about the hiring cycle, articles, research content, and more.

For details, see *Enabling the Default Communications Channel*.

For the Customer Support section, you have the ability to enable the section and customize text for each configuration profile. Note that if the Customer Support section is enabled, but the Customer Support Text is empty, then the default text provided in the *Customer Support String* setting will be displayed. For details, see *Customizing Text in the Customer Support Section*.

For the Documentation Center section, you have to enable the *Communication Channel: Documentation URL* setting (Configuration > [Recruiting] Settings). This setting is used to enter the URL of the HTML page displayed when clicking the Documentation Center link in the Communications channel.

For the Resource Center section, it is Oracle Support who enables the *Taleo Resources Center URL* protected setting (Configuration > [General Configuration] Settings). This settings used to enter the URL of the HTML page displayed when clicking the Resource Center link in the Communications channel.

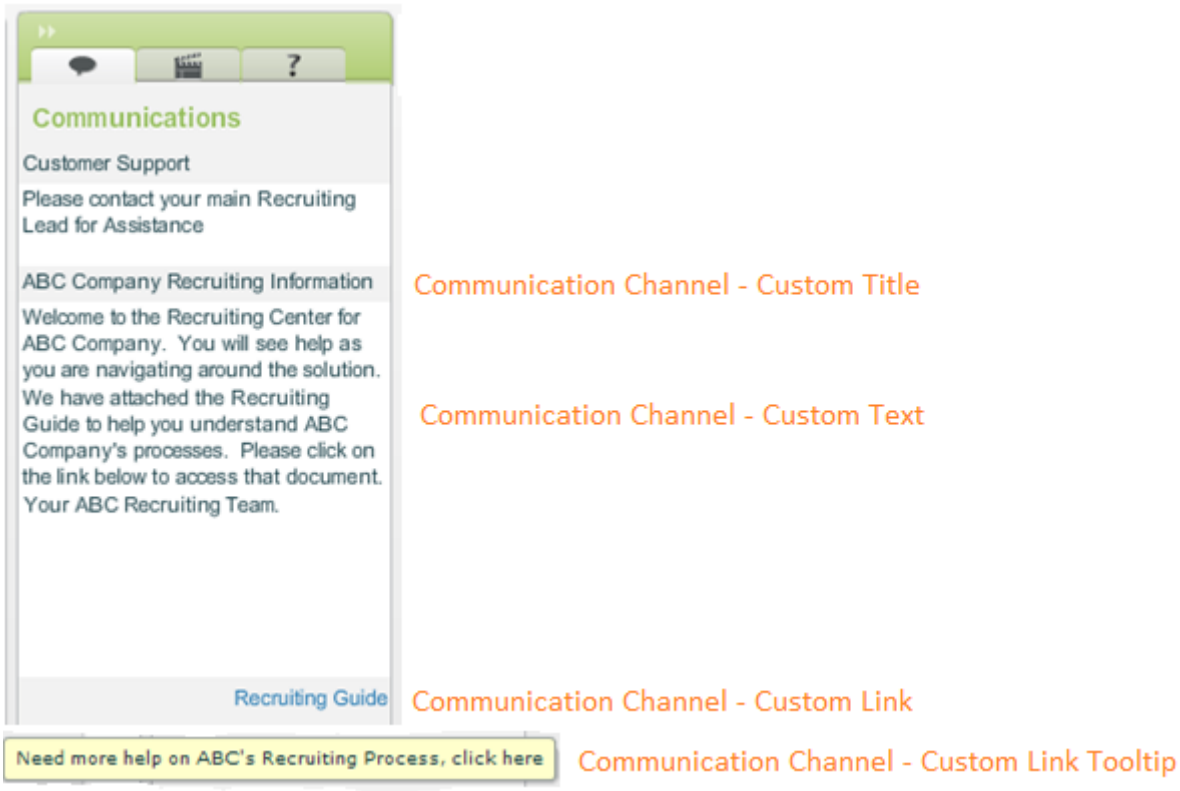
Communications channel - Customized

The Communications channel can be customized by configuration profile.

A Customer Support section can be displayed. As for the default Communications channel, you have the ability to enable the section and customize text for each configuration profile. For details, see *Customizing Text in the Customer Support Section*.

The following elements in the Communications channel can be customized:

- title
- text
- link
- link tooltip
- link URL



For details see, *Customizing the Communications Channel*.

Communications channel - HTML Customized

You have to specify the URL of the HTML page to be displayed in the Communications channel. For details, see *Setting the URL for the HTML Customized Communications Channel*.

Disabling the Communications Channel

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click on a configuration profile.
2. Click on the Communication Channel Mode setting.
3. Click Edit.
4. Select Disabled.
5. Click Save.

Results:

The Communications channel is disabled and is not displayed in the Recruiting Center.

You can also hide the Communications channel by not granting the Access external Web Sites permission. Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.

Enabling the Default Communications Channel

Before you start

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click on a configuration profile.
2. Click on the Communication Channel Mode setting.
3. Click Edit.
4. Select Default.
5. Click Save.

Customizing the Communications Channel

Before you start

The *Communication Channel Mode* setting in the user's configuration profile must be set to Customized.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click on a configuration profile.

2. To customize the title of the section in the Communications channel, click on the Communication Channel - Custom Section Title setting.
3. To customize the text in the Communications channel, click on the Communication Channel - Custom Section Text setting.
4. To customize the text of the link that brings users to an HTML page containing information, click on the Communication Channel - Custom Section Link setting.
5. To customize the tooltip of the link, click on the Communication Channel - Custom Section Link Tooltip setting.
6. To customize the URL of the custom page in the Communications channel, click on the Communication Channel - Custom Section Link URL.

   If the setting is empty, then the Communications channel will be blank.
7. Click Save.

Setting the URL for the HTML Customized Communications Channel

Before you start

The *Communication Channel Mode* setting in the user's configuration profile must be set to HTML Customized.

The HTML Customized mode requires that Flash Player be set in transparent/opaque mode.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click on a configuration profile.
2. Click on the Communication Channel - HTML Custom section URL setting.
3. Click Edit.
4. Enter a URL.

   If no content is provided or if content is invalid, the Communications channel will be displayed blank or with an error message.
5. Click Save.

Results:

The URL is loaded in an iFrame and replaces the Communications channel section. The HTML customized URLs can be the same or can be different for each individual configuration profile.

Customizing Text in the Customer Support Section

Before you start

The *Communication Channel Mode* setting in the user's configuration profile must be set to Default or Customized.

The *Customer Support Section* setting in the user's configuration profile must be set to Yes.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click on a configuration profile.

2. Click on the *Customer Support Text* setting.
3. Click Edit.
4. Enter the desired text for each activated language.
5. Click Save.

Results:

The text is displayed in the Customer Support section of the Recruiting Center Communications channel.

Note that if the Customer Support section is enabled, but the Customer Support Text is empty, then the default text provided in the *Customer Support String* setting will be displayed.

Communications Channel - Settings

Setting	Possible Values	Default Value	Location
Communication Channel Mode	• Default • Customized • HTML customized • Disabled	Default	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - Custom Link	Custom	Communication Channel - Custom Link	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Customer Support Section	• Yes • No	No	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - Custom Link Tooltip			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Customer Support Text			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - Custom Text			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - Custom Title			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - HTML Custom URL			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel - Custom Link URL			Configuration > [SmartOrg] Administration > [Users] Configuration Profiles
Communication Channel: Documentation URL			Configuration > [Recruiting] Settings

Setting	Possible Values	Default Value	Location
Taleo Resources Center URL			Configuration > [General Configuration] Settings - Protected setting
Customer Support String			Configuration > [General Configuration] Settings

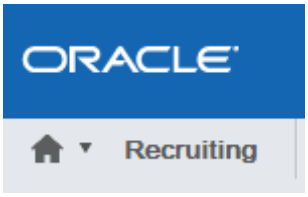
Theme and Logo

Color Theme

The theme is the color used to highlight the core navigation bar in Oracle Taleo Enterprise Edition products.

Skyros Theme

The Skyros theme is available for Oracle Taleo Enterprise Edition products. The Skyros theme is the default theme for new customers. The Skyros theme provides a blue header. Because of the blue header, organization logos that have a white background are not recommended for use with this theme.



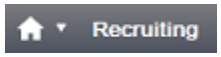
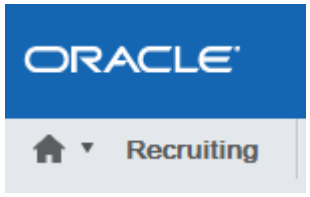
A product setting "Overlay Organization Logo" is available for use in conjunction with the Skyros theme. This setting only works with the Skyros theme. This setting is used to download a logo. Logos with a transparent background are required for this setting. Transparent PNGs are supported and recommended. The image dimensions cannot exceed 280 x 40 pixels.

For the best user experience, the logo used with the Skyros theme should be a light color, preferably white, with a transparent background.

Setting	Default value at migration	Default value for new zone	Location
Overlay Organization Logo	OverlayCompanyLogo.png	OverlayCompanyLogo.png	Configuration > [General Configuration] Settings
Default Theme	Current	Skyros	Configuration > [General Configuration] Settings

Other Themes

The following color themes are provided.

Taleo (default)	Aqua	Sand
Ice	Silver	Skyros
		

A default theme is selected by system administrators. However, Recruiting Center users can modify the default theme in their user preferences (My Setup > Preferences tab).

Modifying the Theme

Before you start

Only one color theme can be displayed per zone.

Configuration > [General Configuration] Settings

Here's what to do

1. Click the Default Theme setting.
2. Click Edit.
3. Select the desired theme color.
4. Click Save.

Results:

Color selected for body text, headings and links is displayed to user.

Selecting the Skyros Theme

Before you start

Logos with a transparent background are required for this setting. Transparent PNGs are supported and recommended. The image dimensions cannot exceed 280 x 40 pixels.

Only one color theme can be displayed per zone.

Configuration > [General Configuration] Settings

Here's what to do

1. Click the Overlay Organization Logo setting.
2. Click Edit.
3. Select the desired logo.
4. Click Save.
5. Click the Default Theme setting.
6. Click Edit.
7. Select the Skyros theme color.
8. Click Save.

Giving the Permission to Overwrite the Selected Theme

Before you start

Configuration > [SmartOrg] Administration [Users] User Types

Here's what to do

1. Click a user type.
2. Click Recruiting.
3. Click Edit next to Other.
4. Select the Access the "Preferences" section in 'My Setup' menu permission.
5. Click Save.

Results:

Users having this user type will be able to overwrite the default theme in their user preferences.

Selected Item Color

Color displayed when selecting elements in the user interface.

The following colors are available:

- Green
- Soft blue (default)
- Yellow
- Blue (inverted)
- Dark (inverted)

The Dark (inverted) color is a high contrast color scheme for visually impaired users.

A default color is selected by system administrators. However, Recruiting Center users can modify the default color in their user preferences (My Setup > Preferences tab).

Selecting the Selected Item Color

Before you start

Only one color can be displayed per zone.

Configuration > [General Configuration] Settings

Here's what to do

1. Click the Selected Item Default Color setting.
2. Click Edit.
3. Select the desired color.
4. Click Save.

Giving the Permission to Overwrite the Selected Item Color

Before you start

Configuration > [SmartOrg] Administration [Users] User Types

Here's what to do

1. Click a user type.
2. Click Recruiting.
3. Click Edit next to Other.
4. Select the Access the "Preferences" section in 'My Setup' menu permission.
5. Click Save.

Results:

Users having this user type will be able to overwrite the default selected item color in their user preferences.

Logo

A logo can be displayed in the upper left corner of pages.

A limit of one logo can be defined by zone. By default, the Taleo logo is displayed. Logo requirements are:

- PNG format.
- Maximum image size is 280 px by 40 px. A margin of 10 px is maintained (left, top, and bottom) outside the image box. An image with smaller dimensions is acceptable. However, it must not be stretched to fill the placeholder.
- Alpha channel is required to support background transparency in the near future.
- The image must be aligned horizontally to the left and vertically to the center within the placeholder.

Uploading an Organization Logo

Before you start

A limit of one logo can be uploaded per zone.

The logo must be in a PNG format.

The maximum image size is 280 px by 40 px. A margin of 10 px is maintained (left, top, and bottom) outside the image box. An image with smaller dimensions is acceptable. However, it must not be stretched to fill the placeholder. The image must be aligned horizontally to the left and vertically to the center within the placeholder.

Configuration > **[General Configuration] Settings**

Here's what to do

1. In the Refine by filter, select Name then type Organization Logo.
2. Click Refresh.
3. Click the Organization Logo setting.
4. Click Edit.
5. Click Browse to select the file containing the company logo.
6. Click Save.

Online Tour and Online Help

Online Help

The Recruiting Center offers comprehensive help about concepts or tasks to perform.

The online help is available in the Help tab located in the supporting tools panel in the right-hand side of all pages. When clicking the Help tab, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

Displaying the Online Help in the Recruiting Center

Before you start

If the path of the URL points to webtop800, you will need to click Reset before.

Configuration > **[General Configuration] Settings**

Here's what to do

1. Click the Taleo Online Help URL setting.
2. Click Edit.
3. Enter the target URL to Recruiting Center online help.

4. Click Save.

Disabling the Online Help in the Recruiting Center

Before you start

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

Here's what to do

You can hide the Help tab by not granting the Access external Web Sites permission.

Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.

Online Tour

The Recruiting Center offers short clips describing essential user interface elements.

These online tours are short clips that present basic information about the design, navigation and certain features of the application. Each clip is no more than one minute in length to give users a quick way to get up to speed with how to use the product.

These tours are available in the Recruiting Center. When enabled, they are available in the Clips tab located in the supporting tools panel on the right.

By default, online tours designed by Oracle come with the product. Oracle reserves the right to add new online tours, modify existing tours or delete tours at any time without notice to customers.

The tab where these online tours are available is configurable. Customers may choose to disable the tab or replace the content with their own content linking to alternative learning materials for their end users.

All online tours have been built using Taleo Proficiency, Taleo's custom online learning tool for an ever changing environment. For customers choosing to create custom content using Taleo Proficiency, the standard online tour content can be purchased as starting material. Contact Oracle Support to learn more about Taleo Proficiency and/or purchasing the online tour content.

Online Tour Creation Guidelines

Customers should evaluate the content of the online tours to determine if it is appropriate given the context of their own deployment. For customers choosing to deploy their own custom online tours, here are some guidelines about what to consider when building this material:

- Focus on the minimum information a new user needs to know in the first few hours of using the product. The concepts have to be focused; otherwise, the online tours will fail.
- Keep each online tour under one minute in length so as to not lose the user's attention.
- Retention of concepts is significantly improved if a user can try to do immediately afterwards what the online tour was explaining. Use the Taleo Proficiency "See It and then Try It" mode to let the user try what they have just seen.

- Online tours are not eLearning tutorials. eLearning tutorials provide steps to achieve something. If you want to include true eLearning in the Online Tours section, we recommend that you clearly distinguish your online tours content from more in depth eLearning content, and present the online tours content first. Then, use the online tours to explain concepts and prompt users awareness of some issues. Use eLearning content to provide the additional details that are not in the online tour.
- Neither online tours nor eLearning tutorials should be designed to "replace" user manuals or online help. These mediums are not useful for reference. They cannot be indexed or searched. Users tend not to reflect on information presented in video format, but to act on it. So present information in this medium that aligns with this format.

Uploading Default Online Tours

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select Taleo Standard (default).
4. Click Save.
5. Click the Taleo Recruiting Online Clips URL setting.
6. Enter the target URL to Taleo Recruiting online tours.
7. Click Save.

Uploading Personalized Online Tours

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select HTML Customized.
4. Click Save.
5. Click the Online Clips - HTML Customized URL setting.
6. Enter the target URL to the customized online tours.
   Note that one URL must be provided per language. And a URL must be provided for every active language.
7. Click Save.

Disabling Online Tours

Before you start

Configuration > **[Recruiting] Settings**

Here's what to do

1. Click the Online Clips setting.
2. Click Edit.
3. In the Value list, select Disabled.
4. Click Save.

Results:

Online tours will not be available in the Recruiting Center and the Clips tab will be hidden.

You can also hide the Clips tab by not granting the Access external Web Sites permission. Note that when this permission is not granted to users, the Communications, Help, and Clips tabs will all be hidden.

Other Page Layout Elements

Creating a Page Header

Before you start

You must first submit the desired text to Oracle Support. Text must be supplied for all active languages.

The text area supports up to 50 characters.

You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Configuration > **[SmartOrg] Configuration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Recruiting Header Text setting.
3. Select Yes.
4. Click Save.

Results:

The header text will be displayed at the top of all pages in the Recruiting Center.

Creating a Page Footer

Before you start

You must first submit the desired text to Oracle Support. Text must be supplied for all active languages.

The text area supports up to 50 characters.

You can use basic HTML formatting such as color, bold, and italics. You cannot embed hyperlinks.

Configuration > **[SmartOrg] Configuration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage Footer Text setting.
3. Select Yes.
4. Click Save.

Results:

The footer text is displayed on the home page of the Recruiting Center.

Creating a Welcome Title

Before you start

Configuration > **[SmartOrg] Configuration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage-Welcome Title setting.
3. Select Yes.
4. Click Save.
5. If you want to have a different Welcome title, contact Oracle Support.
6. In the SmartOrg Configuration Profiles feature, activate the Center Stage-Welcome Title setting.

Results:

The word Welcome followed by the name of the user signing in will be displayed to the user when logging in the Recruiting Center. It is possible to modify the word Welcome; contact Oracle Support for details.

Adding a Separator Line

Before you start

A center stage must be created and activated.

Configuration > **[SmartOrg] Administration** > **[Users] Configuration Profiles**

Here's what to do

1. Click a configuration profile.
2. Click the Center Stage - Separator Line setting.
3. Click Edit.

4. Select Yes.
5. Click Save.

Results:

A line is added between the Welcome title and the content of the center stage.

Creating Custom Instructions for the Forgot Password Message

Before you start

Configuration > [General Configuration] Settings

Here's what to do

1. Click the System Administrator Phone Number setting.
2. Click Edit.
3. Enter text in the Value field. This text will appear in the Forgot Password message that is displayed when a user makes a mistake at login.
4. Click Save.

About Window

The About window displays the following information:

- service pack information (always displayed)
- version information (always displayed)
- legal statement regarding IP protection (displayed if setting enabled)

The legal statement is required mostly for Federal customers. The legal statement will appear as follows:

"Use, reproduction, or disclosure is subject to restrictions set forth in Subcontract No. [Subcontract Number(s)] with Taleo Corporation."

Configuration

To display a legal statement in the About window, a subcontract number must be entered in the following setting. Contact Oracle Support to enter or modify the value.

Setting	Description	Default Value	Location
Subcontract Number	Enter the subcontract number of the agreement in regards to restrictions on use, reproduction or disclosure.	None	Configuration > [General Configuration] Settings

Callout

A callout is a small window or bubble containing information on an element.

Callouts are available throughout the application. To see information contained in a callout, users must place their mouse over the element.

No configuration is required for the callouts. If a user has access to a specific area based on permissions and that area has a callout, the user will be able to see the callout. If there is content that the user cannot see based on the user's permissions and the callout behavior, the field label will be displayed, but the field will be blank. For example, if a user does not have the permission to see the name of internal candidates, the user will still have access to the callout, but the name will show as blank for internal candidates.

The table presents callouts available in the product, fields available in each callout, where the callout is used, and if field security level and availability are taken into consideration.

Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
Attendee Callout	First Name, Last Name, Home Phone, Cellular Phone, Work Phone, Email.	In the Schedule an Interview tool.	None
CSW Callout	Step Name, Step Information.	In the Change Step and Status screen of the requisition-specific candidate list.	None
Requisition Callout - Small	Requisition Title (with an hyperlink to the file), Requisition ID, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting).	In the Requisitions list and Tasks list (in the Requisition column). For security reasons, the requisition callout on the Tasks list will show the callout. However, there will be no access to the requisition for all tasks that are in the Approve Requisition or Approve Offer status for any users. The user can get access to view a PDF of the requisition from within the Approval screen.	None
Requisition Callout - Large	Requisition Title (with an hyperlink to the requisition file), Requisition ID, Status, Recruiter, Status Details, Hiring Manager, Primary Location, Requisition Type, Hired Candidates, Offers Accepted, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting), Department.	In the Requisition Selector of the Match Candidates to Requisitions feature, the Offers list (in the Requisition column), the Requisition Title on the Candidate Job Submission page, the Requisition Title on the Candidate All tab (when grouped by Requisition).	None

Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
Candidate Callout	Candidate Name (with an hyperlink to the file), Home Phone, Cellular Phone, Work Phone, Email.	In the Tasks list (in the Candidate column), the Offers list (in the Candidate column), the Search Results list, the requisition-specific candidate list, the Candidates list, the candidate submission list.	Field security level permissions and field availability are taken into consideration.
Candidate Comment Callout	Comment content.	In the candidate file History tab.	None
Requisition Comment Callout	Comment content.	In the requisition file History tab.	None
Task Callout	Task name (with an hyperlink to the file), Task Type, Assignment Date, Owner.	In the Tasks list (in the Task column).	None
Task Comment Callout	Comment content.	In the Tasks list (in the Comment column).	None
Submission Active/Inactive Callout	Requisition Title (with an hyperlink to the file), Step/Status, Comment.	In the candidate card of the candidate file.	The requisition title viewing permission is ignored; only submissions the user can see will be listed.
List Format Callout	List format information.	In the Requisitions list, the Mini Requisition list, the requisition-specific candidate list, the All Candidate by Requisition list, the All Candidates by Folder list, the All Candidates by Offer list, the quick search results list, the advanced search results list, the candidate capture/possible duplicates list of automatically pooled candidates.	None
Message Template Callout	Message title, information, structure.	In the Send Correspondence feature, when selecting a message template.	None
Message Paragraph Callout	Paragraph title, preview of paragraph body (in active language).	In the Send Correspondence feature, when the message template selected contains many paragraphs.	None
Group Callout	User Name, Employee ID, Job Title, Email, Department.	In the Requisitions list, the Candidates list, the Offers list.	None
Create Candidate Callout	For job-specific submission: Selected Language, Selected Requisitions. For general profile:	In the Create a Candidate feature.	None

Callout	Fields in the Callout	Where the Callout is Used	Security Level/Field Availability Impact
	Selected Language, Folder location and name.		
Create Candidate Flow Description Callout	Create candidate flow title and description.	In the Create a Candidate feature when selecting a candidate file creation template.	None
Most Advanced Progression Status Callout	Requisition Title (with an hyperlink to the file if the user has the required permission), Requisition ID, Status, date when moved into that status.	In the Candidates list, in the Most Advanced Progression Status column.	If a user does not have the permission to see the Most Advanced Requisition, the hyperlink to the requisition will not be available.
Disqualification Question Explanation Callout	Disqualification Question Explanation Title, Disqualification Question Explanation Comment.	In the Disqualification Questions library (Detailed mode), the requisition file and the candidate submission.	None
User Information Callout	First Name, Last Name, Title (of user), ID (of user), Email Address, Work Phone Number, Extension, Fax Number.	In the User Selector available in the Share Candidate feature, Request Approval feature and Request Contribution feature.	None
Requisition Template Callout	Requisition Template Title, Job Code, Status, Requisition Type, User Group, Recruiter.	In the Requisition Template Selector when selecting a template for a requisition file.	None
Requisition Template List Callout	Requisition Template Title, Activated Languages.	In the Requisition Templates library.	None
Attachment Callout	Candidate Name, Job Specific Attachments, Other Attachments.	In the Candidates lists.	Users must have the Access Attachments tab permission to see the callout.
Primary Location Callout	Primary Location, Country, State/Province, Region, Address, City, Zip/Postal Code.	In the left pane of requisitions and requisition templates.	None
Screening Description Callout	Screening Description.	In the job submission Screening block.	None

23 Onboarding (Transitions) Processes in Recruiting

Onboarding (Transitions) Processes in the Recruiting Center

Onboarding (Transitions), a "new generation" onboarding product, provides a unified, automated and customizable system for transitioning candidates and employees. Onboarding (Transitions) processes can be started in the Recruiting Center and several elements and actions have been added to the Recruiting Center to integrate with Onboarding (Transitions).

Processes are created in Onboarding (Transitions). A process is a series of steps typically performed by multiple stakeholders. All necessary steps must be completed before the process acquires the "Complete" status. Depending on the type of process, a process can be started from the Recruiting Center or using Taleo Connect or Web Services.

There are four types of Onboarding (Transitions) processes. The first three types can be started in the Recruiting Center.

- *Pre-Hire*
- *New Hire*
- *E-Offer*
- *Offboarding*

Viewing Onboarding (Transitions) Processes via Channels

The Recruiting Center center stage provides two channels to view Onboarding (Transitions) processes:

- Pre-Hire channel
- New Hire channel

Another channel called Onboarding (Transitions) provides links to access processes in the Onboarding (Transitions) Center.

The Tasks channel contains links to the user's Onboarding (Transitions) tasks that are due today, are overdue, or whose status is "In Progress".

Actions in the Recruiting Center that Affect Onboarding (Transitions) Processes

These actions performed by Recruiting Center users affect running Onboarding (Transitions).

- **Rescind Offer:** If an Onboarding (Transitions) E-Offer process is currently running, an offer was extended, and a user selects the Rescind Offer action, this will cancel the E-Offer process and the offer status will be Rescinded. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.

- **Capture Response:** If a user accepts or refuse an offer that was extended, there is no effect on a running Onboarding (Transitions) E-Offer process; the process still continues. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.
- **Reject Candidate:** If a user rejects a candidate, there is no effect on a running Onboarding (Transitions) E-Offer process; the process still continues. For any other type of Onboarding (Transitions) process currently running, there is no effect, the process continues.
- **Revert, Bypass, Change Step/Status:** If a candidate has an offer with the status Extended, the Revert, Bypass and Change Step/Status actions are not supported. For any other type of Onboarding (Transitions) process currently running, including an E-Offer process, there is no effect; the process continues.

Pre-Hire and New Hire Processes

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Onboarding (Transitions) prehire and new hire processes from the Recruiting Center for candidates on requisitions.

When candidates reach a step and status (in a Candidate Selection Workflow) configured for Onboarding (Transitions) processes, the following actions become available for selection in the More Actions list:

- Start Onboarding (Transitions) Pre-Hire Process
- Cancel Onboarding (Transitions) Pre-Hire Process
- Start Onboarding (Transitions) New Hire Process
- Cancel Onboarding (Transitions) New Hire Process

These types of Onboarding (Transitions) process can be launched from any step of a Candidate Selection Workflow provided the step was configured for these actions and the Recruiting Center users have the required user type permissions.

When an Onboarding (Transitions) process is started, the event is recorded on the History tab of the candidate file. No event is recorded on the History tab, however, when a process is completed, suspended and resumed, or canceled.

These processes can also be started or canceled using Taleo Connect.

Starting Onboarding (Transitions) Process and Impact on SmartOrg User Accounts

Before starting an Onboarding (Transitions) process for a candidate, it is important that Recruiting Center users ensure there is only one candidate record for the person. Performing a check for duplicates (More Actions list > Check for Duplicates) enables Recruiting Center users to determine if a candidate created multiple candidate profiles. If more than one candidate record is found for the person, Recruiting Center users are strongly encouraged to perform the Merge Candidate Files action before starting an Onboarding (Transitions) process.

Starting an Onboarding (Transitions) process for a candidate results in the creation of a user account in SmartOrg (assuming the candidate record is not already linked to a user account). Each person should have a single candidate record and it should be linked to a single SmartOrg user account.

Suppose a candidate is hired using candidate record "A" and an Onboarding (Transitions) process is started. This action results in the creation of a linked user account "A" in SmartOrg. Suppose the person later creates a second candidate record "B" at the external career site and applies for a different job in the organization. If a Recruiting Center user does not perform the Check for Duplicates action and starts an Onboarding (Transitions) process, an unnecessary user

account "B" is created in SmartOrg. These two conflicting user accounts can easily become problematic for integrations, Learn accounts and single-sign-on configurations.

In addition, the two user accounts cannot be merged and even the two candidate records cannot be merged because each is associated with a distinct Onboarding (Transitions) process. (Please see Automatically Deleting Old Onboarding (Transitions) Processes). Such problematic situations can be avoided if Recruiting Center users perform the Check for Duplicates action and merge candidate records that refer to the same person before starting an Onboarding (Transitions) process.

Adding Transitions Actions in a CSW Step

Before you start

The action must be activated.

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

Here's what to do

1. Click the Steps tab.
2. Click a step that is used in the desired CSW.
3. Click the Actions Usage tab.
4. Click Add...
5. Select the desired Onboarding (Transitions) actions:
    - START NEWHIRE ONBOARDING (TRANSITION) PROCESS
    - START PREHIRE ONBOARDING (TRANSITION) PROCESS
6. Click Add.

E-Offer Processes

In the Recruiting Center, two E-Offer processes are available if system administrators have configured them.

The standard E-Offer process simply allows candidates to accept or refuse offers. The advanced E-Offer process, which requires the Onboarding (Transitions) product, allows candidates to accept or refuse offers, and provides additional tasks, forms, electronic signatures, etc. Provided all the right settings and permissions have been configured, the E-Offer process can be started from the Recruiting Center when an offer is extended to a candidate. If an E-Offer is rescinded in the Recruiting Center, the process is automatically canceled in the Onboarding (Transitions) Center. E-Offer processes can also be started or canceled using Taleo Connect.

Offboarding Processes

Offboarding processes can be started and canceled using Taleo Connect or via Web Services from other software products. They can also be canceled in the Onboarding (Transitions) Center.

24 Partner Services

Screening Services

Screening Service

An organization may choose to have external partners provide specialized screening services.

A screening services partner can supply services such as:

- candidate assessment
- background check
- tax credit eligibility
- interview guides
- interview scheduling
- validated tests to identify and measure a candidate's qualifications, motivations, abilities and eligibility

Screening services must be activated by Oracle Support before they can be used in a requisition flow. Services are sourced to the application using an external tool, and enabled by default if the service does not require any additional configuration.

Once a service is made available by Oracle Support, the service can be activated or deactivated by system administrators and made available or not to Recruiting Center users when creating a requisition.

All screening services have the same properties, however, the settings of these properties will vary according to the service. System administrators can configure the screening service that is, modify input fields, phases, etc.

The languages in which an external service is available depend on the languages used by the service providers and vendors.

Screening services are available to Recruiting Center users provided they have been granted the proper user type permission.

Configuration

User Type Permission	Location
Access Screening Services configuration	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration
Services permissions are grouped under the Recruiting functional domain.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

Note: When configuring a correspondence;for a screening services integration, if selecting a message template that is not appropriately configured,the candidate will not be able to access that service.

Input Field

An input field is a specified area of the application where a user must enter or choose information that will be sent to request a partner service.

Input fields used in the application are specific to the service, therefore depending on the service used, the fields displayed in the application will differ from one service to another.

The properties of an input field are:

- Code: The internal name of the input field. The code is a read-only property.
- Name: The label of the field used in the requisition file. Depending on the service definition, the name can be an editable property.
- Domain: The type of field. The domain is a read only property. The possible values are:
    - Text
    - Multilingual text
    - Numerical
    - Selection
    - Date
    - Date UTC sensitive
    - Boolean
- Mandatory: If the service definition specifies the field as mandatory, then the input field will always be mandatory. If the service definition specifies the input field as optional, then the customer will be able to configure the field as being either mandatory or not.
- Default Value: this is the value of the field used by default by the system. Depending on the service definition, this can be an editable property.

Input fields are displayed in the requisition file under the Screening section.

Result Field

A result field is a field for which a partner service will send one result value per service request.

Result fields are specific to the service, therefore depending on the partner service used, the result fields displayed will differ from one service to another. When requesting an external partner service, the result fields will be displayed to the service partner to enter or select the results of the requested service.

The properties of a result field are:

- Domain: The type of field. The domain is a read only property. The possible values are:

    - Text
    - Multilingual text
    - Numerical
    - Selection
    - Date time sensitive
    - Boolean

- Code: The internal name of the result field. The code is a read-only property.
- Name: The label of the field used to return results. Depending on the service definition, this can be an editable property.
- Default Value: depending on the service definition, this can be an editable property.

Result fields are never mandatory because the service partner can send the value of the results incrementally. Once the service partner sends results in their entirety to the application, the application from which the service was requested will use a predetermined user-defined form to display the results supplied by the partner.

Result Set Field

A result set field is a field for which the partner will send more than one result value per service request.

Result set fields are specific to the service, therefore depending on the partner service used, the fields displayed will differ from one service to another. When requesting an external partner service, the result set fields will be displayed to the service partner to enter or select the results of the selected service:

The properties of a result set field are:

- Domain: The type of field. The domain is a read only property. The possible values are:
    - Text
    - Multilingual text
    - Numerical
    - Selection
    - Date
    - Date time sensitive
    - Boolean
- Code: The internal name of the result set field. The code is a read-only property t
- Name: The label of the field used to return results. Depending on the service definition, this can be an editable property.
- Default Value: this is the value of the field used by default by the system. Depending on the service definition, this can be an editable property.

Result fields are never mandatory because the service partner can send the value of the results not all at once.

Taleo Assessment

Assessments

Assessments in the workplace are used to measure the knowledge, skills, abilities and behavioral attributes related to a job or corporate culture. They can also be referred to as screening services, tests, surveys, exams, evaluations, simulations, work samples, assessment centers, interview guides, or realistic job previews. Employers use assessments to hire applicants, develop and promote employees, and collect talent intelligence on internal and external talent pools.

Professional fields related to the scientific research, development and use of workplace assessments include Industrial Organizational (I/O) Psychology and Organizational Development (OD). Also, the fair use of workplace assessments is overseen at the state and federal level or the territory, national and regional/multinational level by various government organizations, such as the U.S. Equal Employment Opportunity Commission (EEOC).

Depending on their professional credentials, authors may also be involved with the following assessment services:

- Job Analysis – determines job-related competencies to include in the assessment.
- Validation Study – determines if the assessment is a reliable and valid measure of the selected competencies and to what degree it predicts job performance.
- Adverse Impact Analysis – determines if the assessment could potentially impact protected groups or promote unfair bias.
- Business Impact Study – determines the cost and time savings, or return on investment, from using a validated assessment over a period of time.

Configuring the Assessment in Recruiting Administration

The configuration of assessments in the Recruiting Administration consists of the following steps.

1. Assessments must be activated in the Assessment Authoring Center before they can be used in a requisition flow. Authored assessments must be activated by Oracle Support. Assessments are sourced to the application using an external tool and enabled by default if the service does not require any additional configuration. Contact Oracle Support for details.
2. *Configuring assessment settings*.
3. *Configuring assessment input fields*.
4. *Configuring assessment result fields*.
5. *Configuring assessment user-defined forms*.
6. *Configuring the assessment message displayed to candidates*.
7. *Configuring the assessment candidate selection workflow*.
8. *Selecting message templates for the Assessment*.
9. *Activating the assessment.*
10. *Adding the Screening block in the requisition file*.
11. *Adding the Screening block in the candidate file*.
12. *Granting assessment permissions*.

Configuring Assessment Settings

Before you start

The Access Administration user type permission is required.

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

Here's what to do

1. Click an assessment.
2. Click Edit next to Properties.
3. In the Settings section, configure the assessment settings as desired.
4. Click Save.

Configuring Assessment 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 an assessment.
2. Click the link under Input Fields.
3. Click Edit next to Properties.
4. Under Default Value, select the assessment that will appear by default in the assessment field located in the requisition Screening block.
5. Click Save.

Configuring Assessment Result Fields

Before you start

Assessment results fields are not configurable by the system administrator. For details, see *Assessment Result Fields*.

Configuring Assessment 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 an assessment.
2. Under User-defined Forms, configure the following elements. For details, see *Assessment User-defined Forms*.
    - Capture of input fields: This is where you define how the Assessment Version 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 Assessment Version 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 Assessment result fields will appear in the candidate submission. Available fields are: Band, Details, Exceptional, Interview Guide, Passed, Score.
    - Display of result set fields: This is used only for those external partners whose certification includes result set fields. Assessment does not use this kind of fields. Therefore, nothing to configure here.
3. Click Save.

Configuring the Assessment Message Displayed to Candidates

Before you start

The Access Administration user type permission is required.

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

Here's what to do

1. Click an assessment.
2. Click Edit next to Labels.
3. Select the language in which you want to create the message.
4. Complete the fields as desired. For details, see *Assessment Labels*.
5. Click Save.
6. Click Preview next to Labels to see how the message will appear to candidates.

Configuring the Assessment 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 an assessment.
2. Click Create next to CSW Actions.
3. Complete the fields as desired. For details, see *Assessment Candidate Selection Workflow*.
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.

Selecting Message Templates for the Assessment

Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an e-mail with a link to the Assessment service instead of taking the assessment immediately during the submission process.

Before you start

The Access Administration user type permission is required.

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

Here's what to do

1. Click an assessment.
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 where to take the Assessment.

Activating the Assessment

Before you start

The Access Administration user type permission is required.

The screening service must be Draft.

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

Here's what to do

1. Click an assessment.
2. Click Activate located next to the name of the assessment.

Results:

The status of the assessment is changed to Active. The Assessment is then available in the Recruiting Center and Career Section provided that the Assessment is included in a requisition and then the requisition is posted to a Career Section.

Adding the Screening Block in the Requisition File

Before you start

The user-defined file must have the inactive or draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click on a user-defined file of type Requisition File.
2. Click Edit next to Section Ordering.
3. Enter the name of the Screening section in the Add a Section field.
4. Click Create Section.
5. Select the Screening block in the Available Blocks section and drag and drop it to the Screening section you created.
6. Click Save.

Adding the Screening Block in the Candidate File

Before you start

The user-defined file must have the inactive or draft status.

At least one section must be created in the user-defined file.

Configuration > [Recruiting] Administration > User-defined Files

Here's what to do

1. Click on a user-defined file of type Candidate File.
2. Click Edit next to Section Ordering.
3. Enter the name of the Screening section in the Add a Section field.
4. Click Create Section.
5. Select the Screening block in the Available Blocks section and drag and drop it to the Screening section you created.
6. Click Save.

Granting Assessment Permissions

The following permissions are used for assessments.

User Type Permission	Description	Location
Request services from Taleo partners	Allows Recruiting Center users to request an Assessment service for candidates. The	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

User Type Permission	Description	Location
	Request Screening Service is then available in the More Actions list.	
Access Taleo partners summary results	Allows Recruiting Center users to access summary results in the candidate submission file.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other
Access Taleo partners detailed results	Allows Recruiting Center users to access detailed results regarding the assessment. The Provider Detailed Results link becomes available in the candidate submission file.	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other

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.

Assessment Properties, Settings, and Fields in Recruiting Administration

The table presents the properties, settings, and fields used to configure Assessment in the Recruiting Administration.

Assessment Property	Description	Location
Name	Name of the assessment.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Description	Description of the assessment.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Provider Name	Name of the provider.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Provider Description	Description of the provider.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Type	Type of screening service.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Status	Status of the assessment. Possible values are Active, Inactive.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Code	Code given to the assessment.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit

Assessment Setting	Description	Location
Validity Period	The validity period is the number of days that an assessment result is valid. If a candidate takes an assessment after the validity period, a request is made to the Assessment Authoring Center for an assessment. The Assessment Authoring Center will respond based on the behavior of the assessment configured in the Assessment Authoring Center. It is a best practice to use the setting "Defined by user" with a date range specified that will not exceed the validity of the assessment. Possible values are:	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit

Assessment Setting	Description	Location
	• Always valid: The results for a particular version received by Recruiting will remain valid for the life of the candidate. If the candidate applies to another position with the same version attached to the requisition, the candidate will NOT be presented with the Screening block in the application process. • Defined by user: This is similar to Always valid by a time frame from when the assessment was completed is entered. A recruiter can therefore specify how long before a candidate would be required to retake an assessment. • Defined by partner: The Screening block is always presented to candidates. When they click the link to take the assessment the Assessment application will determine, based on the assessment author's criteria, if they are allowed to retake it. If not, they are presented with a message indicating that they have already completed the assessment.	
Candidate must answer email within (in hours)	Time frame in hours in which the candidate has to take an assessment. The assessment must be completed in the time frame specified.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
This service is mandatory for new requisitions and for those updated while in "Draft" status	If this setting is activated, the Assessment is mandatory on the requisition file, meaning that it is preselected in the Screening section and cannot be removed.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Access this service through the browser full-screen mode	If using pop-up assessment delivery, this setting determines that the browser ignores the latest defined pop-up size and instead presents the assessment in full screen mode.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit
Client Identifier	Name to identify the company as a customer. This value must be identical to the value defined in the Assessment Authoring Center.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [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 assessment summary. The assessment author should be consulted if requests are not being completed. A higher value gives candidates more time to take and complete an assessment. Once a request expires, Recruiting will NOT accept results for this assessment.	Configuration > [Recruiting] Administration > Screening Services > Assessment > [Properties] > Edit

Assessment Input Field	Description	Location
Version	The assessment version is selected by Recruiting Center users in the Screening block of the requisition. The properties of the input field are: • Code: The internal name of the input field. The code is a read-only property. • Name: The label of the field in the requisition file. For example, Assessment Version. • Domain: The type of field. The domain is a read-only property. • 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. • Default Value: Assessment displayed by default in the requisition file.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Input Fields > Version [Properties] > Edit

Assessment Result Field	Description	Location
Band	The band is the candidate global band.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Band
Details	This is the label of the Details link displayed in the candidate job submission, under the Screening block.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Details
DetailsUrl	This is the label for the URL used to request the interview guide (if enabled) from the Assessment application.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > DetailsUrl
Exceptional	No global bands have been denoted as "Exceptional". This value will always be "No" and is not relevant to the assessment interpretation.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Exceptional
Passed	A status of "Yes" indicates that the candidate received a passing green or yellow global band. Passed status of "No" indicates that the candidate received a failing red global band.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Passed
Score	The score is the candidate's global score. It is best to focus on the global band and dimension bands rather than the global score.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Score

Assessment User-Defined Form	Description	Location
Capture of input fields	This is where you define how the Assessment Version 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 > Assessment > User-defined Forms
Display of input fields	This is where you define how the Assessment Version 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.	Configuration > [Recruiting] Administration > Screening Services > Assessment > User-defined Forms
Display of result fields	This is where you define how the Assessment results fields will appear in the candidate submission. Available fields are: Band, Details, Exceptional, Interview Guide, Passed, Score.	Configuration > [Recruiting] Administration > Screening Services > Assessment > User-defined Forms
Display of result set fields	This is used only for those external partners whose certification includes result set fields. Assessment does not use this kind of fields. Therefore, nothing to configure here.	Configuration > [Recruiting] Administration > Screening Services > Assessment > User-defined Forms

Assessment Label	Description	Location
Service Name	This is the name of the service. Default value: Assessment (AAWT)	Configuration > [Recruiting] Administration > Screening Services > Assessment > Labels
Label 1	Default value: We would like you to provide additional information that will help us evaluate your qualifications for the job.	Configuration > [Recruiting] Administration > Screening Services > Assessment > 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.	Configuration > [Recruiting] Administration > Screening Services > Assessment > 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 > Assessment > Labels
Link to Service	Default value: Fill out the assessment questionnaire	Configuration > [Recruiting] Administration > Screening Services > Assessment > Labels
Tooltip for Link to Service	Default value: Access the assessment questionnaire	Configuration > [Recruiting] Administration > Screening Services > Assessment > Labels

Assessment Label	Description	Location
Label 3	Default value: After completing the questionnaire, you will automatically return to this page.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Labels

Assessment CSW Action	Description	Location
Workflow	The action will take place when a candidate uses the specified workflow.	Configuration > [Recruiting] Administration > Screening Services > Assessments > CSW Actions
Step	The action will take place when the specified step is reached or later if the status criteria is not yet met.	Configuration > [Recruiting] Administration > Screening Services > Assessments > CSW Actions
Status	The candidate must have this status when they reach the selected step or the action will not take place until this status is reached.	Configuration > [Recruiting] Administration > Screening Services > Assessments > CSW Actions
Action	Send Online Screening Assessment	Configuration > [Recruiting] Administration > Screening Services > Assessments > 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 Assessment.	Configuration > [Recruiting] Administration > Screening Services > Assessments > CSW Actions

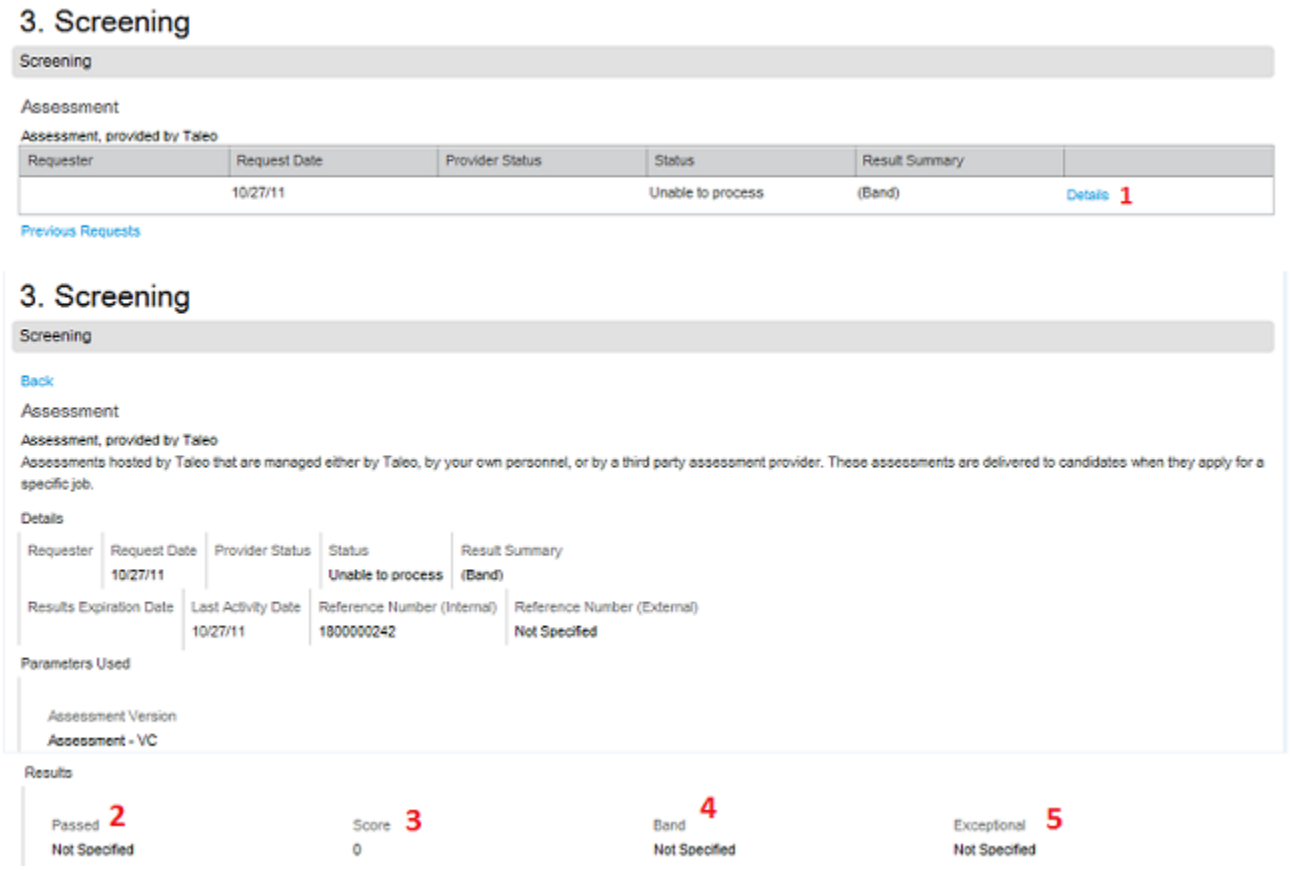
Assessment Message Template	Description	Location
Message template (internal candidate)	Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the Assessment service instead of taking the assessment immediately during the submission process. A message template is selected for internal candidates.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Correspondence
Message template (external candidate)	Message templates are used either when the recruiter manually requests an assessment for a candidate, or when a candidate decides on the Career Section to receive an email with a link to the Assessment service instead of taking the assessment immediately during the submission process. A message template is selected for external candidates.	Configuration > [Recruiting] Administration > Screening Services > Assessment > Correspondence

Career Section Screening Block Properties

Screening Block Property	Value	Location
Allow candidates to receive questionnaire information later by email	• Yes • No	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit
Show this block to the following candidates	• ACE Candidates • Those who Meet RMI Criteria • Those who Meet Required Criteria • All Candidates	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.)	• Pop-up Window • Inline	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.	• Yes • No	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

Assessment Fields in the Recruiting Center

The illustration presents assessment fields configured in the Recruiting Administration.



Element	Description
1: Details	Configured via Details field in Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Details
2: Passed	Configured via Passed field in Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Passed
3: Score	Configured via Score field in Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Score
4: Band	Configured via Band field in Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Band
5: Exceptional	Configured via Exceptional field in Configuration > [Recruiting] Administration > Screening Services > Assessment > Result Fields > Exceptional

Scheduling Center

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.

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).

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.

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

Scheduling Center Screening Service Setting	Description	Location
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
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	The calendar associated with the initial interview phase of the CSW. The properties of the input field are: • Code: The internal name of the input field. The code is a read-only property. • Name: The label of the field in the requisition file. For example, Calendar ID 1. • Domain: The type of field. The domain is a read-only property. • 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. • Default Value: Calendar displayed by default in the requisition file.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Input Fields > Version [Properties] > Edit
AssessementId2-AssessementId10	The calendar associated with the interview phases of the CSW, after the initial phase. The properties of the input field are: • Code: The internal name of the input field. The code is a read-only property.	Configuration > [Recruiting] Administration > Screening Services > Scheduling Center > Input Fields > Version [Properties] > Edit

Scheduling Center Screening Service Input Field Property	Description	Location
	• Name: The label of the field in the requisition file. For example, Calendar ID 1. • Domain: The type of field. The domain is a read-only property. • 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. • Default Value: Calendar displayed by default in the requisition file.	

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
ApointmentStatus2-10	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 > ApointmentStatus1-10
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 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 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

Scheduling Center Screening Service Label	Description	Location
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

Career Section Screening Block Properties

Screening Block Property	Value	Location
Allow candidates to receive questionnaire information later by email	• Yes • No	Configuration > [Career Section] Administration > Application Flows > Click an application flow > Screening link > Edit
Show this block to the following candidates	• ACE Candidates • Those who Meet RMI Criteria • Those who Meet Required Criteria • All Candidates	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.)	• Pop-up Window • Inline	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.	• Yes • No	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

Screening Service - Other Configuration Tasks

Activating a Screening Service

Before you start

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

The screening service must be inactive.

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

Here's what to do

1. Click the name of a service.
2. 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.

Editing a Screening Service

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 the name of a service.
2. Click Edit next to Properties.
3. Modify the settings and properties as required.
4. Click Save.

Results:

The modifications applied to the properties and settings of the service are displayed in the service page and in Recruiting Center under the Screening section of a requisition.

Deactivating a Screening Service

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 the name of a service.
2. Click Deactivate located next to the name of the service.

Results:

The service is no longer available in the Recruiting Center when requesting a service.

Creating a Screening Service Field

A system administrator cannot create an input, result or result set field for a screening service.

What to do next

Editing a screening service field.

Editing a Screening Service Field

Before you start

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

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

Here's what to do

1. Click the name of a service.
2. Click the name of a field.
3. Click Edit next to properties.
4. Edit the information.
5. Click Save.

Results:

The input, result or result set fields of the screening service re customized to a specific need.

Deleting a Screening Service Field

A system administrator cannot delete an input, result or result set field of a screening service.

What to do next

Editing a screening service field.

Editing 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 on the name of a service.
2. Click on a user-defined form.
3. Make desired changes.
4. Click Save.

Results:

The properties and fields of a screening service user-defined form are modified.

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.

Adding a Screening Service to a Candidate Selection Workflow

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 a service.
2. Click **Create** next to CSW Action.
3. Select values in the fields as required.
4. Click **Save**.

Results:

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

Removing a Screening Service from a Candidate Selection Workflow

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 a screening service.
2. In the CSW Actions section of the service page, click Remove located beside the CSW you want to remove.

Results:

This action will no longer be executed during the candidate selection workflow.

Editing 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 a service.
2. Click Edit next to Labels.
3. Complete the fields as required.
4. Click Save.

Results:

When a screening request is sent to a candidate, labels will reflect changes in the e-mail sent to the candidate.

What to do next

Previewing a service label.

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.

Selecting a Message Template for a Screening Service

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 a service.
2. Click Edit next to Correspondence.
3. Click select
4. Select a Message template.
5. Click Select.
6. Click Save.

Results:

The new templates will be used when requesting a screening service.

Deleting a Message Template from a Screening Service

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 a service.
2. Click Edit next to Correspondence.
3. Click Delete next to a message template
4. Click Save.

Results:

The template can no longer be used when requesting a screening service.

Creating a Phase

Before you start

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

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

Here's what to do

1. In the Custom tab, click the elements link located on the same row as the service for which you are creating a phase.
2. Select New.
3. Complete the fields.
   The code value used must be a unique integer.
4. Click Done.

Results:

A new phase is now available in the drop down list under phase in the CSW Action section of the service.

What to do next

Adding an invitation phase to a requisition.

25 LinkedIn Recruiter System Connect

LinkedIn Recruiter System Connect Overview

Use LinkedIn Recruiter System Connect (RSC) to integrate LinkedIn Recruiter with Oracle Taleo Enterprise Edition.

To use LinkedIn RSC, you must be using:

- Oracle Taleo Enterprise Edition, with Fluid Recruiting deployed to the recruiter population.
- Oracle Human Capital Management (HCM) Cloud for Core HR or Talent.

Key Capabilities in LinkedIn Recruiter

In LinkedIn Recruiter, recruiters who have connected their LinkedIn seat licence 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 Fluid 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 Fluid Recruiting.
- Use the Notes feature to enter comments. These notes also appear in Fluid Recruiting.

Key Capabilities in Fluid Recruiting

Here are the key capabilities for recruiters in Fluid 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.
- Users who have been granted a LinkedIn Recruiter seat license can connect that seat to their Taleo user account. After making that connection they 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.

Get a Licence for LinkedIn Recruiter

Your organization must procure a license for LinkedIn Recruiter. That license will give you a set of seats that you can assign to LinkedIn member accounts for the recruiters.

For more details about license and seat procurement, contact LinkedIn.

Map Location Levels

Your location hierarchy must have the concepts of Country, State/Province, and City represented. Those three location concepts must be consistently on the same level throughout the location hierarchy. LinkedIn requires that requisition location data is sent for Country, State/Province, and City.

To ensure that you're sending LinkedIn the right location information, you need to configure them.

1. Go to Configuration > SmartOrg > Settings.
2. Search for these settings:
   - Location Level City
   - Location Level State
   - Location Level Country
3. For each setting, define the level of your SmartOrg location structure on which the countries, states/provinces, and cities are configured.
4. Click Save.

Enable Email Uniqueness

LinkedIn only allows a single member account per email address. In Oracle Taleo Enterprise Edition, you can allow multiple candidates to have the same email address. This is controlled with the Email Uniqueness setting.

1. Go to Configuration > Recruiting > Settings.
2. Search for the Email Uniqueness setting.
3. Set the setting to Yes.
4. Click Save.

Results:

If there are multiple candidates with a common email (from a time prior to Email Uniqueness being activated), the candidate with the most recent modification date will be selected for inclusion in the service. The older candidates will be excluded from the service.

Connect Your Zone to LinkedIn

If you're operating the Apply with LinkedIn (AWLI) service for candidate job applications, then your zone is already connected to LinkedIn. If you're not, you need to create a connection to LinkedIn.

1. Go to Configuration > Recruiting Administration > Integration > Recruiting Services. If Oracle Support has processed your service request, you will see the LinkedIn Recruiter System Connect service.
2. Click LinkedIn Recruiter System Connect to open the service.
3. If a value appears in the Client ID, Secret, and Zones fields, it means you already have a connection to LinkedIn.
4. If the fields are empty:
    a. Click Edit.
    b. Enter your zone URL in the Zones field. Use this format: zone.taleo.net. You don't need to add internet protocols (https://) prior to the URL.
    c. Click the Connect to LinkedIn button.

Results:

Several values will be populated in the Settings table (Client ID, Client Secret, Application ID, Zones, and Application Name).

Set the Application Name

After connecting your zone to LinkedIn, several options appear on the LinkedIn Recruiter System Connect service. One of the options is the ability to manage the Application Name. This value is the name of your organization which appears in the pop-up screen hosted by LinkedIn, which is displayed when recruiters connect their accounts.

1. Go to Configuration > Recruiting Administration > Integration > Recruiting Services.
2. Click LinkedIn Recruiter System Connect to view the service in Edit mode.
3. Enter a value in the Application Name field.
4. Click Update.

Define Data Set to Synchronize

You can configure the data you want to synchronize with LinkedIn. You can synchronize a universal data set, or you can limit the data to specific populations.

Synchronize a Universal Data Set

The Synchronize a universal data set option is selected by default and it's the recommended option. The service will synchronize all the candidates, job applications, and requisitions in your zone.

When you activate Recruiter System Connect with a universal dataset, you maximize:

- Candidates for whom you have access to the LinkedIn Profile Widget inside Oracle Taleo Enterprise Edition.

- Candidates for whom you can review the InMails and Notes from inside Oracle Taleo Enterprise Edition.
- LinkedIn members for whom you can identify whether they are in Oracle Taleo Enterprise Edition, and view their job applications.
- The requisitions for which you can create job submissions from inside LinkedIn Recruiter.
- The requisitions automatically posted to the LinkedIn jobs site as a Limited Listing.

You can choose whether requisitions posted to external and public career sections are posted to the LinkedIn job board as a Limited Listing using the *Synchronize requisitions as Public (posted to LinkedIn jobs site)* setting.

When the setting is enabled, all requisitions posted to a career section that is both externaland public are posted to LinkedIn as a limited listing. The job synchronization with LinkedIn sends this value of public which drives this posting behavior.

When the setting is disabled, all requisitions are sent and synchronized as private.

Synchronize a Limited Data Set

The LinkedIn Recruiter System Connect service allows you to limit the dataset which will be synchronized with LinkedIn. There may be cases where you want to exclude certain datasets from synchronizing with LinkedIn, perhaps for regulatory, privacy, or other considerations. If that's the case, select the Synchronize a limited data set option. Then select desired filters.

If you choose to synchronize a limited dataset, the Candidate Locations, Requisition Locations, User Groups, and Requisition Types filters must have a value populated to activate the LinkedIn Recruiter System Connect service.

Filter	Description
Internal Candidates	• Defines whether internal candidates and job applications created by internal candidates are included in the service. • This configuration is optional.
Candidate Locations	• Candidates whose place of residence is included in the configured list of countries are synchronized with LinkedIn. • Configure the countries of residence to include in the service. • If applicable, include candidates with no place of residence populated by selecting the option Include candidates with location (place of residence) unpopulated.
Requisition Locations	• Requisitions for which the Primary Location is configured in this filter are synchronized with LinkedIn. • Job submissions for which the Primary Location is configured in this filter are synchronized with LinkedIn. • You only need to configure a country to include all the requisitions located on any level in that country. • Configure the locations (typically countries) to include in the service.
User Groups	• Requisitions which are in the User Group configured in this filter are synchronized with LinkedIn. • Job submissions for which the User Group is configured in this filter are synchronized with LinkedIn. • Recruiters who have connected to a LinkedIn Recruiter seat and who are in the User Group configured in this filter are synchronized with LinkedIn. • Configure the User Groups to include in the service.

Filter	Description
Requisition Types	• Requisitions for which the Requisition Type is configured in this filter are synchronized with LinkedIn. • Job submissions for which the Requisition Type is configured in this filter are synchronized with LinkedIn. • Configure the Requisition Types to include in the service.

Synchronize Data Set

1. Go to Configuration > Recruiting Administration > Integration > Recruiting Services.
2. Click LinkedIn Recruiter System Connect to view the service in Edit mode.
3. Go to the Data Synchronization section.
4. Select one of these options:
    - Synchronize a universal data set
    - Synchronize a limited data set

Activate LinkedIn Recruiter System Connect in LinkedIn

To activate LinkedIn Recruiter System Connect at LinkedIn, you first need to request the RSC service, then you need to configure LinkedIn admin settings.

Request the RSC Service

Before you start

- Open another browser tab or window.
- Ensure you're signed into LinkedIn with an account that has administrator privileges on your LinkedIn Recruiter System Connect service. When you're signed into LinkedIn, a configuration window appears at the bottom of the LinkedIn RSC service page.

Here's what to do

1. Scroll down to the bottom of the LinkedIn RSC service page.
2. In the Recruiter System Connect (RSC) section, click Request. A message window may be temporarily displayed while LinkedIn processes your request. No action from you is required.
3. When the request is completed, Partner Ready is displayed.
4. Go back to the LinkedIn Recruiter System Connect page in Oracle Taleo Enterprise Edition and look at the Settings section. The Integration Context and Application ID fields are now populated with values. Take a note of the Application ID value.

Configure LinkedIn Admin Settings

1. Go to *http://www.linkedin.com*.
2. Navigate to LinkedIn Recruiter > More > Admin Settings > ATS tab.
3. Locate the partner service you just created.
4. Ensure that the ATS client name on the screen is identical to the Application ID appearing in the Settings section in Oracle Taleo Enterprise Edition (see above steps).
5. Ensure that the following settings are activated. The LinkedIn Recruiter System Connect service in Oracle Taleo Enterprise Edition can't be activated without these two settings enabled:
    - Contract Level access (for every seat on this contract)
    - Company Level access (for every contract in your company)

Activate Multiple Contracts

Multiple contracts with LinkedIn can be activated. You may have multiple contracts for arrangements of billing and managing seat assignments.

Before you start

If that's the case, the Change Contract button appears at the bottom of the LinkedIn configuration page.

To configure multiple contracts:

Here's what to do

1. Click the Change Contract button.
2. Select another contract.
3. Click the Request button to initiate the RSC service activation at LinkedIn for that contract.
4. Activate LinkedIn RSC for that contract. For details, see *Activate LinkedIn Recruiter System Connect in LinkedIn*.

Activate LinkedIn Recruiter System Connect in Taleo

Activate the LinkedIn Recruiter System Connect service in Oracle Taleo Enterprise Edition.

1. Go to the LinkedIn Recruiter System Connect page in Oracle Taleo Enterprise Edition.
2. Click Activate.
3. Read the legal agreement. Ensure you're familiar with it's content and that you're authorized to act on behalf of your organization for this agreement and partner service activation.
4. Click I Agree. A history event is added. It indicates the name of the user who agreed to the terms, the time and date it was agreed to, and the IP Address from which the agreement was conducted.

What to do next

The LinkedIn Recruiter System Connect service is now activated. The data synchronization process will start. After a few minutes, history events will be added to the service confirming that requisitions, candidates, job applications, and candidate selection workflow events will start to synchronize. When these initial setup synchronizations are complete, an additional history event will be added confirming that the synchronization is completed.

Note: If the legacy Cross System Awareness service was enabled, it will automatically be disabled with this activation.

Configure User Type Permissions

You need to grant the Connect LinkedIn Account to User and the Access the LinkedIn Profile Widget user type permissions.

1. Go to Configuration > SmartOrg > Administration > User Types.
2. Select a user type.
3. Click Recruiting.
4. Click Edit next to Other.
5. Select these permissions:

User Type Permission	Description
Connect LinkedIn account to user	With this permission, users who were granted a LinkedIn Recruiter seat can connect their LinkedIn account to their Oracle Taleo Enterprise Edition user account. For details of what recruiters can do once this permission is granted, see *Key Capabilities in Fluid Recruiting* and *Key Capabilities in LinkedIn Recruiter*. When this permission isn't granted, users won't see the user interface component which allows the Connect function. It's recommended to only grant this permission to your audience of recruiters who are granted a LinkedIn Recruiter seat. This mitigates confusion for users who don't have a seat, as they will not see the ability to make the connection.
Access the LinkedIn Profile Widget	With this permission, users can see the LinkedIn icon to link to the profile widget. Depending on your arrangements with LinkedIn, access to the Profile Widget may be available to all Oracle Taleo Enterprise Edition users, or only to those with a connected seat. Inquire with LinkedIn to understand what is available to your users.

Configure History Event Categories

Users can view LinkedIn InMails and Notes on the History tab of the candidate general profile. These are presented in their own event category called LinkedIn Information.

Before you start

Only users who have successfully connected their LinkedIn seat to their Oracle Taleo Enterprise Edition user account will see this event category.

Here's what to do

1. Go to Configuration > Recruiting > Administration > Settings.
2. Search for the Default History Event Categories setting.
3. Select the LinkedIn Information category.
4. Click Save.

Configure the Candidate List Column

The LinkedIn icon which grants access to the Profile Widget must be added to the candidate list formats. When it's added, only users who have the permission to see the LinkedIn Profile Widget will see the icon in the list.

1. Go to Configuration > Recruiting > Administration > List Formats.
2. Click the Candidate tab.
3. Select a list format.
4. Add the LinkedIn Member Profile column.

What to do next

> **Note:** The column called Linked ID was used for the legacy LinkedIn Cross System Awareness feature. If you were using the legacy feature, you need to remove that column from your list format configuration and from candidate list contexts.

Manage Users with LinkedIn Seats

You can view the connection that recruiters make between their LinkedIn account and their Oracle Taleo Entreprise Edtion user account in SmartOrg, under User Accounts. You can also remove the connection, if desired.

1. Go to Configuration > SmartOrg > Administration > User Accounts.
2. Select a user.
3. Scroll down to the Partner Information section.
4. You can remove the connection if desired.

Data Consideration

Below are points to consider regarding your data management.

- **Data Visibility by User Group:** Requisitions visible on the LinkedIn Recruiter application for the One-Click Export feature are determined by the user groups to which a user belongs. Submissions visible on the LinkedIn Recruiter application in the ATS Indicator are determined by the user groups to which a user belongs.
- **Requisition Location:** Requisition locations are sent to LinkedIn in the base language of the requisition. LinkedIn subsequently parses the locations, and assigns those job locations structures in LinkedIn's location data model. The location names configured for your countries, states/provinces, and cities, should be standard globally understood location names. Peculiarities such as "Branch Office 12345" in a location title may result in poor location processing by LinkedIn.
- **Postal Code:** The postal code is sent to LinkedIn. It's recommended to populate postal codes at the lowest level on the location tree. This includes levels below the City level, which are not mapped on the location mapping.
- **Requisition Number:** The Requisition Number field must not be blank. Requisitions with an unpopulated requisition number will not be synchronized with LinkedIn.
- **Job Title:** The value in the Job Title field must be between 1 and 200 characters in the base language of the requisition to be included in the synchronization. Requisitions with blank job titles or with more than 200 characters are excluded from the synchronization.
- **Job Description:** The External Job Description field must not be blank. Requisitions with unpopulated external job descriptions are excluded from the synchronization. Also, the External Job Description field should be configured as Required for Saving or Required for Approval, and not Required for Sourcing. Requisitions with the Open status are eligible for export to LinkedIn.
- **Synchronization of Delete Action and Other Actions:** When candidates or submissions are deleted, they will also be deleted from LinkedIn Recruiter. This delete action at LinkedIn doesn't impact a LinkedIn Member's member profile they maintain themselves. Only the Taleo information which was synchronized to LinkedIn is deleted. When requisitions are deleted from Taleo, they will be sent to LinkedIn as Closed, and no longer available for use on the 1-Click Export service. If you use a limited data set, descoping parameters will invoke a delete action for requisitions and submissions. Any requisitions for the descoped parameter will be closed at LinkedIn.
- **Posted Requisitions:** Requisitions posted on a Career Section of type External and display type Public, are posted on the LinkedIn jobs site as a Limited Listing. That posting will include a link to apply to the job on the Career Section. As those requisitions become unposted from the Career Section, they will be also be unposted from LinkedIn.
- **InMails and Notes:** All InMails and Notes synchronized into Oracle Taleo Enterprise Edition from LinkedIn Recruiter are visible to all users who have a LinkedIn Recruiter seat connected.
- **Seats:** Only one Taleo account can use a LinkedIn Recruiter seat. Seat sharing is not permitted.

26 Sourcing

Sourcing Integration

Oracle Taleo Enterprise Edition provides an easy access to the Sourcing product which is used to promote and manage employee referrals using social media.

When Sourcing product is enabled, the Sourcing link appears in the Welcome Center, under the Quick Access section, as well as in the core navigation bar via the Home icon.

Single Sign-On is available so users can seamlessly access Sourcing without having to provide a username and password.

Configuration

The Sourcing product is available in the Products Configuration list under SmartOrg. To enable Sourcing, contact Oracle Support.

Permissions have been created to use the Sourcing product.

User Type Permission	Description	Location
Access Social Sourcing	This permission determines if a user can access the Social Sourcing product via the Welcome Center and the Home icon. A user having the Access Social Sourcing permission will be granted the Recruiter role in the Social Sourcing product.	Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Sourcing
Manage Social Sourcing	This permission determines if a user can access the Social Sourcing product via the Welcome Center and the Home icon. A user having the Access Social Sourcing permission and the Manage Social Sourcing permission will be granted the Administrator role in the Social Sourcing product. Note that if you grant the Manage Social Sourcing permission to a user, you must also grant the Access Social Sourcing permission.	Configuration > [SmartOrg] Administration > Users > User Types > Recruiting > Sourcing

27 Exportable Statuses

Integration Service to Export Candidate Submissions

An integration service allows customers to only export candidate submissions having reached a specific step and status in the candidate selection workflow (CSW).

This integration service is configurable via a feature called Exportable Statuses which is available in the Recruiting Administration menu, under Integration. The integration service is used only in the standard Fusion-Taleo Integration.

Taleo customers have different points in time where they need to export candidate submissions to an external system (such as an HRIS). For example, when candidates have reached the Offer step or when candidates are hired. With the Exportable Statuses feature, system administrators have the ability to specify at which workflow/step/status combination candidate submissions are ready to be exported. When the external system makes an export query to Taleo, only candidate submissions having reached the specified combination within the given timeframe will be exported. Combinations are assigned to an external system, making it possible to export candidate submissions to different systems, at a different workflow/step/status combination. Multiple combinations can be set for the same external system.

Recommended Practices

- Because the integration service queries the candidate submissions' History table (which can be demanding for the system), it is recommended not to configure an exportable status on a step/status combination that could define huge volumes of candidates as ready to be exported. For example, it is recommended not to set up an exportable status for the New-New step/status combination.
- Step/status combinations defined as exportable statuses should be set as mandatory in the CSW configuration to increase their usage by recruiters.

Creating an Exportable Status

Before you start

To configure exportable statuses, the system administrator must have the Access Administration permission (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Configuration > **[Recruiting] Administration** > **Integration** > **Exportable Statuses**

Here's what to do

1. Click **Create**.
2. Provide a name for the external system.

   The external system name can contain alpha characters (a to z, A to Z), numeric characters (0 to 9), underscores, and hyphens. It cannot contain spaces. This name will need to be specified in the integration script when asking for an export.
3. Select a workflow, a step and a status.
4. Click **Save**.

Results:

The exportable status appears in the list. When candidate submissions reach the specified combination, the external system makes an export query to Taleo, which will only export candidate submissions having reached the specified combination.

In the list of exportable statuses, invalid combinations are identified in red. For example, if an exportable status is defined on a status that no longer exists, this exportable status will be displayed in red.

The integration service looks in the candidate submissions history and only exports submissions having reached the configured workflow/step/status combination within the given time frame. Submissions are exported even if they are not currently at the workflow/step/status; they only need to have reached it at some point in the given time frame.

Every change to an exportable status is recorded in the History section, making it possible to determine what was the configuration at a given point in time.

Deleting an Exportable Status

Before you start

To configure exportable statuses, the system administrator must have the Access Administration permission (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Configuration > **[Recruiting] Administration** > **Integration** > **Exportable Statuses**

Here's what to do

Click **Remove** next to an exportable status.

Results:

As soon as an exportable status is removed from the list, the export service will no longer export candidate submissions having reached the workflow/step/status combination.

Every change to an exportable status is recorded in the History section, making it possible to determine what was the configuration at a given point in time.

28 Data Archiving and Deletion

Automated Task Configuration

Automated Task

An automated task is an action the system automatically performs to delete and archive information contained in the database.

The Automated Tasks feature allows the deletion of the following data from the database:

- candidates
- submissions
- requisitions
- requisition templates
- questions

The Automated Task feature provides three types of deletion:

- **Permanently delete:** This type of deletion removes data from the database without the possibility of restoring it. This action can be performed on candidate files, submissions, requisition files, requisition templates, and questions. System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis.
- **Delete (all data can later be restored):** This action is available for candidate files only. When using this type of deletion, candidate files deleted no longer appear in the Recruiting Center, but the files are not actually purged from the database. This type of deletion provides system administrators the ability to restore them should the need arise. System administrators can restore a particular candidate file, several candidate files, or even all candidate files deleted by an iteration of the task if necessary. System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis. Reports can include candidate files deleted in this manner. If the candidates referred other candidates, such references are deleted and cannot be restored afterward even if the candidate files are later restored.
- **Delete (non identifying data can later be used for reporting purposes):** This action is available for candidate files only. This type of deletion removes identifying data from the database with the possibility of retaining non identifying information for reporting purposes. Candidate files deleted in this manner cannot be restored afterward. If the candidates referred other candidates, such references are deleted and cannot be restored afterward.

Several criteria are available to define which elements to delete. Criteria using UDFs are also available. Only UDFs of type Selection and Date are available. When system administrators use a UDF of type Selection, the available operator is "Is set to". When system administrators use a UDF of type Date, the available operator is "Is older than". It is possible to select several UDFs for one criterion and to select multiple values for one UDF. In each case, the AND condition is used.

In the following example, the criterion "Include only submissions based on the value of the following UDFs" contains 4 UDFs, and the UDF "Afternoons Available" is selected 3 times with different values.

Candidate file permanent deletions are performed in two phases.

- All candidate files matching the criteria are tagged as "to be deleted". They are still in the database, but not displayed to users.
- All candidate files tagged as "to be deleted" are permanently deleted. Note that the first and second phases cannot occur the same night. Therefore, hard-deleting a single candidate will take as long as hard-deleting 1000 files.

When a candidate is deleted, it is as if the candidate never existed from a user's point of view. Therefore, if a candidate applies for a second time, the candidate would need to create a whole new candidate file. The old file would not be available (unless the system administrator would have reactivated it).
Candidate deletions are done in batches of 1000 candidates per hour. This means that a maximum of 12,000 candidates are processed per evening.

Submission permanent deletions are performed in two phases:

- All candidate submissions matching the criteria are tagged as "to be deleted". They are still in the database, but not displayed to users.
- All candidate submissions tagged as "to be deleted" are permanently deleted. Phase 2 typically happens 24 hours after the execution of Phase 1. During Phase 2, the system checks for special conditions that would prevent a candidate submission from being deleted, such as the existence of an Onboarding (Transitions) process. If such a condition exists, the submission is not permanently deleted and remains tagged as "to be deleted".

The candidate submissions deletion process deletes any elements related to the submission being deleted, for example: tasks, attachments, partner's processes, interview questionnaires and answers.

Onboarding

Note:

When a candidate submission is deleted by an automated task, the last modified date for that candidate is not modified. In this way, the execution of date-sensitive deletion tasks is unaffected by candidate submission deletion tasks.

Requisition deletions are done in batches of 100 requistions per hour. This means that a maximum of 1200 requisitions are processed per evening.
Questions used in requisitions cannot be deleted manually nor through the Automated Task feature. Users can delete obsolete and unreferenced questions only after cleaning up the question library, that is:

- Delete candidates (which will delete the answers associated to questions).
- Delete requisitions and templates.

System administrators can schedule automated tasks to be run automatically, once or on a recurring basis, or they can run them manually. Automated tasks run from 7:00 PM to 7:00 AM (Eastern Time) during the week, and full-time (24 hours a day) during the weekend.

History events of an automated task are kept 24 months in the system (*Recruiting Administration > Automated Tasks > click an automated task > View History*).

Important Information

- When creating an automated task, it is possible to limit the task's scope to elements that meet specific criteria. It is also possible to specify when the task is to start and whether the task is to be run on a recurring basis.
- As the number of candidate files, requisitions, templates, and questions has increased, the size of Taleo customers' databases has grown proportionally. The Permanently delete candidate files action provides a highly configurable tool that can result in significantly improved system performance: faster candidate searches, quicker report generation, pages and lists that are displayed more rapidly. All of these performance improvements will result in greater productivity with respect to users.
- Better compliance with regulations around the world. Some countries have strict laws governing the length of time that personal information can be held in databases. Taleo customers who do business in such countries will be able to delete candidate information in a manner that complies with such legislation. Taleo customers can create tasks that use the Permanently delete candidate files action in particular to ensure that the personal information they have stored in Taleo's databases conforms to the legislation in the countries in which they do business.
- When a candidate is deleted, his/her user name becomes available to other users.
- For Onboarding, there are 2 additional settings to be aware of. They are:
    - Automatically Delete Old Onboarding (Transitions) Processes: This is used to delete older processes and is enabled by default.
    - Consider Onboarding processes before deleting candidates: Determines whether or not candidates are permanently deleted based on the existence of related onboarding processes. Ultimately, the configuration value determines if, based on the existence of onboarding processes, a candidate and their relevant processes are to be soft-deleted or permanently deleted in both Recruiting and Onboarding.

      There are 2 values available to select for configuring this setting. They are:

        - *Permanently delete candidates if no related Onboarding processes exist. Soft delete candidates otherwise.*

          Permanently deletes candidates only if they were never involved in an Onboarding process. Otherwise, regardless if the Onboarding process is still in process or has become canceled or completed.

          This is the default at upgrade.

            - In Recruiting candidate is soft-deleted.
            - In Onboarding, the process name (in the process list) is appended with (Deactivated Candidate) and tasks are marked as To be Deleted and are no longer functional and no longer displayed using the Opened Tasks filters.
        - *Delete candidates even if Onboarding processes are not yet Completed or Canceled.*

          Permanently deletes candidates in Recruiting and, if applicable, in Onboarding, regardless if they were involved in Onboarding processes or not.

          For those candidates that are or were involved in Onboarding, those processes and their tasks are also deleted and no longer displayed in the Onboarding Center.

      > **Note:** Contrary to Recruiting, soft-deleted candidate processes and tasks continue to be displayed in the Onboarding product.

Configuration

To access this feature, users must be granted the Access Automated Tasks permission.

User Type Permission	Location
Access Automated Tasks	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration

To determine whether Onboarding processes are considered prior to deletion, the following setting must be configured:

Setting	Location
Consider Onboarding processes before deleting candidates	Configuration > [Recruiting] > Settings > [Taleo Recruiting Settings]

Default Automated Tasks (System Tasks)

Default automated tasks are available and cannot be deleted.

Items deleted from the candidate search results (system task)

This task is triggered when users perform candidate searches and then delete candidate files. The task deletes the candidate files but the latter can later be restored if necessary (provided the files have not been deleted permanently in the interim by another task). To view and restore some or all of the candidate files deleted, system administrators can click the name of the task and click View History.

Restored items not permanently deleted (system task)

System administrators can trigger this task when they want to restore some or all of the items deleted by a task of type "Delete candidate files (all data can later be restored)" (provided the files have not been deleted permanently in the interim by another task). To do so, systems administrators click the name of the task. All items that have been deleted (as opposed to those that have been permanently deleted) are displayed.

Permanently delete candidate files deleted in the Staffing WebTop at least 7 days ago (system task)

This task is used to automatically perform the permanent deletion of candidates that were soft deleted by way of the Delete Candidate action (used by Recruiters in the Recruiting product) or by way of the Deactivate action (used by candidates as part of their candidate portal's account). The task permanently deletes candidates 7 days after they were initially (soft) deleted, leaving time for the Administrator to restore candidates that might have been deleted by mistake. You can also deactivate this task and keep those (soft deleted) candidates in the database longer.

Delete candidate files; all data can later be restored (system task)

This task stores all the candidates who deactivated their Career Section account themselves by clicking the My Account Options > Deactivate (soft deleted). Candidate files can still be restored from the task history until they are permanently deleted. For candidates to be able to deactivate their account, the following elements are required:

- The Career Portal Page > My Account Options must be displayed in the Career Section.
- The Career Section property "Display the link allowing to deactivate the account in the My account page" must be enabled.

Automated Tasks and OFCCP

The purpose of the OFCCP feature, within the context of candidate searches, is to keep a record of the search results whenever a user performs a search for candidates for a specific requisition.

When a user performs a search for candidates for a specific requisition, a log file that contains the candidates retrieved by the search is created. Once the candidate is entered in the log, the candidate entry cannot be deleted for two years. Such log files can be indispensable if the organization has to undergo an audit.

If you create and run a task to delete ("all data can later be restored" or "nonidentifying data can later be used for reporting purposes") candidate files, future candidate searches will not retrieve the deleted candidate files even if the candidates are recorded in OFCCP logs. If you create a task to permanently delete candidate files, candidate files associated with candidates entered in OFCCP logs will be deleted but not permanently deleted (in compliance with OFCCP). Consequently, future candidate searches files will not retrieve the deleted candidate files but the data contained in the OFCCP logs will be maintained.

Creating an Automated Task to Delete Candidates

Before you start

The Automated Task feature must be activated by Oracle Support.

The **Access Automated Tasks** user type permission is required.

Candidates included in the processing of an automated task must not be locked by the OFCCP feature.

Configuration > **[Recruiting] Administration** > **Automated Tasks**

Here's what to do

1. Click **New Task...**
2. Select the **Candidates** option and click **Next**
3. Select the type of delete you want to perform.
    - Delete (all data can later be restored): Removes data from the database but provides the ability to restore it should the need arise.
    - Delete (non identifying data can later be used for reporting purposes): Removes identifying data from the database with the possibility of retaining non identifying information for reporting purposes. Deleted data cannot be restored afterward.
    - Permanently delete: Removes data from the database without the possibility of restoring it.
4. Select criteria to refine the deletion process. See *Deleting Candidates Criteria*.
5. Type the name and code of the task.
6. Select the task status:
    - If you want the task to be activated when it is created, select Active.
    - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the Calendar icon in the **Task Execution Date** section.

8. Specify the recurrence of the task:
    - If you do not want the task to be run on a regular basis, select No.
    - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click **Next**.
10. If the summary information is correct, click **Finish**.

    The Summary page displays an estimated count if the task was executed now. When you click the Count button, the system displays a list of items matching the specified criteria. However, when the system executes the deletion task, some items may actually not be deleted due to other conditions being enforced by the system. For example, requisitions having candidate submissions will not be deleted. In such cases, if you clicked the Count button, the requisitions would be displayed but the task would not delete them whenever it was run.

Results:

The automated task appears in the Automated Tasks page.

Deleting Candidates Criteria

Criteria	Description
Include candidate files whose "Creation Date" is older than:	Select the criterion if you want the task to process candidate files that were created earlier than a specific period immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.
Include candidate files whose "Candidate File Last Update" has not changed in the last:	Select the criterion if you want the task to process candidate files that were not modified during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose "Candidate File Last Update" date was earlier than March 1st, and satisfied all the other criteria you might have selected. To consult the list of changes that trigger an update to the Candidate File Last Update, see *Events that Trigger Updates to Candidate File Last Update and Last Activity Date*.
Include candidate files whose "Last Activity Date" has not changed in the last:	Select the criterion if you want the task to process candidate files whose Last Activity Date has not changed during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files whose Last Activity Update date was earlier than March 1st, and satisfied all the other criteria you might have selected. To consult the list of changes that trigger an update to the Last Activity Date, see *Events that Trigger Updates to Candidate File Last Update and Last Activity Date*.
Include candidates who have no completed profile or application.	Select the criterion if you want the task to process candidate files of candidates who have not completed any career section flow (profiler or job-specific application), and satisfy all the other criteria you might have selected. The following candidates, even if they have not completed any career section flow as such, are considered to have "completed applications" and thus will not be deleted permanently by the task: • Candidates who are matched to a requisition. • Candidates who are entered in the system by way of the Capture Resume or the import toolkit. • Candidates who are hired.

Criteria	Description
Include candidate files marked as "Identification Missing".	Select the criterion if you want the task to process candidate files that have been identified as "Identification Missing", and satisfy all the other criteria you might have selected. Candidates provided no identification (first name, last name, initial), and did not indicate that they wished to be anonymous.
Include candidates who have not applied on any requisition in the last:	Select the criterion if you want the task to process candidate files of candidates who have not applied on any requisition during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process candidate files of candidates who had not applied on any requisition from March 1st to August 31st.
Include candidates who have been referred by an agent or agency at least this long ago.	Select the criterion if you want the task to process candidates who have been referred by an agent or agency at least this long ago.
Include only candidates who have been deleted.	Select the criterion if you want the task to only process candidates who have been deleted.
Exclude candidate files that were deleted in the last:	Select the criterion if you want the task to exclude candidate files that were deleted in a specific period of time.
Exclude internal candidates.	Select the criterion if you do not want the task to process candidate files of internal candidates.
Exclude candidate files whose status is "Hired" on a requisition.	Select the criterion if you want to exclude from the task candidate files of candidates whose status is "Hired" on at least one requisition. In other words, they are currently employed by the organization. To avoid deleting permanently employees who have been hired outside of the system (and who consequently do not have the "Hired" status), it is recommended that you also select the Exclude internal candidates criterion.
Exclude candidates who are currently active in a selection process.	Select the criterion if you do not want the task to process candidates who are currently active in a selection process.
Exclude referrers.	Select the criterion if you do not want the task to process referrers.
Include candidates only if all requisitions associated to the submissions of that candidate have been closed (Filled or Canceled) or are in Deleted status and that the last one to be closed has been closed since:	
Include only candidates based on the value of the following UDFs:	Select the criterion if you want the task to process candidate files that have specific UDFs. It is possible to build a condition using multiple UDFs. The candidate file must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Exclude candidates based on the value of the following UDFs:	Select the criterion if you want to exclude from the task candidate files that have specific UDFs. It is possible to build a condition using multiple UDFs. The candidate file must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Include candidates whose "Place of Residence" is one of the following locations:	Select the criterion if you want the task to process candidate files that have specific places of residence. It is possible to build a condition using multiple UDFs. The candidate file must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Include candidates who have applied on a requisition whose "Primary Location" is one of the following:	Select the criterion if you want the task to process candidates who have applied on a requisition that has specific locations. It is possible to build a condition using multiple UDFs. The requisition file must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Exclude candidates who have applied on a requisition whose "Primary Location" is one of the following:	Select the criterion if you want to exclude from the task candidates who have applied on a requisition that have specific locations. It is possible to build a condition using multiple UDFs. The requisition file must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.

Candidate Identifying Information

The following "identifying" information is deleted and cannot be restored when using the deletion action "Delete candidate files (nonidentifying data can later be used for reporting purposes)".

- First name
- Last name
- Initial
- Address line 1
- Address line 2
- City
- Zip code
- Phone numbers (all)
- Email address
- Web site
- Employee number
- Social security number (or Government ID)
- Values before change, kept in the Tracking History for Contact Information Updated events
- Date of birth
- Place of residence (Country, State/Province and Region)
- User-defined fields
- Reference by an agent or another candidate
- Cover letter
- Pasted resume
- Additional information
- Career objective
- Attached files

Events that Trigger Updates to "Candidate File Last Update" and "Last Activity Date"

Whenever certain events (actions) occur, the "Candidate File Last Update" and the "Last Activity Date" are updated. Except where otherwise noted, the following events trigger an update to both the "Candidate File Last Update" and the "Last Activity Date".

Career Section Actions	• Change Password • Update Basic Profile • Update Personal Information (including UDFs)

	• Update Competency Answers • Update Question Answers • Update Disqualification Question Answers • Update Additional Information (Pasted Resume, Pasted Cover Letter, etc.) • Create, Delete or Update Education (including UDFs) • Create, Delete or Update Work Experiences (including UDFs) • Update Regulations Answers (USA/Canada) • Attach or Remove a File • Update the "Accept invitations by email..." check mark
Recruiting Center Actions – General Actions	• Attach or Delete Files • Match to a Requisition – only the "Last Activity Date" is updated • Generate New Password • Unlock Account • Add Referrer • Remove Referrer • Delete Candidate • Restore Candidate
Candidate Progression is a Selection Process:	• Change Step/Status – only the "Last Activity Date" is updated • Move – only the "Last Activity Date" is updated • Bypass – only the "Last Activity Date" is updated • Revert – only the "Last Activity Date" is updated
Edits to the Candidate File	• Update any value on the Submission tab • Update any answer on the Regulations tab • Add or Change Referring Agent on the History tab

Creating an Automated Task to Permanently Delete Submissions

Before you start

The Automated Task feature must be activated by Oracle Support.

The **Access Automated Tasks** user type permission is required.

Candidates included in the processing of an automated task must not be locked by the OFCCP feature.

Configuration > [Recruiting] Administration > Automated Tasks

Here's what to do

1. Click **New Task...**
2. Select the **Submissions** option and click **Next**
3. The **Permanently delete** option is selected, click **Next**.
4. Select criteria to refine the deletion process. See *Deleting Submissions Criteria*.

5. Type the name and code of the task.
6. Select the task status:
    - If you want the task to be activated when it is created, select Active.
    - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the Calendar icon in the **Task Execution Date** section.
8. Specify the recurrence of the task:
    - If you do not want the task to be run on a regular basis, select No.
    - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click **Next**.
10. If the summary information is correct, click **Finish**.

    The Summary page displays an estimated count if the task was executed now. When you click the Count button, the system displays a list of items matching the specified criteria. However, when the system executes the deletion task, some items may actually not be deleted due to other conditions being enforced by the system. For example, requisitions having candidate submissions will not be deleted. In such cases, if you clicked the Count button, the requisitions would be displayed but the task would not delete them whenever it was run.

Results:

The automated task appears in the Automated Tasks page.

Deleting Submissions Criteria

Criteria	Description
Include only submissions on requisitions whose "Requisition Number" starts with:	Select the criterion if you want the task to process submissions that have a specific requisition number.
Include only submissions on requisitions whose "Title" starts with:	Select the criterion if you want the task to process submissions that have a specific title.
Include only submissions on requisitions whose "Creation Date" is older than:	Select the criterion if you want the task to process submissions that were created earlier than a specific period immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process submissions whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.
Include only submissions on requisitions whose "Last Modification Date" is older than:	Select the criterion if you want the task to process submissions on requisitions that were modified during a specific period. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.
Include only submissions on requisitions whose "Close Date" is older than:	Select the criterion if you want the task to process submissions on requisitions whose close date is older than a specific period. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.
Include only submissions on requisitions whose "Status" is: (It is preferable to select Filled, Canceled, or Deleted.)	Select the criterion if you want the task to process submissions on requisitions which have a specific status. Possible statuses are: Draft, To be Approved, Approved, On Hold, Filled, Deleted, Canceled, Sourcing, Rejected.
Exclude internal submissions.	Select the criterion if you do not want the task to process internal submissions.

Criteria	Description
Exclude submissions made by internal candidates.	Select the criterion if you do not want the task to process submissions made by internal candidates.
Exclude submissions whose status is "Hired" (also excludes submissions which have been deleted).	Select the criterion if you want to exclude from the task submissions whose status is "Hired" on at least one requisition.
Include only submissions which have been deleted before:	Select the criterion if you want the task to process submissions which have been deleted before a specific period. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.
Include only submissions based on the value of the following UDFs:	Select the criterion if you want the task to process submissions that have specific UDFs. It is possible to build a condition using multiple UDFs. The submission must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Exclude submissions based on the value of the following UDFs:	Select the criterion if you want to exclude from the task submissions that have specific UDFs. It is possible to build a condition using multiple UDFs. The submission must contain each UDF value to be included. Only UDFs of type Selection or Date can be selected.
Include only submissions on requisitions whose "Organization" is one of the following:	Select the criterion if you want the task to process submissions that have specific organizations. It is possible to build a condition using multiple UDFs.
Include only submissions on requisitions whose "Job Field" is one of the following:	Select the criterion if you want the task to process submissions that have specific job fields. It is possible to build a condition using multiple UDFs.
Include only submissions on requisitions whose "Primary Location" is one of the following:	Select the criterion if you want the task to process submissions that have specific primary location. It is possible to build a condition using multiple UDFs.

Creating an Automated Task to Permanently Delete Requisitions

Before you start

The Automated Task feature must be activated by Oracle Support.

The **Access Automated Tasks** user type permission is required.

Requisitions included in the processing of an automated task must not be linked to any candidates.

Configuration > **[Recruiting] Administration** > **Automated Tasks**

Here's what to do

1. Click **New Task...**
2. Select the **Requisitions** option and click **Next**
3. The **Permanently delete** option is selected, click **Next**.
4. Select criteria to refine the deletion process. See *Deleting Requisitions Criteria*.
5. Type the name and code of the task.
6. Select the task status:
    - If you want the task to be activated when it is created, select Active.
    - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.

7. To indicate the day on which you want the task to start running, make a selection using the Calendar icon in the **Task Execution Date** section.
8. Specify the recurrence of the task:
    - If you do not want the task to be run on a regular basis, select No.
    - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click **Next**.
10. If the summary information is correct, click **Finish**.

    The Summary page displays an estimated count if the task was executed now. When you click the Count button, the system displays a list of items matching the specified criteria. However, when the system executes the deletion task, some items may actually not be deleted due to other conditions being enforced by the system. For example, requisitions having candidate submissions will not be deleted. In such cases, if you clicked the Count button, the requisitions would be displayed but the task would not delete them whenever it was run.

Results:

The automated task appears in the Automated Tasks page.

The automated task will permanently delete requisitions, leaving no trace of their existence in the database apart from the database ID, requisition number, requisition title, and creation date of each requisition, which are displayed on the history page of each iteration of the task (see *Viewing the History of an Automated Task*).

Deleting Requisitions Criteria

Criteria	Description
Include requisitions whose "Requisition Number" starts with:	Select this criterion if you want the task to process requisitions whose requisition number starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the requisition number(s) in the field. For example, if you wanted to delete permanently all requisitions whose requisition number started with "REQ-Finance-001-", you would enter REQ-Finance-001- in the field.
Include requisitions whose "Title" starts with:	Select this criterion if you want the task to process requisitions whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field. For example, if you wanted to delete permanently all requisitions whose title started with "FE-class II", you would enter FE-class II in the field.
Include requisitions whose "Creation Date" is older than:	Select this criterion if you want the task to process requisitions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process requisitions whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.
Include requisitions whose "Last Modification Date" is older than:	Select this criterion if you want the task to process requisitions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process requisitions whose "Last Modification Date" was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.
Include requisitions whose "Status" is: (It is preferable to select Filled, Canceled, or Deleted.)	Select this criterion if you want the task to process requisitions that have a particular status, and satisfy all the other criteria you might have selected. It is recommended that you select from the list Filled, Canceled, or Deleted (though it is possible to select one of the other statuses).

Criteria	Description
Exclude requisitions based on the value of the following UDFs:	
Include requisitions whose "Organization" is one of the following:	Select this criterion if you want the task to process requisitions that specify a particular Organization, and satisfy all the other criteria you might have selected. Click Add… to add organizations. If you add an organization and then wish to remove it from the list, click the Remove icon that corresponds to the organization. If you wish to remove all the organizations you added, click Remove All.
Include requisitions whose "Job Field" is one of the following:	Select this criterion if you want the task to process requisitions that specify a particular Job Field, and satisfy all the other criteria you might have selected. Click Add… to add job fields. If you add a job field and then wish to remove it from the list, click the Remove icon that corresponds to the job field. If you wish to remove all the job fields you added, click Remove All.
Include requisitions whose "Primary Location" is one of the following:	Select this criterion if you want the task to process requisitions that specify a particular Primary Location, and satisfy all the other criteria you might have selected. Click Add… to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.

Creating an Automated Task to Permanently Delete Requisition Templates

Before you start

The Automated Task feature must be activated by Oracle Support.

The **Access Automated Tasks** user type permission is required.

Configuration > **[Recruiting] Administration** > **Automated Tasks**

Here's what to do

1. Click **New Task...**
2. Select the **Templates** option and click **Next**
3. The **Permanently delete** option is selected, click **Next**.
4. Select criteria to refine the deletion process. See *Deleting Templates Criteria*.
5. Type the name and code of the task.
6. Select the task status:
   - If you want the task to be activated when it is created, select Active.
   - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the Calendar icon in the **Task Execution Date** section.
8. Specify the recurrence of the task:
   - If you do not want the task to be run on a regular basis, select No.
   - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click **Next**.

10. If the summary information is correct, click **Finish**.

    The Summary page displays an estimated count if the task was executed now. When you click the Count button, the system displays a list of items matching the specified criteria. However, when the system executes the deletion task, some items may actually not be deleted due to other conditions being enforced by the system. For example, requisitions having candidate submissions will not be deleted. In such cases, if you clicked the Count button, the requisitions would be displayed but the task would not delete them whenever it was run.

Results:

The automated task appears in the Automated Tasks page.

The automated task will permanently delete requisition templates, leaving no trace of their existence in the database apart from each template's database ID, job code, template title, and creation date, which are displayed on the history page of each iteration of the task. (see *Viewing the History of an Automated Task*).

Deleting Templates Criteria

Criteria	Description
Include templates whose "Job Code" starts with:	Select this criterion if you want the task to process templates whose job code starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the job code(s) in the field. For example, if you wanted to delete permanently all templates whose job code started with "Templ-Finance-001-", you would enter Templ-Finance-001- in the field.
Include templates whose "Title" starts with:	Select this criterion if you want the task to process templates whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field. For example, if you wanted to delete permanently all templates whose title started with "FE-class II", you would enter FE-class II in the field.
Include templates whose "Creation Date" is older than:	Select this criterion if you want the task to process templates that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process templates whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.
Include templates whose "Last Modification Date" is older than:	Select this criterion if you want the task to process templates that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process templates whose "Last Modification Date" was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.
Include templates whose "Status" is:	Select this criterion if you want the task to process templates that have a particular Status, and satisfy all the other criteria you might have selected.
Include templates whose "Organization" is one of the following:	Select this criterion if you want the task to process templates that specify a particular Organization, and satisfy all the other criteria you might have selected. Click Add… to add organizations. If you add an organization and then wish to remove it from the list, click the Remove icon that corresponds to the organization. If you wish to remove all the organizations you added, click Remove All.
Include templates whose "Job Field" is one of the following:	Select this criterion if you want the task to process templates that specify a particular Job Field, and satisfy all the other criteria you might have selected. Click Add… to add job fields. If you add a job field and then wish to remove it from the list, click the Remove icon that corresponds to the job field. If you wish to remove all the job fields you added, click Remove All.
Include templates whose "Primary Location" is one of the following:	Select this criterion if you want the task to process templates that specify a particular Primary Location, and satisfy all the other criteria you might have selected. Click Add… to add locations. If you add

Criteria	Description
	a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click Remove All.

Creating an Automated Task to Permanently Delete Questions

Before you start

The Automated Task feature must be activated by Oracle Support.

The **Access Automated Tasks** user type permission is required.

Configuration > **[Recruiting] Administration** > **Automated Tasks**

Here's what to do

1. Click **New Task...**
2. Select the **Questions** option and click **Next**
3. The **Permanently delete** option is selected, click **Next**.
4. Select criteria to refine the deletion process. See *Deleting Questions Criteria*.
5. Type the name and code of the task.
6. Select the task status:
   - If you want the task to be activated when it is created, select Active.
   - If you do not want the task to run when it is created, select Inactive. A task whose status is Inactive will not run regardless of its execution date or recurrence.
7. To indicate the day on which you want the task to start running, make a selection using the Calendar icon in the **Task Execution Date** section.
8. Specify the recurrence of the task:
   - If you do not want the task to be run on a regular basis, select No.
   - If you want the task to be run regularly, select Yes then select a frequency from the list.
9. Click **Next**.
10. If the summary information is correct, click **Finish**.

    The Summary page displays an estimated count if the task was executed now. When you click the Count button, the system displays a list of items matching the specified criteria. However, when the system executes the deletion task, some items may actually not be deleted due to other conditions being enforced by the system. For example, requisitions having candidate submissions will not be deleted. In such cases, if you clicked the Count button, the requisitions would be displayed but the task would not delete them whenever it was run.

Results:

The automated task appears in the Automated Tasks page.

The automated task will permanently delete questions, leaving no trace of their existence in the database apart from each question's database ID, question, and creation date, which are displayed on the history page of each iteration of the task (see *Viewing the History of an Automated Task*).

Deleting Questions Criteria

Criteria	Description
Include questions that start with:	Select this criterion if you want the task to process questions that start with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected.
Include questions whose "Creation Date" is older than:	Select this criterion if you want the task to process questions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process questions whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.
Include questions whose "Last Modification Date" is older than:	Select this criterion if you want the task to process questions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list. Suppose, for example, that you selected 6 months and that the task was executed on August 31st. The task would process questions whose "Last Modification Date" was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.
Include questions whose "Type" is:	Select this criterion if you want the task to process questions of a particular type, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the type of question (Prescreening or Disqualification) by making a selection from the corresponding list.
Include questions whose "Status" is:	Select this criterion if you want the task to process questions that have a particular Status, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the Status (Active, Inactive, or Obsolete) by making a selection from the corresponding list.

Viewing the History of an Automated Task

Before you start

The Automated Task feature must be activated by Oracle Support.

The Access Automated Tasks user type permission is required.

Configuration > [Recruiting] Administration > Automated Tasks

Here's what to do

1. Click the task whose history you want to view.
2. In the Overview section, click View History.

Results:

A new page is displayed that includes "historical" information about each past and current iteration of the task: the day and time that each iteration started and ended, the length of time during which the task ran, the name of the person or the system that initiated the iteration, the iteration's current status, the number of items processed, and the number of errors.

29 Product Resource Configuration

Product Resource Identification

Resource Administration

The Resource Administration feature allows system administrators to display the ID associated to text appearing on pages of Oracle Taleo Enterprise Edition products in order to modify the text.

Each element of text also called resource, such as fields, buttons, tooltips, links, page titles and sections, has a unique ID associated to it. These IDs can be displayed in the application, in front of each resource, so users can precisely locate and identify a resource they need to modify or override in the application. If an "X" appears at the right of the resource ID, this means that the text was already overridden.

The value of a resource can be composed of units, special characters, and letters. The resource value is not unique, therefore the same text can be used for different resources. Resource values can be modified and updated in the application by system administrators. To make a global change to the value of a resource for all zones, contact your Oracle representative.

Example: The Save button can be used on several pages of the application. Each Save button appearing in the application will have a specific ID, and the value of every Save button will be text Save.

Resource values can be refreshed. This enables system administrators to apply any changes made to the resource values for the customer's custom set of resources. System administrators can block the refresh of the resource value. This allows system administrators to use a testing environment where the actual value of a resource is either chosen or not. This is usually done while performing some temporary testing in a staging zone.

Each product has a specific Resource Administration feature allowing the display of the product's resource IDs. The New Hire Portal Resource Administration is accessed from this URL: http://yourzonename/newhireportal/ResourceConsole.jss.

Product	Administration Menu
Career Section Administration	Career Section Administration Menu
Career Section	Career Section Administration Menu
Central Configuration	SmartOrg Administration Menu
Onboarding (Transitions) Administration	Onboarding (Transitions) Administration Menu
Onboarding (Transitions) Center	Onboarding (Transitions) Administration Menu
Performance Administration	Performance Administration Menu
Performance	Performance Administration Menu

Product	Administration Menu
Recruiting Administration	Recruiting Administration Menu
Recruiting Center	Recruiting Administration Menu
SmartOrg	SmartOrg Administration Menu

Configuration

User Type Permission	Description	Location
Manage resources	Provides users the ability to refresh resource values, to block resource value refresh, and to force the refresh of resource values.	Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management
Display resource identifiers	Provides users the ability to display resource IDs using the Show Identifier button in the Resource Administration page.	Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management

Note: To modify resource values for a specific product, user type permissions specific to the product are also required in some cases. To modify Onboarding (Transitions) resource values, for example, users require the permissions described in the previous table and at least one Onboarding (Transitions) permission, for example, "Manage Onboarding (Transitions) processes of all types".

Displaying Resource Identifiers

Before you start

The Display Resource Identifiers user type permission is required.

Configuration > **[Product] Administration** > **Resource Administration**

Here's what to do

1. Click Show Identifiers.
2. Close this window.

Results:

Starting with the next page that is displayed, resource IDs will be displayed in front of each element of the application.

Hiding Resource Identifiers

Before you start

Resource Identifiers must be displayed.

The Display Resource Identifiers user type permission is required.

Configuration > **[Product] Administration** > **Resource Administration**

Here's what to do

1. Click Hide Identifiers.
2. Close this window.

Results:

Starting with the next page that is loaded, resource IDs will no longer be displayed in front of each element of the application.

Refreshing Resource Values

Before you start

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

Configuration > **[Product] Administration** > **Resource Administration**

Here's what to do

1. Click Unblock Refresh.
2. Select the desired type of refresh.
3. Enter the name of the project if necessary.
   The project name is associated with revisions made to the customer's custom set of resource values, administered in TexTool application.
4. Click Refresh Values.
5. Close the window.

Results:

The latest value of the resources is displayed.

Blocking Resource Value Refresh

Before you start

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

Configuration > **[Product] Administration** > **Resource Administration**

Here's what to do

1. Click Block Refresh.
2. Add a comment.
3. Click Save.
4. Close the window.

Results:

It will no longer be possible to have the application reflect any changes applied to a value.

Unblocking Resource Value Refresh

Before you start

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

Configuration > **[Product] Administration** > **Resource Administration**

Here's what to do

1. Click Unblock Refresh.
2. Close the window.

Results:

Any changes applied to resource values will be reflected in the application when refreshing the values.