Taleo
Talent Drives Performance

Taleo Enterprise

Taleo 10
Recruiting User Guide

January 28, 2010

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Login

Login and Product Access

Allows users to sign in the application to see the list of products to which they have access.

Detailed Description

When opening the Taleo Enterprise solution, the Sign In page appears. Users must select the language in which they want to use the application. If a user changes the default language on the Sign In page, the page refreshes to the new language and subsequent Taleo pages are presented in the selected language. After selecting a language, users also have the possibility to tell the system to remember their selection so that the next time they sign in, the Sign In page will be presented in the language selected.

In the Sign In page, users must also provide a user name and password before being able to see the list of Taleo products to which they have access. The user name and password are provided by the system administrator. But the user has the ability to modify them in the My Setup page.

Once a user’s credentials have been entered, the Table of Contents page appears and presents Taleo products purchased by the company and to which a user has access according to a user’s permissions and user type.

When accessing Taleo Recruiting Center, the information displayed in the home page is specific to the user who signs into the application and is also dependent on the user type and configuration profile of the user. For example, the home page may contain elements such as menus and channels providing information on requisitions, candidates, offers, tasks, etc., a navigation bar, a search tool, a link to Taleo Web Support, a communication channel, etc.

Benefits

- Users are only presented with the products that they have access to based on their user type permissions.

Accessing an Application

Prerequisite

Users must know the Web address.

Users must have received a user name and password from the system administrator.

Steps

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

Result

User is signed in and can select the product they wish to use.

Changing My Password

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click My Setup located in the top right-hand corner.
2. In the General tab, click Edit.
3. Modify the information contained in the Account section.
4. Click Save.

Release Notes

The release notes feature displays a pop-up message containing new release information or other important information when a user signs in the application.

Detailed Description

The release notes feature provides the option to present users with a pop-up message once they log into the system. No default release notes is provided by Taleo. A blank page is displayed unless the system administrator decides to customize the page to present important information to users.

Once they are logged in, users can turn off the Release Notes message by checking the *Don't display the message again* option. The message will reappear when new release information or other important information is available and also when the user clears the browser cookies.

One release notes message is displayed to users, regardless of application.

Settings allow the activation and configuration of this feature.

Benefits

- Ensures users are informed of system improvements and other important information.
- Provides the ability to broadcast key messages to all users.
- Provides the same message to all users, regardless of the application.

Deactivating the Release Notes Message

Prerequisite

The system administrator must have activated the option to display the release note information pop-up message.

Steps

1. Log on to an application.
2. In the Release Notes page, check the "Don't display this message again" option.

Result

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 the browser cookies.

Getting Help

Online Help

Taleo Recruiting offers comprehensive help about concepts or tasks to perform.

Detailed Description

The online help provides information about a concept or a task to be performed. The online help, represented by this icon ? , is available in the supporting tools panel located in the top right-hand side of all pages. When clicking on the Help icon, a table of content of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

Online Tour

Taleo Recruiting Center offers short clips describing essential user interface elements of Taleo 10.

Detailed Description

These online tours are short animations that present basic information about the design, navigation and certain features of the application. Each tour 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, if activated by the system administrator, are available in the Clips tab in the right panel of the supporting tools, just beside the online help tab.

By default, key online tours designed by Taleo come with the product. Taleo 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 can choose to disable the tab or replace the content with their own XML file 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 Taleo Education Services or your Client Executive to learn more about Taleo Proficiency and/or purchasing the online tour content.

Benefits

- Makes the product more approachable.
- Facilitates first-encounter use of the product.
- Exposes basic, critical features clearly to users.
- Gives sense of accomplishment in user's first hour of using the product.
- Encourages users to continue learning the product.

Tooltip

A tooltip is a short, explanatory text which appears when you “hover” your mouse over a button, a link, a table cell heading or icon without clicking it.

Detailed Description

Tooltips are available throughout the system and they give you additional information about an action before performing it.

Taleo provides tooltips for buttons, links, icons and table cell headings. These tooltips are not configurable. However, for screening services, the system administrator can create tooltips for some types of user-defined fields.

Web Support Link

The Web Support link is displayed in the auxiliary navigation bar, located at the top right hand side of all pages of the application.

Detailed Description

The Web Support link is displayed to users if the system administrator has activated it. Furthermore, the Web Support optional feature must be activated by Taleo Support. If only the setting is turned on, users will not have access to Web Support even though the link will still be present.

Benefits

- Provides a level of control over which users will see the Web Support link.

Basic Concepts

Application Timeout

Application timeout is a security feature that signs out the user when the application has been idled for more than thirty minutes.

Detailed Description

The application includes a security feature that warns the user when the application has not been used for more than thirty minutes even if a user is still signed in the application. When the timeout delay is reached, a message notifies the user that the timeout 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" will direct the user to the application. When the user accesses the application, he/she 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 will be displayed, indicating that the user has been signed out of the application and will need to sign in again to use the application.

The timeout delay is set by default to thirty minutes. The reminder displayed before timeout is set by default to ten minutes before timeout.

Private settings allow the configuration of the application timeout. Contact Taleo Support for details.

Benefits

- Ensures uniform experience to users across browsers.
- Allows users to save information before the application times out.
- Unattended application will automatically sign out the user avoiding any unwanted intruders.

Concurrent Management

Concurrent management ensures that only one user can edit a given element at a time.

Detailed Description

Concurrent management applies by default to requisitions and requisition templates.

If you try to open a requisition that another user is editing, a message appears indicating that you have read-only access. You cannot edit the requisition until the other user closes it. Same thing with requisition templates. If a user applies a template to a requisition while the template is being edited, the last-saved version of the template in the database will be used.

Benefits

- Avoids the possibility of parallel edition of elements.

Setting

A setting is used to configure features and elements in Taleo products.

Detailed Description

There are two types of setting:

- Global settings: Settings related to multiple Taleo products.
- Product settings: Settings specific to each Taleo product, for example, Recruiting, Onboarding, Performance, etc.

Settings are configured by system administrators. A default value is set by Taleo prior to application delivery. The system administrator can decide to change the value that will be applied throughout the application. If for a given setting a user can change the value, the user's value overrides the value set by the system administrator.

For a list of all Taleo 10 settings, refer to the Excel file entitled TEE Settings_External_Taleo 10.xls.

Benefits

- Allows a system administrator to activate and deactivate features in the application.
- Allows a system administrator to configure the application to the specific needs of a company.
- Allows a system administrator to see the actual configuration of the system.

System Status

A status indicates the current state of an element in the system.

Detailed Description

Elements can have one of the following statuses:

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

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

Benefits

- Allows users to create elements without making them available right away.

- Allows users to remove an existing element from use without removing it form the database.

Contextualization: Organization-Location-Job Field

Organizations, locations and job fields represent the fundamental data structure by which information is organized in the application.

Detailed Description

Contextualization, i.e. 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.

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:

Organization Structure
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 Taleo network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. A common location structure is:

Location Structure
Country
State/Province
Region
City
Work 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:

Job Field Structure
Category
Function

Job Field Structure
Specialty

Although Organization-Location-Job Field structures are configured with the help of a Taleo representative during the implementation phase (implementation mode), modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the application 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 Taleo solution that are tied to contextualization (Organization-Location-Job field structure), such as:

- Candidate experience (job field)
- Candidate selection workflow
- Requisitions and job templates
- Message templates
- Onboarding processes
- Reporting
- Integration
- User management
- Source tracking
- Prescreening competencies, questions and assessments
- Forms management
- Candidate matching
- Roles
- Approval paths
- Agencies
- Fields

The purpose of contextualizing an element (that is, associating it to organizations, locations and/or job fields) is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows.

	Organization	Location	Job Field
Requisition	Urban transportation	United States/California/Los Angeles	Bus driver
CSW1	Urban transportation	United States/California/San Jose	Bus driver
CSW2	Urban transportation	United States	Bus driver

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:

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

For additional details on Organization-Location-Job Field structure, refer to the SmartOrg Administration Manual.

Benefits

- Imposes order on various types of information.
- Gives extensive control over information.

Time Zone

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

Detailed Description

In Taleo Recruiting, 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.

A setting allows the system administrator to set the default time zone for the 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 in the My Setup page, under Preferences. The My Setup link is displayed to users if they have the proper user type permission and if the auxiliary navigation bar has been activated in their configuration profile. Once configured, the new time zone information will replace the default company time zone.

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 Taleo Recruiting 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 Taleo 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.

Benefits

- All dates and time are displayed according to the user's time zone.
- When users share information or send e-mails, the time zone is explicit, avoiding ambiguity for the user receiving the information.
- The time zone feature makes Taleo Recruiting global system appear like a local system.

Setting a Time Zone

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Click next to the Time Zone field.
4. Select a time zone.
5. Click Select.
6. Click Save.

Result

The selected time zone will replace the default time zone set for your company.

Print Function

The print function allows users to create a PDF version of a requisition file, a candidate file or a list of requisitions or candidate files that can then be printed.

Detailed Description

The print function is available in a candidate list, a requisition list as well as within a candidate file and requisition file. Users can print a list or the details of each file selected. Multiple files can be selected from a list to be printed (maximum of 50 files). The print function creates a PDF for users to save and/or print.

When using the print function, users can print:

- a requisition file or candidate file containing all sections of the file or only specific sections. 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, he/she can do this by increasing the sections in the file layout.
- a list of requisition files or candidate files. 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.

When selecting one or several candidate files in a candidate list or requisition-specific candidate list in order to print them, the Submission file is printed. When printing from a General Profile list, the General Profile file will be printed.

When using the print function, 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 will be identical to the data presented to the user for the selected sections while looking at the information in view mode.

Note that attachments cannot be printed without first opening them.

Benefits

- Option for more granular sections of information for print selection based on the candidate and requisition file configurations.
- Ability to print what the user wants in a list or file.
- Cleaner print output.

Printing a File

Prerequisite

Your computer must be linked to a printer.

The printing icon must be displayed.

Steps

1. Select a file.
2. Click .
3. Specify the printing parameters.
4. Click Create PDF.
5. Click in the page displaying the PDF.
6. In the Windows File menu, select Print.

Result

A PDF version of the requisition of candidate file is creates and can be senty for printing.

Selector and Autosuggest

For selectors having a large list of values, the autosuggest feature is present.

Detailed Description

When typing letters in a large selector, a drop-down list appears and the system presents values that are relevant with the letters entered and retrieves as many entries as possible. The lookup begins to work as soon as three characters are entered and the list continues to narrow as more characters are entered. The match is made based on a "contains" search to increase likelihood of finding what the user is seeking. When the right entry is found, the user simply selects it from the list. If the list of matching elements cannot be reduced to ten entries, the [more...] option is displayed and the user can access a pre-filtered browser. To increase selection speed of relevant values, for Organization, Location and Job Field, the autosuggest works across the entire structure hierarchy using a single autosuggest field. In addition to the autosuggest feature, users at any time can use the search icon to the far right of the field to open up a full search browser to find the value they are looking for.

For example, if a user types the letters *can* to find a Primary location, the autosuggest feature might suggest:

- Canada
- Canada > British columbia
- Canada > Nunavut
- Canada > Ontario
- Canada > Ontario > Ottawa
- Canada > Ontario > Toronto

As another example, if using a more precise term such as Toronto, the autosuggest feature then might just suggest Canada > Ontario > Toronto.

This feature does not take into account accents. Therefore, if a user wants to find the word École, he/she can type École or Ecole.

If a user prefers to browse a list of available entries, a selector is available.

Benefits

- Allows a quick selection of known data elements without having to browse to find the right element.
- Consolidates selection across multiple fields into a single field.
- Fewer clicks every single time a user is making a familiar selection

History Tab

The History tab presents useful tracking details on an element in Taleo Recruiting Center.

Detailed Description

The History tab is displayed in candidate files, requisition files, competencies, questions and disqualification questions.

The information displayed in the History tab is non editable except in the candidate file (user type permissions are required).

Depending on which part of the application the History tab is displayed, the information provided will vary:

History tab in requisitions, competencies, questions and disqualification questions	
Element	**Description**
Date	Date when an event occurred.
Type	Event or action performed on an element.
Comments	Comments entered by the user.
By	The "actor" (person or system) who performed the event.

History tab in candidate files	
Element	**Description**
Date	Date when an event occurred.
Events	Event or action performed on an element.
Details	Information regarding the event.
Comments	Comments entered by the user.
By	The "actor" (person or system) who performed the event.

In candidate files, the information displayed in the History tab can be filtered with the Show filter.

Benefits

- Allows users to track any modification applied to an element.
- Supplies customer support with valuable information for troubleshooting.

Modifying a Comment

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click on the History tab.
2. In the History tab, click .
3. Modify the comment.
4. Click Done.

Result

The modified comment is displayed in the Comments column of the History tab.

Viewing a Comment

Steps

1. In a list or a file, browse your mouse over the icon or see the comment directly in the list.

Result

The comment is displayed for viewing.

Modifying Event Categories

Steps

1. In the Candidates list, click on a candidate file.
2. Select the History tab.
3. Click Modify.
4. Select the desired event categories.
5. Click Done.

Result

Events related to the event categories selected will be displayed in the candidate file History tab.

Next Step

Filtering events using the Show history for filter.

Modifying an Event Date

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, click on a candidate file.
2. Select the History tab.
3. Click next to the event.
4. Change the date.

Result

The date of an event is modified in order to specify when an action on a candidate's file really took place.

Language

Language Management

Language management refers to the use of languages in Taleo products.

Detailed Description

Each user has a language preference. This preferred language is used as the default content language in the system. The content language is the same across all Taleo products, but if a product does not support the same set of content languages, it will have its own preference configuration.

In Taleo Recruiting, the languages in which an element is available are indicated in the Activated Languages drop-down list. A base language is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user preference is used as the default base language when the user creates an element. Such base language can be changed at any time by the user. A language must be activated before designating it as the base language.

When creating or editing an element, the Configure option in the Activated Languages drop-down list becomes available and gives you access to the Language Configuration window where you can specify the base language as well as the languages in which an element will be available.

A language can be assigned one of the following statuses:

- Active: The element is available in that language.
- Draft: The element is planned to be used in that language, but not yet completely translated or validated. This status is meant to support phase out delivery of languages since a company does not need to deliver them all at once.
- Not Used: The element is not used in that language.

When multiple languages are used for an element (such as requisitions, templates or questions), this icon is displayed in lists: . Hovering your mouse over the icon displays the languages activated for the element. When only one language is used for an element, the name of the language is displayed. When only one language is used in your company, there is no special indicator.

Selecting Languages

Prerequisite

Element must be in edit mode.

Steps

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. Select the base language.
4. For each required language, select Active from the Status drop-down list.
5. Click Save.

Result

Activated languages will be displayed in the Activated Languages drop-down list. The word Base will appear next to the base language.

Selecting the Base Language

Prerequisite

Language must be active.

If only one language is activated, the base language option is not displayed.

Steps

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. Select a language in the Base column.
4. Click Save.

Result

The word Base will appear next to the language in the Activated Languages drop-down list.

Activating a Language

Prerequisite

Element must be in Edit mode.

Steps

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. For each required language, select Active from the Status drop-down list.
4. Click Save.

Result

Activated languages will appear in the Activated Languages drop-down list.

Deactivating a Language

Prerequisite

Element must be in Edit mode.

Steps

1. Edit an element.
2. In the Activated Languages drop-down list, select Configure.
3. For each required language, select Not Used from the Status drop-down list.
4. Click Save.

Result

Selected languages will no longer appear in the Activated Languages drop-down list.

Setting My Preferred Correspondence Language

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired language in the Correspondence Language drop-down list.
4. Click Save.

Setting My Preferred Content Language

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired language in the Content Language drop-down list.
4. Click Save.

Result

When creating a requisition or candidate file, the file will be created in the selected preferred language regardless of the Recruiting Center language the user is logged with.

Layout

Home Page Layout

The home page of Taleo Recruiting contains toolbars, navigation tools, search tools, panels and sections providing relevant information to the user.

Detailed Description

Depending on user type permissions granted to users as well as on how the page was configured by the system administrator, the home page may contain the following elements:

- Auxiliary Navigation Bar
  - Home
  - My Setup (available if a user type permission was granted)
  - Training and/or e-Learning (available if a setting was activated)
  - About (available if a setting was activated)
  - Sign Out
  - Full screen mode icon
  - Web Support (available if a setting was activated)
- Core Navigation Bar
  - Home icon
  - Tasks
  - Requisitions (available if a user type permission was granted)
  - Candidates
  - Offers (available if a user type permission was granted)
  - New Hires
  - Libraries (Templates, Questions, Competencies, Disqualification Questions) (available if a user type permission was granted)
- Search Widget
  - Candidate Search
  - Specific Candidate Search
  - Requisition Search
- Advanced Search
- Search Queries
- Center Stage
  - Candidates channel
  - Requisitions channel
  - Offers channel
  - Tasks channel
  - Onboarding channel
- Supporting Tools panel

  - Communications channel
  - Online Tour
  - Online Help
- Show Filter
- Page Header
- Page Footer
- Welcome Title
- Separator Line
- Logo
- Color Theme
- Selected Item Color

Auxiliary Navigation Bar

The auxiliary navigation bar is the bar located at the top right hand side of pages.

Detailed Description

A setting allows the display of the auxiliary navigation bar.

If the bar is displayed, it is available at all times for users to see and access. The auxiliary navigation bar contains the following links, some of which are also configurable for display by either user type permission or by settings:

- Home
- My Setup (available if a user type permission was granted)
- Training and/or e-Learning (available if a setting was activated)
- About (available if a setting was activated)
- Sign Out
- Full screen mode icon
- Web Support (available if a setting was activated)

Core Navigation Bar

The core navigation bar is located just above the central panel.

Detailed Description

A setting allows the display of the core navigation bar.

If the bar is displayed, it is available at all times but the display will dynamically collapse when deep inside the application. Users can hover their mouse over the core navigation bar section for the bar to dynamically re-appear at any time. User type permissions grant users access to different areas of the core navigation bar. The core navigation bar may contain the following elements:

- Home icon

- Tasks
- Requisitions (available if a user type permission was granted)
- Candidates
- Offers (available if a user type permission was granted)
- New Hires
- Libraries (Templates, Questions, Competencies, Disqualification Questions) (available if a user type permission was granted)

Search Widget

A tool allowing users to search for candidates and requisitions.

Detailed Description

The search widget is available at the top right hand corner of 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.

The search widget gives access to three types of search:

- candidate search
- specific candidate search
- requisition search

Benefits

- Allows users to quickly navigate to specific candidate files and requisition files.

Page Header

A header text can be displayed at the top of all pages of the application.

Detailed Description

To display text in the header, the system administrator must first submit the desired text to Taleo Support. Text requirements are:

- The text supports up to 50 characters.
- The text must be supplied for all active languages.
- Basic HTML formatting such as color, bold and italics are possible, but it is not possible to embed hyperlinks.

A Configuration Profile setting allows the activation of this feature.

Page Footer

A footer text can be displayed on the home page of the application

Detailed Description

To display text in the footer, the system administrator must first submit the desired text to Taleo Support. Text requirements are as follows:

- The text supports up to 50 characters.
- The text must be supplied for all active languages.
- Basic HTML formatting such as color, bold and italics are possible, but it is not possible to embed hyperlinks.

A configuration Profile setting allows the activation of this feature.

Welcome Title

The welcome title is displayed to users when they first log in into the application.

Detailed Description

A Configuration Profile setting allows the activation of this feature.

By default, the text displayed is Welcome followed by the name of the user signing in.

For example, Welcome John Smith. The text Welcome is configurable; contact Taleo Support for information.

Separator Line

This is the line separating the Welcome title from the main content of the center stage.

Detailed Description

By default, the separator line is not displayed.

A configuration Profile setting allows the activation of this feature.

Center Stage

A center stage is what users see in the center panel when they first log into the Recruiting Center.

Detailed Description

From the center stage, users can be presented with key information and/or jump into the underlying application to perform more complex actions. For example, a center stage may contain elements such as task list, links to create requisitions or view candidates, channels providing overview information on requisitions, candidates or offers.

A center stage can be customized for specific needs or users. Consequently, depending on the user logging into Taleo Recruiting Center, the information displayed in the central panel of the home page will differ. The center stage linked to a user is defined via the user's configuration profile.

The Center Stage feature is available in Taleo Recruiting Administration, under Center Stage.

Three default center stages are supplied with the application:

- Recruiter
- Hiring Manager
- Hourly Manager

The system administrator can edit these default center stages and can also create new center stages either from scratch or by duplicating existing ones. Changes made to a center stage are applied the next time a user linked to any configuration profiles using that center stage logs in.

In addition to the center stage configuration, the system administrator can decide to display a welcome title in the center stage, to add a separator line between the welcome title and the widgets of the center stage, and also add a footer text on the center stage.

Information in the center stage 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. The system administrator 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 the system administrator when placing the widgets.

A center stage may contain channels, links and lists.

Channels contain overview counts of information about the area and links that can redirect the user to another part of the application. Channels are supplied by Taleo and cannot be created nor edited. The following channels are available:

- Candidates
- Offers
- Onboarding
- Requisitions
- Tasks

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 filter.

The number in the following two columns work as follows:

- The number in the column 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.

Links redirect the user to another part of the application. Links are supplied by Taleo and cannot be created nor edited. The following links are available:

- Create a Requisition
- Onboarding Process
- Reports
- Search for candidates
- View My Candidates
- View My Requisitions

There is one list format that is available in the center stage as well, known as the Mini Requisition list. This mini requisition list can be added in the center stage to allow 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 center stage.

Benefits

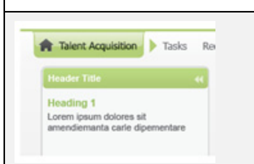
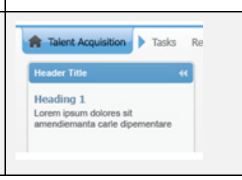
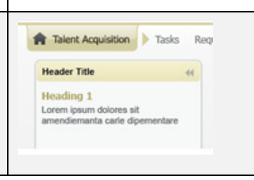
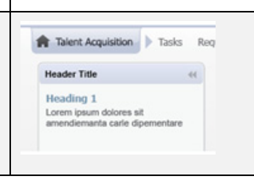
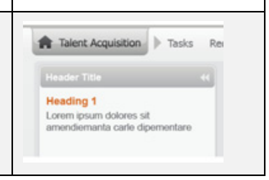
- Displays only the necessary information to specific users.
- Provides a unified method for accessing and interacting with all Taleo applications.
- Provides the ability to customers to self-administer the working environment to provide a more compelling user experience.

Color Theme

A theme is a set of colors used for body text, headings, links within the Taleo Performance and Taleo Recruiting Center applications.

Detailed Description

The following standard color themes are provided by Taleo.

Taleo	Aqua	Sand	Ice	Silver
				

A theme is selected by the system administrator for the Taleo Performance and Taleo Recruiting Center applications.

By default, the theme is the Taleo green. Users can override the theme selected by the system administrator in the My Setup page, under the Preferences tab.

Benefits

- Provides the ability to brand Taleo applications to more closely fit a customer branding.
- Provides a consistent look and feel across Taleo applications.

Communications Channel

The Communications channel allows the display of useful information to users when they first sign in Taleo Recruiting.

Detailed Description

The Communications channel is located under the tab located on the right panel of the home page.

The Communications channel provided by default is made up of three sections, each being expandable and collapsible by users.

Section Name	Default Text	Link
Customer Support	Text entered by the system administrator.	None
Documentation Center	Release notes, tutorials, training manuals, FAQ, glossaries, and other support documentation directly related to the recruiting application.	The Documentation link gives access to the Communication Center.
Resource Center	Informational links within the hiring cycle, articles, research content, and more.	The Resource Center link gives access to the Resource Center

The Communications channel is configured by the system administrator. By deploying the Communications channel, customers 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 group of users.

Benefits

- Flexible options for communication to different audiences.
- Default option allows for distinct support instructions for different configuration profiles.
- Custom option allows for distinct messaging of text and supporting documents to different configuration profiles.
- Ability to disable section for configuration profiles where the information is not applicable.

List Layout

The layout of lists in Recruiting contains toolbars, navigation tools, search tools, panels and sections providing relevant information to the user.

Detailed Description

Depending on user type permissions granted to users as well as on how the page was configured by the system administrator, lists may contain the following elements:

- Auxiliary Navigation Bar
    - Home

    - My Setup (available if a user type permission was granted)
    - Training and/or e-Learning (available if a setting was activated)
    - About (available if a setting was activated)
    - Sign Out
    - Full screen mode icon
    - Web Support (available if a setting was activated)
- Core Navigation Bar
    - Home icon
    - Tasks
    - Requisitions (available if a user type permission was granted)
    - Candidates
    - Offers (available if a user type permission was granted)
    - New Hires
    - Libraries (Templates, Questions, Competencies, Disqualification Questions) (available if a user type permission was granted)
- Search Widget
    - Candidate Search
    - Specific Candidate Search
    - Requisition Search
- Advanced Search
- Search Queries
- Left Pane
    - Quick Filter
    - Advanced Filter
    - Show Filter
    - Folder
- Right Pane
    - Online Tour
    - Online Help
- Center Pane
- Logo
- Color Theme
- Selected Item Color

Advanced Filter

Advanced filters are used to filter lists by a more expansive set of filtering criteria.

Detailed Description

Both requisition and candidate lists have “advanced” filtering tools at the very bottom of the left panel of the page. Users can select several advanced filter criteria to filter a list. Once executed, the criteria are presented to the user across the top of the screen with a small x adjacent to the filter criteria. By clicking the x, the criteria can be removed and the list will dynamically update 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. For 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 have the ability to 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 filters are activated by the system administrator. The system administrator has the ability to specify if the Advanced Filters button will be displayed or not. Criteria available in advanced filters are pre-defined by the system based on the columns selected for the list format context. The system administrator cannot modify them.

Benefits

- Easy removal of filter criteria and dynamic list updating improves usability.
- System administrators can control if users have access to advanced filters by context.

Quick Filter

Quick filters help users quickly filter a list down to relevant information.

Detailed Description

Both requisition and candidate lists have “quick” filtering tools on the left panel of the page under the tab. Quick filters are dynamic and are therefore applied to the list automatically. Users do not need to refresh the list. Several filtering criteria can be applied at a time.

The Status quick filter available in the Requisitions list 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.

The Candidate quick filter available in the Candidates list is considered a single select on different fields and acts as an AND between the filters. For example, when selecting the Internal and Referred candidate filters, the user will only see the candidates that are Internal and Referred.

Quick filters are configured by the system administrator. For a list format context, the system administrator has the ability to select filters amongst a predefined list of filters that will be displayed.

The system administrator 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 according to this default value. As a result, the total number of candidates on a requisition can be different from what users see on their list.

For 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.

The system administrator also has the ability to define the order in which quick filters are displayed. It is important to note that 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. (Important Note - you must click apply changes - which is about half way down the page prior to clicking Done for the changes to the filter format configuration to take place.)

Requisition List Filter Options		
Filters	**Main Requisition List**	**Mini Requisition List**
Primary Location	yes	yes
Organization	yes	yes
Job Field	yes	yes
Status	yes	no
Requisition ID	yes	no

Candidate List Filter Options					
Filters	**All Candidates by Requisition**	**All Candidates By Folder**	**All Candidates By Offer**	**Requisition Specific Candidate List**	**Search Results - Quick or Advanced**
Internal	yes	yes	yes	yes	yes
Referred	yes	yes	yes	yes	yes
Requiring Attention	yes	yes	yes	yes	yes
In selection Process	yes	yes	no	no	no
Active on Current Requisition	yes	no	no	yes	no
Exclude disqualified	yes	no	no	yes	no
New in selection process	yes	no	no	yes	no
Submission completed	yes	no	no	yes	no

Candidate List Filter Options					
Filters	**All Candidates by Requisition**	**All Candidates By Folder**	**All Candidates By Offer**	**Requisition Specific Candidate List**	**Search Results - Quick or Advanced**
Meets required criteria	yes	no	no	yes	no
ACE	yes	no	no	yes	no
Assets Met	yes	no	no	yes	no
Results between	yes	no	no	yes	no
Dates: Creation, and Application completion	yes	no	no	yes	no
Last activity Date	yes	no	no	yes	yes
Step	yes	no	no	yes	no
Status	yes	no	no	yes	no
Employer	yes	yes	no	yes	yes
Program	yes	yes	no	yes	yes
Requisition Status	yes	no	no	no	no
Requisition Organization	yes	no	no	no	no
Requisition Primary location	yes	no	no	no	no
Requisition Job Field	yes	no	no	no	no
Requisition ID	yes	no	no	no	no
Folder Name	no	yes	no	no	no
Offer Status	no	no	yes	no	no
Offer Dates: Creation, Start, Approval, Expiration & Acceptance	no	no	yes	no	no

Benefits

- Dynamic filtering on screen improves usability.
- Configuration by variation options gives flexibility in layout for different user audiences where necessary.

Show Filter

The Show filter feature allows users to filter information displayed in a list using ownership and collaboration criteria.

Detailed Description

The Show filter can appear in:

- requisitions list
- candidates list
- home page

The Show filter is displayed to users if the *Show information for Filter Visibility* configuration profile setting has been configured in the user's configuration profile.

The Show filter:

- can be displayed everywhere except in the home page
- can be displayed everywhere including the home page
- cannot be displayed at all.

Values appearing in the Show filter depend on the permissions granted to the user and on the configuration of the application.

Possible values are:

- I own
- I collaborate on
- I own or collaborate on
- I own in My coverage area
- I own or collaborate on or in My coverage area
- Groups the user is part of
- All

For example:

- If a user’s permissions do not allow a user to see requisitions he/she does not own, the user will only see the “I own” value.
- If a user’s permissions allow a user to see requisitions he/she does not 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 “I own or collaborate on or in My coverage area”.
- If a user’s permissions allow the user to see requisitions he/she does not 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 “I own or collaborate on or in My coverage area”.

Benefits

- The Show filter may be hidden to avoid users changing it and being distracted or confused by it.
- A default value may be set for the Show filter for users’ convenience and to ensure that they see the relevant requisitions without having to change this filter each time.
- Retail and hourly customers can use the configuration to default to My coverage area and to simplify the experience for their decentralized hourly managers.

Configuration

Settings			
Name	**Possible Values**	**Default Value**	**Location**
Show information for Filter Default	• I own • I collaborate on • I own or I collaborate on • My coverage area • All users	I own	Configuration > [SmartOrg] Administration > Configuration Profiles
Show information for Filter Visibility	• Never display • Everywhere except in the home page • Everywhere including in the home page	Everywhere including in the home page	Configuration > [SmartOrg] Administration > Configuration Profiles

Page Structure

The same page structure is used in Taleo Recruiting Center and information is organized the same way throughout the application.

Detailed Description

Pages all have the same structure and can be displayed as a normal layout or as an expanded layout. The normal layout displays the following:

Pane	Description
Top Pane	The top pane is the section of the screen above the core navigation bar. It contains the search widget, the Advanced Search link, the Search Queries link, the core navigation bar, the auxiliary navigation bar as well as a logo or header text the client wishes to display.
Central Pane	The central pane is the middle and main section of the application. It is where the primary content is presented. For example, the candidate list, requisition list, candidate file, requisition file. Upon initial login, this area contains elements configured in the center stage. The center stage can be customized for specific needs or users. A center stage is selected for each configuration profile and a configuration profile is tied to each user. Consequently, depending on the user logging in to Taleo Recruiting Center, the information displayed in the central pane of the home page will differ.
Left Pane	This is the section of the screen located on the left hand side. It is persistent throughout the application and it can be expanded and collapsed. It contains filters, folders and other key content for navigation.

Pane	Description
Right Pane	This is the section of the screen located on the right hand side which is called supporting tools. It is persistent throughout the application and it can be expanded and collapsed. It can contain the Communications tab (), the Clips tab () and the Help tab ( ). Supporting tools such as the Communications channel, the online help, customer support content/custom instructions that Taleo or you have configured, tours (short clips) provided by Taleo to help end users understand essential skills and features
Lower Pane	The lower pane is the section of the screen located at the bottom. It can contain a footer.

To hide or show the right or left pane, users simply have to click available in the corresponding pane.

In addition, the overall layout of the page can be expanded to take advantage of the screen real estate. To expand or collapse the page, users must click available in the auxiliary navigation bar.

The recommended screen resolution for the page layout is 1024 x 768.

List Usage

Several tools are available to manage requisition and candidate lists.

Detailed Description

List Filtering: Several filters are available to filter information in a list:

- quick filters
- advanced filters
- show filter

Column Sorting: Columns in a list are sortable by clicking on the column header. Columns made of a user-defined field, including partner services result fields, are also sortable.

Column Manipulation: It is possible to drag columns and change the width of a given column on a list. Columns can also be moved on the page using a drag and drop action. Changes in columns are kept during the session.

Column Display and Interaction: Column headers and rows have different colors depending on their statuses:

Header Color	Status
White	Indicates a normal status.
Light Blue	Indicates that the cursor is passing over the column header or row.
Dark Blue	Indicates that the row has been selected or that the column is used to sort elements.

An up or down arrow is displayed in the column header to indicate a descending or ascending sorting order.

Candidate Count Column: The Candidate Count column indicating the number of candidates who applied on a requisition is available on the left of the list to make it easier and faster for users to get to the list of candidates.

Actions Directly in the List: Several actions can be performed directly in a list using inline actions. For example, from the requisition file, users can select a drop-down just adjacent to the requisition and take an action on the file without having to load the file first.

Callouts: Candidate and requisition files display a callout containing relevant information about the file. The callout is displayed as a bubble beside the candidate or requisition name.

For the candidate file, the callout includes the following information:

- Candidate name with an hyperlink to the candidate file.
- Home, work and cellular numbers (primary phone is indicated).
- E-mail address.

For the requisition file, the information contained in the callout as well as the link to access the requisition file are different based on the context.

Context	Type of callout	Link
Requisition list	Small callout	Requisition file
Candidate list from requisition	Medium callout	Requisition file
Candidate submission on a requisition	Medium callout	Requisition file
Requisition selector (Match, Capture, etc.)	Medium callout	PDF of the requisition file
Candidate pooling list	Medium callout	Requisition file

The callout contents available are:

- A small callout including the following information:
  - Requisition title with an hyperlink to the requisition file.
  - Requisition ID.
  - Activated languages.
  - Activated features such as ACE Alert, Daily Recruiting Report, Urgent Need and Prevent Posting.
- A medium callout including the following information:
  - Requisition title with an hyperlink to the requisition file.
  - Requisition ID.
  - Status.
  - Status detail.
  - Recruiter.
  - Primary location.
  - Requisition type.
  - Activated languages.
  - Activated features such as ACE Alert, Daily Recruiting Report, Urgent Need and Prevent Posting.

Callouts are not configurable.

All Files on One Page: Requisition and candidate lists display all requisitions or candidate files in a single page. Users can simply scroll through a single long list versus needing to go through information page by page. A maximum of 1000 candidate files or requisition files can be displayed. If this limit is exceeded, no files will be displayed and the user will first have to filter the list using quick filters.

Candidate Bulk Actions: The following actions can be performed for 1000 candidate files at a time:

- All candidate selection workflow actions such as move, change status, add comments, enter grade, revert, bypass, reject candidate, candidate has declined, hire, etc.).
- All queue and route actions.
- Delete and undelete.
- Start and delete the onboarding process.
- Share.
- Match.

The share and match bulk actions are delayed scheduled actions if the following requirements are met:

- For the Share action if (number of candidates) * (number of recipients) >= 10.
- For the Match action if (number of candidates) * (number of requisitions) >= 10.

When the action is delayed, a new task is scheduled for immediate execution. The execution of the action depends on the scheduler's load. As a general rule, the action is executed a few minutes after the task is created.

The processing of actions by the system is done in groups of 20 and is committed within that group of 20. For example, if a recruiter wants to hire 21candidates on a requisition and the requisition only has 20 positions available, the system will hire the first 20 candidates and commit the data. Once candidate 21 is processed, the system will fail and will display a message to the recruiter indicating that he/she cannot hire the last candidate because there is no longer any positions available. If the recruiter needs to undo the first 20 hired transactions, he/she will have to do it manually.

Note that the Send Correspondence and Print actions are limited to 50 candidates at a time.

Option to Reset the Item Requiring Attention Icon: There is a setting configurable by the system administrator to remove 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. The actions for which this feature is available are:

- Successful CSW move/change step and status
- Successful offer related actions
- Successful Start Onboarding action
- Successful delete submission
- Successful comparison of candidates

Benefits

- Users can quickly get to what they want on a list.
- Users see what they need to see when on a list.

- Users do what they need to do when on a list.

Selector and Autosuggest

For selectors having a large list of values, the autosuggest feature is present.

Detailed Description

When typing letters in a large selector, a drop-down list appears and the system presents values that are relevant with the letters entered and retrieves as many entries as possible. The lookup begins to work as soon as three characters are entered and the list continues to narrow as more characters are entered. The match is made based on a "contains" search to increase likelihood of finding what the user is seeking. When the right entry is found, the user simply selects it from the list. If the list of matching elements cannot be reduced to ten entries, the [more...] option is displayed and the user can access a pre-filtered browser. To increase selection speed of relevant values, for Organization, Location and Job Field, the autosuggest works across the entire structure hierarchy using a single autosuggest field. In addition to the autosuggest feature, users at any time can use the search icon to the far right of the field to open up a full search browser to find the value they are looking for.

For example, if a user types the letters *can* to find a Primary location, the autosuggest feature might suggest:

- Canada
- Canada > British columbia
- Canada > Nunavut
- Canada > Ontario
- Canada > Ontario > Ottawa
- Canada > Ontario > Toronto

As another example, if using a more precise term such as Toronto, the autosuggest feature then might just suggest Canada > Ontario > Toronto.

This feature does not take into account accents. Therefore, if a user wants to find the word École, he/she can type École or Ecole.

If a user prefers to browse a list of available entries, a selector is available.

Benefits

- Allows a quick selection of known data elements without having to browse to find the right element.
- Consolidates selection across multiple fields into a single field.
- Fewer clicks every single time a user is making a familiar selection

Logo

A logo can be displayed in the upper left corner of Taleo Recruiting Center and Taleo Performance pages.

Detailed Description

The system administrator has the ability to upload a logo that will appear in the upper left corner of Taleo Recruiting Center and Taleo Performance pages. By default, the Taleo logo is displayed.

A limit of one logo can be defined by zone. The logo must have a JPEG format and dimensions of 185 x 60 pixels.

Benefits

- Provides the ability to brand Taleo applications to more closely fit a customer branding.
- Provides a consistent look and feel across Taleo applications.

By default, the Taleo logo is displayed. The system administrator can upload another logo if desired.

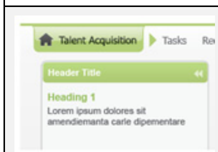
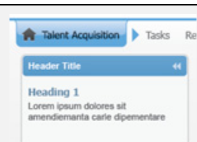
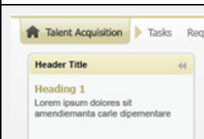
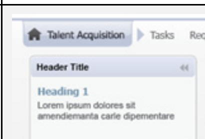
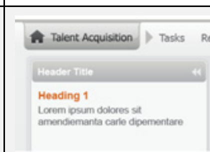
- Migration
  - For Taleo Performance customers, the logo already implemented will be migrated.
  - The Taleo Performance setting to upload a logo was moved out of Taleo Performance Administration and into the new Central Configuration menu.

Color Theme

A theme is a set of colors used for body text, headings, links within the Taleo Performance and Taleo Recruiting Center applications.

Detailed Description

The following standard color themes are provided by Taleo.

Taleo	Aqua	Sand	Ice	Silver
				

A theme is selected by the system administrator for the Taleo Performance and Taleo Recruiting Center applications.

By default, the theme is the Taleo green. Users can override the theme selected by the system administrator in the My Setup page, under the Preferences tab.

Benefits

- Provides the ability to brand Taleo applications to more closely fit a customer branding.
- Provides a consistent look and feel across Taleo applications.

Selected Item Color

Color displayed when selecting elements in the user interface.

Detailed Description

The following standard colors are provided by Taleo:

- Green
- Soft blue
- Yellow
- Blue (inverted)
- Dark (inverted)

A default color is selected by the system administrator. However, users can override the default color by modifying the Selected Item Default Color in the My Setup page, under the Preferences tab (available via the Setup link located in the up right corner of pages).

A high contrast color scheme, Dark (inverted), is available to users to address the Section 508 compliance standard for visually impaired users.

Setting Theme, Selected Item Color and Font Size

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired theme in the Default Theme drop-down list.
4. Select the desired selected item color in the Select Item Default Color drop-down list.
5. Select the desired font size in the Default Text Size drop-down list.
6. Click Save.

List

List Format

A list format allows the display of candidate file or requisition file information in different columns.

Detailed Description

List formats are configured by the system administrator then used by users in Taleo Recruiting Center. List formats are available for candidate lists as well as requisition lists.

Users can select (among the list formats created by the system administrator) the list format they wish to use to display files in a list.

If they have been granted the permission, users can also create up to three list formats and select columns to display specific information. Columns available to choose from have been previously defined by the system administrator.

Benefits

- Facilitates the search and organization of information.
- Improves the organization of lists.
- Speeds up candidate evaluation and improves recruiting process.
- Displays only relevant information in columns.

List Column

A list is composed of columns that display different types of information.

Detailed Description

For a column to be available for a list format, it must have been made available for this purpose. This is done via the field configuration feature. When defining the properties of a field, whether the field was provided by Taleo or is user-defined, the system administrator must specify if the field will be available in Taleo Recruiting. When this option is selected, the field becomes available when selecting a column for a context.

Example of a list format and its columns.

Context	List Format	Columns
All Candidates/By Requisition	Education	Item Requiring Attention Icon
		Disqualification Question Result
		Candidate Record Identifier
		Requisition Number and Title
		Selection Step and Status
		Education Level (most relevant education)

Context	List Format	Columns
		Program (most relevant education)

Item Requiring Attention Icon

The Item Requiring Attention icon is used to draw users attention to items that they own that require viewing.

Detailed Description

The Item Requiring Attention icon appears in the Candidates list and Requisitions list to draw a user's attention to items that he/she owns and that require viewing.

This icon is only displayed to the owner of an element. A user who creates a requisition is considered the owner of the requisition. However, when creating a requisition, the user can specify other owners for the requisition by completing the Recruiter, Recruiter Assistant, Hiring Manager and/or Hiring Manager Assistant fields.

The icon is removed when:

- an item that has the Item Requiring Attention icon is opened
- the user takes action on an item from the list view (without opening the item)

There is a setting configurable by the system administrator to have the system remove 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.

The table below indicates the actions affected by the activation of the setting.

Action	The icon is 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

Action	The icon is removed?
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
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
Onboarding Actions	
Start Onboarding Process	Yes

Action	The icon is removed?
Cancel Onboarding Process	Yes

Locating the Name of a List Format

Allows a system administrator to change elements available in a specific list format, without mistaking the name.

Steps

1. In any list of Taleo Recruiting Center, click .

Result

The name of the list format is the selected list format.The system administrator can change elements available in a specific list format, without mistaking the name.

Selecting a List Format

Steps

1. In the Requisitions or Candidates list, click .
2. Select a list format.
3. Click Apply.

Result

The list is displaye din the selected format.

Creating a Personalized List Format

Allows users to specify which columns will appear in a requisition or candidate list format and in which order.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Requisitions or Candidates list, click .
2. Click next to Personal Format 1, 2 or 3.
3. Provide a name for the list format.
4. Select the check box next to the columns you want to activate.
5. Specify how you want files to be sorted.

   To select one sort criterion, click in the Sort By column next to the desired column name.

   To select a second sort criterion, click in the Then By column next to the desired column name.

   To select a third sort criterion, click in the second Then By column next to the desired column name.

To select ascending or descending sorting order, click the triangle icon repeatedly.

To disable sorting for a specific column, click the triangle icon again. The triangle icon disappears.

6. To modify the order of the columns selected, use the arrows.
7. Click Save.

Result

The personalized list format is available in the List Formats window.

Editing a Personalized List Format

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Requisitions or Candidates list, click .
2. Select a personal format then click .
3. Make necessary changes.
4. Click Save.

Result

The name of a requisition or candidate list format and the columns displayed in the list are modified as specified.

Deleting a Personalized List Format

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Requisitions or Candidates list, click .
2. In the List Formats window, select a personal list format then click .

Result

The list format created is deleted.

Displaying Information in a List

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Requisitions or Candidates list, click .

2. Select a list format (personal or system defined) that includes the column that will allow displaying the required information.

   If no list format includes the required column, contact your system administrator.
3. Click Apply.

Result

The column is displayed in the list format.

Changing the Candidate List Sorting Key

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired value in the Sorting Key drop-down list.
4. Click Save.

Candidate File Identifier

A candidate file identifier contains candidate-specific information presented in the Candidate Record Identifier column of a candidate list.

Detailed Description

A 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
- Internal candidate
- In at least one selection process
- Referred candidate
- Registered person

The Candidate Record Identifier column is always present in a candidate list. The system administrator is responsible of defining which information will appear by default in the column. However, users can modify the information set by the system administrator via the My Setup page.

Selecting the Information in the Candidate Record Identifier Column

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired elements in the Identifier Content section.
4. Click Save.

Result

The options selected appear in the Candidate Record Identifier column of a candidate lists.

Folder Management

Folder

A folder is a storage area for organizing candidate files and search queries.

Detailed Description

Users, if they have been granted the proper permissions, have the ability to 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 feature is represented by this icon and is available in the left panel of the Candidates list and Search Queries page.

Benefits

- Allows users to organize files more efficiently.

Creating a Folder

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click located in the left pane of the Candidates list and Search Queries page.
2. Select the Personal folder.
3. Click Manage.
4. Select Create.
5. Enter the folder name in the blank field that appears.
6. Press Enter.

Result

A new folder appears in your personal list of folders to organize candiate files and search queries.

Next Step

Sharing the folder.

Defining the folder properties.

Deleting a Folder

Prerequisite

A user type permission grants users access to this feature.

Files included in the folder must not be opened by another user.

Steps

1. Click located in the left pane of the Candidates list and Search Queries page.
2. Select a folder.
3. Click Manage.
4. Select Delete.

Result

The folder is removed from your personal list of folders.

Renaming a Folder

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click located in the left pane of the Candidates list and Search Queries page.
2. Select a folder.
3. Click Manage.
4. Click Rename.
5. Enter a new folder name.
6. Press Enter.

Next Step

Modifying the folder properties.

Moving a Folder

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click located in the left pane of the Candidates list or Search Queries page.
2. Select a folder.
3. Click Manage.
4. Click File In...
5. Select the desired personal folder.
6. Drag the folder in the desired folder.
7. Click Yes in the message that appears.

Result

The personal folder is moved into another folder.

Next Step

Modifying the folder properties.

Modifying the Properties of a Folder

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click located in the left pane of the Candidates list and Search Queries page.
2. Select a folder.
3. Click Manage.
4. Select Properties...
5. Enter information in the fields.
6. Click Done.

Result

A name, an pwner and comments are specified for the folder.

Next Step

Sharing a folder.

Sharing a Folder

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click located in the left pane of the Candidates list and Search Queries page.
2. Select a folder.
3. Click Manage.
4. Click Sharing...
5. Specify the users and/or groups who can have access to the folder.
6. Click Done.

Result

The folder is available in the Shared folders section and a hand appears below the folder to show that it is shared. When a user shares a folder, this user will not see his/her own folder in the "shared" directory. Shared folders are only available to users who have been granted the permission to access shared folders.

Storing a File in a Folder

Allows users to put a file in a folder in order to consult it later on.

Steps

1. Click located in the Candidates list and the Search Queries page.
2. Select an element to file in a folder.
3. Select a folder. You can also create a new folder if the ones available do not suit your needs.
4. Click Done.

File Attachment

Attachment

An attachment is a file that can be tied to a requisition, a candidate file, an offer, etc.

Detailed Description

User type permissions allow users to attach and remove files in requisitions and candidate files.

Settings can be configured to specify the following:

- the maximum size of an attachment (by default, the allocated limit is 100 kb).
- the maximum size of all attachments (by default, the allocated limit is 500 Mb).
- the maximum number of attachments (by default, five files can be attached).

The following file formats are supported by the application. It is the responsibility of the system administrator to define which formats are available to users.

- Word Perfect (.wpd)
- MS Word (.doc)
- MS Word 2007 (.docx)
- Adobe (.pdf)
- Text (.txt)
- Rich Text Format (.rtf)
- Hypertext Markup Language (.htm)
- Portable Document Format (.html)
- Zip Format

Adding an Attachment to a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Candidate must be in a step that includes the Attach File action.

A candidate file may contain up to five attached files, each limited to 100 KB.

File must be in the following format: *.doc (MS-Word), *.docx (MS Word 2007), *.wpd (Word Perfect), *.txt (text), *.rtf (rich text format), *.pdf (Adobe), *.html and *.htm.

McAfee scans files for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

Steps

1. In the Candidates list, click on a candidate file.
2. Under the Attachments tab, click Add.
3. Click Browse to select a file.

4. Complete fields as required.
5. Click Done.

Result

The candidate file is supplemented with more information.

Removing an Attachment from a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click on the Attachments tab.
2. Move the mouse over the name of an attachment.
3. Click .
4. In the warning window, confirm your deletion.

Result

The attachment is no longer attached to the candidate file.

Viewing Attachments in a Candidate File

Steps

1. In the candidate file, click on the Attachments tab.
2. In the Attachments list, click on the name of an attachment.

Result

The content of the attatchment is displayed to the user.

Adding an Attachment to a Requisition File

Prerequisite

A user type permission grants users access to this feature.

A user can attach as many files as desired until the total zone capacity set by the system administrator has been reached.

McAfee scans files for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

File must be in the following format: *.doc (MS-Word), *.docx (MS Word 2007), *.wpd (Word Perfect), *.txt (text), *.rtf (rich text format), *.pdf (Adobe), *.html and *.html.

Steps

1. Open a requisition file.

2. In the Attachments tab, click Browse to select a file.
3. Click Add.

Result

The attachment appears in the Attachments tab. The file is attached to the requisition file and can be shared with approvers and users having access to the requisition.

Removing an Attachment from a Requisition File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In a requisition file, click on the Attachments tab.
2. Move the mouse over the name of an attachment.
3. Click Delete.
4. In the warning window, confirm your deletion.

Result

The attachment is no longer attached to the requisition.

Viewing Attachments in a Requisition File

Steps

1. In the requisition file, click on the Attachments tab.
2. In the Attachments list, click on the name of an attachment.

Result

Content of the attachment is displayed to the user.

Adding an Attachment to an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate file must include an offer.

A user can attach as many files as desired until the total zone capacity set by the system administrator has been reached.

McAfee scans files for viruses. If a virus is detected, the file is not attached. The system displays file information or suggests attaching a different file.

File must be in the following format: *.doc (MS-Word), *.docx (MS Word 2007), *.wpd (Word Perfect), *.txt (text), *.rtf (rich text format), *.pdf (Adobe), *.html and *.htm.

Steps

1. In the candidate file, click .

2. Select Offer in the Attach to option.
3. Browse to select a file.
4. Click Done.

Result

The name of the attached file is displayed in the Attachments list under the Attachments tab of the candidate file.

Removing an Attachment from an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate file must have a file attached to an offer.

Steps

1. In the candidate file, select the Attachments tab.
2. Move your mouse over the name of the file to remove.
3. Click ☒.
4. In the warning window, confirm deletion.

Result

The file no longer appears in the list of attachments.

Personal Preferences

My Setup

The My Setup feature allows users to set their personal preferences for certain features of the application.

Detailed Description

The My Setup link is displayed at the top right hand corner of pages. It is available to users if it has been configured in the user's configuration profile and if the user has been granted a user type permission.

Most settings appearing in the My Setup link have been previously configured by the system administrator, but users can override the value of these settings to fit their personal preferences.

For a list of all preferences that can be modified, refer to Personal Preferences.

Personal Preferences

The table presents personal preferences that can be modified by a user in the My Setup page.

Element	Description
Personal Information	• First Name • Last Name • Prefix • Suffix • Initial • Employee ID • Title • Department Name
Contact	• Email address • Fax Number • Work Phone Number • Cellular Phone Number • Pager Number • Home Phone Number
Address	• Complete address
Account	• User Name • Password • Work item delegation

Element	Description
General User Preferences	• Enable eShare Email for Response Center Access • Default Distance Unit • Correspondence Language • Content Language • Time Zone • Workflow Event Notification • Fax Notification • Default Theme • Default Text Size • Selected Item Default Color • Accessibility Features
Search	• Last Update • Place of Residence
Candidates	• Identifier Content • Sorting Key • Candidate List Content • Tab displayed when accessing a candidate file in navigation • Tab displayed when accessing a candidate file from a list • Sorting Key • Sorting Key • Sorting Key
Requisition	• Default Hiring Manager • Default Recruiter • Requisition File Automatic Filling • Preferred Non-Electronic Media • Display Question Details in Libraries
Frequent Collaborators	
Frequent Approvers	• Requisition Approval • Offer Approval

Changing Personal Preferences

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. Click on a tab.
3. Click Edit.
4. Modify your preferences.
5. Click Save and Close.

Result

Personnal preferences are changed.

Adding Preferred Non-Electronic Media

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Click Add... located under Preferred Non-Electronic Media.
4. Locate and select the desired medium.
5. Click Done.

Result

The medium appears in the Source list of the Preferences tab. Users now have their own personalized list of preferred non-electronic media different than the one defined by the system administrator.

Next Step

Modifying the list of preferred non-electronic media.

Modifying Preferred Non-Electronic Media

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Click Modify... located under Preferred Non-Electronic Media.
4. Select one or several media.
5. Click Select.
6. Click Done.

Result

The media appear in the Source list of the Preferences tab.

Correspondence

Correspondence

A correspondence is a message sent to candidates.

Detailed Description

A correspondence can be sent to one or several candidates at the same time.

Users can send a correspondence to up to 50 candidates, all selected on one page.

When sending a correspondence, a user can create a message from scratch or use a message template defined by the system administrator. The correspondence can be sent via email or it can be printed in order to fax it or send it by regular mail.

Attachments can be included in a correspondence.

The maximum file size of attachments is specified by the system administrator.

To send a correspondence, to create a message from scratch and to attach files to a correspondence, a user must have been granted the proper user type permissions.

Sending a Customized Correspondence

Prerequisite

A user type permission grants users access to this feature.

A user type permission is required to attach a file to a message.

Step must include the Send Correspondence action.

Steps

1. In the Candidates list, select one or several candidate files.
2. In the More Actions list, select Send Correspondence...
3. Select From scratch.
4. Complete required fields.

   To send correspondence to more than one recipient, use a semi column to separate names.
5. Click Next.
6. Enter information in the fields.
7. To select a file to attach, click Browse...
8. Click Send.

Result

Depending on the option you selected, the message will be sent to the candidates selected or printed. No notification is sent for invalid e-mail addresses.

Next Step

If the message was printed, you can either fax the message to the candidates or send it via regular mail.

Sending a Standard Correspondence

Prerequisite

A user type permission grants users access to this feature.

A step of the candidate selection workflow must include the Send Correspondence action.

Corresponce can be sent to a maximum of 50 candidates at a time.

Steps

1. In the Candidates list, select one or several candidate files.
2. In the More Actions list, select Send Correspondence...
3. Select From template.
4. Click .
5. Select the paragraphs to include in the message.
6. Complete required fields.
7. Click Next.
8. If values are missing in the message, provide the required information.
9. Click Next.
10. In the Message Preview page, look at the message content.

    If changes are required, click Edit.
11. Click Send to send the message via e-mail or Print to print it.

Result

Depending on the option you selected, the message will be printed or sent to the selected candidates.

Next Step

If the message was printed, you can either fax the message to the candidates or send it via regular mail.

Resending a Correspondence

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click on the History tab.
2. In the Details column, click on the link corresponding to the correspondence that was sent.
3. Click Resend.
4. Add a comment.
5. Click Next.
6. Click Send.

Result

The correspondence previously sent is sent again.

Candidate

Candidate File

Candidate File

A candidate file is a form containing candidate information such as personal information, work experience, certifications, references, EEO information, screening information.

Detailed Description

When opening a candidate file, users are always in view mode and, if authorized, users can choose to go into edit mode. This provides a cleaner layout and eliminates the need to "close" the file (to exit out of it and reactivate other buttons on the screen) if only viewing the file. In view mode, only fields for which data is provided are displayed. However, in edit mode, fields that do not contain data are displayed according to user permissions.

When opening a candidate file, the screen is organized into three panes:

- Left pane containing the candidate card in the top section and supporting information in the bottom section. The pane can be expanded or collapsed.
- Right pane containing supporting tools such as the online help. The pane can be expanded or collapsed.
- Central pane containing a menu bar allowing users to perform actions on the candidate file. It also contains tabs that provide complete information about the candidate. Depending on which side the candidate card is, the information displayed will vary.

The candidate file contains several tabs:

- Job Submission/General Profile
- Attachments
- Tasks
- Offer
- Offer Approval
- Referral
- History

The content of the candidate file is presented as a long form. The main content of the candidate file is within the Job Submission/General Profile tab, which includes various sections. The other tabs contain peripheral information.

Note that the landing tab when opening a candidate file can be configured by users in My Setup, under the Preferences tab.

Whether in edit or view mode, on the Job Submission/General Profile tab, users always have access to a table of contents section that allows quick jumping to different portions of the file. To display this table of contents, users simply have to click ▼ located in the Job Submission/General Profile tab.

All fields displayed in the candidate file and the candidate card are linked to a security level. Depending on the user type permissions a user has been granted by the system administrator, the user may or may not be able to see or to edit fields of the candidate file or the candidate card.

Benefits

- Allows users to locate candidate information at a glance.
- Easy access to other submission status information.
- Centralized attachment management
- The candidate file is highly flexible and shows only what the user is allowed to see.
- The candidate file is easy to read as it does not display empty fields.

Candidate Card

The candidate card provides quick information about the candidate.

Detailed Description

Located on the left panel of the candidate file, the candidate card quickly provides information about the candidate. The candidate card can be “flipped” by clicking its top-right corner.

One side of the candidate card displays information on the general profile of the candidate such as:

- name
- address
- phone number
- e-mail address
- etc.

The other side of the candidate card displays information on the candidate's job submission(s) such as:

- Candidate Selection Workflow step/status
- prescreening results
- etc.

In addition, the candidate card displays links to other submissions of interest. This gives users a quick way of knowing which of the other submissions that have been created are still under “active” consideration. By hovering over the active or inactive link, users are presented with a callout with links to navigate to the relevant submissions. On this listing, there is also a column that indicates the step/status of the candidate for that specific submission. It is therefore easy to see at a glance without having to open and read through the actual submission, if the candidate is at the interview or at the offer stage on another position.

The content of the candidate file left panel (bottom part) is also dependent on the candidate card side selected. For example, the submission date, the source type, the recruiter and hiring manager names can be displayed. A link to any existing offers is also available. Users will only be able to see information on submissions and offers that they are authorized to access.

The content of the candidate file central panel is also dependent on the candidate card side selected. Depending on which side the candidate card is, the information displayed will vary:

- If the candidate card is on the General Profile side, the General Profile tab is displayed. The general profile contains information provided by the candidate. The information can be related for example to preferred organizations, locations, job fields, education, work experience, personal information, source tracking information, etc. Candidates have at least one profile but can have more than one. For example one in English and one in French.
- If the candidate card is on the Candidate Submission side, the Candidate Submission tab is displayed. Information relating to a specific requisition is displayed in the central panel. The candidate submission contains information about the candidate specific to that requisition.

Candidate File Tabs

Candidate File Tabs	
Name	**Description**
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 Taleo Recruiting Administration module. Depending on the candidate card side being viewed, this tab will be either specific Job Submission OR the General Profile.
Attachments	Contains resume and other attachments provided by the candidate and attachments provided by the user. Attachments are added with the 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.
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 within your company and you must also have been granted the permission to manage self-assigned tasks.
Offers	Exists if offer management is used. It contains offers submitted to the candidate, offers from competitors, candidate expectations and requisition offer information. This tab will only appear on the job submission card side and will show offer data specific to that job submission.
Offer Approvals	Exists if offer management and approvals are used. It contains the most recent offer approval information. This tab will only appear from the job submission card side and will contain information relevant to that job submission.
Referral	Contains both employee/candidate referral and agency referral information and actions
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. Offer history information is also stored in this area with this release as opposed to being in a separate offer tab section.

Candidate Duplicate Check

Allows users to verify if a candidate already exists in the system.

Detailed Description

The candidate duplicate check is used when users capture candidate information or when they merge candidate files. The candidate duplicate check feature is also used by agents who refer candidates for a position.

To determine if candidate files are duplicates, the system performs a duplicate check against criteria specified by the system administrator. Duplicate check criteria are:

- First Name (default)
- Last Name (default)
- Street Address (default)
- City (default)
- Zip/Postal Code (default)
- Place of Residence
- Social Security Number
- Phone Numbers
- Date of Birth

Benefits

- Avoids increasing the size of the database with duplicated information.

Candidate File Event

A candidate file event is any action performed on a candidate file.

Detailed Description

When a candidate file is modified, either by the candidate or the user, an event to track this action is generated and is displayed in the candidate file History tab. There are 103 distinct combinations (tracking event + event details) in the application and each combination belongs to one of the following eleven categories.

The system administrator selects the event categories used to track events but users can modify the event categories selected.

- Agent and referer
- Attachments
- Candidate file update
- Candidate information
- Candidate progression
- Comments
- Correspondence

- Questions and competencies
- Regulation
- Resume
- Screening services
- Offer

The Correspondence event category allows users to review previously sent correspondence. A user type permission allows users to resend the correspondence directly from the History tab.

Comments relating to an event can be added and edited in the History tab if the user has the proper user type permissions.

A user type permission allows users to 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. 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. For 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’s creation date and the current date.

Candidate Screening Results

Screening results such as background checks, tax credit eligibility, etc. are displayed in the candidate file.

Detailed Description

Screening results are available in the candidate file, in the Job Submission tab.

A Previous Requests link gives access to the previous transactions with the same provider. The information is displayed in the columns of a table as follows:

- Requester
- Request Date
- Provider Status
- Status
- Result Summary

A Details link provides details on the transaction selected. This view is configurable by the system administrator. Information on partner updates is also displayed.

The History tab in the candidate file provides detailed information on each transaction as well as updates sent by partners.

Results are automatically reused across the system, if applicable. If the results of a screening service are applicable on a different candidate submission, they will automatically be re-used on that new job submission. This means that as the candidate applies on a career section, he/she will NOT have to go through the screening service if there is already active information stored on the candidate for that service. The screening results will show in the candidate file screening section of all the applications configured with that screening service automatically (no result synchronization necessary on the Partner screening service). In addition, auto-flow will automatically progress the candidate on ALL the applications that the candidate applied where the results are valid.

With the candidate General Profile, it is possible to view the results of any screening services the candidate has completed on any of its job submissions, provided that the results are reusable across all applications.

Creating a Candidate File

Prerequisite

A user type permission grants users access to this feature.

The information you will need to provide depends on the flow and options configured by the system administrator.

File used for resume parsing must be in a *.doc (MS-Word), *.txt (text), *. rtf (rich text format), *.pdf (Adobe PDF), *.html and *.htm.

The processing of resumes written in other languages than the submission language might not be supported.

If using *.PDF file for resume parsing, file must not contain an image of text.

Steps

1. In the Candidates list, select Create Candidate in the More Actions list.
2. Follow the on-screen instructions.

   Instructions and fields to complete vary from one configuration to another.
3. A duplicate check is automatically performed by the system when a candidate file is created.

Result

Candidate information such as personal information, work experience, education, etc. is captrue in a candidate file appearing in the candidate list.

Editing a Candidate File

Prerequisite

User type permissions grants users access to this feature.

Candidate file must not be identified as registered i.e with the  icon.

Steps

1. In the Candidates list, click on the name of a candidate.
2. Click Edit.
3. Modify information as needed.
4. Click Save.

Result

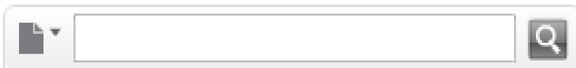
Information is updated in the candidate file.

Deleting a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Enter the name of the candidate in the search widget
.
2. in the Quick Search Results list, select a candidate file.
3. In the More Actions list, select Delete Candidate.
4. Click Yes to confirm the deletion.

Result

The candidate file is permanently removed form the database.

Adding a Comment in a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click .
2. Add a comment.
3. Click Done.

Result

The comment is displayed in the candidate file History tab. Comments become searchable 10 or 15 minutes after being saved. Comments are not case sensitive and do not require quotation marks to be searched.

Exporting a Candidate File to SAP

Prerequisite

The action must have been added to a step of the candidate selection workflow.

Candidate must be in a step that includes the action Export to SAP.

Steps

1. In the candidate file, select Export to SAP in the More Actions list.

Result

The candidate file is exported to SAP human resources management system (HRMS).

Entering a Grade in a Candidate File

Prerequisite

A user type permission grants users access to this feature.

The action must have been added to a step of the candidate selection workflow.

Candidate must be in a step that includes the action Enter grade.

Steps

1. In the Candidates list, click on a candidate file.
2. In the candidate file, select Enter Grade... in the More Actions list.
3. Complete fields as required.
4. Click Done.

Result

The grade is displayed in the History tab.

Merge Form

A merge form is a PDF document that can be tied to candidate selection workflows, steps and statuses or that can be generated/filled out at any point on demand by a user.

Detailed Description

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.

Merge forms are first built in Adobe Acrobat. System administrators then add them in Taleo Recruiting Administration and tie them to candidate selection workflows, steps and statuses to make them available to users in Taleo Recruiting Center. 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).

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 Taleo 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.

Benefits

- 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.
- Merge forms provide consistency and the ability for corporate driven forms to be interchanged with basically no interruption to the end user.
- Pre-populating information in a merge form reduces the time necessary for a candidate to complete the form.

Using the Fill Out Form

Prerequisite

The Fill Out Form action must be enabled in a candidate selection workflow.

Steps

1. In a candidate list, select a candidate.
2. In the More Actions list, select Fill Out Form.
3. In the Fill Out Form list, click on a form. Acrobat® Reader opens, displaying the form. The form is filled automatically using the corresponding fields of the candidate file or requisition.
4. Validate the information.
5. Click Print.

Result

A PDF form containing information automatically generated by the system is created.

Candidate

Candidate

A candidate is a person for which the system has information for.

Detailed Description

A candidate is a person:

- who has submitted a profile
- who has submitted a job application
- for which a user has created a profile
- who has been matched to a requisition by a user
- who has been referred by an agent for a job opening
- who has been referred by a friend for a job opening
- who's profile has been submitted by an agent
- who's profile has been submitted by a friend

In general, candidates applying on a job or submitting their profile from an internal career section are considered internal candidates. All other candidates are considered external candidates. Candidate’s internal/external state is tracked in the general profile and at the job submission level.

In the General Profile: Internal candidates are identified by the icon. This icon is displayed in the candidate card located on the left pane and in the candidate list.

Application flows can be configured to allow external candidates to indicate that they are actually internal candidates.

A user type permission grants users access to the Internal Candidate check box which is available in the Candidate Personal Information section of the candidate file General Profile tab. This check box allows users to change the internal/external state of a candidate directly in the candidate file.

A recruiting setting allows users to automatically identify a candidate as Internal so that candidates who reach the Hire/Hired status in a candidate selection workflow will automatically have their general profile updated to indicate Internal. The system will display the icon for those candidates in a candidate list. Candidates who have received the Internal designation at the general profile level are considered to be internal candidates on the general profile even if they applied via an external career section. Authorized system users or integrations are required to remove this designation from employees who leave the company. For integration and reporting purposes, this field is named “Candidate,InternalApplication”.

In the Submission: Internal/external submissions are identified in the candidate submission, in the Submission Type field located under the candidate card. The internal/external state value is used to improve metrics and analysis. Because all hired candidates can become “internal” candidates without an application level designation of Internal or External, all hires might appear in metrics as “internal hires”, which would be incorrect. Values for the Submission Type field are either External or Internal and this value is not currently editable. This field is derived strictly from the internal/external value on the candidates' profile at the time the job submission was completed. For integration and reporting purposes, this field is named “Application,IsInternal”.

Registered Candidate: A registered person file is a candidate that was created as a result of two different actions:

- Someone who did not have a candidate file in the system referred a candidate and because they were asked to provide some information about themselves, a registered person file was created.
- A candidate logged in to the career section and instead of following the application process, the candidate clicked on the My Account link and provided the information on that page.

Candidate Creation

Users have the ability to create a candidate file to capture candidate information such as personal information, work experience, education, etc.

Detailed Description

The creation of candidates is done via the Create Candidate action which is available in the home page as well as in the Candidates list via the More Actions list. This action is available to users if they have been granted the proper user type permission; it also depends to which creation file the user’s configuration profile was granted access to.

When selecting the Create Candidate action, the Create a Candidate wizard is launched. Users have the ability to create a general profile or a job-specific submission if these two types of files have been activated by the system administrator. If selecting the job-specific submission option, users need to specify the requisition, which controls for which staffing types they want to capture a candidate.

After deciding on the type of file to create, users have to select a template to create the candidate. Templates are used to capture general profiles, job-specific submissions or referrals, be general profile or job specific. The templates provided are based on the selected requisitions and their staffing type. Note that all users do not have the same list of templates since the system administrator can activate a different set of templates for different configuration profiles.

Users then select the folder where they want to save the candidate file and the language in which they want to create the candidate file.

Users can also select the Resume Parsing option to extract key data elements from a candidate's resume and to use these data elements to automatically populate fields in the application. The candidate's resume cannot exceed 100 kilobytes or the size defined by the system administrator. It must also have the proper file format as defined by the system administrator. Resume Parsing has no impact on the formatting of a text (bold, italics, bullets). It can detect text in the header and footer. The following data elements are extracted from the candidate's resume:

- Personal information: first name, last name, initial, address, city, state/province, country, zip/postal code, phone number, e-mail address.
- Education: education level, evaluation date.
- Experience: start date, end date, achievement.

Then, a duplicate check has to be performed to find out if the candidate already exists in the database. If duplicates are found, the system displays them in a list. Users can select the candidate file and edit the file. If no duplicates are found or if duplicates are found and the candidate is not on the list, users can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

When the candidate file template appears, users have to complete the required fields. The layout of the file is presented as a long form containing sections, blocks of information and fields selected by the system administrator. For details, see the Candidate File chapter.

Benefits

- Any users who have been granted the proper user type permission can create candidates.
- The creation of candidates can be done from any candidate lists.
- The capture form is tailored to the process, requisition type, Organization-Location-Job Field structure and user security.

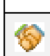
Candidate Progression Status

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.

Detailed Description

To see the progression status of a candidate, your system administrator must add the Most Advanced Progression Status column in the candidate list format. When this column is added, an icon appears in the candidate list, in the Progression Status column, indicating the furthest active progression status of a candidate across all positions where he/she is being considered. When mousing over the icon, a tooltip appears. The tooltip indicates the active status and a date. For example, “Most advanced progression status: Offer (as of 09/19/2009)”. It is also possible to obtain more details on the status by clicking on the icon.

Statuses are based on the reference workflow and there is one icon for each of the possible job application status of the application workflow. Icons are displayed for active candidates on active requisitions.

Icon	Description
	New
	Reviewed
	First, second and third interview
	Testing
	Offer
	Hired

In the scenario 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

Job	Job Status	Candidate Status
4	Active for sourcing	Interview 1 > To be scheduled

The icon that would appear for this candidate across all contexts would be Interview 1 because it is the furthest active progression status on an active job. Note that both requisition status and candidate status must be active to be considered for the furthest active progression status.

In the Candidates list, the icon remains available and shows the parallel job applications of the candidate. In an application specific list, the progression status icon may be displayed while the staircase icon may not be displayed if there is only one job application. In the search result list, if the staircase icon is displayed, the progression status icon is also displayed. If no staircase icon is displayed, the progression status column is empty.

It is recommended to remove the tracking solution (staircase 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 staircase 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.

Benefits

- Reduces chances of having multiple users working on the same candidate simultaneously.
- Users are informed of candidates being considered on other requisitions and they can have additional details directly on the candidate list on the job where the candidate is active and has progressed furthest.

Deleting a Candidate Submission

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select a candidate file.
2. Select Delete Submission in the More Actions list.
3. Click Save and Close.

Result

The candidate submission is removed from the requisition. The status of the candidate for the requisition is Deleted.

Restoring a Deleted Candidate Submission

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select a candidate file.

2. In the More Actions list, select Restore Submission.
3. Add a comment.
4. Click Save and Close.

Result

The candidate submission for the requisition is restored. The status of the candidate for the requisition is Restored.

Rejecting a Candidate

Prerequisite

A user type permission grants user access to this feature.

Steps

1. In the Candidates list, select a candidate file.
2. In the More Actions list, select Change Status/Step.
3. Select Rejected from the New Status list.
4. Enter comments.
5. Click Save and Close.

Result

The candidate is rejected for the requisition. The status of the candidate is Rejected.

Hiring a Candidate

Prerequisite

Candidate must be at the completion status of a step.

The candidate selection workflow must include the Hire step.

Steps

1. In the Candidates list, select a candidate.
2. From the More Actions list, select Bypass.
3. Select Hire in the New Step field.
4. Complete mandatory fields.
5. Click Save and Close.

Result

The user hired the candidate is hired without going through all the steps of the candidate selection workflow. The status of the candidate is Hired.

Hiring a Candidate More than Once for the Same Requisition

Prerequisite

A setting allows the activation of this feature.

The action can only be performed for one candidate at a time.

The action can only be performed on hourly requisitions. This is the only type of requisitions for which the selection process can be restarted.

The requisition must be active (it cannot be canceled or filled).

The candidate must not be disqualified for the application or for his/her profile.

The action cannot be performed if the application is flagged as deleted.

The action cannot be performed if the Offer management step is part of the workflow (active or not active step).

The action cannot be performed if it brings the hiring manager to a restricted step.

The action can be performed on a candidate with the following status:

- Rejected
- Declined
- Offer
- Hired

Steps

1. In a candidate list, select a candidate file.
2. In the More Actions list, select Reset Selection Process.
3. Click Done.

Result

The candidate is now back into the selection process and can be rehired.

Recording that a Candidate was Hired

Steps

1. In the Candidate file, select Move... from the More Actions list.
2. In the Move window, select the Hire step and Hired status.
3. Click done.

Result

The Hired status is displayed in the candidate list indicating that a candiate has completed a selection process and is ready to be hired.

Next Step

Onboarding process can be started.

Indicating a Candidate has Declined a Job Offer

Steps

1. In the candidate file, select Candidate has declined... in the More Actions list.
2. In the Change Status menu, enter a comment.
3. Click Done.

Result

Usrt was able to indicate that the candidate has removed his/her application on a specific requisition. Candidate is no longer in the candidate selection workflow for that requisition.

Reverting to Step and Status Previously Reached

Prerequisite

Step must include the Revert action.

Step must not be an RSOffer step.

Status of the requisition must not be filled or cancelled.

Steps

1. In the candidate file, select Revert in the More Actions list.
2. In the Revert window, add a comment.
3. Click Done.

Result

Candidate is moved back to the step and status previously reached.

Unlocking a Candidate Account

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, click on a candidate file.
2. In the candidate file, select the General Profile tab.
3. Confirm candidate identity.
4. Click Unlock Account under the Account information section.

Result

Candidate can noe access the application.

Generating a Password for a Candidate Account

Prerequisite

A user type permission grants user access to this feature.

Steps

1. Confirm candidate identity.
2. In the candidate file, select the General Profile tab.
3. In the Account Information section, click Generate New Password.
4. Click Yes to confirm your choice.
5. Click OK.

Result

A new password is generated at the candidate’s request. The new system-generated password is temporary. The candidate will only be able to use this password once, at the next login. The system will then force the candidate to change his/her password.

Changing the Internal/External State of a Candidate

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, select the General Profile tab.

   You may need to flip the candidate card on the left pane.
2. Click Edit.
3. In the Candidate Personal Information section, select or clear the Internal Candidate field.
4. Click Save and Close.

Result

The candidate profile indicates if thecandidate is an internal or external candidate.

Ace Candidate

ACE Recruiting Guidelines

ACE Recruiting is the entire process of creating a requisition, complete with a good job description, questions and competencies, that enables the automated identification of top (ACE) candidates.

Detailed Description

At the basis of ACE Recruiting is the creation of an ACE requisition that contains a comprehensive job description listing all relevant Abilities, Certifications, and Experiences and that includes competencies and questions developed utilizing standardized formats.

The ACE Recruiting success formula contains the following steps:

Writing a Good Job Description: An effective job description must be compelling, intelligent and honest. It must attract, intrigue and persuade top talents. It should include specific information and be focused on the talent.

For details, see the Requisition Description chapter.

Identifying the Job Basic Requirements (ACE List): When writing the description of a requisition, the basic requirements for the job must be identified. Break up the qualifications into Abilities, Certifications and Experience that are required or strongly desired to obtain the ACE (Abilities-Certifications-Experience) list.

There are two kinds of abilities (skills):

- Hard Skills: measurable, clearly identifiable professional trade skills. For example: Java, Pediatrics.
- Soft Skills: personality and life experiences, which are more difficult to quantify. These skills are often better assessed in an interview. Express them in terms of proficiency in or years of experience in questions. For example: What is your level of proficiency managing software integration projects?.

There are two kinds of certifications:

- Academic Certifications: degrees, diplomas, or certificates obtained from a post-secondary institution. For example: Bachelor Science in Engineering.
- Professional Certifications: courses, seminars, or programs that offer a recognized standard in a specific industry. For example: PMI (Project Management).

There are two kinds of experiences:

- Role-Specific: knowledge and previous experience gained by working in a particular role with specific responsibilities. For example: Nurse, Web Developer.
- Industry-Specific: knowledge and previous experience gained by working within a specific discipline or marketplace. For example: Healthcare, Telecommunications.

Based on your ACE list, you create questions and add those questions to the requisition.

Creating Questions and Adding Questions to the Requisition: The requisition contains questions that candidates will answer to provide information you are looking for and not the information they feel is relevant. Questions should have prescreening value, clearly indicate whether the candidate meets a requirement or has an asset, contain all of the possible answers listed in a logical and standardized order.

For details, see the Question and Question Writing Tips chapters.

Adding Competencies to the Requisition: The requisition may also contain competencies. Competencies are supplied with the system. Competencies are not written as a question. Examples of competencies could be “Human resource planning”, “Develop, implement and evaluate human resources policies and procedures”.

For details, see the Competency chapter.

Assigning the Required, Asset and Weight criteria to Questions and Competencies: Once questions and competencies have been added to the requisition, you need to specify if the questions and competencies are required for the position or if they are an asset. You can then add a weighting to give more considerations to certain questions or competencies.

For details, see the Prescreening chapter.

Setting the ACE Alert: The ACE Alert is a threshold to identify the ideal candidates or ACE candidates. The ACE Alert is set in the requisition Alerts tab. Once the ACE Alert is set, the system identifies the candidates who achieves or exceeds the ACE Alert threshold for a job offer.

For details, see the ACE Candidate Alert chapter.

Sorting ACE Candidates: The ACE Candidate icon ★ identifies top candidates in the Candidate list of a requisition. You can sort the Candidate list by ACE candidates. You can also use the “Requirements”, “Assets Met X/Y” and “Result” columns to sort candidates.

For details, see the ACE Candidate Filtering chapter.

Reviewing the ACE Recruiting Process: A best practice is to review and analyze your results on an ongoing basis until you find what works best for you and your positions. Ask yourself: “Did I hire an ACE candidate?” If yes, did the candidate align with the ACE criteria. If no, do I need to adjust questions, required and assets criteria, ACE Alert?

Benefits

- ACE Recruiting decreases time to hire and increases the quality of hires.
- ACE Recruiting helps users identify top candidates quickly without sorting through volumes of unqualified candidates.

ACE Candidate Alert

The ACE Candidate alert allows users to set a threshold to identify the ideal candidates and to send an e-mail to specific recipients to inform them that ACE candidates were found.

Detailed Description

The ACE alert allows the system to identify the candidate who achieves or exceeds the ACE Alert threshold for a job offer. The ACE alert identifies top candidates based on their responses to the competencies and questions in the Prescreening section of the requisition file.

The ACE Candidate icon ★ identifies top candidates in the Candidate list of a requisition.

The ACE alert is based on Required and Asset criteria. The ACE alert divides candidates into three groups that assist you in determining 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 no Asset criterion.
- Other candidates: Do not consider these candidates because they do not meet any Required criteria.

A best practice is to always have the ACE alert activated.

When setting the ACE Candidate alert:

- Select the option "A candidate meeting all the required criteria achieves a result of at least x%" 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 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.
- Select the option "A candidate meeting all the required criteria has at least x assets out of y" 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.
- Select the option "Identify a candidate as an ACE when either condition is met" to identify ACE candidates using the result or asset condition.
- Select the option "Identify a candidate as an ACE when both conditions are met" to identify ACE candidates using the result and asset conditions.

When setting the ACE Alert, you have the option to send an e-mail to notify specific recipients that an ACE candidate was found.

ACE Candidate Filtering

ACE candidate filtering allows users to use different methods to filter ACE candidates, that is those candidates who have met the Required, Asset and Weight criteria included in the Prescreening section of the requisition file.

Detailed Description

Different methods can be used to filter ACE candidates.

Viewing the Candidate List: The Candidate list of a specific requisition contains the ACE column represented by this icon: ★. Candidates with this icon are ACE candidates. You can sort the candidate list by ACE candidates.

You can also use the "Requirements", "Assets Met X/Y" and "Result" columns to sort candidates.

Using Quick Filters: The "ACE" filter available on the left hand side of the page can help you to only display ACE candidates for a requisition.

The “Meets required criteria” is another way to quickly filter your Candidate list to show active candidates who meet all the required criteria of the Prescreening section of the requisition file.

You can also use the “Assets Met” and “Results between (%)” features to filter your list.

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

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

Configuring ACE Recruiting - Overview

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Create a requisition.
2. Define basic job requirements.
   a. Abilities
   b. Certifications
   c. Experience
3. Create questions.
4. Add questions to the requisition.
5. Assign the Required, Asset and Weight criteria to Questions and Competencies.
6. Set the ACE alert.

Setting the ACE Candidate Alert

Allows users to set criteria to identify the ideal candidates and to select recipients who will be informed that ACE candidates were found.

Prerequisite

A user type permission grants users access to this feature.

A best practice is to always activate the ACE candidate alert.

When setting the ACE candidate alert, answer the prescreening competencies and questions as your ideal candidate would. Then calculate the total assets and weight to determine the ACE threshold.

Steps

1. In the requisition file, click the Alerts tab.
2. In the ACE Candidate Alert section, click Modify Alert.
3. In the ACE Candidate Alert page, select the desired criteria.
4. Click Next.

5. In the Ace Candidate Alert window, select the desired recipients.
6. Click Done.

Result

In the requisition Alerts tab, the criteria and recipients are displayed in the ACE Candidate Alert section.

Next Step

Setting the Request More Information alert.

Adding a Recipient to an ACE Alert

Allows users to select a person who will be receiving alerts for ACE candidates.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, click the Alerts tab.
2. In the ACE Candidate Alert section, click Modify Alert.
3. Click Next.
4. In the Ace Candidate Alert window, select the desired recipients.
5. Click Done.

Result

The selected recipient will appear in the list of recipients that will receive an ACE alert.

Removing a Recipient from an ACE Alert

Allows users to remove a person previously selected to receive alerts of ACE candidates.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, click the Alerts tab.
2. In the ACE Candidate Alert section, click Modify Alert.
3. In the ACE Candidate Alert window, click Next.
4. In the Ace Candidate Alert window, browse mouse over the name of a recipient.
5. Click .
6. Click Done.

Result

The recipient no longer appears in the list of recipients of the ACE alert.

Candidate Comparison

Candidate Comparison

Allows users to display candidate files side by side for comparison purposes.

Detailed Description

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.

Up to four candidate files can be displayed simultaneously side by side. However, more than four candidate files can be compared. After expanding or collapsing sections of information to focus on the most interesting criteria for a given comparison of four candidate files, the user can click on the icon to lock a candidate file as being the reference against which the other candidate files will be compared. The user can scroll through the other candidates selected earlier, continue the comparison and remove unwanted candidates from the comparison view as needed using the using the small x in the top right corner of the column for the candidate.

The sections of information displayed when comparing candidate files match the sections and sub-sections configured for the candidate file. The following fields are included in the compare process if they are present in the candidate file. Note that UDFs (other than screening results) are not included among the fields being compared.

Section	Field
Basic Profile	• Education Level • Job Level • Job Type • Schedule • Shift • Employee Status • Minimum Annual Salary • Currency • Travel • Advance Notice • Date of Availability
Work Experience	• Achievements • Current Job • Employer • Start Date • End Date • Job Function • Other Employer • Other Function
Work Conditions	• Currency • Expected Hourly Pay Rate • Hours per week willing to work • Hours per week, preferred • Willing to work on holidays • Willing to work on weekends

Section	Field
Certifications	• Certification • Expiration Date • Issue Date • Location • Organization • Other Certification
Education	• Program • Institution • Other Institution • Other Program • Start Date • Graduation Date • GPA / GPA out of • Graduated from High School or GED • City
Prescreening	• All questions • All competencies
Shift Availability	• Grid
Source Tracking	• Display source or event
Screening Services	• Most recent result for each service
Submission Medium	• Display Medium
Contingent	• Bill Rate • Charge Sales Tax • Pay Rate • Worker Type

When comparing candidates, certain actions can be taken. The action will apply to all candidates residing in the compare window at the time the action is taken. Available actions are:

- Change Step/Status
- Bypass
- Revert
- Send Correspondence
- Add Comments
- Create Self-assigned Task
- Enter Grade
- File in a Folder
- Find Similar Candidates
- Match
- Share

A user type permission and a recruiting setting grant users access to this feature.

Benefits

- Provides an efficient way to analyze candidates side-by-side and to present finalists for review and decision.

- Displays comparable information for a subset of candidates in a clear, side-by-side format.
- Can take certain actions on individual candidates or on all candidates.

Comparing Candidate Files

Prerequisite

A setting activates this feature.

A user type permission grants users access to this feature.

Candidate files must be linked to the same requisition

Steps

1. In the Requisitions list, for the desired requisition, click on the number located in the column.
2. In the candidate list of the selected requisition, select candidates to compare.
3. In the More Actions list, select Compare...
4. Compare candidate as desired.

Result

User can compare candidate files linked to the same requisition

Candidate Sharing

Candidate Sharing

This feature allows users to share candidate files with people via e-mail.

Detailed Description

The share action is represented by the icon and is available in the candidate list and the candidate file.

The file generated when sharing a candidate file is a PDF file similar in look to what would be generated using the Print function. In addition, the sections available for selection by a user are based on how the file is configured and on user type permissions. This means, if a system administrator wanted to allow users to more precisely control what is printed, he/she can do this by increasing the sections in the file layout.

When using the share function, only fields containing data are visible in the view/print mode; this means fields with no data will not be rendered when sharing.

The PDF generated by the share function will be identical to the data presented to the user for the selected sections while looking at the information in view mode.

A user type permission grants users access to this feature.

Benefits

- More granular sections of information based on the candidate file configurations.
- Ability to share what the user wants in a list or file.

Sharing a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select a candidate file.
2. Click .
3. Select a recipient.
4. Click Next.
5. Select Content to share.
6. Click Share.

Result

An e-mail is sent to the recipient with all or part of the selected content of the candidate file.

Candidate File Merge

Candidate File Merge

A candidate file merge allows users to combine two candidate files into one file.

Detailed Description

A candidate file merge can be done in the following contexts:

- Candidate search
- Candidate advanced search
- Candidate folders

During a candidate file merge, a candidate file is enhanced with the content of another candidate file (i.e., the master file). The system suggests a master file as follows:

- If both candidates were not referred, the system suggests the most recent candidate file.
- If the most recent candidate was referred, the system suggests the oldest candidate file.
- If both candidates were referred, the system suggests the first referral.

To determine if the two candidate files are duplicate files, the system performs a duplicate check against fields specified by the system administrator. The following rules apply:

- If there is no match between the fields, a message is displayed but the merge can still be done.
- If there is a match between the fields, the system merges the two candidate files. The master candidate file is enhanced with the content of the duplicate file, and the duplicate file is then deleted.

When a merge occurs, the content of the duplicate file is added to the content of the master candidate file. For the Education block, field content is copied over if Institution, Program or Education Level are different. For the Work Experience block, field content is copied over if Employer or Job Function are different. Note that the content of custom fields is also merged.

Note that the candidate file that is not selected is soft deleted (that is data can later be restored). All new candidate applications are considered for the merge action. However, existing candidate applications of the master candidate file are not overwritten.

If the e-mail option was selected when merging two candidate files, an e-mail message is sent to the candidate to inform him/her that two candidate files corresponding to his/her profile were merged and to invite him/her to review the new candidate file. If the candidate file is owned by an agent, the e-mail message is sent to the agent rather than to the candidate.

A user type permission is required to be able to merge candidate files. Also, users who do not have the permission to view sensitive information for internal applications are able to merge candidate files. However, the name of the candidate is not displayed; “Confidential Information” appears instead.

It is not possible to merge candidate files for the following reasons:

- The duplicate candidate file is already in an onboarding process.
- The duplicate candidate file contains an offer.
- The duplicate candidate file contains an interview request.

- The duplicate candidate file contains an incomplete external service request (i.e., an open Passport transaction) such as a background check, a tax credit check, an assessment.

It is not possible to merge more than two candidate files at a time. However, here's a possible workaround. If three duplicate files are found, first merge two candidate files. Then use the merged candidate file and merge it with the third candidate file. When doing the first merge, do not send a message to the candidate or the agent. Send it when doing the merge with the third file.

It is not possible to automatically restore the master candidate file in its original state. You have to restore it manually by removing information that was added. However, the deleted duplicate candidate file can be restored by your system administrator.

It is possible to "unmerge" candidate files. You can undelete the duplicate candidate file, since this file was soft deleted. Regarding the master candidate file, users have to delete the newly created file manually to restore the state. The tracking history is not modifiable, but a comment can be added to explain what was done.

Files attached to the duplicate file are also merged. If the maximum number of attachments allowed is exceeded or the attachments exceed the allocated disk space, the attachments will be merged. However, you will not be able to add additional files, since the maximum number is reached or exceeded.

Merging can create multilingual candidate files. When merging two candidate files with different languages, the master candidate file will have two languages instead of one. However, the language of the master candidate file will be used for the general correspondence. Application specific correspondence will continue to be in the language of the application, thus the candidate might start receiving correspondences in both languages.

Benefits

- Provides a cleaner database.
- Recruiters do not work on the same candidate files without knowing it.
- Agents are informed if two duplicate candidate files exist in the database, thus resolving conflicting situations. When a duplicate candidate file is merged, agents who are owners of the master candidate file are informed immediately.

Merging Candidate Files

Prerequisite

A user type permission grants users access to this feature.

Candidate file must not be in an onboarding process.

Candidate file must not contain an interview request.

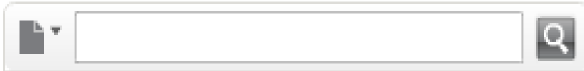
Candidate file must not contain an incomplete external service request (i.e., an open Passport transaction) such as a background check, a tax credit check, an assessment.

Candidate file must not contain an offer.

Candidate file must not be identified as registered i.e with the icon.

Steps

1. Enter the name of a candidate in the search widget.

   .

2. In the Quick Search Results list, select candidate files.
3. Click .
4. Click Yes to confirm merging.

Result

If there is no match between the fields, a message is displayed but you can still perform the merge.

If there is a match between the fields, the system merges the two candidate files. The master candidate file is enhanced with the content of the duplicate file, and the duplicate file is then deleted. When a merge occurs, the content of the duplicate file is added to the content of the master candidate file. For the Education block, field content is copied over if Institution, Program or Education Level are different. For the Work Experience block, field content is copied over if Employer or Job Function are different. Note that the content of custom fields is also merged. Note that the candidate file that is not selected is soft deleted (that is data can later be restored). All new candidate applications are considered for the merge action. However, existing candidate applications of the master candidate file are not overwritten.

Next Step

If the e-mail option was selected in the Merging Candidate Files window, an e-mail message is sent to the candidate to inform him/her that two candidate files corresponding to his/her profile were merged and to invite him/her to review the new candidate file. If the candidate file is owned by an agent, the e-mail message is sent to the agent rather than to the candidate.

Similar Candidates

Similar Candidate Search

Users have the ability to look for similar candidates based on information of an existing candidate.

Detailed Description

This type of search can be performed from a candidate list or from within a candidate file by using the icon .

Basically, a “find similar candidate” search uses the following fields of the candidate file to find similar candidates:

- Pasted resume from the general profile
- Career objectives from the general profile
- Additional information from the general profile
- Education (Institution, Program, Education Level (Achieved), and text-based user-defined fields) from the general profile
- Work Experience (Employer, Job Function, Achievements, and text-based user-defined fields) from the general profile
- Text-based answers to questions from library
- Text-based user-defined fields answers
- The last three attachments per candidate provided the attachments use one of the following supported file formats:
  - .doc (MS Word). Warning: the docx Word 2007 format is not supported, only the standard Word format.
  - .txt (standard text file)
  - .rtf (Rich Text Format)
  - .pdf (Adobe Portable Document Format)
  - .htm or .html (hypertext documents)
  - .wpd (WordPerfect)

In addition to the fields mentioned above, the system uses the default value for the Last Update field. The Last Update value is a user preference and can be defined in the Setup window.

Note that performing a “find similar candidate” search using a candidate file that contains no information in any of the fields listed above retrieves no candidates. You increase your chance of retrieving similar candidates by using a candidate file that contains a valid attachment or a pasted resume.

Finding similar candidates can be performed for one candidate file at a time.

Finding Similar Candidates

Steps

1. In the candidate list, select a candidate.
2. Click .

Result

A list of candidates similar to an existing candidate is displayed.

Candidate Matching

Candidate Matching to a Requisition

This feature allows users to select one or several candidate files and to match them to one or several requisition files.

Detailed Description

The matching action is available via this icon and can be performed from a candidate list or from within a candidate file.

Basically, a user selects a candidate file, clicks and the system presents a list of requisitions. Requisitions are displayed by the system if they match the default matching requisition criteria set by the system administrator. However, these default criteria can be modified by the user to find more relevant requisitions for a particular candidate. This is done by selecting the Matching Requisitions option and clicking this icon both available in the Match Candidates to Requisitions window. Once a candidate has been matched to a requisition, the user can decide to send an e-mail to the candidate to inform him/her that a match has been done and to obtain more information on his/her application. E-mails are sent only for posted requisitions, to avoid inviting candidates to requisitions they cannot see on the career section.

Users can match a candidate file to requisitions based on their user type permissions.

Benefits

- This feature is useful if, for example, a recruiter has found an interesting candidate who is not the best fit for the position they applied to. However, the recruiter believes there may be other openings that would be a better fit for this candidate's experience and skills.

Matching Requisition Criteria

Matching requisition criteria are used to find a match between a candidate file and requisition file.

Detailed Description

Default matching requisition criteria are set by the system administrator. However, these default criteria can be modified by the user to find more relevant requisitions for a particular candidate. Matching criteria are:

- Preferred Jobs and Job
- Preferred Locations and Locations
- Preferred Organizations and Organization
- Place of residence and 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.

Matching a Candidate to a Requisition

Allows users to select a candidate file and to match it to a specific requisition.

Prerequisite

A user type permission grants users access to this feature.

A candidate can only be matched to a requisition that has the Approved status.

Candidate file must not be identified as registered i.e with the icon.

Steps

1. Select a candidate file.
2. Click .
3. Click Select next to the desired requisition. If no requisitions are displayed, select different values in the quick filters.
4. Click Done.

Result

Users selected a candidate file and matched it to a specific requisition. Selected candidate will be considered for the requisition.

Modifying Matching Requisition Criteria

Steps

1. Select a candidate file.

2. Click .
3. In the Quick Filters pane, select the option Matching Requisitions and click .
4. In the Matching Criteria window, modify criteria available in the tabs.
5. Click Done.

Result

Criteria to find requisitions are modified to find a better fit for a candidate. The list of requisitions is modified according to the criteria selected.

Emailing Candidates Matched to a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Careers Section, select Preview Matching Candidate.
3. In the Postings Requisitions- Filter Matching candidates window, select candidates to email to.
4. Click Done.

Result

An e-mail is sent to selected candidates to invite them to apply on a job.

Candidate Interview

Candidate Interview

A candidate interview is a formal meeting to evaluate the qualifications and work experience of a candidate.

Detailed Description

Users can schedule, update and cancel interviews directly in Taleo Recruiting. Attendees invited to a meeting receive an interview notification by e-mail and they add the meeting to their calendars. Each time and interview is scheduled, updated or cancelled in Taleo Recruiting, an e-mail 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. The recruiter opens the candidate file and schedules an interview. 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-Taleo Recruiting users can also be invited to the meeting via their e-mail 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 user type permission, he/she 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 e-mail and they can add the invitation directly into their calendars. If the candidate has no e-mail 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. Note that to 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 integrates with Microsoft® Outlook® calendar or any iCalendar system (for example, Lotus Notes®). Note that events occurring in MS Outlook calendar or any iCalendar system are not managed by Taleo Recruiting. For example, if an interview meeting is modified in Outlook, the new information will not appear in Taleo Recruiting.

MS Outlook 2000 and higher are supported. The iCalendar plug-in has been tested with LotusNotes version 5.5 and higher. 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.

Benefits

- Interviews are scheduled directly in Taleo Recruiting.
- By importing the interview schedule information directly into Outlook or Lotus Notes calendars, candidate interview schedules can be tracked directly in Taleo Recruiting without the necessity for an external product.
- The ability to add scheduling information into a calendar minimizes the risk for forgotten meetings or conflicting agendas.
- Efficient communication and tracking of interview information at the users fingertips.

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.

Detailed Description

The candidate file attached to the e-mail message only contains information included in the sections:

- Preescreening
- Screening
- Resume
- Profile

The attached file never contains confidential candidate information included in the sections:

- Offers
- Tracking
- Regulations

Files attached to the candidate file (for example, a resume) are not included in the interview invitation.

The requisition file attached to the e-mail message only contains information included in the sections:

- Logistics
- Description

User type permissions grants 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. Note that 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.

Candidate Interview and Candidate Selection Workflow

The candidate interview feature can be configured in the candidate selection workflow for proper candidate selection tracking.

Detailed Description

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.

Scheduling an Interview

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

A candidate can only have one interview scheduled per requisition at a time.

The candidate must be at an interview step.

The language icon in the Schedule an Interview page indicates the language in which the candidate application was submitted; ensure that the interview information is in the candidate's language.

Validate e-mail addresses of internal attendees before sending the interview request.

Steps

1. In the candidate file, select Schedule an Interview... in the More Actions list.
2. Follow the on-screen instructions.
3. Click Done.
4. Change the status of the candidate to Scheduled.
5. Enter comments.
6. Click Done.

Result

A formal meeting is organized with a candidate to obtain more information regarding his/her qualifications and work experience. An e-mail message containing the interview details is sent to all attendees. Attendees can add the interview meeting in their calendar. Scheduling information is available in the candidate list Interview column as well as in the candidate file History tab.

Changing Interview Attendees

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

An interview must have been scheduled.

Only one user at a time can modify interview information.

The candidate must have the scheduled status.

Steps

1. In the candidate file, select Update the Interview... in the More Actions list.
2. Add or remove attendees.
3. Click Done.

Result

An e-mail message containing the interview details is sent to existing and new attendees. The e-mail message is identical to the original message except that (Updated) appears in the subject of the e-mail. Attendees that have been removed receive a cancellation message. The ics file attachment is now named “Update my calendar.ics”. In the candidate file, the Tracking tab indicates that the interview has been updated.

Changing Interview Information

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

An interview must have been scheduled.

Only one user at a time can modify interview information.

The candidate must have the scheduled status.

Steps

1. In the candidate file, select Update the Interview... in the More Actions list.
2. Follow on-screen instructions.
3. Click Done.

Result

An e-mail message containing the interview details is sent to the attendees. The e-mail message is identical to the original message except that (Updated) appears in the subject of the e-mail. The ics file attachment is now named “Update my calendar.ics”. In the candidate file, the Tracking tab indicates that the interview has been updated.

Adding an Interview to MS Outlook

Prerequisite

For MS Outlook 2000 and higher.

The iCalendar plug-in has been tested with Lotus Notes version 5.5 and higher.

Other calendar products may be functional but are not officially supported.

Steps

1. In MS Outlook, open the e-mail containing the interview message.
2. Double-click the Add to my calendar.ics attachment.
3. Click Accept
4. If desired, send a response to the meeting organizer.

Result

The candidate interview invitation is added to the MS Outlook calendar.The subject, location, date and time of the meeting are recorded.

Cancelling an Interview

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

An interview must have been scheduled.

A user cannot cancel an interview that is being updated by another user.

Steps

1. In the candidate file, select Cancel the Interview... in the More Actions list.
2. Select to send or not a cancellation message to the candidate.
3. Select a new status for the candidate.

4. Enter comments.
5. Click Done.

Next Step

An e-mail message is sent to the attendees. The e-mail message is identical to the original message except that (Canceled) appears in the subject of the e-mail. The ics file attachment is now named “Remove from my calendar.ics”. In the candidate file, the Tracking tab indicates that the interview has been canceled.

Onboarding

Candidate Onboarding

Candidate onboarding is the process of integrating a new employee into an organization.

Detailed Description

Onboarding begins when a person accepts a position; it can include orientation, communication, filling out forms, getting equipment such as a laptop.

A user type permission grants users access to this feature.

Benefits

- Improves time to productivity.
- Reduces time and effort for Human Resources.

Starting an Onboarding Process

Prerequisite

Candidate must be hired.

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Start Onboarding Process.
3. Complete the fields.
4. Click Done.

Cancelling an Onboarding Process

Prerequisite

Candidate must be involved in an onboarding process.

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select a candidate.
2. In the More Actions list, select Cancel Onboarding Process.
3. Enter a comment.
4. Click Done.

Result

Onboarding process is cancelled. Action is tracked under the candidate file History tab.

Updating Onboarding Data

Prerequisite

A user type permission grants users access to this feature.

The step/status of the candidate must be Hire/Hired.

An onboarding process must be started for the candidate.

Steps

1. In a candidate file, select Cancel Onboarding Process from the More Actions list.
2. In a candidate file, select Start Onboarding Process from the More Actions list.
3. Select the option Update onboarding data with current recruiting data.

   If you do not select the option, the system does not overwrite data and only updates the Assignment, Job Position and Application data. Also, all data entered previously on all Onboarding forms are kept intact, enabling you to review each step or simply submit them as they are.
4. Complete fields as required.
5. Click Done.

Result

The system overwrites Candidate, Experience and Education data and updates Assignment, Position and Application data. Also, all data entered on Onboarding forms prior to running this process is removed.

Contingent Hiring

Contingent Hiring

Contingent hiring is used to hire people when needed and for a limited period of time. Contingent hiring may include part-time, temporary and contractor work.

Detailed Description

Once the contingent hiring feature has been purchased, the feature must be activated by Taleo.

Contingent hiring is not configured by default i.e it must be configured from scratch by the system administrator.

When the feature is activated and configured, users can start acquiring contingent workers. When creating a requisition, users can choose a contingent requisition type which offers more functionalities than other requisition types as it has its own set of candidate selection workflow, a contingent information block, supplier invitation to submit candidates using the agency portal, confirmation of availability and specific candidate ownership rules.

Settings			
Name	**Possible Values**	**Default Value**	**Location**
Contingent Functionality Activation	• No • Yes	No	Configuration> [Recruiting] Settings

Candidate Selection Workflow

Candidate Selection Workflow

Candidate Selection Workflow

A candidate selection workflow (CSW) provides the framework to move a candidate through the hiring process.

Detailed Description

A candidate selection workflow (CSW) includes steps, phases, statuses and actions a user 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.

The CSW is created by the system administrator then selected by the user 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.

CSW can be displayed to the user 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 a user is creating a requisition.

A CSW can be contextualized, that is organizations, locations and job fields can be associated by the system administrator to the candidate selection workflow. As a result, when creating a requisition, the user will only see the CSW with an Organization-Location-Job Field structure matching the one of the requisition. If a CSW is not associated to any Organization-Location-Job Field element, this means that the CSW will be available for all requisitions.

When associating an Organization-Location-Job Field structure to a CSW, 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.

Standard candidate selection workflows are supplied with the application which can be used as templates to create customized workflows.

A candidate selection workflow can be associated to a requisition type (professional, hourly, etc.). As a result, when creating a requisition, the user will only see the CSW matching the selected requisition type. If a CSW is not associated to any requisition type, this means that the CSW will be available for all requisition types.

Candidate Selection Workflow Priority

The candidate selection workflow priority ensures that the most appropriate workflow is displayed to the user when creating a requisition.

Detailed Description

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.

Example:

Organization	**Location**	**Job Field**
Food Processing/Food Production	United States/California/Los Angeles	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
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				

Candidate Selection Workflow Example

Example of a Candidate Selection Workflow			
Step	Status	Status completing the step	Status stopping the CSW
New	• To be reviewed • Waiting for info • Under consideration • Phone screen • Candidate declined • Short list* • Rejected	Short list	Rejected

Example of a Candidate Selection Workflow			
Manager review	• Manager to review • Under consideration by manager • Candidate declined • Short list* • Not interested	Short List	Not interested
Interview	• To be interviewed • 1st interview • 2nd interview • 3rd interview • 4th interview • Assessment/Test scheduled • Candidate declined • To offer* • Rejected	To offer	Rejected
Pre-offer check	• Pre-offer checks to do • Pre-offer check initiated • Candidate declined • Pending results - Proceed conditionally* • All checks passed - Proceed* • All checks NOT passed - Proceed* • Rejected	• Pending results - proceed conditionally • All checks passed - Proceed • All checks NOT passed -Proceed	Rejected
Offer	• Offer to create • Offer sent out • Negotiating • Offer rejected • Offer accepted*	Offer accepted	
Hire	Hired		

Standard Candidate Selection Workflows

Standard Candidate Selection Workflows	
Workflow	**Description**
Standard	A streamlined version of the Master workflow similar to the original sequential workflow.
Internal	A workflow designed to accommodate an internal recruitment selection process.
Executive	A workflow designed to accommodate an executive recruitment selection process.
Executive (Agency)	A workflow designed to accommodate an agency driven executive recruitment selection process.
Temporary/Contract	A workflow designed to accommodate a temporary or contract recruitment selection process.
Campus/Student	A workflow designed to accommodate a campus recruitment selection process.
Master	A workflow that can be customized when no other workflow meets your requirements.

Standard Candidate Selection Workflows	
Workflow	**Description**
Reference Workflow 4.1	
Sequential Workflow 4.1	
Staffing Station	A workflow for applications received via Staffing Stations.
Union	A workflow for unionized candidates.

Candidate Selection Workflow Step

A step represents a major stage or event in a candidate selection workflow.

Detailed Description

A step in a candidate selection workflow can be mandatory or optional.

- Mandatory: 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.
- Optional: 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 a hire can be completed.

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.

Notifications can be added to steps, This allows sending a message to users to let them know when a step is reached by candidates.

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.

Example of a step versus possible statuses:

Step	Status
New	• To be reviewed • Waiting for info • Under consideration • Phone screen • Candidate declined • Phone screen

RSOffer Step

The RSOffer step is a step that can be included in a candidate selection workflow to allow users to use the offer management module.

Detailed Description

The system administrator is responsible of adding the RSOffer step in the candidate selection workflow. 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	
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	fter 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

Candidate Selection Workflow Status

A status indicates the position or state a candidate has reached in the step of a candidate selection workflow.

Detailed Description

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.

Available statuses will depend on the candidate selection workflow being used. For example:

- Approved
- In Process
- Negotiating
- Waiting for results

Example of a step versus possible statuses:

Step	Status
New	• To be reviewed • Waiting for info • Under consideration • Phone screen • Candidate declined • Phone screen

Statuses also have different progression levels.

Progression Level	Description
Initial	Indicates the first status that will apply to a candidate accessing a new step. Example: For the 1st Interview step, the initial status would be To Be Scheduled.
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 option “move” is available to the user at this point.
Conditionally Completed	Indicates that a candidate can move from one step to another even if some activities are not completed in the step (missing information, waiting for an approval, waiting to confirm an interview date, waiting for test results, etch.). When a status is conditionally completed, the user is able to return to the step and eventually complete unfinished activities. The step is not completed until all activities are finished. More than one status in a step can be conditionally completed.

A status can be linked to a button that will be used as a shortcut to change the status of a candidate directly in a candidate file.

Shortcut Button	Description
	Changes the candidate’s status to the next appropriate status.
	Changes the candidate’s status to Rejected.
	Changes the candidate’s status to Under consideration.

Candidate Selection Workflow Action

A candidate selection workflow action is an event performed on a candidate file during the hiring process.

Detailed Description

A candidate selection workflow action is linked to a specific step of the candidate selection workflow by the system administrator and it is performed by a user when a candidate reaches the step of the workflow. For example, if the action Start Onboarding Process is added to a step, then the recruiter can start the Onboarding process when a candidate is in that step.

Candidate selection workflow actions are provided by the system. They cannot be created. Available actions for a candidate selection are:

Candidate Selection Workflow Actions	
Action	**Description**
Add Comments	Add comments to a candidate file.
Attach Files	Attach a document to a candidate file.
Bypass	Bypass a step in a candidate selection workflow without any restriction.
Change Status/step	Change the status of a step in a candidate selection workflow.
Export to SAP	Export a candidate file to SAP human resources management system (HRMS).
Fill Out Form	Add a PDF form to a candidate file. The candidate will be required to fill out the form.
Grade	Enter or remove a grade in a candidate file.
Move	Move a candidate from one step to another.
Revert	Undo the last action in a step.
Send Correspondence	Send a correspondence to a candidate.
Start Onboarding Process	Start an onboarding process.
Undelete	Undelete a candidate file.
Update Start Date	Update the start date of a candidate.

Bulk Move to the Hire Step/Status

Users can move more than one candidate to the Hire step/status in a single transaction.

Detailed Description

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.

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.

Benefits

- Improved usability for users by allowing them to move more than one candidate to the Hire step/status.

Step/Status Change in One Click

Allows users to access steps and statuses directly in the Candidates list without having to select an action in the More Actions list.

Detailed Description

To be able to change the step/status of a candidate with one click, the Next Action column must be added in a candidate list format. In order to do that, the user type permission allowing the personalization of list formats must be granted to the user.

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.

Benefits

- This feature eases the movement of candidates in a Candidate Selection Workflow (CSW).

Moving a Candidate to the Next Step

Prerequisite

A user type permission grants users access to this feature.

Candidate must be in a step that includes the Move action.

Candidate must be at a completion status.

Candidate must not be in a RSOffer step.

Steps

1. In the candidate list, select a candidate.
2. Select Change Status/Step in the More Actions list.
3. Click Done.

Result

User can move a candidate to a subsequent step regardless of the status of the step the candidate is currently at.

Moving Several Candidates to the Next Step

Prerequisite

A user type permission grants users access to this feature.

Candidates must all be related to the same requisition.

Candidates must be at the same step and status.

Candidates must be at a completion status.

Step must include the Move action.

Candidate must not be in a RSOffer step.

Steps

1. In the candidate list, select several candidates.
2. Select Change Status/Step in the More Actions list.
3. Click Done.

Result

User can move several candidates to a subsequent step regardless of the status of the step the candidate is currently at.

Moving a Candidate to Any Step

Prerequisite

A user type permission grants users access to this action.

Candidate must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

Steps

1. In a Candidate file, select a candidate.
2. Select Bypass from the More Actions drop down list
3. Click Done.

Result

User can move a candidate to a subsequent step regardless of the status of the step the candidate is currently at.

Moving Several Candidates to Any Step

Prerequisite

A user type permission grants users access to this action.

Candidates must all be related to the same requisition.

Candidates must be at the same step and status.

Candidates must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

Steps

1. In the Candidate list, select several candidates.
2. Select Bypass in the More Actions list.
3. Click Done.

Result

User can move several candidates to any step of the candidate selection workflow regardless of the status of the step the candidates are currently at.

Changing the Status of a Candidate

Prerequisite

A user type permission grants users access to this action.

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

Candidate must not be in a RSOffer step.

Steps

1. Select a candidate file.
2. In the More Actions list, select Change Status/Step.
3. Select a new status.
4. Click done.

Result

The status of the candiadte is changed.

Changing the Status of Several Candidates

Prerequisite

A user type permission grants users access to this action.

Step must include the Change Status action.

Candidate must not be in a RSOffer step.

Steps

1. In a candidate list, select several candidate files.
2. In the More Actions list, select Change Status/Step.
3. Select a new status.
4. Click Done.

Result

The status of several candiate is changed.

Identifying the Requisition's Candidate Selection Workflow

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, click Edit under the Requisition tab.
2. Locate the Candidate Selection Workflow section.
3. The Candidate Selection Workflow field indicates the name of the candidate selection workflow used with the requisition.

Result

The user is able to identify the name of the candidate selection workflow used for a requisition.

Next Step

For troubleshooting purposes, view the candidate selection workflow steps, status etc.

Removing the Tracking Solution Feature

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click My Setup in Taleo Recruiting
2. Select the Preferences tab.

3. Clear the In at least one selection process option.
4. Click Save and Close.

Result

The staircase icon will no longer appear in the candidate list.

Next Step

Activating automatic progression of a candidate.

Requisition

Requisition

Requisition File

A requisition file details the specific requirements for a job position.

Detailed Description

When opening a requisition file, users are always in view mode and they can from there choose to go into edit mode. This provides a cleaner layout and eliminates the need to “close” the file (to exit out of it and reactivate other buttons on the screen) if only viewing the file. In view mode, only fields for which data is provided are displayed. However, in edit mode, fields that do not contain data are displayed according to user permissions.

When opening a requisition file, the screen is organized into three panes:

- Left pane containing the requisition card in the top section and supporting information in the bottom section. The pane can be expanded or collapsed.
- Right pane containing supporting tools such as the online help and the diagnostic tool. The pane can be expanded or collapsed.
- Central pane containing a menu bar allowing users to perform actions on the requisition file. It also contains tabs that provide complete information about the candidate. Depending on which side the candidate card is, the information displayed will vary.

The requisition file contains several tabs:

- Requisition
- Alerts
- Attachments
- Approvals
- Posting and Sourcing
- History
- Reports

The content of the requisition file is presented as a long form. The main content of the requisition file is within the Requisition tab, which includes various sections. The other tabs contain peripheral information.

From the main requisition tab, whether in edit or view mode, users always have access to a table of contents section that allows quick jumping to different portions of the file. To display this table of contents, users simply have to click ▾ located in the Requisition tab.

The fields and layout of the requisition are configured by the system administrator. It is also the system administrator who grants users access to requisition files. Fields in a requisition are completed by a user to create a requisition. The requisition contains many details and fields such as the title of the job, the number of openings, the requisition owners and collaborators, the organization, location and job field associated to it, compensation information, job description, questions and competencies, etc. Once the requisition is created and approved, the user can post it on internal and/or external career sections, on job boards via eQuest, or via agency offering staffing services. Once the requisition is posted, candidates can apply for the job and fill the required fields.

Benefits

- Easy to navigate requisition files.
- Diagnostic tool making it easy to understand what fields are required and when
- The requisition file is highly flexible and only displays what the user is allowed to see.
- The system administrator has the ability to define the layout of the requisition file based on requisition types.

Requisition Creation

Recruiters and managers have the ability to create requisitions to detail the specific requirements for a job position.

Detailed Description

The creation of requisitions is done via the Create Requisition button which is available in the home page Requisitions channel as well as in the Requisitions page. This button is available to users if they have been granted the proper user type permission.

When creating a requisition, the Create a Requisition wizard is launched. One of the first step when creating a requisition is to select a requisition type. The system administrator is responsible of activating requisition types and of granting the user type permissions that allow users access to specific requisition types. If more than one requisition type has been activated, the user is asked to select the desired requisition type.

Depending on the company’s configuration, users may be able to specify specific elements such as the position, the department, the Organization- Location-Job Field structure. When this information is provided, the system fills certain fields in the requisition form.

When all of the above have been specified, users complete the various fields of the requisition. When saving the requisition, a message appears if information is missing in certain fields. Users can also use the diagnostic tool to know which fields must be filled to be able to save the requisition. If information is missing for certain fields, the diagnostic tool provides links to jump quickly to these fields to enter the missing information. The diagnostic tool is located in the right-hand pane.

Once the requisition is completed, the requisition goes through an approval process before being posted on career sections or job boards.

Diagnostic Tool and Show Required Fields

These two features allow you to know which requisition fields must be completed for certain actions to take place.

Detailed Description

In the requisition file, in edit mode, the “Show fields required to” feature allows you to know which fields must be filled for certain actions to take place, that is, saving, posting and approval request. For example, when selecting the Save action, an asterisk would appear beside the fields that must be completed in order to perform the save action.

Also, a diagnostic tool is available in the requisition file, in view and edit modes. This tool, located in the right hand side of the page, is accessible by clicking this icon . The diagnostic tool allows you to see all the fields that are missing information and to jump quickly to those fields to enter the missing information.

Requisition Description

The description of a requisition is the information provided to candidates who apply for a job.

Detailed Description

The requisition description provides information about the job as well as the qualifications required.

A requisition can have two descriptions:

- internal description for current employees applying for a job
- external description for external candidates

The requisition description also contains the opening date and closing date of the requisition, that is the period provided to apply for the job.

An effective job description must be compelling, intelligent and honest. It must attract, intrigue and persuade top talents. It should include specific information and be focused on the talent.

When writing the description of a requisition, consider the following elements:

- Job Title: Make sure applicants outside the organization will know what it means.
- Headline: Start with a brief marketing statement, “grabber”.
- Structure: Explain where and how the position fits into the organization.
- Type of Environment: Explain what it is like to work for the organization (fast-paced, small/large team, multiple projects, etc.).
- Description of the Role: Concentrate on important, positive aspects of the position.
- Description of the Person Required: List qualifications, important competencies, relevant experience, personal qualities; Be specific and keep it short.
- Salary/Benefits/Training/Opportunities: Highlight key benefits offered by the organization.

Request More Information Alert

The Request More Information alert allows users to send an e-mail to candidates who meet certain conditions but whose application information is incomplete.

Detailed Description

The message invites the candidates to return to their applications and provide the missing information. The system determines automatically which information is missing by reviewing fields identified by your company at the time of implementation.

When setting the Request More Information alert:

- Select the option "A candidate meeting all the required criteria achieves a result of at least x%" 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.
- Select the option "A candidate meeting all the required criteria has at least x assets out of y" 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.
- Select the option "Request information when candidate meets either condition" to notify candidates who meet the result or asset condition.
- Select the option "Request information when candidate meets both conditions" to notify candidates who meet the result and asset condition.

Daily Recruiting Report

The daily recruiting report is an e-mail message sent to users and that contains statistics on one or more requisitions.

Detailed Description

The 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.

The daily recruiting report option is available in the requisition Reports tab. When selecting this option, a user can then select the recipients to whom the report will be sent.

Benefits

- Keeps collaborators informed of different statistics on candidate applications and requisitions.

Creating a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Requisition list, click Create Requisition.
2. Follow on-screen instructions.

   The information you will need to provide depends on the flow and options configured by your system administrator.

   Budget fields support currency symbols, commas and decimals. Bonus and Salary fields support only commas and decimals.

The opening and closing dates refer to when the company offers the position.These dates may differ from the posting (sourcing) dates.

3. Click Save.

Result

The requisition appears in the Requisition list and the status is Draft.

Next Step

Requesting an approval for the requisition.

Editing Requisition Fields

Prerequisite

Settings allow the activation of this feature.

A user type permission grants users access to this feature.

Status must be On Hold.

You cannot edit the fields:

- Title by manager
- Justification
- All fields in the profile
- Candidate Selection Workflow
- Included in the sections Budget, Compensation and Other
- Contact name
- Contact e-mail

Steps

1. In the requisition file, click Edit.
2. Make changes to the editable fields.
3. Click Save and Close.

Editing the Organization-Location-Job Field of a Requisition

Prerequisite

A user type permission grants users access to this feature.

The system administrator must have contextualized the requisition fields (i.e. associate fields to Organizations, Locations and Job Fields) in order to make them relevant according to the requisition context.

Steps

1. In the requisition file, click Edit.
2. Click Edit in the Structure section.

Depending on the status of the requisition and user type permissions granted to the user, available editing functionalities will vary.

3. Click Save and Close.

Result

The Organization-Location-Job Field structure of the requisition modified.

Selecting the Candidate Selection Workflow for a Requisition

Prerequisite

A user type permission grants users access to this feature.

The requisition must be draft.

The candidate selection workflow in a requisition can never be edited; you will always need to cancel the requisition and duplicate it to be able to make changes.

Steps

1. In the requisition file, under the Requisition tab, click Edit.
2. Click Edit in the Candidate Selection Workflow section.

   Depending on the status of the requisition and user type permissions granted to the user, available editing functionalities will vary.
3. Click Save and Close.

Selecting a Screening Service

Prerequisite

Screening service must be activated by support.

A user type permission grants users access to this feature.

Steps

1. In the requisition file, under the requisition tab, click Edit.
2. In the Screening section, select the desired service in the requisition.
3. Click Save and Close.

Result

A screening service is added to the requisition.

Cancelling a Requisition

Prerequisite

A user type permission grants users access to this feature.

The status must NOT indicate Canceled or Filled.

Steps

1. In the requisition file, click Cancel Requisition... in the More Actions list.

2. Enter comments.
3. Click Done.

Result

The status of the requisition becomes Cancel. If you cancelled the requisition by mistake, reopen the requisition via the More Actions list.

Duplicating a Requisition

Prerequisite

A user type permission grants users access to this feature.

Any requisition can be duplicated regardless of its status.

Steps

1. Open a requisition.
2. Click .
3. Modify the information as necessary.

   When duplicating a requisition, all of the information is duplicated except the Alerts tab information and the Target Start Date field content. The information on the Alerts tab defaults to your organization's ACE settings.
4. Click Save.

Result

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

Next Step

Requesting an approval for the requisition.

Deleting a Requisition

Prerequisite

A user type permission grants users access to this feature.

Requisition must be draft.

Steps

1. In the requisition file, click Delete... in the More Actions list.
2. Enter comments.
3. Click Done.

Result

The requisition no longer appears in the requisition list.

Saving a Requisition as a Template

Steps

1. In the requisition file, click .

Result

The requisition is now a requisition template that is available in the Libraries menu, under Templates.

Reopening a Requisition that Was Cancelled not Filled

Allows users to reopen a requisition that had not been filled when it was cancelled.

Prerequisite

A setting activates this feature.

A user type permission grants users access to this feature.

The requisition status must be Canceled.

Steps

1. In the requisition file, select Reopen Requisition... in the More Actions list.
2. In the Reopen Requisition window, indicate a specific number of job openings or indicate Unlimited.
3. Enter comments.
4. Click Done.

Result

The requisition that was cancelled without being filled is reopend. The system displays a window in which you indicate whether you want to post the requisition immediately or at a later time. If you click Yes, a new series of steps is displayed that enable you to post the reopened requisition.

Reopening a Filled Requisition and Adding Openings

Prerequisite

A setting activates this feature.

A user type permission grants users access to this feature.

The requisition status must be Filled.

Steps

1. In the requisition file, select Reopen Requisition... in the More Actions list.
2. In the Reopen Requisition window, click the radio button next to Add Openings and then indicate a specific number of openings or click the radio button next to Unlimited.
3. Enter comments.
4. Click Done.

Result

The system displays a window in which you indicate whether you want to post the requisition immediately or at a later time. If you click Yes, a new series of steps is displayed that enable you to post the reopened requisition. A candidate who was hired prior to reopening of the requisition remains on the requisition and retains the Hired step and status.The requisition that was filled is reopened and new openings are added while retaining candidates hired to fill the original opening.

Reopening a Filled Requisition and Cancelling the Hiring

Prerequisite

A setting activates this feature.

A user type permission grants users access to this feature.

The requisition status must be Filled.

Steps

1. In the requisition file, select Reopen Requisition... in the More Actions list.
2. Click the radio button next to Cancel the hiring of the candidates.
3. Enter comments.
4. The system displays a reminder that you have to revert the hired candidate's step and status using the Revert action. Click Yes.

   Clicking No is not a best practice: if you forget to change the candidate's step and status later, the reopened requisition will contain a candidate whose step and status is Hired.
5. The system displays the candidate list corresponding to the requisition.
6. Click the check box next to the candidate's name and click Revert... in the More Actions list.
7. Enter comments.
8. Click Done.

Result

Allows users to reopen The filled requisition is reopened and the candidates who had been hired on the requisition are cancelled. If you click the Requisitions tab, the requisition now has Open status in the Requisitions window. If you click the corresponding number in the Candidates column, the candidate who was originally hired is still displayed in the requisition's Candidates list but the person has the step and status he/she had prior to reaching the Hired step.

Filling a Requisition

Allows users to indicate that a position has been filled.

Prerequisite

A user type permission grants users access to this feature.

The Status must NOT indicate Filled, Draft or On Hold.

The Status must not indicate Pending with a Status Details displaying to To Be Approved.

Steps

1. Open a requisition.
2. In the More Actions list, select Fill...
3. Enter comments.
4. Click Done.

Result

When a requisition is filled, the step of the remaining candidates changes to Rejected and the requisition no longer appears in the requisition list.

Cancelling the Hiring of a Candidate

Prerequisite

A user type permission grants users access to this feature.

The status must be Filled.

Steps

1. In the requisition file, select Reopen Requisition in the More Actions list.
2. Select the option Cancel the hiring of candidates.
3. Click done.

Result

Candidates previously hired for the requisition will no longer be hired.

Putting a Requisition on Hold

Allows users to restrict or postpone activities related to a requisition.

Prerequisite

A user type permission grants users access to this feature.

The status must indicate Unposted, Open or Expired.

The status must NOT indicate Deleted, Cancelled, Filled, Posted, or Scheduled for posting.

The offers under the OFfers tab must NOT have the status Accepted with Final Start Date, Accepted with Tentative Start Date, Negotiating, or Extended (waiting for candidate response).

Steps

1. In the requisition file, select Put on Hold....in the More Actions list.
2. Enter comments.
3. Click Done.

Result

The status of the requisition is changed to On Hold.

Reactivating an On Hold Requisition

Prerequisite

The Status of the requisition must be On Hold.

Steps

1. In the requisition file, select Reactivate... in the More Actions list.
2. Enter comments.
3. Click Done.

Result

The status of the requisition becomes Draft.

Reopening a Requisition

Prerequisite

A user type permission grants users access to this feature.

The status of the requisition must be Filled.

Steps

1. In the requisition file, select Reopen Requisition in the More Actions list.
2. In the Reopen Requisition page, complete the required information.
3. Click Done.

Result

The status of the requisition becomes Draft.

The requisition that was no longer active is reopened. For example when additional positions are offered for a requisition that has been filled, or if canceling the hiring of a candidate.

Requesting a Contribution

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, select Request Contribution.... in the More Actions list.
2. Select a contributor.
3. Complete desired fields.
4. Click Done.

Result

The selected colleague will receive an e-mail requesting to contribute to the task.

Returning my Contribution

Prerequisite

A user type permission grants users access to this feature.

A contribution must have been requested.

User must have completed the contribution.

Steps

1. In the requisitions file, select Return my contribution in the More Actions list.
2. Select the contribution.
3. Enter comments.
4. Click Done.

Result

User that has requested a contribution is notifed that the contribution is completed

Adding a Comment in a Requisition File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, click .
2. Enter a comment.
3. Click Done.

Result

The comment is displayed in the requisition file History tab. The comment cannot be modified once entered.

Adding a Source to a Requisition

Prerequisite

A user type permission grants users access to this feature.

The organization, location and job field of the source and of the requisition must match or the source must not be associated to any organization, location and job field.

Source must be active.

Steps

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify.

4. Click Select next to the desired source.
5. Click Done.

Result

The selected source appears in the Modify Source List section of the requisition. Users can add sources to a requisition to know how candidates have heard about a position.

Removing a Source from a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify.
4. In the Posting Requisitions window, click ☒ next to a selected source.
5. Click Done.

Result

The selected source no longer appears in the Modify Source List section of the requisition.

Using the Requisition Automatic Filling Option

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the option I want to use the automatic filling option of the requisition file.
4. Click Save.

Result

When a user will create a requisition, certain fields will be automatically filled.

Modifying the Daily Recruiting Report

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, click the Reports tab.

2. Click Modify Report.
3. Select the option allowing you to include the requisition in the report.
4. Select the recipients of the report.
5. Click Done.

Result

In the requisition Reports tab, there is an indication that the requisition will be included in the report. The name of the recipients is also displayed.

Setting the Request More Information Alert

Prerequisite

A user type permission grants users access to this feature.

Use totals that are equal to or slightly lower than those you used in the ACE candidate alert section.

Steps

1. In the requisition file, click the Alerts tab.
2. In the Request More Information section, click Set Alert.
3. Select the desired criteria.
4. Click Done.

Result

In the requisition Alerts tab, the criteria are displayed in the Request More Information section. An e-mail is sent to candidates meeting certain conditions but whose application information is incomplete.

Next Step

Setting the ACE Candidate alert.

Requisition Template

Requisition Template

A requisition template is a requisition file containing information that will likely be reused for a similar job position.

Detailed Description

Requisition templates are available to users in the Libraries menu.

A requisition template can be created for each position or job category. Depending on your organization's policies, the requisition template may be very detailed or may include only basic information.

When creating a new requisition, it is a best practice to select a requisition template first; this will auto-populate many of the requisition fields based on the selected template.

The creation of requisition templates is similar to the creation of requisitions. It is done via the Create Template button which is available in the Requisition Templates page, via the Libraries menu. This button is available to users if they have been granted the proper user type permission.

When creating a requisition template, the Create Requisition Template wizard is launched. One of the first step when creating a requisition template is to select a requisition type. The system administrator is responsible of activating requisition types and of granting the user type permissions that allow users access to specific requisition types. If more than one requisition type has been activated, the user is asked to select the desired requisition type.

Depending on the company’s configuration, users may be able to specify specific elements such as the Organization, Location and Job Field (Organization-Location-Job Field structure). When this information is provided, the system fills certain fields in the requisition form.

A status is defined for a requisition template. A template can be draft, inactive, active or active for a specific period of time.

When all of the above have been specified, users complete the various fields of the requisition template. When saving the requisition template, a message appears if information is missing in certain fields. Users can also use the diagnostic tool to know which fields must be filled to be able to save the requisition template. If information is missing for certain fields, the diagnostic tool provides links to jump quickly to these fields to enter the missing information. The diagnostic tool is located in the right-hand pane.

Once the requisition template is completed, it is available in the Requisition Templates page.

Benefits

- Allows the creation of a requisition file without having to start from scratch.

Creating a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Libraries menu, select Templates.
2. Click Create Template.
3. Follow on screen instructions.
4. Click Save.

Result

The requisition template containing information likely to be reused for a similar job position is available in the Requisition Templates page.

Duplicating a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Libraries menu, select Templates.
2. Click on a template.
3. Click .
4. Modify information.
5. Click Save and Close.

Result

The new requisition template appears in the Requisition Templates page.

Editing a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Libraries menu, select Templates.
2. Click on a template.
3. Click Edit.
4. Modify fields as required.
5. Click Save and Close.

Activating a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

The requisition template must be inactive.

All requisition templates must be displayed in the Requisition template list.

Steps

1. In the Libraries menu, select Templates.
2. In the Requisition Templates page, click on a template.
3. Click Edit.
4. Select Active.
5. Click Save and Close.

Result

The requisition template is available to users creating a requisition.

Deactivating a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

The requisition template must be active.

Steps

1. In the Libraries menu, select Templates.
2. Click on a template.
3. Click Edit.
4. Select Inactive.
5. Click Save and Close.

Result

The requisition template is no longer available for use.

Requisition Types

Requisition/Staffing Type

A requisition (or staffing) type allows a user to determine the type of candidates that he/she wants to hire.

Detailed Description

Six requisition types are available:

- Professional: Requisitions for most professional employees.
- Executive: Requisitions for executives. This type of requisition allows you to secure and protect private executive candidates in the system.
- Hourly: Requisitions for hourly employees.
- Campus: Requisitions for students or campus job fairs.
- Contingent: Requisitions for contractual employees submitted by agencies.
- Universal: Requisitions that can be used for all types of requisition templates.

The system administrator is responsible of activating requisition types. Also, user type permissions grant users access to the different requisition types and indirectly, different pools of candidates.

When creating a requisition, if more than one requisition type is activated, the user is asked to select the desired requisition type. When a requisition type is no longer available, it cannot be selected, but requisitions created with that type keep their original requisition type.

For Integration purposes: Campus requisitions and Hourly requisitions must be identified by your Taleo representative in order for the integration team to change requisition type with a manual script. This will be allowed only once by customer. If more than one requisition type is active, import files must be modified.

Benefits

- Allows users to create requisitions for a specific type of hiring.

Changing the Type of a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Libraries menu, select Templates.
2. Click on a template.
3. Click .
4. Select a requisition type.
5. Click Done.

Result

The requisition template can now be used to create requisitions for the specified requisition type.

Requisition Ownership

Requisition Owner

Requisition ownership refers to the individuals chosen as the recruiter, the hiring manager, the recruiter assistant or the hiring manager for a specific requisition.

Detailed Description

The individuals chosen as the recruiter, the hiring manager, the recruiter assistant or the hiring manager for a specific requisition are considered owners of the requisition.

To be available for a requisition, the recruiter assistant and the hiring manager assistant roles must be activated by your system administrator. These two assistant roles can carry out requisition-related activities to help out the recruiter or hiring manager while, from a reports perspective, the requisition is attributed to the recruiter and hiring manager.

When creating a requisition, you can choose a recruiter assistant and/or a hiring manager assistant. To modify the recruiter, the hiring manager, the recruiter assistant and the hiring manager assistant, you must be the owner of the requisition or have the *Reassign requisitions to owners and collaborators even if the user is not a owner* user type permission.

When viewing the Requisition list, you can use the "I own" quick filter located on the left-hand side of the page to gain quick access to your requisitions. You can also use the advanced filters Recruiter, Hiring Manager, Recruiter Assistant, Hiring Manager Assistant to view requisitions owned by a specific user.

When notifications (such as attention indicator flags, workflow event notifications) are sent, the recruiter, the hiring manager as well as the assistants will receive them.

System-assigned tasks (such as To be completed, Ready for sourcing, Extend posting and To be filled) are assigned to the assistant (if an assistant was identified) instead of the recruiter. However, the recruiter also has access to these tasks even though they were assigned to the assistant.

The recruiter, recruiter assistant, hiring manager, hiring manager assistant chosen for the requisition as well as the creator of the approval path can terminate the approval path.

Benefits

- Assistant roles can carry out activities to help out the hiring manager and recruiter.

Changing the Ownership of Requisition

Prerequisite

A user type permission grants users access to this feature.

User must be the owner of the requisition or have the appropriate user type permission.

Steps

1. In the requisition file, click Edit.
2. In the Owners section, select new individuals as recruiter, hiring manager, recruiter assistant and hiring manager assistant for the requisition.
3. Click Save and Close.

Result

Notifications will be sent to the new owners of the requisition.

Requisition Collaboration

Collaborator

A collaborator is a person chosen by the owner of a requisition who helps out or takes responsibility for certain parts of the requisition process.

Detailed Description

To provide special access to a number of users throughout the requisition's life cycle, a Collaborator role is available. To be available, the Collaborator field must be activated by the system administrator.

Requisition owners (for example the recruiter, hiring manager, recruiter assistant and hiring manager assistant) can grant privileges and access to one or multiple users they identify as collaborators on their requisitions. The recruiter, the hiring manager and the assistants, if any, are the principal actors throughout the requisition's life cycle. Collaborators will help out or take responsibility for certain parts of the process.

Any user (not deleted) can be a collaborator, even non-Taleo Recruiting users (these users can be involved in the approval process with the use of the Taleo e-share Center).

When creating a requisition, a user can specify collaborators who would be responsible for selected steps within the requisition or recruitment process. If using the same individuals as collaborators, a user can create a list of frequent collaborators in the My Setup page. Once a list of frequent collaborators is created, these collaborators can quickly be added to requisitions by clicking the Add Frequent Collaborators button.

If a user wants to modify the collaborators added in a requisition, the user must be the owner of the requisition and have the *Edit requisitions* user type permission or, have the *Reassign requisitions to owners and collaborators event if user is not an owner* user type permission.

When viewing the Requisition list, a user can use the "I collaborate on" quick filter located on the left-hand side of the page to gain quick access to requisitions he/she collaborates on.

Benefits

- Collaborator role has functional privileges and can quickly access requisitions.
- There is no limit to the number of collaborators, and collaborators do not have to be part of the user group.
- More effective recruitment process thanks to greater collaboration capabilities.

Adding a Collaborator in a Requisition

Prerequisite

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

Steps

1. In the Requisition tab of the requisition file, click Edit.
2. Click Add in the Collaborators section.

3. Select a user.
4. Click Done.

Result

The name of the collaborator appears in the Collaborators section of the requisition.

Deleting a Collaborator in a Requisition

Prerequisite

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

Collaborators must have been included in the requisition.

Steps

1. In the Requisition tab of the requisition file, click Edit.
2. Select a collaborator in the Collaborators section.
3. Click Delete.

Result

The collaborator no longer appears in the Collaborators section of the requisition.

Adding Frequent Collaborators in a Requisition

Prerequisite

The list of frequent collaborators must be defined in the My Setup page.

A user type permission grants users access to this feature.

The Owners section must be included in the requisition.

Steps

1. In the Requisition tab of the requisition file, click Edit.
2. Click Add Frequent Collaborators in the Collaborators section.

Result

The list of frequent collaborators defined under My Setup appears in the Collaborators section.

Creating a List of Frequent Collaborators

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborators field must be activated by the system administrator.

Steps

1. Click My Setup link located in the top right-hand corner.

2. In the Frequent Collaborators tab, click Add...
3. Select one or several collaborators.
4. Click Done.

Result

Individuals with whom users will work on a regular basis regarding requisitions, i.e. collaborators, will appear in the Collaborators list. These collaborators will be available via the Add Frequent Collaborators button when creating a requisition.

Adding a Collaborator to the Frequent Collaborators List

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborator field must be activated by the system administrator.

Steps

1. Click My Setup link located in the top right-hand corner.
2. In the Frequent Collaborators tab, click Modify...
3. Select a collaborator.
4. Click Done.

Result

The collaborator appears in the Collaborators list. The collaborator will be available via the Add Frequent Collaborators button when creating a requisition.

Removing a Collaborator from the Frequent Collaborators List

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The Collaborator field must be activated by the system administrator.

Steps

1. Click My Setup link located in the top right-hand corner.
2. In the Frequent Collaborators tab, click Modify...
3. Hover your mouse on the name of a collaborator.
4. Click on the that appears.
5. Click Done.

Result

The collaborator no longer appears in the Collaborators list. It will no longer be available via the Add Frequent Collaborators button when creating a requisition.

Requisition Matching

Preview of Candidates Matching a Requisition

This feature allows users to select a requisition and to preview candidates who would be a fit for the requisition based on the Job, Location and Organization structure fields as well as additional matching criteria and filters.

Detailed Description

When a user posts a requisition to a career section, the Preview Matching Candidates button in the Posting and Sourcing tab allows him/her to preview a list of candidates whose profiles match default matching criteria and filters.

For the Preview Matching Candidates button to appear in a requisition file, the country specified in the requisition must correspond to the country specified by the system administrator. For example, if a user posts a requisition for a job available in the United States, the Preview Matching Candidates button will be displayed if the system administrator selected United States among the countries for which users can view matching candidates. This 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).

Default matching criteria are set by the system administrator. However, these default criteria can be modified by the user to find more relevant candidates for a particular requisition.

Default matching filters are also set by the system administrator. However, these default filters can be modified by the user.

Once the user feels that he/she has found the right candidates, an e-mail is sent to these candidates to invite them to apply for the job.

Criteria for Matching Candidates

Criteria for matching candidates are used to find a match between a requisition file and candidate file.

Detailed Description

Default matching candidate criteria are set by the system administrator. However, these default criteria can be modified by the user to find more relevant candidates for a particular requisition. Matching criteria are:

- Preferred Jobs and Job
- Preferred Locations and Locations
- Preferred Organizations and Organization
- Place of residence and Location
- Competencies
- Questions
- Job Level
- Job Type

- Schedule
- Shift
- Employee Status
- Education Level
- Willing to Travel
- Salary

Matching criteria (except for competencies and questions) can be set as desired or required:

- Required: The criterion is mandatory. The candidate has to meet this specific criterion to appear in the list of candidates displayed to the users.
- Desired: The criterion is not mandatory, it is considered an asset. A candidate who does not have an asset will be matched as long as he or she meets all the required criteria. Candidates who do not match a Desired criterion are not rejected. Candidates who meet all the Required criteria and who also meet some of the Desired criteria will appear at the top of the list of candidate displayed to the user.

Competencies and questions criteria are considered as wildcards. If these criteria are not set to Required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered. The candidate will be matched if he or she matches all the other required criteria. Answering these criteria will help determine the position of the candidate on the candidate list.

Filters for Matching Candidates

Filters for matching candidate are used to control the number of candidates displayed to users when viewing a list of candidates matching a requisition.

Detailed Description

Default matching candidate filters are set by the system administrator. However, users have the ability to modify default filters for a specific requisition. Matching candidate filters are:

- A filter to invite or not candidates who have at least one job application with a specific status.
- A filter to invite or not candidates who have applied for a job through any type of source or through a specific source.
- A filter to invite candidates living in all countries, the requisition country, the requisition state/ province or the requisition region.
- A filter to invite candidates whose information has been modified during the last x months.
- A filter to invite or not internal candidates.

Viewing Candidates Matching a Requisition

Allows users to view a list of candidates who meet default candidate matching criteria.

Prerequisite

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Preview Matching Candidates.

Result

The Posting Requisitions - Filter Matching Candidates window displays candidates matching the requisition.

Next Step

Modify default matching candidate criteria.

Modify default matching candidate filters.

Modifying Matching Candidate Criteria

Allows users to modify default matching criteria to find more relevant candidates for a particular requisition.

Prerequisite

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Preview Matching Candidates.
3. In the Posting Requisitions - Filter Matching Candidates window, click available in the Filters section on the left pane.
4. Modify criteria available in each tab.
5. Click Done.

Result

In the Posting Requisitions - Filter Matching Candidates window, the list of candidates matching the requisition is updated according to the selected criteria.

Next Step

Modify matching candidate filters.

Modifying Matching Candidate Filters

Allows users to modify default filters to control candidates who will be invited to apply for a specific job.

Prerequisite

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Preview Matching Candidates.
3. In the Posting Requisitions - Filter Matching Candidates window, selected the desired filters in the Filters section on the left pane.

Result

In the Posting Requisitions - Filter Matching Candidates window, the list of candidates matching the requisition is updated according to the selected filters.

Next Step

Modify matching candidate criteria.

Sending an E-mail to Candidates Matched to a Requisition

Allows users to send an e-mail to candidates to invite them to apply for a job.

Prerequisite

The requisition must be posted on a career section.

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. In the Posting Requisitions window, select the option Email this job posting to matching candidates.
4. Click Done.

Result

Candidates matched to the requisition will receive an e-mail inviting them to apply for the job.

Candidate Search for a Requisition

Candidates Search for a Requisition

Allows users to look for candidates who match specific criteria of the requisition.

Detailed Description

This type of search can be performed from within a requisition file by using the icon .

The External Job Description and Qualifications fields are used as search criteria. In addition to these two fields, the system uses the default value for the Last Update field. The Last Update value is a user preference and can be defined in the My Setup page. Candidate files matching these search criteria are displayed in a search results list.

This type of search can be performed for one requisition file at a time.

Finding Candidates for a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. Click .

Result

Candidate files that best match the external job description and qualifications contained in a requisition are displayed. The search results can include candidates who have already been matched to the requisition.

Creating a Search Query Based on a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition.
2. Click .
3. Click Save Query.
4. Complete the required information.
5. Click Done.

Result

The search query created based on the content of a requisition is now available in the Search Queries page.

Requisition Approval

Requisition Approval Rerouting After Changes

Configuration options when activated can force requisitions to automatically be rerouted for approval when certain business scenarios occur.

Detailed Description

The system administrator can configure certain settings to force requisitions to automatically be rerouted for approval when certain business scenarios occur. The system administrator define which scenarios he/she wishes 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 Name	Description
Restart Approval Process After "Cancel" Step	Restart the approval process when reopening a requisition after it has been cancelled.
Restart Approval Process After "Fill" Step	Restart the approval process when reopening a requisition after it has been filled.
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.

For example, if a user re-opens a cancelled requisition and if the *Restart Approval Process After "Cancel" Step* setting has been activated, the user 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 approved 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 cancelled 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.

Immediately upon a user has performed an action that makes true one of the above activated conditions:

- The requisition status will return to "Draft".
- The job will be unposted.

Amending a Requisition Approval Path

Allows users to modify a requisition approval path created by another user.

Prerequisite

A user type permission grants users access to this feature.

The Status column must indicate To be Approved.

Steps

1. In the requisition file, select Amend Approval Path... in the More Actions list.
2. In the Amend Approval page, select the approvers. If desired, change the order of the approvers.
3. Enter comments.
4. Complete other necessary fields.
5. Click Done.

Result

The system assigns the requisition to the first approver in the sequence.

- If the approver is a Taleo Recruiting user, an Approve Requisition task will be assigned to the us
- If the approver is not a Taleo Recruiting user, the approver will receive an e-share approver message

Next Step

- If the approver is a Taleo Recruiting user, he/she can select the following actions: Approve, Reject, Pass, Pending.
- If the approver is not a Taleo Recruiting user, he/she can select the following actions: Approve, Refuse to Approve.

Approving a Requisition

Prerequisite

A user type permission grants users access to this feature

To approve a requisition, a collaborator must be in the same group as the requisition owner.

Steps

1. In your Tasks list, click Approve Requisition.

   Users can access the tasks list either by clicking the Respond link in the email received requesting the approval of the requisition, or by directly accessing Taleo Recruiting.
2. In the Decide on Approval window, indicate your decision.
3. Enter comments if mandatory.
4. Click Done.

Approving a Requisition via a BlackBerry

Allows users who are not Taleo Recruiting users to approve a requisition via a BlackBerry.

Prerequisite

BlackBerry must:

- Support HTML tables
- Use foreground and background colors
- Use background images

- Support style sheets
- Java Script is required on the login page if login authentication was activated via eShare.

A user type permission grants users access to this feature.

User must have received an e-mail on his/her BlackBerry.

Steps

1. In the e-mail requesting approval, click Respond.
2. Provide a comment.
3. Click Done.

Result

Approved is indicated in the Decision column of the Approvals tab of the requisition.

Requesting an Approval Path Amendment

Allows a user to ask a colleague who has the proper permissions to amend an approval path.

Prerequisite

A user type permission grants users access to this feature.

The requisition must have the status To be approved.

Steps

1. In a requisition file, select Request Approval Path Amendment... in the More Actions list.
2. Click 🔍 to select a contributor.
3. Click Done.

Result

The colleague will receive a task to amend an approval path.

Requesting the Approval of a Requisition

Allows users to request the approval of a requisition to one or several colleagues before being able to post a requisition.

Prerequisite

A user type permission grants users access to this feature.

To approve a requisition, a collaborator must be in the same group as the requisition owner.

Steps

1. In the requisition file, select Request Approval... in the More Actions list.
2. In the Request Approval page, select the approvers. If desired, change the order of the approvers.
3. Select a user in the Assign the next task to field.
4. Enter comments.

5. Complete other necessary fields.
6. Click Done.

Result

The system assigns the requisition to the first approver in the sequence.

- If the approver is a Taleo Recruiting user, an Approve Requisition task will be assigned to the user.
- If the approver is not a Taleo Recruiting user, the approver will receive an e-share approver message

Next Step

- If the approver is a Taleo Recruiting user, he/she can select the following actions: Approve, Reject, Pass, Pending.
- If the approver is not a Taleo Recruiting user, he/she can select the following actions: Approve, Refuse to Approve.

Resending a Requisition Approval Request

Allows users to send a requisition approval request reminder to the currently assigned eShare approver. This feature is useful in the case where an approver may have lost or accidently deleted the original message.

Prerequisite

This feature is only relevant to use if approvers are eShare users and are therefore receiving e-mail based task requests.

A user type permission grants users access to this feature.

Steps

1. In a requisition file, click on the Approvals tab.
2. Click the Send Reminder option.

Result

Another approval request notification is sent to the active approver only.

Self Approving a Requisition

Allows a user to approve his/her own requisition.

Prerequisite

A user type permission grants users access to this feature.

A requisition can be approved only if mandatory fields have been filled, unless the system has been configured to accept partially filled requisitions.

Steps

1. In the requisition file, select Save As Open... in the More Actions list.

2. Enter comments.
3. Click Done.

Result

The status of the requisition is Approved.

Next Step

Posting the requisition.

Sending an Approval Request Reminder

Allows users to send a reminder to the approver of a requisition.

Prerequisite

A user type permission grants users access to this feature.

The requisition status must be To be Approved.

Steps

1. In the Requisition list, click on a requisition.
2. In the More Actions list, select Send an approval request reminder...
3. Enter comments.
4. Click Done.

Result

Another approval request notification is sent to the active approver only. The approver receives the message and must click Respond to respond to the approval request.

Terminating an Approval Path

Allows users to stop an approval path if the position has been cancelled or if the requisition is no longer required.

Prerequisite

A user type permission grants users access to this feature.

User must be the owner of the requisition or the creator of the approval path.

The Status Details must indicate To be Approved.

Steps

1. In the requisition file, select Terminate Approval Path... in the More Actions list.
2. Enter comments.
3. Complete other necessary fields.
4. Click Done.

Requisition Prescreening

Prescreening

The Prescreening section of the requisition file contains disqualification questions, competencies and questions used to find the ideal candidates.

Detailed Description

The Prescreening section contains questions and competencies and can also contain disqualification questions if this feature was activated. The Prescreening section is available to users who have been granted the proper user type permission. A set of user type permissions also grants users access to actions that can be performed in the Prescreening section.

Disqualification questions are displayed in the Prescreening section if the locations and job fields of the question matches the locations and job fields of the requisition.

When defining competencies and questions for a requisition, users have the ability to apply the pre-defined model of competencies and questions associated with the requisition. When clicking Apply Model, questions and competencies that match one location or one job field of the requisition are added to the requisition.

For each question and competency contained in a requisition, users can define if the question or competency is required or an asset, the weight (optional), the minimum proficiency (competencies only) and the minimum experience (competencies only).

Competencies and questions contained in a requisition are answered by candidates. The candidates' responses to the questions and competencies are filtered by the system and presented on the Candidate list of the requisition. An ACE Candidate icon ★ identifies top candidates, and the amount of requirements and assets that the candidate has achieved with his/her responses is also displayed. Users can then review the Candidate list and have the option to reset the Required, Asset and Weight indicators as well as the ACE alert to modify the threshold if necessary to obtain a viable pool of top candidates.

Best practices:

- Identify Required criteria first and then identify and select any Asset criteria.
- When some assets are “Strongly Preferred” and others are “Nice-to-Have”, use weight to differentiate them.
- When starting out, use Required and Asset only and NOT Weight.
- Use weight when they are many assets and you want to indicate some are more important then others.

Required, Asset and Weight Criteria

When adding questions and competencies to a requisition, users need to specify if the question or competency is required for the position or if it is an asset. Weight can also be added to a competency, an asset or a question to give it more consideration when prescreening candidates.

Detailed Description

When adding questions and competencies to a requisition, users need to specify if the question or competency is required for the position or if it is an asset.

A required criterion means that the competency or answer to a question absolutely has to be selected for the candidate to be considered for the job. Think “Minimum Requirements”. Are there any circumstances where this qualification could be waived? Goal: All hires have all Required qualifications.

An asset criterion means that the competency or answer to a question does not have to be selected for the candidate to be considered for the job, but would distinguish this candidate compared to others. Think “Strongly Preferred” and “Nice-to-Have” qualifications. Goal: Identify enough Assets to separate “minimally qualified” candidates from “ideal” candidates (ACE Candidates). A best practice is to identify Required criteria first and then identify and select any Asset criteria. When some assets are “Strongly Preferred” and others are “Nice-to-Have”, use weight to differentiate.

Example 1: Question 1 is a single answer question, the candidate will only check one answer. If a Bachelor's Degree is required, we must mark that answer and all answers greater than that answer as required. If we do not do this, a candidate that answers Master's degree will not be recorded by the system as having met the requirement, even though candidates with a Master's degree do meet the minimum requirement.

	Required	**Asset**
Question 1: Indicate the highest level of education you have completed.		
High School		
Associate’s Degree		
Bachelor’s Degree	x	
Master’s Degree	x	
PhD	x	
None of the above		

Example 2: Question 2 is a single answer question, the candidate will only check one answer. If a minimum of 2 years of experience is required, we must mark “1 to 3 years” and all answers greater than that answer as required. If we do not do this, a candidate that answers “3 to 6 years” will not be recorded by the system as having met the requirement, even though those candidates have at least 3 years of experience and thus do meet the minimum requirement.

	Required	**Asset**
Question 2: How many years of experience do you have in Java programming.		
No experience		
Less than 1 year		
1 to 3 years	x	
3 to 6 years	x	
6 to 10 years	x	
More than 10 years		

Weight is a numerical value added to a required or asset competency or answer to a question to give it more consideration when prescreening candidates. The weight criterion is an optional third level filter. To use weighting, users assign a certain number of "points" to the answer they want to weight. Goal: Keep it simple! Weighting is used to refine requirements and assets, so it should be used selectively.

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

Weight can be assigned to a question having a single answer or a question having multiple answers.

There is no limit to the number of points that can be awarded or the number of answers that can have points. Once the points are assigned, the system automatically calculates a percentage. This percentage is the amount that question earns relative to the entire questionnaire. Since these percentages add up to 100%, we can assume these were the only points assigned on this entire questionnaire. All point percentages will be normalized and add up to 100% at the bottom of the prescreening questionnaire.

If users decide to use weighting either because they have a high volume requisition or wish to utilize the third level of filtering, there are some basic usage tips to keep in mind to know what to weight:

- First determine what answers need points. Not all questions or answers need weighting.
- Only weight assets not requirements, and only those assets that really need to stand out from the others in order to sort your ideal candidates to the top of the list.
- One exception to the asset rule is you can put weighting on single answer requirements if the questions are minimum or greater like we saw earlier.
- Another exception is if the Prescreening requirement column is strictly used for OFCCP compliance, then typically assets are not used, and some organizations may want to use weighting in that case to help sort the list.

Example 1: Question 1 is a multiple answer question where you may have several assets. Weighting helps you identify preferred, or super, assets over other assets listed. Here we see MS Project is the most important asset out of the 4 assets. 3 out of the 4 assets are weighted with extra points. When utilizing a list that includes requirements and assets, never assign weighting to requirements. The candidate will either meet the requirement or not, adding weight to a requirement listed here does not assist in providing further differentiation from other candidates. The total weighting for this question is 100%, so you can assume in this example, that this is the only question weighted on the whole questionnaire. If a candidate selected all the assets with weighting they would receive 6 asset points or a 100% result.

	Required	**Asset**	**Weight**
Question 1: Indicate which computer applications you have used to perform your job duties in the past. Select all that apply.			
MS Access			
MS Word	x		
MS Excel	x		
MS Publisher		x	1 (17%)
MS Project		x	3 (50%)
Adobe Acrobat		x	2 (33%)
Adobe Pagemaker		x	

	Required	Asset	Weight
None of the above			
Total for Competencies and Questions			6 (100%)

Example 2: Question 2 is a single answer question. The one exception where you would weight requirements is on a question like this one. In this example, we are hiring a junior level HR Generalist, so a preferred level of years experience is indicated even though anyone with one or more years of experience would meet the requirement. Here, we see that 3-5 years is the most desirable out of all the choices. The 5-7 years is a medium level. And the over 7 years gets the least amount of points as they may be overqualified.

	Required	Asset	Weight
Question 2: How many years of experience do you have as a Human Resources Generalist?			
No experience			
Less than one year			
More than 1 year and less than 3 years	x		
More than 3 years and less than 5 years	x		3 (100%)
More than 5 years and less than 7 years	x		2 (67%)
More than 7 years	x		1 (33%)

Tips

- Identify Required criteria first and then identify and select any Asset criteria.
- When some assets are "Strongly Preferred" and others are "Nice-to-Have", use weight to differentiate them.
- When starting out, use Required and Asset only and NOT Weight.
- Use weight when they are many assets and you want to indicate some are more important then others.

Weight Criteria

Weight is a numerical value added to a required or asset competency or answer to a question to give it more consideration when prescreening candidates.

Detailed Description

Weight is a numerical value added to a required or asset competency or answer to a question to give it more consideration when prescreening candidates. The weight criterion is an optional third level filter. To use weighting, users assign a certain number of "points" to the answer they want to weight. Goal: Keep it simple! Weighting is used to refine requirements and assets, so it should be used selectively.

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

Weight can be assigned to a question having a single answer or a question having multiple answers.

There is no limit to the number of points that can be awarded or the number of answers that can have points. Once the points are assigned, the system automatically calculates a percentage. This percentage is the amount that question earns relative to the entire questionnaire. Since these percentages add up to 100%, we can assume these were the only points assigned on this entire questionnaire. All point percentages will be normalized and add up to 100% at the bottom of the prescreening questionnaire.

If users decide to use weighting either because they have a high volume requisition or wish to utilize the third level of filtering, there are some basic usage tips to keep in mind to know what to weight:

- First determine what answers need points. Not all questions or answers need weighting.
- Only weight assets not requirements, and only those assets that really need to stand out from the others in order to sort your ideal candidates to the top of the list.
- One exception to the asset rule is you can put weighting on single answer requirements if the questions are minimum or greater like we saw earlier.
- Another exception is if the Prescreening requirement column is strictly used for OFCCP compliance, then typically assets are not used, and some organizations may want to use weighting in that case to help sort the list.

Example 1: Question 1 is a multiple answer question where you may have several assets. Weighting helps you identify preferred, or super, assets over other assets listed. Here we see MS Project is the most important asset out of the 4 assets. 3 out of the 4 assets are weighted with extra points. When utilizing a list that includes requirements and assets, never assign weighting to requirements. The candidate will either meet the requirement or not, adding weight to a requirement listed here does not assist in providing further differentiation from other candidates. The total weighting for this question is 100%, so you can assume in this example, that this is the only question weighted on the whole questionnaire. If a candidate selected all the assets with weighting they would receive 6 asset points or a 100% result.

	Required	**Asset**	**Weight**
Question 1: Indicate which computer applications you have used to perform your job duties in the past. Select all that apply.			
MS Access			
MS Word	x		
MS Excel	x		
MS Publisher		x	1 (17%)
MS Project		x	3 (50%)
Adobe Acrobat		x	2 (33%)
Adobe Pagemaker		x	
None of the above			
Total for Competencies and Questions			6 (100%)

Example 2: Question 2 is a single answer question. The one exception where you would weight requirements is on a question like this one. In this example, we are hiring a junior level HR Generalist, so a preferred level of years experience is indicated even though anyone with one or more years of experience would meet the requirement. Here, we see that 3-5 years is the most desirable out of all the choices. The 5-7 years is a medium level. And the over 7 years gets the least amount of points as they may be overqualified.

	Required	**Asset**	**Weight**
Question 2: How many years of experience do you have as a Human Resources Generalist?			
No experience			
Less than one year			
More than 1 year and less than 3 years	x		
More than 3 years and less than 5 years	x		3 (100%)
More than 5 years and less than 7 years	x		2 (67%)
More than 7 years	x		1 (33%)

Adding a Competency to a Requisition

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.
2. In the Competencies section, click Add.
3. Select a competency.
4. Click Done.
5. Click Save and Close.

Result

The competency appears in the Competencies section of the requisition file.

Removing a Competency from a Requisition

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.

2. In the Competencies section, select a competency.
3. Click Remove.
4. Click Save and Close.

Result

The selected competency no longer appears in the Competencies section of the requisition.

Applying Competency and Question Model

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In the requisition file, click the Requisition tab.
2. Click Edit.
3. In the Prescreening section, locate the Competencies section.
4. Click Apply Model.
5. Click Save and Close.

Result

Questions and competencies associated to the model of the position appear in the requisition.

Next Step

Defining competency criteria.

Ordering Competencies in a Requisition

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.
2. In the Competencies section, for each competency, select an order number from the list.
3. Click Reorder.
4. Click Save and Close.

Result

Competencies will be displayed in the requisition in the selected order.

Defining Competency Criteria

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In the requisition file, click the Requisition tab.
2. Click Edit.
3. In the Competencies section, select the criteria for a competency.
4. Click Save and Close.

Result

The required/asset criteria, the minimum proficiency and experience required, the weight are set for the competenc.

Adding a Question to a Requisition File

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.
2. In the Questions section, click Add.
3. Select a question.
4. Click Done.
5. Click Save and Close.

Result

The question appears in the Questions section of the requisition file.

Removing a Question from a Requisition File

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.
2. In the Questions section, select a question.
3. Click Remove.
4. Click Save and Close.

Result

The selected question no longer appears in the Questions section of the requisition.

Ordering Questions in a Requisition File

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In a requisition file, click Edit.
2. In the Questions section, for each question select an order number from the drop down list.
3. Click Reorder.
4. Click Save and Close.

Result

Questions will be displayed in the requisition in the selected order.

Defining Question Criteria

Prerequisite

A user type permission grants users access to this feature.

The requisition must not be posted.

Steps

1. In the requisition file, select the Requisition tab.
2. Click Edit.
3. In the Questions section, select values for the criteria of the question.
4. Click Save and Close.

Result

Users has specified if a question is required or an asset and to set the weight of a question

Creating a Question for a Requisition

Prerequisite

A user type permission grants users access to this feature.

Requisition must not be posted.

Steps

1. In the requisition file, click the Requisition tab.
2. Click Edit.
3. In the Questions section, click ! .

4. Complete the fields.
5. Click Save and Close.

Result

The question is added to the requisition. The question is not added to the Question Library therefore not available for other requisitions.

Duplicating a Question for a Requisition

Prerequisite

A user type permission grants users access to this feature.

The requisition must not be posted.

Steps

1. In the requisition file, select the Requisition tab.
2. Click Edit.
3. In the Questions section, click .
4. Complete the fields.
5. Click Save and Close.

Result

The question is added to the requisition. The question is not added to the Question Library therefore not available for other requisitions.

Requisition Posting

Requisition Posting

Requisition posting allows a user to publish a requisition in order to have candidates applying on the job.

Detailed Description

A requisition can be posted on:

- Internal or external career sections.
- eQuest: this is the doorway to post a requisition on any job board. A requisition must be posted on a career section before being posted on eQuest.
- Staffing agents: a user 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 the Setup page, under Preferences.

Depending on how settings are configured by the system administrator, a requisition may need approval before being posted. When an approval is required, the approval requirements will be displayed in the requisition file Approval Path tab.

When the last position of a requisition is filled, the requisition is automatically unposted from the company's career sections and intranet, and the requisition is no longer displayed in the requisition list. Users might have to remove the requisition manually from other sites. Also, the step for remaining candidates is changed to Rejected.

Users must have the required user type permission to be able to post requisitions. Also, different permissions are also required to perform certain posting actions.

Benefits

- Allows a user to target where a requisition will be posted.

Allowing the Posting of a Requisition

Prerequisite

A user type permission grants users access to this feature.

A requisition must have been prevented from being posted in order to allow the posting.

Steps

1. In the requisition file, select Allow Posting... in the More Actions list.
2. Enter a comment.
3. Click Done.

Result

The icon is no longer displayed in the requisition file left panel as well as in the Requisitions list. The requisition that has been prevented from being posted can now be posted.

Preventing the Posting of a Requisition

Prerequisite

A user type permission grants users access to this feature.

The requisition must not be posted.

A requisition must be approved and ready.

Steps

1. In the requisition file, select Prevent Posting... in the More Actions list.
2. Enter a comment.
3. Click Done.

Result

The icon is displayed in the requisition file left panel as well as in the Requisitions list. Also, the Posting and Sourcing action is deactivated so that it becomes impossible to post the requisition even if it is ready for posting.

Posting a Requisition on a Career Section

Prerequisite

A user type permission grants users access to this feature.

The Status must indicate Open.

The Status Details must indicate Approved (Ready), Unposted or Expired.

There must be no Organization, Location and Job Field associated to the Career Section or, the Organization, Location and Job Field of the requisition and the Career Section must match.

Career section must be active.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. Select the posting start date and end date for the desired career section.
4. Click Post.

Result

The status of the requisition is Posted. Information regarding the posting is displayed in the requisition Career Sections section. Once a requisition has been posted, candidates can start applying.

Unposting a Requisition from a Career Section

Prerequisite

A user type permission grants users access to this feature.

The requisition must be Approved.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Career Sections section, click Modify.
3. In the Posting Requisitions page, click Unpost.

Result

The status of the requisition is Unposted. Candidates can no longer apply via this career section.

Posting a Requisition on a Job Board

Prerequisite

A user type permission grants users access to this feature.

The Status must indicate Open.

The Status Details must indicate Posted.

A requisition must be posted on a career section before being posted on eQuest. A requisition must be posted on an external company career section for at least the same time as on eQuest job boards.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards (eQuest) section, click Modify.
3. Verify and complete requisition and company information as necessary.

   See eQuest help if necessary.
4. Click Post Job.
5. Review information in the Final Confirmation window.
6. Click Post Job.

Result

The status of the requisition is Posted. Information regarding the posting is displayed in the requisition Job Boards (eQuest) section. Once a requisition has been posted, candidates can start applying.

The eQuest feature brings the user to another service which is not the responsibility of Taleo Corporation. Posting requisitions on certain job boards through eQuest may imply additional costs and fees independent of the services offered by Taleo Corporation. The selections you make will be effective once you quit the eQuest portal and return to Taleo Recruiting. Once postings have been made, information on dates and status will be available in the requisition Posting and Sourcing tab.

Unposting a Requisition from a Job Board

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Job Boards (eQuest) section, click Modify.
3. In the Posting Requisitions page, click Unpost.

Result

The status of the posting for the job board is Unposted. Candidates can no longer apply via this job board.

Posting a Requisition on a Job Board with a Future Start Date

Prerequisite

A user type permission grants users access to this feature.

The requisition must be active. Status must indicate Open and the Status Details must indicate Posted.

A requisition must be posted on a career section before being posted on eQuest. A requisition must be posted on an external company career section for at least the same time as on eQuest job boards.

Steps

1. In the requisition file, enter a date later than the current day's date in the Opening Date field.
2. Select the Posting and Sourcing tab.
3. Post the requisition on an internal career section that is unavailable to both internal and external candidates, specifying today's date in the Start Date field.
4. Post the job to eQuest, specifying the future date on which you want the job to be displayed on USAJOBS.

Result

The requisition is displayed on USAJOBS on the correct future date automatically because USAJOBS allows the queuing of jobs.

Posting a Requisition to Non-Electronic Media

Prerequisite

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

A requisition must be Approved to be posted.

Steps

1. In the requisition file, select the Posting and Sourcing tab.

2. In the Non-Electronic Media section, click Request Service.
3. Select a medium.

   If you want to select a medium amongst your preferred non-electronic media, select the option Preferred non-electronic media located on the left pane.
4. Specify the start date and end date of the posting.
5. Click Next.
6. In the Posting Requisitions page, select the agency that will post the job ad.
7. Click Done.

Result

The agency will receive a request to post the requisition to the selected non-electronic media such as newspapers, magazines, billboards, etc.

Unposting a Requisition from Non-Electronic Media

Allows users to remove the posting of a requisition on a non-electronic media.

Prerequisite

A user type permission grants users access to this feature.

The requisition must be posted on a career section.

The requisition must be approved.

Posting must not be overdue.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Non-Electronic Media section, click Request Service.
3. Browse mouse over the name of a non-electronic media.
4. Click .

Requesting Resume Searching

Allows users to ask an agency to search for resumes over the internet.

Prerequisite

A user type permission grants users access to this feature.

A requisition must be Approved to be posted.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Internet Mining section, click Request Service.
3. In the Posting Requisitions page, select an agency.
4. Click Done.

Result

The agency will receive a request to search for resumes over the internet.

Requesting Sourcing Strategy

Allows users to ask an agency to find relevant media before preparing an ad request.

Prerequisite

A user type permission grants users access to this feature.

A requisition must be Approved to be posted.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Sourcing Strategy Request section, click Request Service.
3. In the Posting Requisitions page, select an agency.
4. Click Done.

Result

The agency will receive a request to find relevant media.

Requisition Posting via a Staffing Agent

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.

Detailed Description

Agency portals (or agency career sections) 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 user can decide to use staffing agents to help him/her find candidates for the job. The list of agents available is dependent on the organization, location and job field selected for the requisition. The user 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. Note that 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 Taleo agency portal, locates the requisition associated to him/her and refers a candidate. When referring a candidate, the agent must first verify if the candidate already exists in the database by entering the candidate’s email address and performing a duplicate check. If the candidate does not exist in the database, the agent is able to refer the candidate.

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 user can easily identify candidates referred by an agent with this 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.

As per the configuration aspect of the feature, the system administrator is responsible for creating the agency portal as well as the application flows used by agents and agencies to refer candidates. For more information, see the Career Section Administration Manual. Once the agency portal and flows are created, the system administrator creates agencies and agents. It is necessary to create an agency because every agent is linked to an agency to be functional. An agency is not linked to a portal; only an agent at an agency is linked to a portal.

Inviting an Agent to Refer Candidates

Prerequisite

A user type permission grants users access to this feature.

The requisition must be Approved.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Staffing Agents section, click Modify.
3. Select an agent.

   If no agents appear in the Agent Selector window, check with your system administrator to ensure the proper career section and agents have been created.
4. Select start and end dates, for the agent.
5. Click Post.
6. Click Done.

Result

The agent has been invited to refer candidates for the requisition available in an organization.

Preventing an Agent from Referring Candidates

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the requisition file, select the Posting and Sourcing tab.
2. In the Staffing Agents section, click Modify.
3. Click Unpost.
4. Click Done.

Result

The agent is no longer invited to refer candidates for the requisition for a position available in an organization..

Source

Recruiting Source

A recruiting source is a medium or event through which a candidate has heard about the job posted or about a company.

Detailed Description

Sources are used for source tracking purposes. Sources may be as diverse as Internet job boards, job fairs, magazines, specialized trade publications, newspapers, professional associations, mailing lists, recruiting agencies, etc.

Two types of sources exist:

- System-defined sources: These sources are provided by Taleo and cannot be deleted from the database. However, they can be removed by the system administrator. 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 form the sources list, it no longer appears to users in Taleo Recruiting Center, unless users can access Taleo 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 the system administrator, that is if the source is used in the profiler, in a requisition, in both, or in none.
- User-defined sources: These sources are created by the system administrator. A user-defined source can be permanently deleted from the sources list, provided it is not in use. 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 the system administrator even if the source is in use.

The system administrator can configure the use, the visibility and the Organization-Location-Job Field structure of a source.

- Use: a source is required by users when creating a requisition (use = in requisition). A source can also be used by candidates when entering their profile in a career section (use = in profiler). 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 Taleo 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
- Visibility: The visibility of a source can be set to internal or public. An internal source can be viewed only by users. A public source can be viewed by candidates in career sections and by users in Taleo Recruiting Center.
- Organization-Location-Job Field structure: 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 OLF block and therefore the system is just set to not look at the OLF when defining what sources to display.

Benefits

- Allows your organization to know how many candidates applied through each source.
- Provides data on the performance of each source allowing your organization to better decide where to post jobs.
- When posting a job, only the sources relevant to the context are included and available for candidates to choose from.
- Provides the ability to efficiently manage large numbers of sources.
- Does not require any settings activation.

Source Tracking

Source tracking allows users to know how the candidate has heard about a position.

Detailed Description

Users have the option to embed the ID of an event or of a source into the URL that sends the candidate to a Career Section. By using the ID of a source or an event in the URL of a Career Section, it is possible to track the event or the source from which the candidate has heard about a position.

If a source code is the same as the event code, the source code will win over the event code. Therefore, the same code should not be used for a source and an event.

There are technically three levels of source tracking:

Level	Item	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

The system administrator can determine at what level the tracking will take place:

- Source: Sourcing performance is measured in terms of the source only.
- Event: Sourcing performance is measured in terms of a specific event related to a source.

To collect sourcing data, the application can be configured to ask candidates where they heard about the job they are applying for. The choice of answers for each job posted can be specified by the administrator in Recruiting Configuration. Recruiting Center users can then view data in various layouts of the Source Tracking Report.

Note: Agencies and agents appearing under the Corporate Sources List are created under the Agencies section of Recruiting Configuration.

Adding a Source to a Requisition

Prerequisite

A user type permission grants users access to this feature.

The organization, location and job field of the source and of the requisition must match or the source must not be associated to any organization, location and job field.

Source must be active.

Steps

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify.
4. Click Select next to the desired source.
5. Click Done.

Result

The selected source appears in the Modify Source List section of the requisition. Users can add sources to a requisition to know how candidates have heard about a position.

Removing a Source from a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition.
2. Click the Posting and Sourcing tab.
3. In the Modify Source List section, click Modify.
4. In the Posting Requisitions window, click next to a selected source.
5. Click Done.

Result

The selected source no longer appears in the Modify Source List section of the requisition.

Event

Recruiting Event

An event is a specific advertisement in a trade magazine, a recruiting event on a university campus (job fair), or a special recruiting event at an organization.

Detailed Description

Events allow users to track down which event/banner/campaign are attracting the most candidates to their career sections. Events are created by the system administrator and are linked to a specific source. When a source is used in a source list of a requisition (in requisition) or a general profile (in profiler), any event created for that source is also populated in the list.

For events to be made available in requisitions or in general profiles, the system administrator must set the *Tracking Mode* setting value to Event. This will display the Events column in the Corporate Sources List and from there, the system administrator will be able to configure events.

For tracking purposes, the event ID which is unique, can be embedded into the URL that sends the candidate to a career section. Therefore, when a candidate logs to a career section, the URL will include the event from which the candidate has heard about the job posting or the company. For details, refer to the Career Section Administration Manual.

The properties of an event can be modified even if the event is used in a requisition or in a general profile.

Benefits

- Provides data on the performance of each event allowing an organization to better decide where to post jobs.

Creating an Event

Prerequisite

The source must be created.

The *Tracking Mode* setting must be set to Event.

The *Access Source Tracking configuration* user type permission must be granted in the SmartOrg user type feature.

Configuration > [Recruiting] Administration > Sources

Steps

1. On the Corporate Sources tab, click the number in the Events column next to a source.
2. Click New...
3. Complete the fields.
4. Click Done.

Result

The event appears in the Events list of the source. Candidates will be able to select this event in the Career Sections.

External Services

Screening Service

An organization can choose to have external partners provide specialized screening services.

Detailed Description

An organization can choose to have some services executed by a third party. 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 the support service 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 the support service, the service can be activated or deactivated by the system administrator and made available or not to users when creating a requisition.

All screening services have the same properties, however, the settings of these properties will vary according to the service. The system administrator can configure the screening service i.e. 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 users provided they have been granted the user type permission. User type permissions are granted by an administrators through the SmartOrg product.

Benefits

- Allows an organization to delegate specialized services to third party providers.
- Allows an organization to concentrate resources on recruiting services.

Requesting a Screening Service

Prerequisite

A screening service must be available in the application.

A user type permissions grants users access to this feature.

Candidate must be in a selection process.

Steps

1. In the Candidate list, click on the name of a candidate.
2. In the More Actions list, select Request Screening Service.
3. Select a service from the Available Service drop-down list.
4. Comment is necessary.
5. Click Done.

Result

Candidate will receive a request from a screening service.

Offer

Offer

Offer

An offer contains the terms and conditions of a job.

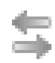
Detailed Description

The offer process can be started once a candidate has been moved to the Offer step. All offer-related actions are available in the candidate list or from anywhere in the candidate submission via the More Actions list.

The offer form, available in the candidate file Offers tab, is where all the information is gathered to create an offer. It contains not only the information about the current offer to be made to a candidate but it can also be used to collect and maintain information on previous offers, competitive offers, and offer expectations.

To create an offer, a user clicks Create Offer in the More Actions list. This action is available from the candidate list and from any tab in the candidate file. Note that to create an offer, a user must have been granted the proper user type permission.

In the offer form, each offer appears in a specific column. When a new offer is created, it automatically appears in the first column to the left and is labeled Offer (New). It is possible to view up to four columns at a time and users can use the arrows in the top right corner of the center panel to navigate through more offers as desired. Users can also use the drop-down option at the top of each column to change or remove the context being viewed.

When creating an offer for a candidate, it is possible to use information from another offer column, such as the terms of a previous offer, by using the icon . This icon appears when hovering the mouse at the top of a column or beside rows or sections of the offer form. By clicking this icon, a user can move fields to the new offer all at once or individually. Note that previous offers are for reference only and cannot be modified. When choosing to carry over an entire offer column or section, the only field that will not carry over automatically is the actual offer correspondence. To carry over an offer correspondence, the user must select this row individually and explicitly choose to move it across. This is because the information in the prior offer will not automatically reflect the new offer details, users choosing to use prior offer correspondence will need to manually update the prior offer to reflect any changes in terms from the prior offer on which the correspondence was initially created.

When in the offer form, if the user has been given appropriate permissions, it is possible to look at offers presented to the candidate for other requisitions by clicking the Other Offers link located in the left panel.

There can only be one current offer per candidate application at a time. The current offer can be modified until it is approved or extended to a candidate, after which only the start date and expiration date can be modified. Changes made to the start date and expiration date are tracked by the system.

Once all required offer fields have been completed, the user can submit the offer for approval. The user can review the current offer approval details at any time by going to the candidate file Offer Approvals tab. Approval information is available in the candidate file Offer Approvals tab.

If a user has been granted the proper permissions, the Amend Approval Path and Terminate Approval buttons can be available.

Benefits

- Improved usability: fewer clicks to take offer-related actions.
- Ability to create new offers by leveraging data from prior offers (including the offer correspondence).
- Easy access to offer approval information.
- Easy access to offers on other job submissions.
- All offer-related actions available in the More Actions list via the candidate list and via any tab with the candidate submission file.

Offer Statuses

An offer can go through different statuses.

Detailed Description

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.
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	fter 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

Creating an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

The candidate selection workflow must contain the RSOffer step.

Steps

1. In the candidate list, select a candidate file.
2. Select Create Offer... in the More Actions list.
3. Complete mandatory information.
4. Select required information.
5. Click Save and Close.

Next Step

Requesting an approval.

Making an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

Candidate selection workflow must not contain the RSOffer step.

Steps

1. Select a candidate file..
2. Select Make Offer... in the More Actions list.
3. Complete mandatory information.
4. Select required information.
5. Click Save and Close.

Result

The status is changed to “Offer” in a workflow that does not include offer management but does include a simple offer step.

Editing an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

Offer must be created but not approved.

Steps

1. In the candidate list, select a candidate file.
2. Select the Offers tab.
3. Click Edit under an offer.
4. Edit information.
5. Click Save and Close.

Result

Offer is modified before being approved.

Next Step

Requesting an approval.

Cancelling an Offer

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached an Offer step.

An offer must be created but not extended to candidate.

Steps

1. In the candidate list, select a candidate file.
2. Select Cancel Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

Result

The offer is no longer approved, and no request to approve the offer is in process. The offer approval process is stopped and reset.

Extending an Offer in Writing

Prerequisite

A user type permission grants users access to this feature.

A setting allows the configuration of the feature.

Candidate must be at an offer step.

Offer must be approved.

Steps

1. In the candidate list, select a candidate file.
2. Select Extend Offer... in the More Actions list.
3. Select the option Extend by letter, email, or fax via the correspondence.
4. Click Done.

Result

Offer is communicated to the candidate either by mail, email or fax.

Extending an Offer Verbally

Prerequisite

A user type permission grants users access to this feature.

Candidate must be at an offer step.

Offer must be approved.

Steps

1. In the candidate list, select a candidate file.
2. Select Extend Offer... in the More Actions list.
3. Select the Extend Verbally option.
4. Click .
5. Select the current date in the calendar.
6. Select the capture candidate response, if necessary.
7. Click Done.

Result

Offer is communicated verbally to the candidate.

Next Step

Sending an offer

Sending an Offer

Prerequisite

A user type permission grants users access to this feature.

Offer must have been extended to candidate verbally.

Steps

1. In the candidate list, click on a candidate file.
2. Select Send Offer... from the More Actions list.
3. Complete mandatory fields.
4. Select required information.
5. Click Next.
6. Click Send.

Result

The offer previously communicated verbally is sent to the candidate with the selected medium.

Capturing the Candidate Response

Prerequisite

A user type permission grants users access to this feature.

Offer must be approved.

Offer must have been extended to candidate verbally.

Steps

1. In the candidate list, select a candidate file.
2. Select Capture Response... in the More Actions list.
3. Select the response the candidate has made to the offer.
4. Click Next.
5. Complete required information according to the response given by candidate.
6. Click Done.

Result

The response to an offer made verbally to a candidate is entered in the candidate file.

Next Step

Sending the offer.

Capturing Candidate Expectations

Users can capture candidate expectations before a formal offer is made. Candidate expectations can be captured throughout the selection process, but most likely during an interview.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate list, select a candidate file.
2. Select Capture Expectations... in the More Actions list.
3. Select the type of expectation.
4. Click Create.
5. In the Desires (New) column, complete information.
6. Click Save and Close.

Editing Candidate Expectations

Prerequisite

A user type permission grants users access to this feature.

Candidate expectations must be included in file.

Steps

1. In the candidate file, select the Offers tab.
2. Click Edit in the expectations column.
3. Change information.
4. Click Save and Close.

Capturing Candidate Current Conditions

Users can capture candidate current work conditions for comparison purposes before a formal offer is made. Candidate current work conditions can be captured throughout the selection process, but most likely during an interview.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, select Capture Expectations... from the More Actions list.
2. Select Current Job.
3. Click Create.
4. In the current Job (New) column, complete information.
5. Click Save and Close.

Editing Candidate Current Conditions

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, select the Offers tab.
2. Click Edit next to Current Job column.
3. Make changes.
4. Click Save and Close.

Capturing Competitive Offer Information

Users can gather information on offers made by other companies. Competitive offer information can be entered in the offer form throughout the selection process, during interviews or telephone conversations.

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate list, click on a candidate file.
2. Select Capture Competitive... in the More Actions list.

3. In the Competitive Offer (New) column, complete information.
4. Click Save and Close.

Editing Competitive Offer Information

Prerequisite

A user type permission grants user access to this feature.

Competitive offer must be captured.

Steps

1. In the candidate file, select Capture Competitive...from the More Actions list.
2. Click Edit under the Competitive Offer column.
3. Complete the information.
4. Click Save and Close.

Cancelling an Accepted Offer

Prerequisite

A user type permission grants users access to this feature.

The offer must have been extended to the candidate.

Steps

1. In the candidate list, select a candidate file.
2. Select Rescind Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

Result

The offer is canceled although it was sent to the candidate.

Indicating a Candidate has Declined an Accepted Offer

Prerequisite

A user type permission grants users access to this feature.

The offer must have been extended to the candidate.

Steps

1. In the candidate list, select a candidate file.
2. Select Renege Offer... in the More Actions list.
3. Add a comment.
4. Click Done.

Result

The candidate file indicates that the candidat has declined an offer previously accepted.

Updating the Offer Expiration Date

Prerequisite

A user type permission grants users access to this feature.

An offer must be created.

Steps

1. In the candidate list, select a candidate file.
2. Select Update Expiration Date... in the More Actions list.
3. Select a new expiration date.
4. Click Done.

Result

The date before which the candidate must respond to an offer is changed.

Specifying if the Offer Start Date is Tentative

Prerequisite

A setting allows the activation of this feature.

The candidate must be at the Offer step.

Steps

1. In the candidate file, click on the Offer tab.
2. In the More Actions list, select Create Offer.
3. Under the start date section, select or not the Tentative option.
4. Click Save.

Result

The offer form now indicates if the start date is tentative or not.

Updating the Offer Start Date

Prerequisite

A user type permission grants users access to this feature.

An offer must be created.

Steps

1. In the candidate list, select a candidate file.
2. Select Update Start Date... in the More Actions list.

3. Select a new starting date.
4. Click Done.

Result

The starting date on which the candidate is required to start working is changed in the offer.

Using the Salary Calculator

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, select the Offers tab.
2. Click Edit in a column.
3. Click .
4. Complete fields as required.
5. Click Done.

Result

Salary related values generated by the calculator are automatically included in the file.

Offer Approval

Requesting an Offer Approval

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

Offer must be created.

Steps

1. In the candidate list, select a candidate file.
2. Select Request Approval....in the More Actions list.
3. Select the approvers. If desired, change the order of the approvers.
4. Select a user in the Assign the next task to field.
5. Enter comments.
6. Complete other necessary fields.
7. Click Done.

Result

The system assigns the task to the first approver in the sequence.

- If the approver is a Taleo Recruiting user, an Approve Offer task will be assigned to the user
- If the approver is not a Taleo Recruiting user, the approver will receive an e-share approver message.

Next Step

- If the approver is a Taleo Recruiting user, he/she can select the following actions: Approve, Reject, Pass, Pending.
- If the approver is not a Taleo Recruiting user, he/she can select the following actions: Approve, Refuse to Approve.

Modifying an Offer Approval Path Created by a User

Prerequisite

A user type permission grants users access to this feature.

Decision of approver must be pending.

An offer must be created for the candidate.

Steps

1. In the candidate list, click on a candidate file.
2. In the Candidate file, select Amend Approval Path in the More Actions list.
3. Add or remove approvers. If desired, change the order of the approvers.
4. Enter comments.

5. Complete other necessary fields.
6. Click Done.

Result

The system assigns the approval to the first approver in the sequence.

- If the approver is a Taleo Recruiting user, an Approve Offer task will be assigned to the user.
- If the approver is not a Taleo Recruiting user, the approver will receive an e-share approver message.

Next Step

- If the approver is a Taleo Recruiting user, he/she can select the following actions: Approve, Reject, Pass, Pending.
- If the approver is not a Taleo Recruiting user, he/she can select the following actions: Approve, Refuse to Approve.

Approving an Offer

Prerequisite

A user type permission grants users access to this feature

Steps

1. In your Tasks list, click Approve Offer.
2. Indicate your decision.
3. Enter comments if mandatory.
4. Click Done.

Approving an Offer via a BlackBerry

Prerequisite

BlackBerry must:

- Support HTML Tables
- Use Foreground and Background Colors
- Use Background Images
- Support Style Sheets
- Java Script is required on the login page if login authentication was activated via eShare.

A user type permission grants users access to this feature.

User must have received an e-mail on his/her BlackBerry.

Steps

1. In the email requesting approval, click Respond.
2. Provide a comment.
3. Click Done.

Result

User approved an offer without using Taleo Recruiting Center. Approved is indicated in the Decision column of the Approvals tab of the offer.

Approving an Offer on Behalf of Another Approver

Prerequisite

A user type permission grants users access to this feature.

Candidate must have reached the offer step.

Approval for offer must have been requested.

Steps

1. In the candidate list, click on a candidate file.
2. Select Amend Approval Path in the More Actions list.
3. Select Approve from the Decision drop-down menu.
4. Complete mandatory fields.
5. Click Done.

Terminating the Offer Approval Process

Prerequisite

A user type permission grants users access to this feature.

Approval must have been requested for the offer.

Offer must not have been extended to the candidate.

Steps

1. In the candidate list, click on a candidate file.
2. Select Terminate Approval Process... in the More Actions list.
3. Enter comments.
4. Click Done.

Requesting an Approval Path Amendment

Prerequisite

A user type permission grants users access to this feature.

Offer must have a the status To be approved.

Steps

1. In a candidate file, select Request Approval Path Amendment... in the More Actions list.
2. Click 🔎 to select a contributor.
3. Click Done.

Result

The colleague who has the proper user typ epermission will receive a task to amend an approval path.

Approval

Approval

Approval

An approval is the act of a user approving an element or asking others to approve an element.

Detailed Description

An approval can be requested for:

- requisitions
- offers

When an approval is requested, the user must choose from a list the name of the users who will be required to approve the requisition or the offer. 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 user will select approvers from a list containing all the users of the database. The user will also be able to create a list of preferred approvers via the Setup feature.
- If the dynamic approval routing is used within an organization, the user will select approvers from a short list of approvers configured within the Dynamic Approval Routing feature. The system administrator creates an approval path, linked to roles for which assignees are preselected. These assignees are displayed as approvers when requesting an approval, based on 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 element. Once approved, the approval request goes to the next approver, and so on.
- Parallel: All approvers receive an approval request at the same time and they can all approve the element at the same time.

If the standard approval process is used within an organization, the system administrator must activate settings to enable sequential or parallel approval. If the dynamic approval routing is used within an organization, approval will be sequential unless there are more than one approver for the same role, then approval will be parallel.

Users have the ability to approve requisitions and offers either via the Tasks feature and/or eShare. System administrators can choose the method(s) of approval for different users:

- eShare e-mail: 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 for *Enable eShare Center E-mail* is set to True (Recruiting Center > My Setup > Preferences).
- Tasks channel: Tasks will be available to the user if the system administrator has configured the Tasks channel into the user's center stage and/or the system administrator has granted access to the Core Navigation Bar in the user's configuration profile. Also, an approval task will only appear to the user if the user is “authorized to view” the requisition – that means the user would need to either be a collaborator on the requisition or authorized to view requisitions within his/her group.

- Either by eShare or the Tasks channel: 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 channel. Users can decide on approval from either location. Tasks executed from the eShare response center will be automatically updated in the user's Tasks channel as well. If an approval is executed from the Tasks channel, the eShare request will indicate that the decision has already been made and the eShare is no longer active.

User type permissions grant users access to the approval feature and approval-related actions.

Benefits

- Allows users to select approvers based on their role.
- Allows the system administrator to choose default approvers.

eShare Approval Acknowledgement

eShare users have the ability to receive a confirmation of their requisition or offer approvals.

Detailed Description

eShare users have the ability to receive a confirmation of their requisition or offer approvals. This feature is automatically active on all eShares sent from the system. When a user receives an eShare approval request, there is an available check box to trigger the receiving of an approval acknowledgement. If the user chooses to receive the acknowledgement, upon completing his/her decision on the request, the user will receive an e-mail message confirming his/her action.

Six 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 acknowledgement sent will depend on the decision of the approver:

- Requisition Approved Acknowledgement
- Requisition Rejected Acknowledgement
- Requisition Passed Acknowledgement
- Offer Approved Acknowledgement
- Offer Rejected Acknowledgement
- Offer Passed Acknowledgement

Note that approvals decided via the Tasks channel do not have an acknowledgement option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

Approvers

Approver

An approver is a Taleo Recruiting user who will approve requisitions and/or offers.

Detailed Description

A list of default approvers can be defined by the system administrator at the department level. A list of personal default approvers can also be defined by the 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 approvers are selected under My Setup, these approvers will be automatically selected.
- If approvers are not selected under My Setup, the approvers set for the department 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.

Benefits

- Simplifies requisition and offer creation for users.
- Prevents re-typing the same list of approvers for each requisition or offer.
- Prevents approval path errors.

Creating a List of Frequent Approvers

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click My Setup link located in the top right-hand corner.
2. In the Frequent Approvers tab, click Add...
3. Select one or several approvers.
4. Click Done.

Result

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer overwriting the default approvers set by the system administrator.

Adding an Approver to the Frequent Approvers List

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click My Setup link located in the top right-hand corner.
2. In the Frequent Approvers tab, click Add...
3. Select one or several approvers.
4. Click Done.

Result

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition and/or offer. The system cannot modify the approver list a user has set under My Setup.

Removing an Approver from the Frequent Approvers List

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click My Setup link located in the top right-hand corner.
2. In the Frequent Approvers tab, click Modify...
3. Hover your mouse on the name of an approver.
4. Click on the that appears.
5. Click Done.

Result

The approver no longer appears in the Approvers list under My Setup.

Modifying the List of Frequent Approvers

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Frequent Approvers tab, click Modify...
3. Select one or several approvers.

4. Click Select.
5. Click Done.

Result

The approvers appear in the Approvers list. These approvers will be automatically selected when requesting the approval of a requisition or offer overwriting the default approvers set by the system administrator. The system cannot modify the approver list a user has set under My Setup.

Search

Quick Search

Candidate Quick Search

The candidate quick search allows users to quickly find specific candidates.

Detailed Description

The candidate quick search is available at the top right hand corner of 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 candidate quick search, the search engine will search for candidates who applied on a job, submitted a profile or are registered but did not apply on a job (that is a person who referred a friend for a job and who had to register himself/herself as a new user).

When performing a candidate search, users can enter partial (either the first or family name) or complete names in the field. However, a best practice is to enter complete names to obtain more exact 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 hyphenate's his/her last name, it is not required to enter both names. Let’s say Smith-Jones is the name you are looking for; entering smith will only bring you candidates whose last name, fisrt name, username or first part of the email address is smith. Entering smith jones (smith space jones) will bring you back Smith-Jones.

If users have been granted permissions to access candidate identification information, the candidate search will allow users to search by:

- candidate identification number only (you must use at least three 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
- e-mail address
- user name

The candidate quick search searches for all the search terms in all five fields. For this reason, the specific candidate search often produces search results that are more relevant than those generated by the candidate quick search.

Benefits

- Users can quickly locate candidate files.

Performing a Candidate Search

Prerequisite

Settings allow the activation of this feature.

User type permissions grant users access to this feature.

Steps

1. In the Search tool, select Candidates.
2. Enter the candidate first name, last name, identification number, user name and/or email address.
3. Click .

Result

Users can quickly find a specific candidate file. Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Filter the list of candidates using quick filters.

Put search results in a folder or print them.

Editing a candidate file

Specific Candidate Search

The specific candidate search can be considered to be an extension of the candidate search.

Detailed Description

The specific candidate search is available at the top right hand corner of 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.

The specific candidate search can be considered to be an extension of the candidate quick search in that it offers greater searching precision.

If user permissions give access to candidate identification information, the candidate search will allow users to search by:

- candidate identification number only (you must use at least three 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
- e-mail 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 search.

Wild card can be used with 1 or 2 characters in the specific candidate search, to support searching for combined words. For example, d* in first name and magnan in last name will return all magnan with first name starting by d, while d* magnan in quick search is not supported, because searching for d* in all 5 fields typically returns too much entries for the search result to display in a performant manner.

Performing a Specific Candidate Search

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the Search tool, select Specific Candidate.
2. Enter information in the fields.
3. Click Search.

Result

Userscan search for candidates using the First Name, Last Name, Initial, Email Address and/or Candidate ID fields. Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Edit a candidate file.

Print search results.

Match candidate to requisition.

Requisition Quick Search

The requisition search allows users to quickly find specific requisitions.

Detailed Description

The requisition quick search is available at the top right hand corner of 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.

The requisition quick search allow users to enter the title, the number or a keyword to find the desired requisition. A wildcard 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, the search engine looks through all the content of the requisition file.

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, only up to 300 matching files are displayed.

For more information on this feature, see the recording http://bit.ly/WGuw7.

Benefits

- Users can quickly locate requisitions.

Performing a Requisition Search

Prerequisite

Settings allow the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the Search tool, select Requisitions.
2. Enter a keyword in the field.
3. Click 🔍.

Result

Users can quickly find a specific requisition file using a keyword. Requisitions that satisfy the search criteria are displayed in the search results list.

Next Step

Filter the list of requisitions using quick filters.

Print Search results.

Setting Default Search Criteria

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired value in the Last Update and Place of Residence fields.
4. Click Save.

Result

The value selected for the Last Update and Place of Residence search criteria will be used in all types of candidate search. Note that the "Within x Miles of ZIP/Postal Code" or "Within x km of ZIP/Postal Code" search results could include candidates living outside the specified area or exclude candidates living within the specified area. If candidates do not specify their ZIP code or postal code, the place of residence will be used.

Advanced Search

The advanced search allows users to search for candidate files using an array of criteria that are different than the ones used in the search function.

Detailed Description

The advanced search is available at the top right hand corner of pages. It is displayed to users if it has been activated in the user's configuration profile.

When performing an 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 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.

By default, the following search criteria are included in the advanced search form:

- Keywords
- External/Internal Candidate
- Last Update
- Place of Residence
- Disqualified Candidate

A user type permission allows users to add other search criteria provided they were made available by your system administrator. The system adminsitrator can also define different default pages.

For many search fields, you 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.

Example of an advanced search.

Field	Value
Disqualified Candidate	Excluded.
Place of Residence	Within 25 miles of location; US > FL > Jacksonville. Required.
Preferred Job	Category: Technology; Function: Network Engineering. Required.

Field	Value
Preferred Job	Category: Technology; Function: System Administration. Required.
Education	Program: Computer Engineering; Education Level: Bachelor’s Degree

After running the above search, the search engine would return the following candidates:

- Candidates who had not been disqualified, AND
- Candidates who lived within 25 miles of Jacksonville, Florida, AND
- Candidates who had indicated a preference for work in network engineering or system administration, AND
- Candidates without any job field, AND
- Candidates who had a Bachelor's degree in computer engineering.

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 Search with Keywords

Keywords can be used when performing an advanced candidate search.

Detailed Description

The Advanced Search looks for keywords in the Candidate Profile and in up to five most recently attached files: three attached by candidates and two attached by users. The attached files must be in a supported file format.

An entire word or 3 characters with a wildcard (*) can be used as a keyword. When performing an advanced search using the Keywords field, the search engine looks through the following content of the candidate file:

- candidate name
- candidate address
- candidate phone number
- pasted resume of the profile
- cover letter of the profile
- additional information of the profile
- text answers to prescreening questions from the library
- program descriptions of the profile
- institution descriptions of the profile
- employers' names of the profile
- job function descriptions of the profile
- user comments
- source descriptions

- event descriptions
- all text-based custom fields
- the last two files attached by any user
- the last three files attached by the candidate provided they use one of the following supported file formats:
  - .doc, Word. Warning: the docx Word 2007 format is not supported, only the standard Word format.
  - .txt, standard text file
  - .rtf, Rich Text Format
  - .pdf, Adobe Portable Document Format
  - .htm or .html, hypertext documents
  - .wpd, WordPerfect

Conjunctions, prepositions, articles and other words that are not key to searches are ignored by the search engine. Such words are often called "stop words". Also, words entered in the Keywords field are highlighted in the candidate files returned by the search engine.

When performing an advanced search using the Keywords field, the following options are available:

- Exact Term
- Related Terms
- Conceptual

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 wildcard character *, 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: When you perform a Keywords search with Related Terms selected, words that match exactly the terms you entered and words with the same root, or of the same family are returned, and entered words are highlighted. Selecting Related Terms generally broadens the scope of your search. Wildcards, Boolean operators and parentheses cannot be used with Related Terms selected. The system applies the OR operator between words.

Example: If you enter "secretary" with Related Terms selected, the system would retrieve candidate files that contain "secretary" and typically words such as "receptionist," "stenographer," or "bookkeeper". It is usually best to use relatively "generic" search criteria rather than specific ones. For example, by specifying "banking," related banking terms and the names of specific banks may be among the results.

Keywords and Conceptual: 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.

Keyword 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 setting allows your system administrator can limit the number of highlighted words. 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. Note that words are highlighted throughout the entire candidate file, even the labels, so some of the highlighted words are not used to retrieve the candidates.

Advanced Search and Multiple Occurrences of Information Blocks

When performing an advanced search, it is possible to use multiple occurrences of the Education and Work Experience blocks.

Detailed Description

When using multiple blocks, the OR operator is used.

If you use multiple occurrences of blocks, care should be taken in choosing fields and in making selections from the Required, Desired and Excluded options.

The following examples demonstrate how multiple Education blocks can be used to perform highly precise searches. The same principles apply to multiple Work Experience blocks.

Example 1: In this example, the search results would contain either candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4, or candidates with a college diploma in computer information systems and a GPA between 3.5 and 4. Note that both Education blocks are Required.

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 - Search Value
Education Block 2	Required
Program	Computer Information System
Education Level Achieved	Associate’s Degree/College Diploma
GPA is at least	3.5 out of 4

Example 2: In this example, the search results would contain only candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4. Candidates who studied at McGill University—regardless of the program, education level, and GPA—would appear higher on the results list than those who had never attended the school. Note that the first Education block is Required and the second one is Desired.

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 -Search Value
Education Block 2	Desired
Institution	McGill University
GPA is at least	3.5 out of 4

Example 3: In this example, the search results would contain only candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 provided they never attain McGill University. The following candidates (among others) could conceivably appear in the search results:

Education Block 1 - Search Field	Education Block 1 - Search Value
Education Block 1	Required
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

Education Block 2 - Search Field	Education Block 2 - Search Value
Education Block 2	Excluded
Institution	McGill University
Program	Computer Information System
Education Level Achieved	Bachelor's Degree
GPA is at least	3 out of 4

- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University.
- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University and with a Master's degree in computer information systems at McGill University.

- Candidates with a Bachelor's degree in computer information systems and a GPA between 3 and 4 at Brown University and with a second Bachelor's degree in computer information systems at McGill University and a GPA of only 2.

Note that the first Education block is Required and the second one is Excluded.

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.

Detailed Description

Once the conceptual search is activated, the system administrator can control which users will have access to conceptual search by granting them a user type permission. Please note: even if customers have not activated the conceptual search, they will have the user type permission available in their list of permissions but the permission has no function until the module is activated by Taleo.

The conceptual search is available via the advanced search. When selecting the Conceptual option, users must enter significant text in the Keywords text box like a job description or a paragraph describing the ideal candidate. On top of that, users can increase the conceptual search with any specific fielded 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 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 users 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 a minimum amount of structured fields. This tool can be used when 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 a user wants to know if there are other candidates whose records contain similar information.

The conceptual search uses mathematical algorithms to assign a weight to each word in a block of data with the exception of stop words—conjunctions, prepositions, articles and other words that are not key to searches—taking into account the other words in the text and their relationships with each other. It then searches for candidate files that contain similar text-based information.

The conceptual search looks for patterns in text with a special algorithm and figures out the subject of the text while the advanced search is looking for exact matches with exact field values. The conceptual search is designed to recognize themes and concepts based on your input. For example, searching with an interesting candidate's academic background generally gives better results than searching with the candidate's academic background and personal information such as address.

The conceptual search cannot retrieve disqualified candidates because they are not indexed in the database.

Boolean Operators

Boolean operators are used when performing an advanced search using a keyword.

Detailed Description

Boolean operators that can be used with keywords in the advanced search are:

- AND: Place AND between search terms to search for candidate files that contain all of the terms. For example, a search for university AND librarian will retrieve candidate files that contained both the words university and librarian.
- OR: Place OR between search terms to search for candidate files that contain at least one of the terms. For example, a search for university OR college will retrieve candidate files that contained either word or both words.
- NOT: Place NOT before search term to exclude candidate files that contain the terms you specify. For example, a search for computer NOT technician will retrieve files that contained the word computer but only if they did not contain the word technician.
- * (wildcard): You can place a wildcard character within or at the end of a word but not at the beginning of a word. A minimum of 3 characters must be used with the * (wildcard). For example, a search for comput* will retrieve all words that begin with comput such as computer, computing, computers, computation. Note that the wildcard character ? is not supported.
- Quotation marks: Use quotation marks to search for occurrences of an exact expression. For example, a search for "database administrator " will retrieve candidate files that contain the exact term database administrator with no terms or punctuation separating the two words.
- Parenthesis: 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.

Neither search terms, nor operators are case-sensitive.

If you do not use Boolean syntax and simply enter a number of words in the Keywords field, those candidate files that contain all of the terms will be retrieved.

If the words AND, OR, or NOT are present in the Keywords field, the search engine assumes they are Boolean operators.Users cannot search the words OR, AND, or NOT as they are not recognized as words but as booelan operators. Boolean operators are not recognized as a string in the search field or in the text being searched. If boolean operators are used in double quotes, they are ignored.

Randomized Search Result

The randomized search result feature allows users to specify that the information contained in the advanced search result list be returned in random order.

Detailed Description

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. It could be candidate number 1, 2, 13, 57, 423, 789, etc. As soon as a candidate matches the search criteria, the candidate is displayed, even the least matching candidate, as long as this candidate meets the mandatory criteria. No pattern is used; therefore, if you run the same exact search again, the list of candidates returned will be completely different.

An advanced candidate search done without randomization will return all candidates matching search criteria and display the first 300 candidates or less, based on the number of returned candidates in the candidate list. The first 300 candidates will be displayed based on relevancy but sorted on the list definition. Thus it is always the same set of candidates, but sorted differently. If required criteria are used instead of relevancy then the 300 returned candidates to work with are all valid candidates and are not displayed in a particular order.

Performing an Advanced Search

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Advanced Search.
2. Enter information in the fields.
3. Click Search.

Result

Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Filter the list of requisitions using quick filters.

Put search results in a folder or print them.

Why Advanced Search is not Displaying Expected Results

Certain elements could have an impact on advanced search results.

Detailed Description

Segmentation: In a global environment, data segmentation, if activated, might exclude a lot of candidates from the search results. Make sure to verify if your company has introduced such restrictions and if this is the case, verify the impact and what, as a user, you are entitled to view. There are two dimensions to data segmentation: a permission per user type whereby what users can view is determined by their respective staffing type; and a recruiting setting allows users to indicate if candidate search results are restricted based on the search domains of each user's groups and personal coverage areas. A user This is probably the most complex case to validate. While it might be easy to manage only a few groups around specific organizations, segmentation can be difficult to clearly understand if users are associated with multiple groups incorporating various organizations, locations and job fields

Incomplete applications: There are a significant number of candidates who never complete their applications for various reasons. An incomplete general application might not be retrieved in a search result if the system configuration excludes their applications. Note that up to 30% of candidates might not have completed their application. An interesting alternative to not displaying such candidates is to display them but to use the “incomplete application” column (to do so, activate the Complete Application Indicator column in the List Format Configuration window and look at the candidate files that have no checkmark in this column). Remember that the “incomplete application” flag refers to the online application process, not to the completeness of the candidate file. You might have detailed candidate files with a lot of information not displayed because the candidates didn’t complete the application process online. On the other hand, you might have partial candidate files, that were captured or imported and whose basic information has the “complete” flag, even if only few fields were captured.

The incomplete application setting is an internal one, which can be activated only through a service request. It is important that you know if your organization has them displayed or not because thousands of candidates might remain in an incomplete state and never be retrieved by the search engine.

Identification missing: ”Identification missing” candidates are candidate files without first and last name and without the official “anonymous” flag. The name of the candidate does not appear; instead ”Identification missing” is displayed. Ask your system administrator if he/she has activated the *Display Identification Missing Candidates* setting.

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 he/she has activated the *Candidate Search Mask Processed* setting.

Excluding candidates in selection process who have attained or proceeded beyond a specific status: The *Search Most Advanced Submission Status* setting works in tandem with the *Allow users to recruit candidates being considered in other active requisitions* user type permission to prevent competitive recruiting. This setting sets the status from which the system is to stop showing candidates. If the candidate has attained or proceeded beyond the selected status in one of its submissions, the candidate will no longer be displayed in the search results. This prevents users from matching these candidates to additional requisitions and inviting them to apply for multiple positions. Ask your system administrator if he/she has activated that setting and user permission.

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). When the *Search Place of Residence Match Activation* setting is turned on, only exact matches are retrieved. 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. Taleo place of residence locations, which are centrally managed, increase in number as customers request that specific new countries be included. Taleo 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 Taleo feels it is fair to retrieve those candidates who never had the opportunity to indicate their structured place of residence. Some Taleo clients might want to change this setting however.

Search Result Archiving

The search result archiving feature allows users to select the requisition for which they want to archive search criteria and results.

Detailed Description

The search result archiving feature was introduced for U.S. clients in order to comply with a regulation of the Office of Federal Contract Compliance Programs (OFCCP) regarding the collection of gender, race and ethnicity data for each candidate. 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.

Settings allow the activation of this feature.

Configuration

Settings			
Name	**Possible Values**	**Default Value**	**Location**
OFCCP search trace activation	• Enabled (without requisition identification) • Disabled • Mandatory (without requisition identification) • Optional (with requisition identification	Disabled	Configuration > [Recruiting] Settings
OFCCP search trace candidate IDs activation	• Yes • No	Yes	Configuration > [Recruiting] Setting

Setting Default Search Criteria

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the Preferences tab, click Edit.
3. Select the desired value in the Last Update and Place of Residence fields.
4. Click Save.

Result

The value selected for the Last Update and Place of Residence search criteria will be used in all types of candidate search. Note that the "Within x Miles of ZIP/Postal Code" or "Within x km of ZIP/Postal Code" search results could include candidates living outside the specified area or exclude candidates living within the specified area. If candidates do not specify their ZIP code or postal code, the place of residence will be used.

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.

Detailed Description

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.

A user type permission and settings grant users access to this feature.

Benefits

- Helps to ensure candidates who do not apply for a specific job are also considered.
- Enhances the advanced search functionality.

Exclusion of Agency Owned Candidates in Search Results

Agency owned candidates can be excluded from candidate search results.

Detailed Description

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.

A user type permission grants user access to this feature.

Benefits

- Provides the option to exclude agency owned candidates from search results. Recruiters and hiring managers have a much more efficient experience as they no longer need to manually go through candidate files to make sure they are not off limits based on agency ownership agreements.

- Clients can more confidently manage agency agreements and expenses.
- Provides extended configurability when using agencies for candidate referrals.
- Provides reduced risk of unknowingly incurring agency costs.

Customizing the Advanced Candidate Search Form

Prerequisite

The Candidate Search option displayed in the Properties page of a field must be selected for the field to appear in the Available Fields list.

Configuration > [Recruiting] Administration > Candidate Search Page

Steps

1. Select a field in the Available Fields list.
2. Click Add.
3. Click Save.

Result

The field appears in the Selected Fields list. It is available to users when customizing the advanced candidate search form provided the *Advanced Search Toolbar* setting is activated in the Smartorg Configuration Profiles feature.

Next Step

Configuring the *Advanced Search Toolbar* setting in the SmartOrg Configuration Profiles feature.

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 users.

Detailed Description

A search query is a set of search criteria selected by the 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 pages. It is displayed to users if it has been activated in the user's configuration profile. Users can save a Query if the feature is activated in the user’s configuration profile and if the user type permission has been granted.

Two types of queries can be created:

- Personnal 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.

Benefits

- Saves time.
- Allows users to repeat the same search.

Saving an Advanced Candidate Search Query

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Advanced Search.
2. Enter information in the fields.
3. Click Save Query...
4. Enter information in the fields.
5. Click Done.

Result

The search query is available in the Search Queries window. User wil be able to repeat the same search in the future using the same fields and their respective values.

Adding a Search Criterion to an Advanced Candidate Search Query

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Search Queries.
2. Click on a search query.
3. Click Customize...
4. Click Select next to the criterion you want to add.
5. Click Done.

Removing a Search Criterion from an Advanced Candidate Search Query

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Search Queries.
2. Click on a search query.
3. Click Customize...
4. Click  next to the criterion you want to remove.
5. Click Done.

Duplicating a Saved Search Query

Prerequisite

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

Steps

1. Click Search Queries.
2. Open an existing query.
3. Click .
4. Complete fields.
5. Click Done.

Result

The query created from the duplication of another query is saved in the selected folder.

Editing the Search Query Properties

Prerequisite

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

Steps

1. Click Search Query.
2. Open a search query, click Properties.
3. Click Properties.
4. In the Search Query Properties window, make changes.
5. Click Done.

Deleting an Advanced Candidate Search Query

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Search Queries.
2. Select a search query.
3. Click .

Result

The search query is no longer available in the Seach Queries window.

Question, Competency, Disqualification Question Librairies

Question

Question Library

The Question Library contains all the questions that can be included in requisitions to prescreen candidates and find the best candidates for a job.

Detailed Description

A user type permission grants users access to the Question Library.

When accessing the Question Library, the screen is organized into three panes:

- Left pane containing three tabs. The pane can be expanded or collapsed.
-

Tab	Description
Library	Contains all the questions. Users can filter the list using dynamic filters such as the Active status, the In profile and In model criteria, the question visibility (all candidates, internal candidates, external candidates), the job field or location association, etc.
Job Field	Contains questions associated to one or more job fields. Users can display all questions associated to a job field as well as questions that have been tagged In profile or In model. A tree structure allows users to display questions associated to all job fields, or questions associated to a specific job field.
Location	Contains questions associated to one or more locations. Users can display all questions associated to a location as well as questions that have been tagged In profile or In model. A tree structure allows users to display questions associated to all locations, or questions associated to a specific location

- Right pane containing supporting tools such as the online help. The pane can be expanded or collapsed.
- Central pane containing a menu bar allowing users to perform actions on questions. The central pane also contains the list of questions. Questions displayed depend on the filters and options selected in the left pane.

Question

A question is used to prescreen candidates and find the best candidates for a job.

Detailed Description

Questions are created and configured in the Question Library. Questions available in the Question Library can then be added in the Prescreening section of a requisition file. A user type permission grants users access to the Question Library as well as to the actions that can be performed on questions in the requisition Prescreening section and in the Question Library.

Questions can also be created directly in a requisition. However, these questions are only available for the requisition and they are not available in the Question Library for other requisitions. If at a later date you use that same requisition to create a requisition template, the question that you created will not be added to the Question library. However, if the question is created for a requisition template, then the question will be added to the library.

Questions linked to a requisition are not duplicated in the requisition; they are re-used. Therefore, any changes made to such a question from the requisition will be applied to the question in the Question Library as well. These changes will therefore also appear in all requisitions to which this question is linked.

Three types of questions can be created:

Question Type	Description
Single Answer Question	The candidate can select one answer from a list of choices. • Example: *Please indicate the highest level of education that you have attained*.
Multiple Answer Question	The candidate can select as many answers as applicable from a list of choices. • Example: *Please indicate in which areas you have a demonstrated knowledge and understanding of (check all that apply)*.
Text Question	The candidate can type a brief answer in response to a specific question. Use text questions sparingly; use them where they can allow for expansion of information asked in a previous question. • Example: *Provide a short overview of a program you have designed and implemented that had impact on employee development.*

A question can have a maximum of 3000 characters.

Depending on the type of question created, different answer formats are available:

- radio button
- pop-up list
- checkbox

Each question is assigned a code. With this unique code, users are able to standardize questions and better control their import/export mechanism. When creating a question, users are required to assign a code to questions created in the Question Library. For questions created at the requisition level, a code is generated automatically.

Questions have one of the following statuses:

- draft
- active
- inactive

Even if a question has been used in the past, it is possible to inactivate the question in the Question Library. Once inactive, a question is retained on existing requisitions but cannot be used in newly created requisitions. Inactive questions are also removed from active templates and cannot be carried over when duplicating a requisition where a question was active. Also, now that a code is assigned to each question, it is easy to deactivate the right question when users realize they have a duplicate. In addition, users who manage questions can wait until a question is ready before making it available to end users.

Note that inactivated disqualification questions are no longer displayed in the requisition, candidate file or in career section. Recalculation of the disqualification flag is not done automatically, but once the candidate file is edited with the new set of questions, be in the recruiting center or the career section.

When creating a question in the Question Library, users can make the question visible to internal candidates, external candidates or all candidates.

When creating a question in the Question Library, the question can be associated to locations and job fields.

- If a question is not associated to any location or job field, the question will be available to users when adding questions to a requisition.
- If a question is associated to all locations and/or to all job fields, the question will be available to users when adding questions to a requisition only if the In Model option is selected.
- If a question is associated to specific locations and/or job fields, the question will be available to users when adding questions to a requisition if the In Model option is selected and if the question matches the locations or job fields of the requisition.

When associating a question to locations or job fields, the question can be made available in a profile or in a model:

- If a question is tagged "In profile", the question will be available to users who create a candidate file, and to candidates who are entering their profile in a career section. Questions made available will be sorted to match the location and job field preferences defined by the candidate.
- If a question is tagged "In model", the question will be available to users who complete the Prescreening section of a requisition. Questions will be grouped in a model based on the location and job field of the requisition.

Once a question is created in the Question Library, users can add it to the Prescreening section of a requisition file. When adding questions to a requisition file, users should consider balancing the number of questions with the expected candidate volume and job complexity.

The following table outlines the recommended number of questions as per the number of candidates expected and the job complexity.

	Difficult to Fill Position	Average to Fill Position	Easy to Fill Position
Number of Candidates Expected	Low - Less than 30	Medium - 30 to 100	High - 100 +
Recommended Number of Questions	8 or less	12 or less	As many as required
ACE Indicators	Use Required Use Asset optionally Do not use Weight	Use Required, Use Asset Use Weight optionally	Use Required Use Asset, Use Weight
% of Candidates Identified as ACE Candidates	15% and higher	10% to 15%	5% to 10%

The difficult to fill position expects few candidates. Less questions should be used. As a rule of thumb, do not exceed 8 questions (job specific and skills together).

The average to fill position should keep candidates engaged, but not lose them due to too many questions. As a rule of thumb, do not exceed 12 to 15 questions (job specific and skills together).

The easy to fill position expects a large number of candidates. You can use as many questions as necessary (job specific and skills together).

Question Writing Tips

Questions must be written to obtain useful data from candidates and to facilitate the hiring process. When creating questions to prescreen candidates, these simple rules will help you achieve these goals.

Tip	Description
Using the right amount of questions	Balance the number of questions with the job complexity and expected candidate volume.
Writing effective questions	The question should contain Required and Asset criteria. The question should help you sort candidates who apply for the position. The response to the question should provide value in determining the caliber of the candidate for the position.
Using Yes/No questions	Use Yes/No questions for straight-forward requirements. For other questions, consider answer ranges that make it less obvious what the correct answer is. Do not use a Yes/No question for question of type *Do you have a Bachelor's degree?*
Including an “Out” answer	Always include an “out” answer to the question such as None of the above, None or Not applicable. Otherwise you force the candidate to be untruthful. For example: *With which of the following software do you have experience? Microsoft Word, Microsoft Excel, Microsoft PowerPoint, None*.
Standardizing questions and answers	Standardize answer ranges to questions to give the candidate a positive experience. For example, always put “None of the above” at the top or bottom of the answer list. Also, all years of experience questions should have the same ranges in the same order. For example: *Indicate the highest level of education you have attained. High School Diploma, Associates Degree, Bachelor’s Degree, Master’s Degree, Doctorate Degree, None of the above*.
Reviewing grammar and spelling	A best practice is to review the questions and answers for grammar and spelling
Using strong verbs	Use strong verbs in questions such as “write a program” or “operate”. Avoid phrases containing words like “work with” or “involved in”.
Using known acronyms	Use only highly recognized acronyms such as IT.
Using examples in the question	Use examples if necessary and reveal more about the position within the question. For example: *In this position, you will be required to drive within a 200 mile radius to various merchandise outlets. Do you have a valid driver's license?*.
Adhering to legal guidelines	Adhere to legal guidelines by checking with your Employment Law and Diversity officers, keeping questions directly job-related (no personal questions). Also, do not create questions that may lead to discrimination.
Asking one question per question	Do not ask too many different questions within one question. For example, avoid questions such as this one: *Please indicate the number of years you have hands-on experience in marketing, accounting and/or manufacturing*. It would be more valuable to restructure the question completely or to simply have three different questions if it is important to know the number of years the candidates have worked within those three areas.
Separating questions for years of experience and proficiency	Many times, candidates are asked about the number of years they have performed certain tasks or worked within a certain industry. However, it can be more helpful to know the candidate's proficiency or how well he/she performs a certain task. Ask yourself if it is more important to know the number of years of experience or the level of proficiency to evaluate a candidate

Creating a Question

Prerequisite

A user type permission grants users access to this feature.

The question can have a maximum of 3000 characters.

Recruiting > Libraries > Questions

Steps

1. Click Create Question.
2. Select the type of answer.
3. Complete mandatory fields.
4. Select necessary information.
5. Click Save and Close.

Result

The question is available in the Question Library.

Next Step

Activating a question.

Activating a Question

Prerequisite

A user type permission grants users access to this feature.

The question must be draft or inactive.

Recruiting > Libraries > Questions

Steps

1. Select a question.
2. In the More Actions list, select Activate Question.

Result

The status of the question is Active. The question is available for selection in a requisition

Deactivating a Question

Prerequisite

A user type permission grants users access to this feature.

The question must be active.

Recruiting > Libraries > Questions

Steps

1. Select a question.
2. In the More Actions list, select Deactivate Question.

Result

The question remains in the Question Library with the Inactive status.

Editing a Question

Prerequisite

A user type permission grants users access to this feature.

If the question is active, only grammatical and typographical corrections are allowed.

If the question is draft, any corrections are allowed.

An inactive question cannot be edited.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

Result

Changes will be applied to questions that will eventually be added to a requisition. Changes are not applied in a requisition that already contains a question.

Duplicating a Question

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Select a question.
2. Click Duplicate.
3. Modify the information in the fields.
4. Translate the question if necessary.
5. Click Save and Close.

Result

The question created based on an existing one is available in the Question Library.

Associating a Question to a Location

Prerequisite

A user type permission grants users access to this feature.

Question should have the draft or active status.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. In the question page, click Edit.
3. In the Locations section, specify if you want to associate the question to all locations or to specific locations.

   If you associate the question to specific locations, click Modify, select a location in the Location selector, then click Save.
4. Click Save and Close.

Result

Users are able to add the question in a requisition if the question matches the location of the requisition.

Dissociating a Question from a Location

Prerequisite

A user type permission grants users access to this feature.

Question should have the draft or active status.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Locations check boxes.
4. Click Save and Close.

Result

A question which is not associated to any location remains in the Question Library but can only be added manually to a requisition.

Associating a Question to a Job Field

Prerequisite

A user type permission grants users access to this feature.

Question should have the draft or active status.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. In the question page, click Edit.

3. In the Job Fields section, specify if you want to associate the question to all job fields or to specific job fields.

   If you associate the question to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

Result

Users are able to add the question in the requisition if the question matches the job field of the requisition.

Dissociating a Question from a Job Field

Prerequisite

A user type permission grants users access to this feature.

Question should have the draft or active status.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

Result

A question which is not associated to any job field remains in the Question Library but can only be added manually to a requisition

Adding a Question to the Job Field or Location Structure

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Question...
3. Click Select next to the desired question.
4. Click Done.

Result

The user adding a question to a requisition will be presented with a selector window containing questions matching the Organization-Location-Job Field structure of the requisition.

Removing a Question from the Job Field or Location Structure

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. Click Remove Question.

Result

By removing a question from the Location and/or Job Field structure, the user adding a question to a requisition will be presented with a selector window containing this question regardless of the requisition Organization-Location-Job Field structure. Note that the selector window presents questions matching the Organization-Location-Job Field structure of the requisition or any questions that is not associated to any Organization-Location-Job Field

Adding a Question to the Model

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Add to Prescreening Model.

Result

In the Question Library list, a check mark appears in the In Model column, next to the question. The question is available to another user completing the Prescreening section of a requisition.

Removing a Question from the Model

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Remove from Prescreening Model.

Result

In the Question Library list, a check mark no longer appears in the In Model column, next to the question. The question is no longer available to another user completing the Prescreening section of a requisition.

Adding a Question to the Profile

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Add to Profile.

Result

In the Question Library list, a checkmark appears in the In Profile column, next to the question. The question is available to another user creating a candidate file and to a candidate completing a profile in a career section.

Removing a Question from the Profile

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. In the Question Library page, click on the Job Field or Location tab in the left pane.
2. Select a question.
3. In the More Actions list, click Remove from Profile.

Result

A check mark no longer appears in the In Profile column, next to the question. The questionis no longer available to another user creating a candidate file and to a candidate entering a profile in a career section.

Viewing a Question in Another Language

Prerequisite

A user type permission grants users access to this feature.

The icon must be displayed next to the question in the Question list.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Select a language from the Activated Languages list.

Result

The question is displayed in the selected language.

Changing the Visibility of a Question

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Question Properties section, select the visibility from the Visible by drop down list.
4. Click Save.

Result

The selected question will be visible to internal, external or all candidates according to the selected visibility.

Disqualification Question

Disqualification Question Library

The Disqualification Question Library contains all the disqualification questions that can be included in requisitions to prescreen candidates and find the best candidates for a job.

Detailed Description

To have access to disqualification questions, this feature must be activated within your company. A user type permission grants users access to this feature.

When accessing the Disqualification Question Library, the screen is organized into three panes:

- Left pane containing three tabs. The pane can be expanded or collapsed.
-

Tab	Description
Library	Contains all the questions. Users can filter the list using dynamic filters such as the Active status, the In profile and In model criteria, the question visibility (all candidates, internal candidates, external candidates), the job field or location association, etc.
Job Field	Contains questions associated to one or more job fields. Users can display all questions associated to a job field as well as questions that have been tagged In profile or In model. A tree structure allows users to display questions associated to all job fields, or questions associated to a specific job field.
Location	Contains questions associated to one or more locations. Users can display all questions associated to a location as well as questions that have been tagged In profile or In model. A tree structure allows users to display questions associated to all locations, or questions associated to a specific location

- Right pane containing supporting tools such as the online help. The pane can be expanded or collapsed.
- Central pane containing a menu bar allowing users to perform actions on disqualification questions. The central pane also contains the list of disqualification questions. Questions displayed depend on the filters and options selected in the left pane.

Disqualification Question

A disqualification question is a single-answer question that contains the minimum requirements for a candidate to be eligible for a job. A candidate not meeting the required response can be instantly exited from the application process.

Detailed Description

To have access to disqualification questions, this feature must be activated within your company.

Disqualification questions are created and configured in the Disqualification Question Library. Questions available in the Disqualification Question Library can appear in the Prescreening section of a requisition file if the locations and job fields of the disqualification question matches the locations and job fields of the requisition.A user type permission grants users access to this feature.

A disqualification question requires one answer from the candidate, that is the candidate is limited to one answer from a list of choices. When creating a disqualification question, at least two answers must be provided, one of which must indicate that the candidate passes. There are three results for each answer:

- The candidate passes: the candidate is not disqualified.
- The candidate is disqualified: the candidate is automatically disqualified.
- To be verified: the candidate file must be reviewed.

If configured by your system administrator, you can have the ability to configure disqualification questions so that candidates are prompted for explanations for specific responses. This feature provides candidates a greater opportunity to accurately explain their qualifications and it also reduces the need for users to make follow-up contact with candidates to obtain details regarding their responses.

A disqualification question can be viewed by internal candidates, external candidates or all candidates.

A disqualification question can be associated to locations and job fields.

- If a question is not associated to any location or job field, the question will be displayed in the requisition.
- If a question is associated to all locations and/or to all job fields, the question will be displayed in the requisition.
- If a question is associated to specific locations and/or job fields, the question will be displayed in the requisition if it matches the location or job field of the requisition.

Unanswered disqualification questions are considered as being passed and will not affect the disqualification status of the candidate.

Explanations for Disqualification Questions

This feature provides users the ability to configure disqualification questions so that candidates are prompted for explanations for specific answers.

Detailed Description

When creating a disqualification question, when this feature is activated, the system administrator may specify that an explanation is required for certain answers. Note that it is not currently possible to change whether the explanation is required for certain answers once the question is active.

If an explanation is required for an answer, the user must enter an introduction sentence for the explanation. For example, if the question is “Have you ever been convicted of a crime?”, the introduction sentence could “Please specify the crimes you were convicted for as well as any details”. A maximum of 256 characters can be entered.

When applying, if the candidate selects a response to a disqualification question requiring an explanation, the candidate must provide it. A maximum of 1000 characters can be entered for the explanation. Authorized recruiters and managers can also enter an explanation on behalf of the candidate either by capturing or editing the candidate submission.

When an explanation is provided for an answer, the explanation is displayed just below the question answer in the candidate file Prescreening section.

Benefits

- Provides users the ability to collect relevant additional details from candidates for Disqualification Questions.
- Provides candidates the ability to explain their responses to disqualification questions as well as greater opportunity to accurately explain their qualifications.
- Requiring candidates to provide explanations during initial submission reduces the need for users to make follow-up contact with candidates to obtain details regarding their responses.

Creating a Disqualification Question

Prerequisite

A setting allows the activation of this feature.

The question can have a maximum of 3000 characters.

Recruiting > Libraries > Disqualification Questions

Steps

1. Click Create Question.
2. Complete mandatory fields.
3. Specify required information.
4. Click Save and Close.

Result

The disqualification question is available in the disqualification question library. New disqualification questions added to existing requisitions will not affect candidates who have already applied until they update their candidate profiler or their application.

Next Step

Activate the disqualification question so it appears in the Prescreening section of a requisition file.

Duplicating a Disqualification Question

Prerequisite

A setting allows the activation of this feature.

Recruiting > Libraries > Disqualification Questions

Steps

1. Select a question.
2. Click Duplicate.
3. Modify the information in the fields.
4. Translate the question if necessary.
5. Click Save and Close.

Result

The disqualification question created based on an existing one is available in the Disqualification Questions library.

Editing a Disqualification Question

Prerequisite

A setting allows the activation of this feature.

If a question is active, only grammatical and typographical corrections are allowed.

If a question is draft, any corrections are allowed.

Inactive questions cannot be edited.

Taleo Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a disqualification question.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

Result

Modifications to a disqualification question do not affect already answered questions. Candidates who had passed will still pass. Candidates who had been disqualified will remain disqualified.

Associating a Disqualification Question to a Location

Prerequisite

A setting allows the activation of this feature.

Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Locations section, specify if you want to associate the question to all locations or to specific locations.

   If you associate the question to specific locations, click Modify, select a location in the Location selector, then click Save.
4. Click Save and Close.

Result

The disqualification question will be added to a requisition if the location of the disqualification question matches the location of the requisition.

Dissociating a Disqualification Question from a Location

Prerequisite

A user type permission grants users access to this feature.

Disqualification Questions should have the draft status.

Inactive disqualification questions cannot be dissociated from a job field.

Taleo Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

Result

By dissociating a disqualification question from a location, the question will be available to be added to all requisitions regardless of the location specification of a requisition.

Associating a Disqualification Question to a Job Field

Prerequisite

A setting allows the activation of this feature.

Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Job Fields section, specify if you want to associate the question to all job fields or to specific job fields.

   If you associate the question to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

Result

The disqualification question will be added in a requisition if the question matches the job field of the requisition.

Dissociating a Disqualification Question from a Job Field

Prerequisite

A user type permission grants users access to this feature.

Disqualification Question should have the draft status.

Disqualification Question must not be used by a posted requisition.

Inactive disqualification questions cannot be dissociated from a job field.

Taleo Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a question.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

Result

The question will not appear in a new requisition related to the previously selected job field. By dissociating a disqualification question from a job field, the question will be available to be added to all requisitions regardless of the job field specification of a requisition

Adding a Disqualification Question to the Job Field or Location Structure

Prerequisite

A setting allows the activation of this feature

A user type permission grants users access to this feature.

Recruiting > Libraries > Disqualification Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Question...
3. Click Select next to the desired question.
4. Click Done.

Result

The user adding a disqualification question to a requisition will be presented with a selector window containing questions matching the Organization-Location-Job Field structure of the requisition

Removing a Disqualification Question from the Job Field or Location List

Prerequisite

A setting allows the activation of this feature.

Recruiting > Libraries > Disqualification Questions

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a question.
3. Click Remove Question.

Result

By removing a disqualification question from the location or job field list, users will be able to add the question to all requisitions regardless of the location or job field of a requisition

Activating a Disqualification Question

Prerequisite

A setting allows the activation of this feature.

The question must have a draft or inactive status.

Recruiting > Libraries > Disqualification Questions

Steps

1. Select a question.
2. In the More Actions list, select Activate Question.

Result

The status of the disqualification question is Active. The disqualification question is displayed in the requisition.

Deactivating a Disqualification Question

Prerequisite

A setting allows the activation of this feature.

The question must be active in order to be deactivated.

Recruiting > Libraries > Disqualification Questions

Steps

1. Select a question.
2. In the More Actions list, select Deactivate Question.

Result

The disqualification question no longer appears in the Disqualification question Library.

Viewing a Question in Another Language

Prerequisite

A user type permission grants users access to this feature.

The icon must be displayed next to the question in the Question list.

Recruiting > Libraries > Questions

Steps

1. Click on a question.
2. Select a language from the Activated Languages list.

Result

The question is displayed in the selected language.

Changing the Visibility of a Disqualification Question

Prerequisite

A user type permission grants users access to this feature

Recruiting > Libraries > Disqualification Questions

Steps

1. Click on a disqualification question.
2. Click Edit.
3. In the Question Properties section, select the visibility from the Visible by drop down list.
4. Click Save.

Result

The selected disqualification question will be visible to internal, external or all candidates according to the selected visibility.

Competency

Competency Library

The Competency Library contains all the competencies that can be included in requisitions to gather proficiency level and years of experience of a candidate in order to find the best candidate for a job.

Detailed Description

A user type permission grants users access to the Competency Library.

When accessing the Competency Library, the screen is organized into three panes:

- Left pane containing three tabs. The pane can be expanded or collapsed.
-

Tab	Description
Library	Contains all the competencies. Users can filter the list using dynamic filters such as the In profile and In model criteria, the question visibility (all candidates, internal candidates, external candidates), the job field or location association, etc.
Job Field	Contains competencies associated to one or more job fields. Users can display all competencies associated to a job field as well as competencies that have been tagged In profile or In model. A tree structure allows users to display competencies associated to all job fields, or competencies associated to a specific job field.
Location	Contains competencies associated to one or more locations. Users can display all competencies associated to a location as well as competencies that have been tagged In profile or In model. A tree structure allows users to display competencies associated to all locations, or competencies associated to a specific location.

- Right pane containing supporting tools such as the online help. The pane can be expanded or collapsed.
- Central pane containing a menu bar allowing users to perform actions on competencies. The central pane also contains the list of competencies. Competencies displayed depend on the filters and options selected in the left pane.

Competency

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.

Detailed Description

Competencies are supplied with the system and are available in the Competency Library. Competencies available in the Competency Library can then be added in the Prescreening section of a requisition file. A user type permission grants users access to the Competency Library as well as to the actions that can be performed on Competencies in the requisition file Prescreening section and in the Competency Library.

Competencies are not written as a question. Examples of competencies could be “Human resource planning”, “Develop, implement and evaluate human resources policies and procedures”.

There are three types of competencies:

- Simple competency: A simple competency allows you to identify if the competency is required or an asset and to specify the weight of the competency. In career sections, when candidates assess their competencies in a prescribing questionnaire, they are presented with a question and a choice of competencies to select (check boxes).
- Detailed competency: A detailed competency allows you to identify if the competency is required or an asset, to specify the weight of the competency and to indicate the proficiency and experience level. In career sections, when candidates assess their competencies in a prescreening questionnaire, they are presented with lists for each competency they have to assess.
- Simple and detailed competency: In career sections, candidates will have the choice of using the simple competency or to use the lists to provide more information on specific competencies.

A competency can be visible to internal candidates, external candidates or all candidates.

A competency can be associated to locations and job fields.

- If a competency is not associated to any location or job field, the competency will be available to users when adding competencies to a requisition.
- If a competency is associated to all locations and/or to all job fields, the competency will be available to users when adding competencies to a requisition only if the In Model option is selected.
- If a competency is associated to specific locations and/or job fields, the competency will be available to users when adding competencies to a requisition if the In Model option is selected and if the competency matches the locations or job fields of the requisition.

When associating a competency to locations or job fields, the competency can be made available in a profile or in a model:

- If a competency is tagged "In profile", the competency will be available to users who create a candidate file, and to candidates who are entering their profile in a career section. Competencies made available will be sorted to match the location and job field preferences defined by the candidate.
- If a competency is tagged "In model", the competency will be available to users who complete the Prescreening section of a requisition. Competencies will be grouped in a model based on the location and job field of the requisition.

Competency Assessment

The competency assessment score consists of three parts: Proficiency/Last Used basic score, Proficiency/ Experience Rectifier and Interest Weight. The competency score is the sum of the basic score and rectification value, multiplied by the interest weight. The maximum result is 100.

Detailed Description

Three formats of competencies assessment are available:

- Detailed competencies Assessment (DSA): allows candidates to assess their competencies by selecting—from lists—the appropriate level of experience, proficiency, last used, and interest. The process is repeated for each competency.
- Simple competencies Assessment (SSA): is a simplified DSA format. It 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 and Simple competencies Assessment (DSA/SSA): uses both lists and check boxes to allow candidates to assess their competencies.

The available format depends on the permission enabled by your system administrator.

The Proficiency and Experience level default value is Intermediate 1-3 years. To modify the default value, select the Modify the minimum requirements of proficiency and experience option on the Prescreening section of the requisition.

The Proficiency/Last Used basic score is the basic score attributed to a competency. It is based on a candidate's level of proficiency and the last time the competency was used.

Proficiency	Never	Current	Last Year	1-3 years ago	3-4 years ago	5+ years ago
None	0	0	0	0	0	0
Beginner	5	25	20	15	10	5
Intermediate	10	50	40	30	25	20
Advanced	20	80	70	60	50	40
Expert	30	100	90	80	70	60

The score from the Proficiency/Last Used basic score table is rectified by the candidate's declared experience as per the following table. The negative numbers represent off-limit answers and could be considered invalid.

Proficiency	None	-1 year	1-3 years	3-4 years	5+ year
None	0	+5	+10	+15	+20
Beginner	0	+5	+10	+15	+20
Intermediate	-10	0	+5	+10	+15
Advanced	-20	-10	0	+5	+10
Expert	-30	-20	-10	0	+5

Competency assessment should attribute a higher score to a candidate who is a passionate beginner than to a bored expert. Therefore, the following scaling factor is applied to the score calculated so far.

Interest	Weight	Description
None	0.5	divide by 2
Low	0.5	divide by 2
Medium	1	current score
High	1.5	+25%

Competency Assessment 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.
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.

Creating a Competency

Competencies are supplied with the system, they cannot be created by a user or a system administrator. Contact Taleo Support for more information.

Editing a Competency

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. Make modifications.
4. Click Save and Close.

Result

The visibility of the competency as well as the locations and job fields associated to the competency reflect changes.

Associating a Competency to a Location

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. In the Locations section, specify if you want to associate the competency to all locations or to specific locations.

If you associate the competency to specific locations, click Modify, select a location in the Location selector, then click Save.

4. Click Save and Close.

Result

The competency can be added in a requisition if the competency matches the location of the requisition

Dissociating a Competency from a Location

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. In the Associated Structure section, clear the Location check boxes.
4. Click Save and Close.

Result

A competency which is not associated to any location remains in the Competency Library but can only be added manually to a requisition.

Associating a Competency to a Job Field

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. In the Job Fields section, specify if you want to associate the competency to all job fields or to specific job fields.

   If you associate the competency to specific job fields, click Modify, select a job field in the Job Field selector, then click Save.
4. Click Save and Close.

Result

The competency can be added in the requisition if the competency matches the job field of the requisition

Dissociating a Competency From a Job Field

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. In the Associated Structure section, clear the Job Fields check boxes.
4. Click Save and Close.

Result

A competency which is not associated to any location remains in the Competency Library but can only be added manually to a requisition.

Adding a Competency to the Job Field or Location Structure

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Click Add Competency...
3. Click Select next to the desired competency.
4. Click Done.

Result

The user adding a competency to a requisition will be presented with a selector window containing competencies matching the Organization-Location-Job Field structure of the requisition.

Removing a Competency from the Job Field or Location Structure

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. Click Remove Competency.

Result

By removing a competency from the Location and/or Job Field structure, the user adding a competency to a requisition will be presented with a selector window containing this competency regardless of the requisition Organization-Location-Job Field structure. Note that the selector window presents competencies matching the Organization-Location-Job Field structure of the requisition or any competencies that is not associated to any Organization-Location-Job Field.

Adding a Competency to the Profile

Prerequisite

A user type permission grants users access to this feature.

Taleo Recruiting > Libraries > Competencies

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Add to Profile.

Result

In the Competency Library list, a checkmark appears in the In Profile column, next to the competency. The competency is available to another user creating a candidate file and to a candidate entering a profile in a career section.

Removing a Competency from the Profile

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Remove from Profile.

Result

In the Competency Library list, a check mark no longer appears in the In Profile column, next to the competency. The competency is no longer available to another user creating a candidate file and to a candidate completing a profile in a career section.

Adding a Competency to the Model

Prerequisite

A user type permission grants users access to this feature.

Recruiting > Libraries > Competencies

Steps

1. Click on the Job Field or Location tab in the left pane.
2. Select a competency.
3. In the More Actions list, click Add to Prescreening Model.

Result

In the Competency Library list, a check mark appears in the In Model column, next to the competency. The competency is available to another user completing the Prescreening section of a requisition.

Viewing a Competency in Another Language

Prerequisite

A user type permission grants users access to this feature.

The icon must be displayed next to the competency in the competencies list.

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Select a language from the Activated Languages list.

Result

The competency is displayed in the selected language.

Changing the Visibility of a Competency

Prerequisite

A user type permission grants users access to this feature

Recruiting > Libraries > Competencies

Steps

1. Click on a competency.
2. Click Edit.
3. In the Competency Properties section, select the visibility from the Visible by drop down list.
4. Click Save.

Result

The selected competency will be visible to internal, external or all candidates according to the selected visibility.

Task

Task

Task

A task is an action a user needs to perform regarding requisitions, candidate files and offers.

Detailed Description

For the task feature to be available to the user in the center stage, the system administrator must have configured the center stage to include the Tasks channel and activated the proper settings.

Tasks are generated by the system and displayed in the Tasks channel of the center stage. Hyperlinks in the Tasks channel give access to the Tasks list where users can see all tasks in one list view and use quick filters to filter the list. Users who are assigned a task but dot not have access to the product (or who desire it) can receive e-mails (eShare) for approval related tasks. In the Tasks list, a task can only be executed by the owner of the task or his/her delegate. 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.

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.

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.

The Tasks list provides quick filters and presents information in different columns. Quick filters and columns are not configurable.

Available quick filters are:

- task ownership (for example, I own, I collaborate on, etc.)
- tasks requiring attention
- completed tasks (by default, the Hide Completed Tasks option is selected)
- tasks due date (with the ability to exclude tasks with no due date)
- task type (for example, tasks to be completed, tasks ready for sourcing, self-assigned tasks, etc.)
- tasks related to a specific candidate or requisition
- tasks related to a specific owner

Available columns are:

- Attention indicator flag
- Tasks (links to the activity to complete the task; displays a callout containing the task type, assignment date and owner)
- Candidate (links to the associated candidate file; displays a callout containing phone numbers and e-mail address)
- Requisition (links to the associated requisition file; displays a callout with requisition ID, activated languages and features)
- Assignee
- Comments (callout displaying the comment)
- Due date (only relevant for self-assigned tasks)
- Priority (only relevant for self-assigned tasks)
- Status

Tasks are related to requisition files, candidates files and offers. Available tasks are:

Tasks Related to a Requisition File	Tasks Related to a Candidate File	Tasks Related to an Offer
To be completed	Finalize Start Date	Extend Offer
Approve requisition	Verify	Approve Offer
Ready for sourcing	Self-Assigned Task	Confirming Employee presence at Work
Amend Approval Path		
Sourcing strategy to be defined		
Contribute		
To be filled		
Complete Selection Process		
Extend posting		

Benefits

- By having all tasks into one channel and one list, it is easier for users to see everything in one place.

Self-assigned Task

A self-assigned task is a task you create for yourself.

Detailed Description

For the self-assigned task feature to be available, the feature must be activated within your company and you must also have been granted the permission to manage self-assigned tasks.

You 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.

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 e-mail message reminding you to call John to see if he is available for an interview the following Monday. The e-mail 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.

Benefits

- By having all tasks into one channel and one list, it is easier for users to see everything in one place.

Viewing Tasks

Prerequisite

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

Steps

1. In the Recruiting Center, click on the Tasks link.

Result

The task list of the user is displayed.

Executing a Task

Prerequisite

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

Steps

1. In the Tasks list, locate the task to perform.

2. Click the link.

   The user is redirected to the page of the application where the task is performed.
3. Complete the task indicated in the Task column of the Tasks list.

Result

Once the task is completed, it is removed from the Tasks list.

Creating a Self Assigned Task

Self assigned tasks can be created as personal reminders.

Prerequisite

A user type permission grants users access to this feature.

A setting allows the activation of this feature.

Steps

1. In the candidate file, select Create Self Assigned Task in the More Actions list.
2. In the Task window, complete the information as required.
3. Click Save and Close.

Result

An email message is sent to the user. The message contains a link that redirects the user to the information of the task. The task is listed in the Tasks list.

Removing a Task

Prerequisite

A user type permission grants users acces to this feature.

Only self assigned tasks can be removed.

Steps

1. In the Tasks list, hover your mouse over a task of the Tasks column.
2. Click .

Result

The self assigned task is removed from the Tasks list.

Confirming Employee Presence at Work

To complete a hiring process, it may be necessary to confirm the employee’s presence at work.

Prerequisite

Only the owner of the requisition or a delegate can confirm an employee’s presence.

Candidate must be hired.

Current date must be the same or near the start date indicated in the offer.

Steps

1. In the Tasks list, click the link Confirm Employee Presence.
2. In the Confirm Employee Presence window, select an answer to the question Is the candidate present for work.
3. Click Done.

Work Item Delegation

Work item delegation allows a user to delegate work items such as requisitions, offers, tasks, meetings, folders to another user for a short preset period of time.

Detailed Description

A user delegates work items to another user for a preset period of time. This can be useful during the time a user is on vacation or on a sick leave. When selecting a user (new owner) to whom work items 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 of the current owner.
- If the current owner is an eShare user (not a Taleo Recruiting user), the new owner must also be an eShare user.

Delegating My Work Items

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

The new owner must be different from the current owner.

The new owner must have the same user type permissions as the current owner.

The new owner must be in all the same groups of the current owner.

If the current owner is an eShare user, the new owner must also be an eShare user.

Steps

1. Click the My Setup link located in the top right-hand corner.
2. In the General tab, click Delegate.
3. Click Search to select the user to whom you wish to delegate your work items.
4. Click to open the calendar and select a starting date and an end date.
5. Click Done.

Result

Work items such as requisitions and tasks are delegated to another user for a specific period of time.

Transferring My Work Items

@@@@.

Prerequisite

This is a prerequisite for this task.

Page 1 > Page 2 > etc.

Steps

1. This is step 1.
2. This is step 2.

   This is additional information (optional) to step 2.
3. This is step 3.
   a. This is a substep (optional and not recommended) to step 3.
4. This is step 4.

   Step Result:

   This is a step result (optional) for step 4.
5. This is step 5.
   - This is a choice (optional) for step 5.

Result

This is the result for this task.

Next Step

This is the next step or post-requisite for this task.

Report

Report

Report

A wide range of custom and standard reports are available via Taleo Recruiting.

Detailed Description

Reports are available within the Taleo Reporting and Analytics solution. If your company has acquired this solution, users will be able to access a wide range of reports by selecting “Reporting and Analytics” in the Taleo Recruiting Table of Content page. For more details on the Taleo reporting solution, refer to the Reporting and Analytics User Guide.

Custom fields can be added to reports. In Taleo Recruiting Administration, the system administrator can create custom fields and tag them to appear in reports.

Troubleshooting

Problem Solving

Troubleshooting

Before contacting Taleo Customer Support, first check available documentation. Information located in the Prerequisites will often help solve problems.

Problem	Solution	Keywords
Cannot attach a file	Storage limit may have been exceeded, contact Taleo customer service.	Attachment
I received a Taleo (-1) error	Record all the steps you took prior to receiving the error. Report the issue to Taleo customer service.	Error message
Cannot delete candidate files	Candidate file is locked by OFCCP feature. Contact Taleo customer service.	Automated Task
Automated task is not carried out	An error may cause a task to fail. If processing status of the task is Error, contact Taleo customer service.	Automated task, Candidate
Cannot delete requisition files with the automated task feature	Verify if there are candidates linked to the requisition. All candidates linked to the requisition must first be permanently deleted.	Automated task, Requisition
Automated task is not deleting the proper elements	Verify the automated task criteria.	Automated task
Unable to perform actions on a candidate file.	An error message will be displayed stated that the file is being used by another user. When sending correspondence, the message stipulates that the requested action cannot be performed. In both cases wait until other user is finished. If candidate file remains booked for more than an hour, contact Taleo customer service.	Error message
Unable to perform actions on a candidate file.	If the error message Unable to perform Action is displayed when user tries to perform the Move or the Change Status actions, but no error message is displayed when selecting the Send correspondence action for the More Actions menu, then the file is corrupted. Contact Taleo customer service	Actions
Unable to hide fields in a candidate file.	Even if a field is set to not available it will be displayed to users in Read only mode. When editing a file, the system will take the field setting into account and will hide the field accordingly. To make sure fields are not displayed in read only mode, user type permissions can be removed to the user, such as See dates of birth and security numbers.	Fields
Properties and elements of a field included in a block does not display the same information in all languages	If a field is not configured in a language, then base language is displayed by default. Configure all fields in the required language.	Fields
LUDs do not appear in the Careers section	The option Require Description in WebTop and content languages must be activated in the LUDs.Configuration> [Recruiting] Administration>Selections>Large Selections	LUD, field
Candidate Search not working properly.	The indexation is used to flag candidate files in the database and make then searchable. If these flags are corrupted, search will not perform properly. Contact Taleo customer service.	Candidate search

Problem	Solution	Keywords
Candidate is not located with the search candidate feature	Candidate may have been deleted by an automated task. Try restoring a candidate deleted by an automated task. The user may not have permission to access the candidate	Candidate, search
User unable to log on.	Verify the user type permissions. Verifying is user account is locked. Verifying user account properties.	Log on
EEO fields are not displaying	Verify that the Recruiting setting to enable EEO/Affirmative action is activated. Verify that the requisition location matches the diversity form location and verify that the diversity form is active.	Requisition, EEO,
Unable to cancel a requisition	If the status of the requisition is not Canceled or filled, contact Taleo web support.	Cancel, Requisition
Unable to post a requisition	If Status Details indicates Draft, complete the requisition and Save as Open. If the Status indicates On hold, edit the requisition select Reactivate in the More Actions list. If the Status indicates Canceled, then the requisition can no longer be posted or reactivated, you will need to create a new requisition or duplicate the canceled requisition. If the Status indicates Pending and the status Details indicates To Be Approved, it means that an approvers still needs to approve the requisition.If the approver is unable to approve the requisition for any reason, then three actions are available: Terminate Approval Path Process (ends the approval process), Amend Approval Path (lets the user modify the approval), or, Request Approval Path Amendment (sends a request to amend the approval path to a user with greater permissions) If the Status indicates Filled, you will need to edit the requisition by clicking on the title. Then, in the More Actions drop down, select reopen requisition to reactivate the requisition and after adding a new position, you will be able to post your requisition.	Unpost
Unable to cancel a requisition	If the Status indicates Cancelled or filled, and the cancel action is not available, contact Taleo customer support.	Requisition, cancel
Unable to fill or close a requisition	If the Status indicates Pending and the status Details indicates To Be Approved, it means that an approvers still needs to approve the requisition.If the approver is unable to approve the requisition for any reason, then three actions are available: Terminate Approval Path Process (ends the approval process), Amend Approval Path (lets the user modify the approval), or, Request Approval Path Amendment (sends a request to amend the approval path to a user with greater permissions). If the Status indicates On hold, edit the requisition, select Reactivate in the More Actions list.	Requisition, fill
Unable to reopen a requisition	If the Status indicates Open, then the requisition is already open and therefore the action to re-open is not necessary. If the Status indicated On Hold, then the requisition is not closed and must be reactivated rather than re-opened If the Status indicates Pending, then the requisition is pending approval and that once it is approved it will be opened, so there is no need to re-open it. If the Status indicates Draft, then the requisition is incomplete. complete the requisition and Save as open.	Requisition, reopening,

Problem	Solution	Keywords
Unable to post a requisition	Requisition location must match the Location of the diversity form	Requisition, posting
Unable to create a candidate with the resume parsing option.	If the file used for resume parsing is a *.pdf , open the file and try highlighting text. If you cannot highlight text in the PDF, then the file includes an image of text and you will not be able to use the resume parsing feature.	Candidate, resume parsing.
Cancelled a requisition by mistake.	If you cancelled a requisition by accident or selected Request Approval instead of Save as Open, you will not see the requisition. If it was cancelled, you can select the Show Requisitions for All option. If you requested approval on it, you will need to wait until the approver(s) complete their action.	Cancel, requisition
Cannot find my requisitions	Check the view in the left pane. Is the Show requisitions for field set to your requisitions? You may need to change it to All (depending on how you created the requisition	Requisition
Unable to edit fields in a requisition	Check if a selection is made for the settings Use this flow for requisition creation without posting" and "Use this flow for requisition creation with posting".	Field, edit
Candidate is unable to log in	Candidate file may be corrupted. Open the candidate file in Recruiting Center, and select Move from the More Actions menu. If the action is not performed try the send Correspondence action. If the send correspondence action works but not the Move action, then the candidate file is corrupted.	Log in
Candidate is not auto-progressing in the CSW	Candidate file may in use by another user. Make sure the steps in the CSW are properly ordered A candidate cannot progress from a status 4 to a status.	Auto progression
Candidate did not receive email notification	Check if the template used to send the notification is configured properly. email address, contents field etc.	Notification
When matching a candidate to a requisition, the automatic email is not sent.	If the template used to send the email includes a field to redirect the candidate to a career site, then the requisition must be posted.	Match