Taleo Enterprise

Taleo Recruiting
User Guide

Feature Pack 12A
May 3, 2012

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Revision History

Date	Modification	Revised Topic
May 3, 2012	Added information regarding the language in which the LinkedIn Preview window is displayed to users.	*LinkedIn Profile Preview*
May 3, 2012	Added clarification in the Candidate File Merge feature regarding the duplicate candidate files that cannot be merged.	*Merging Candidate Files*
April 5, 2012	Added the following details regarding the print feature: For candidate files, a maximum of 50 files can be printed. For requisition files, a maximum of 15 files can be printed.	*Print Function*, *Printing a Candidate File*, *Printing a Requisition*, *List Usage*.
March 30, 2012	Added a note regarding an issue with Interview Scheduling and Microsoft Outlook.	*Candidate Interview*
March 30, 2012	Added information on the Visible by candidates option when adding an attachment to a candidate file.	*Adding an Attachment to a Candidate File*
March 30, 2012	Removed the important note related to an issue with time zone and scheduling interview. There is no longer a one hour discrepancy while scheduling an interview.	*Time Zone*
March 2, 2012	Added a note to indicate that currently it is not possible to setup a reminder to a self-assigned task when moving a candidate to the next step.	*Moving a Candidate to the Next Step*
March 2, 2012	Added information on how to view candidates who applied on a requisition as well as the candidate selection workflow steps.	*Viewing Candidates who Applied on a Requisition*
February 15, 2012	Removed the Attach Files action because it is not a default action available for candidate selection workflows.	*Candidate Selection Workflow Action*
January 27, 2012	Initial publication.	

Getting Started

Login

Login and Product Access

When opening the Taleo Enterprise solution, the User 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 User Sign In page will be presented in the language selected.

In the User 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 users have the ability to modify their password.

Once a user’s credentials have been entered and accepted, the Welcome Center appears and allows access to Taleo products purchased by the organization and to which a user has access according to the user’s user type and permissions.

Welcome Center

The Welcome Center is a home page that is displayed to users immediately after they log in and provides a "one-click" access point to Taleo products.

The Welcome Center contains a core navigation bar, an auxiliary navigation bar, a Quick Access panel and a Communications panel. If the Welcome Center is enabled, it replaces the table of contents page.

The core navigation bar is a set of tabs that provide direct links to Taleo products. A user might have a tab for any or all of the following products: Taleo Performance, Taleo Recruiting, Taleo Compensation, Taleo Analytics, Taleo Configuration, and Taleo Learn.

A Quick Access panel provides an alternative "one-click" access to the same information and to a selection of modules within products.

The Welcome Center also contains, at the top right of the page, an auxiliary navigation bar containing links to additional resources and the Sign Out link.

Finally, Taleo clients can create information of interest to all Taleo product users in the organization for display in the Communications section. Alternatively, they can create distinct sets of information for the Communication section and associate an information set with a configuration profile.

Accessing a Taleo Application

Prerequisite

You 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 Sign In.

Using the Forgot Password Link

Several methods are available to recover a forgotten password.

The two main methods to recover a password are via an access code and security questions. There are other options which are a combination of access code and/or security questions as well as an option to contact your system administrator.

With the access code method, users are asked to enter their user name and email address. An email containing an access code is sent to the user and the user is prompted to enter a new password.

With the security questions method, users are asked to answer security questions (between 1 and 3) previously entered in their profile. If the answer is correct, the user is invited to enter a new password.

Changing My Password

Steps

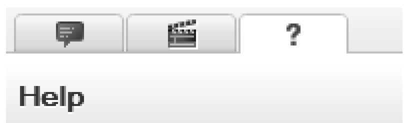
1. In the auxiliary navigation bar, click Resources and select My Setup.
2. Click Edit next to Account Information.
3. Modify the information contained in the Account section.
4. Click Save.

Getting Help

Online Help

The Recruiting Center offers comprehensive help about concepts or tasks to perform.

The online help is available in the supporting tools panel located in the right-hand side of all pages. When clicking the Help icon, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.



Online Clips

The Recruiting Center offers short clips describing essential user interface elements.

These online clips present basic information about the design, navigation, and certain features of the application. Each clip is no more than one minute in length to give users a quick way to get up to speed with how to use the product.

When online clips are enabled, they are available in the Clips tab, located in the supporting tools panel in the right-hand side of all pages.

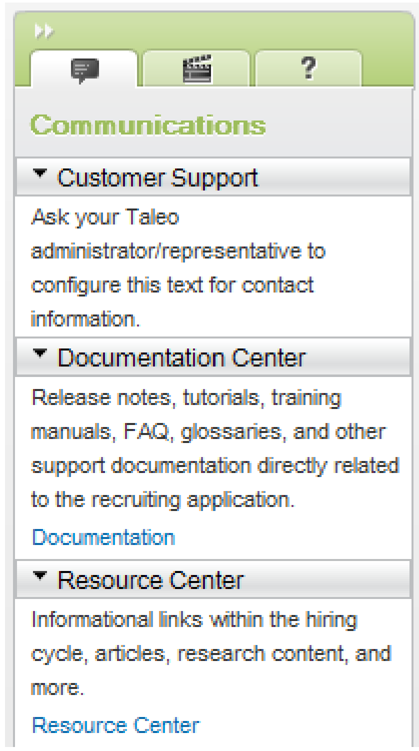
By default, online clips designed by Taleo come with the product. Taleo reserves the right to add new online clips, modify existing clips, or delete clips at any time without notice to customers.

The tab where these online clips are available is configurable. Customers may choose to disable the tab or replace the content with their own content linking to alternative learning materials for their end users.

Communications Channel

The Communications channel allows the display of useful information to Recruiting Center users.

The Communications channel is 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.

Section	Description
Customer Support	May contain information to contact Taleo Support.
Documentation Center	Contains a Documentation link giving access to supporting information such as the latest release notes.
Resource Center	Contains a Resource Center link giving access to information about the hiring cycle, articles, research content, and more.

Web Support

The Web Support link gives users access to Taleo Web support and question submission feature.

The Web Support link is available in the auxiliary navigation bar of all pages of the application if it was enabled by the system administrator.

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.

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

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

Release Notes Message

A pop-up message containing new release information, system improvements, key messages, or other important information may be displayed when users log into the system.

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.

Deactivating the Release Notes Message

Prerequisite

The release notes message must have been enabled.

Steps

1. Log on to a Taleo 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.

Navigation Tools and Page Layout

Auxiliary Navigation Bar

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

If enabled, the auxiliary navigation bar is available at all times for users to see and access.

The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them):

Element	Description
Home	• If you have access to multiple Taleo products and you click Home, the Welcome Center is displayed. • If you have access to Taleo Recruiting only and you click Home, the Recruiting Center front page is displayed.
Resources	May include: • My Setup: Access to personal preferences. • Training: Access to online training materials. • e-Learning: Access to eLearning materials. • Web Support: Access to Taleo Technical Support. • About: Information about the application such as the version number and the build number you need to provide to Taleo Support when you need to contact them.
Talent Grid	Access to Talent Exchange, Solution Exchange, Knowledge Exchange.
Sign Out	Terminates the session and you are automatically signed out of all Taleo products.

Core Navigation Bar

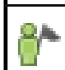
The Recruiting Center core navigation bar provides access to specific recruiting features.

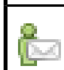
The core navigation bar is located just above the central panel. If enabled, the core navigation bar is available at all times for users to see and access.

The core navigation bar may contain the following elements (if enabled and if users were granted access to them):

Element	Description
	If your organization has multiple Taleo products, clicking the Home icon displays the Welcome Center. If your organization has no other Taleo products apart from Taleo Recruiting, clicking the Home icon displays the Recruiting Center. The arrow provides direct links to Taleo products as well as to specific modules within the products.
Recruiting	Access to the Recruiting main page.
Tasks	Access to the Tasks list.
Requisitions	Access to the Requisitions list.
Candidates	Access to the Candidates list.
Offers	Access to the Offers list.
Libraries	Access to requisition templates, questions, disqualification questions, and competencies.

Recruiting Center Icons

Icon	Description
	Used to draw a user's attention to items that he/she owns and that require viewing.
	If the Disqualification Questions functionality is enabled, this icon is displayed in the Candidates lists.
	Identifies top candidates (those who meet all required criteria) in the candidate list of a requisition.
	Indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.
	Indicates that a candidate is in at least one selection process.
	Indicates that a file was attached.
	Indicates that the candidate is internal, that he/she already works for your organization.
	Indicates that the candidate was referred by a agent or a colleague.
	Indicates that the candidate is new in the selection process.

Icon	Description
	Indicates the number of candidates who applied on a requisition.
	Indicates the number of candidates who received a job posting notification.
	Indicates that a requisition requires the recruiter/hiring manager's immediate attention.
	Prevents users from posting a requisition.
	Indicates that the daily recruiting report function has been activated for that requisition.
	List format configuration.
	Online help.
	Clips
	Comments.
	Print function.
	Filtering section.
	Folder management section.
	Talent pool section.
	Calendar.
	Add comments.
	File in a folder.
	Find similar candidates.
	Match candidates.
	Merge candidate files.
	Share information about a candidate.

Icon	Description
	Candidate referred by an agent.
	Diagnostic tool for requisitions.
	Duplicate a requisition.
	Save requisition as a template.
	Create a search query based on a requisition.
	Delete a requisition.
	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 progression status - New
	Candidate progression status - Reviewed
	Candidate progression status - First, second, and third interview
	Candidate progression status - Testing
	Candidate progression status - Offer
	Candidate progression status - Hired
	Candidate progression status - Pipeline
	Candidate progression status - Contact

Navigation Icons

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

Icon	Description
≤	Displays the previous page.
<<	Goes to the previous 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 21-30.
≥	Displays the next page.
>>	Goes to the next 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 41-50.

Home Page and User Interface Elements

Depending on user type permissions granted to users as well as on how the Recruiting Center was configured by the system administrator, the following elements may be displayed.

Element	Description
Auxiliary Navigation Bar	The auxiliary navigation bar is located at the top right of pages. It may contain the following elements (if enabled and if users were granted access to them): • Home • Resources (My Setup, Training, eLearning, Web Support, About) • Talent Grid (Talent Exchange, Solution Exchange, Knowledge Exchange) • Sign Out
Core Navigation Bar	The Recruiting Center core navigation bar provides access to specific recruiting features. It may contain the following elements (if enabled and if users were granted access to them): •  • Recruiting • Tasks • Requisitions • Candidates • Offers • Libraries (Templates, Questions, Disqualification Questions, Interview Questions, Competencies)
My Setup	The My Setup feature is available in the auxiliary navigation bar, under Resources. It gives access to the user's personal preferences.

Element	Description
Training	The Training link is available in the auxiliary navigation bar, under Resources. It gives access to online training materials.
eLearning	The eLearning link is available in the auxiliary navigation bar, under Resources. It gives access to eLearning materials.
About	The About link is available in the auxiliary navigation bar, under Resources. It provides information about the application such as the version number and the build number you need to provide to Taleo Support when contacting them.
Web Support	The Web Support link is available in the auxiliary navigation bar, under Resources. It gives access to Taleo Technical Support. This link only works for users who are authorized Web Support users.
Talent Grid	The Talent Grid link is available in the auxiliary navigation bar. It gives direct access to the Solution Exchange, Knowledge Exchange and Talent Exchange.
Search Widget	Search tool allowing users to perform *quick candidate search*, *specific candidate search*, and *quick requisition search*.
Advanced Search	The Advanced Search link is available at the top right hand corner of pages, just beside the search widget. It allows users to search for candidate files using an array of criteria that are different than the ones used in the quick search function.
Search Queries	The Search Queries link is available at the top right hand corner of pages, just beside the search widget. A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other users.
Center Stage	A center stage is what users see in the center panel when they first log into the Recruiting Center.
Communications Channel	The Communications channel displays useful information to users when they first log into the Recruiting Center. The Communications channel is located in the Communications tab located in the supporting tools panel on the right.
Online Clip	Short clips describing essential user interface elements. When enabled, these tours are available in the Clips tab, located in the supporting tools panel on the right.
Online Help	Comprehensive help about concepts or tasks to perform. The help is available in the Help tab, located in the supporting tools panel on the right.
Color Theme	Color used to highlight the core navigation bar (or navigation ribbon) in Taleo products.
Selected Item Color	Color displayed when selecting elements in the user interface.

Center Stage

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

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. Once the center stage is created and configured, it is associated to a configuration profile. And one configuration profile is then assigned to a user account. Consequently, depending on the user logging into Taleo Recruiting, the information displayed in the central panel of the home page will differ.

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. The following channels may be displayed:

- 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. The following links are available:

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

A **mini requisition list** may be available in the center stage. This mini requisition list allows users to access a candidate list directly from the home page without having to go through the standard requisition list page. This mini requisition list can contain up to four columns of summary information about each requisition, including the number of candidates. It can also display up to 30 requisitions (the ones with the most recent submission activity). This mini requisition list is used by default with the Hourly Manager center stage.

The center stage displays a Refresh button to allow users to update all the channels with the latest numbers. The Refresh button is only present when there is a channel on the center stage that needs to be refreshed with dynamic content. For example, if only links are present on the center stage, the Refresh button will not be present.

Page Structure

Pages in the Recruiting Center all have the same structure and information is organized the same way throughout the application.

Pages 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/Center Stage	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.
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.

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

Color Theme

The theme is the color used to highlight the core navigation bar (or navigation ribbon) in Taleo products.

The following color themes are provided by Taleo.

Taleo	Aqua	Sand	Ice	Silver
				

A theme is selected by the system administrator. However, Recruiting Center users can modify the theme selected by the system administrator in their user preferences (My Setup > Preferences tab).

Selected Item Color

Color displayed when selecting elements in the user interface.

The following colors are provided by Taleo:

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

A color is selected by the system administrator. However, Recruiting Center users can modify the color selected by the system administrator in their user preferences (My Setup > Preferences tab).

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

Expandable and Collapsible Sections in a File

Sections in candidate files, requisition files, and requisition templates can be expanded or collapsed.

In view mode, upon initial entry, the first section in candidate files, requisition files, and requisition templates is always expanded and the other sections are always collapsed. When navigating from file to file, the expanded section currently being viewed will be the expanded section on the next/previous file accessed. In edit mode, all sections are expanded. If users return to the view mode, all sections remain expanded regardless of the current expand/collapse setting.

Each section has an icon to expand and collapse the section. Only the section title is visible when the section is collapsed.

Callout

A callout is a small window or bubble containing information on an element.

Callouts are available throughout the application. For details, see the table below.

To see information contained in a callout, users must place their mouse over the element.

No configuration is required for the callouts. If a user has access to a specific area based on permissions and that area has a callout, the user will be able to see the callout. If there is content that the user cannot see based on the user's permissions and the callout behavior, the field label will be displayed, but the field will be blank. For example, if a user does not have the permission to see the name of internal candidates, the user will still have access to the callout, but the name will show as blank for internal candidates.

Callout	Fields in the Callout	Context Where Callout is Used	Security Level/Field Availability Impact
Attendee Callout	First Name, Last Name, Home Phone, Cellular Phone, Work Phone, Email.	In the Schedule an Interview wizard.	None
CSW Callout	Step Name, Step Information.	In the Change Step and Status screen of the requisition-specific candidate list.	None
Requisition Callout - Small	Requisition Title (with an hyperlink to the file), Requisition ID, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need, Prevent Posting).	In the Requisitions list and Tasks list (in the Requisition column). For security reasons, the requisition callout on the Tasks list will show the callout. However, there will be no access to the requisition for all tasks that are in the Approve Requisition or Approve Offer status for any users. The user can get access to view a PDF of the requisition from within the Approval screen.	None
Requisition Callout - Large	Requisition Title (with an hyperlink to the requisition file), Requisition ID, Status, Recruiter, Status Details, Hiring Manager, Primary Location, Requisition Type, Hired Candidates, Offers Accepted, Activated Languages, Activated Features (such as ACE Alert, Daily Recruiting Report, Urgent Need,	In the Requisition Selector of the Match Candidates to Requisitions wizard, the Offers list (in the Requisition column), the Requisition Title on the Candidate Job Submission page, the Requisition Title on the Candidate All tab (when grouped by Requisition).	None

Callout	Fields in the Callout	Context Where Callout is Used	Security Level/Field Availability Impact
	Prevent Posting), Department.		
Candidate Callout	Candidate Name (with an hyperlink to the file), Home Phone, Cellular Phone, Work Phone, Email.	In the Tasks list (in the Candidate column), the Offers list (in the Candidate column), the Search Results list, the requisition-specific candidate list, the Candidates list, the candidate submission list.	Field security level permissions and field availability are taken into consideration.
Candidate Comment Callout	Comment content.	In the candidate file History tab.	None
Requisition Comment Callout	Comment content.	In the requisition file History tab.	None
Task Callout	Task name (with an hyperlink to the file), Task Type, Assignment Date, Owner.	In the Tasks list (in the Task column).	None
Task Comment Callout	Comment content.	In the Tasks list (in the Comment column).	None
Submission Active/Inactive Callout	Requisition Title (with an hyperlink to the file), Step/ Status, Comment.	In the candidate card of the candidate file.	The requisition title viewing permission is ignored; only submissions the user can see will be listed.
List Format Callout	List format information.	In the Requisitions list, the Mini Requisition list, the requisition-specific candidate list, the All Candidate by Requisition list, the All Candidates by Folder list, the All Candidates by Offer list, the quick search results list, the advanced search results list, the candidate capture/ possible duplicates list of automatically pooled candidates.	None

Callout	Fields in the Callout	Context Where Callout is Used	Security Level/Field Availability Impact
Message Template Callout	Message title, information, structure.	In the Send Correspondence wizard, when selecting a message template.	None
Message Paragraph Callout	Paragraph title, preview of paragraph body (in active language).	In the Send Correspondence wizard, when the message template selected contains many paragraphs.	None
Group Callout	User Name, Employee ID, Job Title, Email, Department.	In the Requisitions list, the Candidates list, the Offers list.	None
Create Candidate Callout	For job-specific submission: Selected Language, Selected Requisitions. For general profile: Selected Language, Folder location and name.	In the Create a Candidate wizard.	None
Create Candidate Flow Description Callout	Create candidate flow title and description.	In the Create a Candidate wizard when selecting a candidate file creation template.	None
Most Advanced Progression Status Callout	Requisition Title (with an hyperlink to the file if the user has the required permission), Requisition ID, Status, date when moved into that status.	In the Candidates list, in the Most Advanced Progression Status column.	If a user does not have the permission to see the Most Advanced Requisition, the hyperlink to the requisition will not be available.
Disqualification Question Explanation Callout	Disqualification Question Explanation Title, Disqualification Question Explanation Comment.	In the Disqualification Questions library (Detailed mode), the requisition file and the candidate submission.	None
User Information Callout	First Name, Last Name, Title (of requisition), ID (of requisition), Email Address, Work Phone Number, Extension, Fax Number.	In the User Selector available in the Share Candidate wizard, Request Approval wizard and Request Contribution wizard.	None

Callout	Fields in the Callout	Context Where Callout is Used	Security Level/Field Availability Impact
Requisition Template Callout	Requisition Template Title, Job Code, Status, Requisition Type, User Group, Recruiter.	In the Requisition Template Selector when selecting a template for a requisition file.	None
Requisition Template List Callout	Requisition Template Title, Activated Languages.	In the Requisition Templates library.	None
Attachment Callout	Candidate Name, Job Specific Attachments, Other Attachments.	In the Candidates lists.	Users must have the Access Attachments tab permission to see the callout.
Primary Location Callout	Primary Location, Country, State/Province, Region, Address, City, Zip/Postal Code.	In the left pane of requisitions and requisition templates.	None
Screening Description Callout	Screening Description.	In the job submission Screening block.	None

Selector and Autosuggest

The autosuggest feature is available for selectors having a large list of values.

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 trigger begins to work as soon as two characters are entered. A list of matching values beginning with the two characters that were entered is displayed. For example, if you are looking for Bishop University, if you type "bi" or "un", Bishop University will match. But if you type "shop", Bishop University will not show up.

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. A list of ten elements is displayed in the suggested list. When more then ten elements are available, the {more...} option is available. Clicking {more...} opens a selector with pre-filtered data. When the right entry is found, the user simply selects it from the list.

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 *ca* 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.

Capitalization and accentuated characters are ignored. For example: é = e, C = c. Therefore, to find the word École, type École or Ecole.

The following special characters are supported: &, - and ' . All other special characters are ignored.

For very large lists like employees or organizations containing sometimes more than 100 000 values, there might be a small delay because the filtering applied to the result set is based on user permissions. Newly created elements or changed elements are available within minutes.

This table indicates the content appearing in a selector where the autosuggest feature is available.

List	Content
User (Recruiter, Hiring Manager, Collaborator, Recipient, etc.)	First Name and Last name, alphabetically sorted.
User Group	Group description, alphabetically sorted.
Job Role, Position, Department	Code and name, alphabetically sorted.
Requisition Template	Code and title, alphabetically sorted.
Candidate Selection Workflow	Name, alphabetically sorted.
Organization, Location, Job Field	Name, sorted by sequence defined in SmartOrg.
Employer, Institution, Program, Certification	Description, alphabetically sorted.
Message Template	Name, alphabetically sorted.
Time Zone	Description, alphabetically sorted.
Requisition	Number and title, alphabetically sorted.
Email	Name, alphabetically sorted.
Large User-Defined Selection	Code and description, alphabetically sorted. Note: the configuration of the code and description display has no impact on the autosuggest feature.

Item Requiring Attention Icon

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

The Item Requiring Attention icon appears in 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).

Personal Preferences

My Personal Preferences

Recruiting Center users can set certain elements of the application according to their personal preferences.

Users can set personal preferences such as personal information, address, email, password, person to whom work items are delegated, frequent collaborators and approvers. Users can also override options that were previously configured by the system administrator to fit their personal preferences.

Personal preferences are set in My Setup (available under the Resources link in the auxiliary navigation bar). For a list of options that can be modified, see *Personal Preferences Options*.

Personal Preferences Options

The table presents options that can be modified by a user under My Setup.

Element	Description
Personal Information	• First Name • Last Name • Prefix • Suffix • Initial • Employee ID • Title • Department Name
Contact	• E-mail address • Fax Number • Work Phone Number • Cellular Phone Number • Pager Number • Home Phone Number
Address	• Complete address
Account	• Password • *Work item delegation*
General User Preferences	• Enable eShare Email for Response Center Access • Distance Unit • Correspondence Language • Content Language • *Time Zone* • Workflow Event Notification • Fax Notification

Element	Description
	• *Theme* • Text Size • *Selected Item 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
Requisition	• Default Hiring Manager • Default Recruiter • Requisition File Automatic Filling • Preferred Non-Electronic Media • Display Question Details in Libraries
Frequent Collaborators	• Individuals who are frequently requested to act as collaborators.
Frequent Approvers	• Individuals who are frequently requested to approve requisitions and offers.

Changing My Personal Preferences

Prerequisite

User type permissions grant users access to this feature.

Steps

1. In the auxiliary navigation bar, click Resources, then My Setup.
2. Click on a tab.
3. Click Edit.
4. Modify your preferences.
5. Click Save and Close.

Lists and Filters

List Usage

Several tools are available to manage requisition and candidate lists.

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

- *quick filters*
- *advanced filters*
- *show filter*

Actions Directly in the List: Several actions can be performed directly in a list. A contextual action menu is available in the Requisitions list, Requisition Templates list, and Candidates list. To display the list of actions, users simply have to click the arrow next to the file title. See *Actions Available Directly in a List*.

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

Column Drag and Drop: Columns in a list can be moved on the page using a drag and drop action. Changes in columns are kept during the user's session.

Column Width: It is possible to enlarge or reduce the width of columns in lists. Changes in columns are kept during the user's session. See *Column Width in Lists*.

Wrapped Text: Text is wrapped in every column, except for the Candidate Record Identifier column.

Column Header and Row Colors: When a cursor passes over a column header or column row, the element is highlighted in light blue. When clicking on a column header to sort elements or when selecting one or several rows, the elements are highlighted with a dark color.

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.

Callouts: A callout is a small window or bubble containing information on an element. To see information contained in a callout, users must place their mouse over the element. See *Callout*.

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 step and 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 is limited to 150 candidates at a time. For the Print action, a maximum of 50 candidate files and 15 requisition files can be printed at a time.

Maximum Number of Rows Displayed in a List

To maintain good performance, the display of results in a list are handled as follows.

	Maximum number of rows returned	Results displayed if the maximum number of rows returned is exceeded	Results are sorted if not all rows can be displayed	Scrollbar available
Requisitions List	1000	Yes (but, no indication that the results exceeded the limit)	Yes. A system sort is applied using the last modification date. The user can then perform a sort on the 1000 requisitions.	Yes
Candidates List	1000	No (but a message indicates to filter the list)	No	Yes
Job-Specific Candidate List	1000	No (but a message indicates to filter the list)	The user can perform a sort.	Yes
Automatic Candidate Pooling List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Advanced Search Results List	300	Yes (but, no indication that the results exceeded the limit)	No	Yes
Offers List	1000	No (but a message indicates to filter the list)	No	Yes
Selectors (such as Organizations, Locations, Job	1000	Yes (but, no indication that the	Alphabetical sort	Yes

	Maximum number of rows returned	Results displayed if the maximum number of rows returned is exceeded	Results are sorted if not all rows can be displayed	Scrollbar available
Fields, Employers, Institutions, etc.)		results exceeded the limit)		

Actions Available Directly in a List

Recruiting Center users have the ability to take actions on files directly from a list without having to open the file first.

Candidate File	Requisition File	Requisition Template
Edit	Add Comments	Edit
File in a folder	Allow Posting	Create Requisition...
Find similar candidates	Amend Approval Path	Duplicate this template
Match...	Cancel Requisition	Print...
Print...	Create Requisition...	
	Decide on Approval	
	Delete	
	Duplicate this requisition	
	Edit	
	Fill	
	Posting and Sourcing...	
	Prevent Posting	
	Print...	
	Put on Hold	
	Reactivate	
	Reopen Requisition	
	Request Approval	
	Request Approval Path Amendment	

Candidate File	Requisition File	Requisition Template
	Request Contribution	
	Request Sourcing Configuration	
	Return my Contribution	
	Save as Open	
	Send an approval request reminder	
	Terminate Approval Process	

Column Width in Lists

The width of columns in lists can be enlarged or reduced.

The width of icon columns is 26 pixels.

Columns Represented by Icons	
Icon	Description
	Used to draw a user's attention to items that he/she owns and that require viewing.
	If the Disqualification Questions functionality is enabled, this icon is displayed in the Candidates lists.
	Identifies top candidates (those who meet all required criteria) in the candidate list of a requisition.
	Indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.
	Indicates that a candidate is in at least one selection process.
	Indicates that a file was attached.
	Indicates that the candidate is internal, that he/she already works for your organization.
	Indicates that the candidate was referred by a agent or a colleague.
	Indicates that the candidate is new in the selection process.
	Indicates the number of candidates who applied on a requisition.

Columns Represented by Icons	
Icon	Description
	Indicates the number of candidates who received a job posting notification.
	Indicates that a requisition requires the recruiter/hiring manager's immediate attention.
	Prevents users from posting a requisition.
	Indicates that the daily recruiting report function has been activated for that requisition.

The width of field columns is set as follows: the label length + the sorting icon length. There is a minimum default width of 50 pixels. Note that if a column has two fields (like Employer/Title or Step/Status), then the width would be increased by 30 pixels.

There are exceptions to the above rule. The following column have a specific hard-coded default width:

Candidate List - Hard-coded Default Width	
Column	Width
Application LinkedIn ID	70 pixels
Profile LinkedIn ID	70 pixels
Application City	100 pixels
Profile City	100 pixels
Application State, City	100 pixels
Profile State, City	100 pixels
Contest Number, Job Information, Title	170 pixels
Job Information, Title	170 pixels
Application CRI	170 pixels
Profile CRI	170 pixels

Requisition List - Hard-coded Default Width	
Column	Width
Requisition Active Locales	45 pixels

Requisition List - Hard-coded Default Width	
Column	Width
Requisition Mini Active Locales	45 pixels
Job Active Locales	45 pixels
Requisition Status	100 pixels
Requisition Status Detail	100 pixels
Requisition Mini Status Detail	100 pixels
Job Status	100 pixels
Requisition Recruiter	100 pixels
Requisition Mini Recruiter	100 pixels
Requisition Recruiter Assistant	100 pixels
Requisition Mini Recruiter Assistant	100 pixels
Job Recruiter	100 pixels
Requisition ID	100 pixels
Requisition Title	170 pixels
Requisition Mini Title	170 pixels
Requisition Job Information Title	170 pixels
Requisition Mini Job Information Title	170 pixels
Requisition Mini Title 2	170 pixels
Requisition Mini Title 3	170 pixels
Job Information Title	170 pixels

Candidate Lists Exceeding 1000 Candidates

In a job-specific candidate list, the list filtering capabilities can handle mass applicant volumes.

When viewing candidates who applied on a requisition, if more than 1000 candidates match the filter(s) selected, Recruiting Center users are prompted to narrow down the list. Two solutions are available:

- to use quick filters to narrow down the list of candidates, or
- to choose the "View First 1000 Candidates" option.

When selecting the "View First 1000 Candidates" option, the user is brought to the list of candidates and the first 1000 candidate files are displayed. Candidates will be presented initially in descending order, beginning with the candidate who most recently applied. Anytime a new quick filter criterion or list sort action is applied, the list will refresh considering the entire set of applicable candidates. In the case of list sorting, this means a different list of 1000 candidates may be returned. In the case of applying filters, this link may or may not appear again depending on whether the list is still greater than 1000 candidates. To view the entire list, use the Step/Status filters and disposition candidates out of the quick filter view being used. This way the entire list can be accessed and reviewed.

When using the “View First 1000 Candidates” option, users should place candidates into a Step/Status other than New/New so that they can continue to access the first 1000 new files using this feature by reapplying the filter and continuing to successively go thought the list.

If needing to reject more than 1000 candidates at one time, users should not put them all into the Rejected status and then try to perform this action because the list will not easily render. Instead, if sending manual reject correspondence, users should send them prior to putting candidates into the Rejected status.

Users cannot use advanced filters until there are at least some candidates displayed in the list. Therefore, advanced filters cannot be used to do the initial list filtering.

Prerequisites to this feature are:

- More than 1000 candidates have applied on a requisition.
- Quick filters in use do not narrow the list below 1000 candidate files.

This feature is only available for job-specific candidate lists. It does not apply to:

- Search results: This view shows a maximum of 300 candidates.
- Folders: When more than 1000 files exist, users need to use quick filters to narrow down the list.
- Candidates List: When more than 1000 files exist, users are prompted to narrow down the list. Users can use quick filters, or they can view candidates that applied on specific requisitions (one requisition at a time), or they can use the advanced search or quick search if looking for a specific candidate.

Candidate File Identifier

The candidate file identifier is used to specify which candidate-specific information is presented in the Candidate column of candidates lists.

The candidate file identifier can provide the following information in the form of text or icon:

- Candidate name (first name, last name, middle initial)
- Identification number
- Ace candidate 
- Internal candidate 
- In at least one selection process 
- Referred candidate 

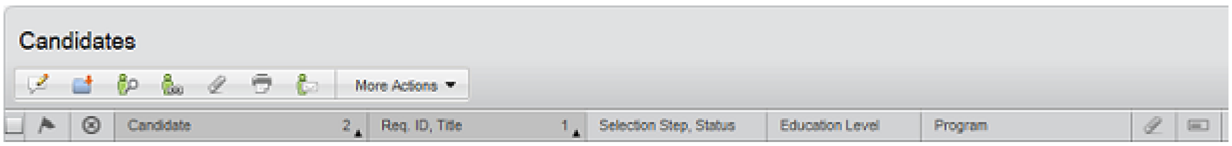
The Candidate column is always displayed in candidates lists. System administrators are responsible of defining which information will appear by default in the column. However, Recruiting Center users can modify the default set by their system administrator via their *personal preferences* available under My Setup.

List Format

List formats are available for candidates lists and requisitions lists. They allow the display of candidate file or requisition file information in different columns.

The system provides a selection of default candidate and requisition lists that are ready to use. However, system administrators can create new list formats to better suit their organization needs. Recruiting Center users can select (among the list formats created by their system administrator) the list format they wish to use to display files in a list. They can also create up to three list formats and select columns to display specific information (if permissions were granted). Columns available to choose from have been previously defined by system administrators.

In this illustration, the Education list format was selected to display candidates.



Selecting a List Format

Steps

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

Creating 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. 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.
    a) To select one sort criterion, click in the Sort By column next to the desired column name.
    b) To select a second sort criterion, click in the Then By column next to the desired column name.
    c) To select a third sort criterion, click in the second Then By column next to the desired column name.
    d) To select ascending or descending sorting order, click the triangle icon repeatedly.
    e) To disable sorting for a specific column, click the triangle icon again. The triangle icon disappears.

f) To modify the order of the columns selected, use the arrows.

6. Click Save.

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.

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 .

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 My Setup located in the Resources drop-down list of the auxiliary navigation bar.
2. Click the Preferences tab.
3. Click Edit.
4. Select the desired value in the Sorting Key drop-down list.
5. Click Save.

Quick Filter

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

Quick filters are displayed on the left panel of a page and are available in the following lists:

- Tasks
- Requisitions
- Candidates
- Offers
- Requisition Templates
- Questions

- Interview Questions
- Disqualification Questions
- Competencies

By default, quick filter categories are collapsed and only display selected filtering criteria. When no quick filter is selected, the list displays all available entries. As soon as one filter is selected, it is automatically applied to the list and the list refreshes according to the selection made. Users do not need to refresh the list. For example, in the Requisitions list, if the Status - Open quick filter is selected, only open requisitions are displayed in the list.

Several quick filters can be applied at a time. Quick filters can be restored to their initial value by clicking .

Some quick filters have an icon to refresh the related list. Also, when entering data in more than one field and clicking or pressing the Enter key, the refresh action takes into account the data entered in all the fields.

For a list of available filters, see *Candidate List Quick Filters* and *Requisition List Quick Filters*.

Important Note: *(ID 317) When applying Organization, Location or Job Field quick filters, select the desired value and then click into another field in the quick filter area to get the list to refresh with the criteria applied.*

Requisition List Quick Filters

Quick Filters Available for Requisition List Formats		
Filter	Main Requisition List	Mini Requisition List
Primary Location	✓	✓
Organization	✓	✓
Job Field	✓	✓
Status	✓	✗
Requisition ID	✓	✗
The Status quick filter is considered a multi-select within the same field and acts as an OR filter. For example, when selecting the Draft and Open status filters, the user will see all requisitions that are either in Draft or Open status.		

Candidate List Quick Filters

	Quick Filters Available for the Candidate List Formats					
Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Candidates - Internal	✓	✓	✓	✓	✓	✓
Candidates - Referred	✓	✓	✓	✓	✓	✓
Candidates - Requiring Attention	✓	✓	✓	✓	✓	✗
Candidates - In selection Process	✓	✓	✗	✗	✗	✗
Candidates - Active on Current Requisition	✓	✗	✗	✓	✗	✗
Candidates - Active on concurrent requisition	✓	✗	✗	✓	✓	✓
Candidates - Exclude disqualified	✓	✗	✗	✓	✗	✗
Candidates - New in selection process	✓	✗	✗	✓	✗	✗
Submissions - Submission completed	✓	✗	✗	✓	✗	✗
Submissions - Meet required criteria	✓	✗	✗	✓	✗	✗
Submissions - ACE	✓	✗	✗	✓	✗	✗

Quick Filters Available for the Candidate List Formats						
Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Submissions - Assets Met	✓	✗	✗	✓	✗	✗
Submissions - Results between %	✓	✗	✗	✓	✗	✗
Submissions - Creation Date	✓	✗	✗	✓	✗	✗
Submissions -Completion Date	✓	✗	✗	✓	✗	✗
Submissions - Last Activity Date	✓	✗	✗	✓	✓	✓
Submissions - Step	✓	✗	✗	✓	✗	✗
Submissions - Status	✓	✗	✗	✓	✗	✗
Submissions - Employer	✓	✓	✗	✓	✓	✗
Submissions - Program	✓	✓	✗	✓	✓	✓
Submissions - Radius	✗	✗	✗	✗	✗	✓
Requisitions - Status	✓	✗	✗	✗	✗	✗
Requisitions - Organization	✓	✗	✗	✗	✗	✗
Requisitions -Primary location	✓	✗	✗	✗	✗	✗
Requisitions - Job Field	✓	✗	✗	✗	✗	✗
Requisitions - Requisition ID	✓	✗	✗	✗	✗	✗

Quick Filters Available for the Candidate List Formats						
Filter	All Candidates by Requisition	All Candidates By Folder	All Candidates By Offer	Requisition Specific Candidate List	Search Results - Quick or Advanced	List of automatically pooled candidates
Folder Name	✗	✓	✗	✗	✗	✗
Offer Status	✗	✗	✓	✗	✗	✗
Shift	✗	✗	✗	✗	✓	✓
Offer Dates: Creation, Start, Approval, Expiration & Acceptance	✗	✗	✓	✗	✗	✗

Candidates quick filters are considered a single select on different fields and act 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.

The Candidates - Active on Current Requisition filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in hire step/status). The Candidates - In selection Process filter will display any candidates in an active step/status (excluding any that are in a rejection, decline, or in a hire step/status) and not flagged as disqualified based on disqualification questions.

Advanced Filter

Advanced filters help Recruiting Center users to filter lists using an expansive set of filtering criteria.

Both requisitions and candidates lists have “advanced” filtering tools at the very bottom of the left panel of the page. Recruiting Center 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 an adjacent to the filter criteria. By clicking , 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”.

Show Filter

The Show filter allows Recruiting Center users to filter information displayed in a list using ownership, collaboration or status criteria.

The Show filter can appear in:

- Requisitions list.
- Candidates list.
- Tasks list.
- Home page.

The Show filter:

- Can be displayed everywhere except in the home page.
- Can be displayed everywhere including the home page.
- Can be not displayed at all.

Values appearing in the Show filter depend on the permissions granted to the user and on the configuration of the application. Available values are the same for all three pages where the Show filters can appear. 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 does 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".

When displaying the Candidates list, a check box called *Show requisitions inactived since* appears just underneath the Show filter. Selecting this check box will add to the Requisitions list the Deleted, Canceled and Filled requisitions.

Folders

Folder

In the Recruiting Center, folders are used for organizing candidate files and search queries.

Recruiting Center users who have been granted the proper permissions 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 tab is available in the left panel of the Candidates list and Search Queries list.

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 candidate 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 owner 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.

Languages

Languages

Taleo products are available in different optional languages.

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

The preferred language of a user is set in the user's account by the system administrator. The preferred language is used by the system as the default content language which is the same across all Taleo products. If a product does not support the same set of content languages, it will have its own preference configuration.

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

When multiple languages are used for an element, the icon is displayed. Hovering the 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 a company, there is no special indicator.

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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

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. In the auxiliary navigation bar, click Resources, then My Setup.
2. In the Preferences tab, click Edit.
3. Select the desired language in the Correspondence Language drop-down list.
4. Click Save.

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 the Base option for the desired language.
4. If necessary, select Active in the Status drop-down list.
5. Click Save.

Result

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

Selecting Languages for an Element

Steps

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

Result

Activated languages will be displayed in the Activated Languages drop-down list.

Deactivating a Language

Prerequisite

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

Steps

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

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

4. Click Save.

Result

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

Attachments

Attachment

Files can be attached to requisitions, candidate files, offers, etc.

The following file formats are supported by the application. System administrators define which formats are available to users.

- Any File Format
- Excel (.xls and .xlsx)
- Hypertext Markup Language (.htm and .html)
- OpenOffice Writer (.odt)
- Portal Document Format (.pdf)
- Rich Text Format (.rtf)
- Text (.txt)
- Word (.doc and .docx)
- Word Perfect (.wpd)
- Zip Format

Basic Concepts

Application Time-out

Taleo applications include 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 time-out delay is reached, a message notifies the user that the time-out delay for the application is imminent.

Two scenarios are possible:

- User takes action: When the application has been idled for thirty minutes, a message notifies the user that the application requires attention. Clicking “Access the application” directs the user to the application. When the user accesses the application, 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 is displayed, indicating that the user has been signed out of the application and has to sign in again to use the application.

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

Element Status

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

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.

Concurrent Management

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

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.

Contextualization: Organization-Location-Job Field

Organizations, Locations, and Job Fields (OLF) represent the fundamental data structure by which information is organized in the application.

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. Taleo strongly recommends defining a zipcode for the location. 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
Specialty

Although Organization-Location-Job Field structures are configured with the help of a Taleo representative during the implementation phase (Implementation operation 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 selection workflow
- requisitions and requisition templates
- message templates
- onboarding processes
- reporting
- integration
- user management
- source tracking
- prescreening competencies, questions and assessments
- approvals
- etc.

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

Time Zone

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

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 via the My Setup feature (located in the top right-hand corner of pages) if they were granted the permission by their system administrator.

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.

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

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

- Use the user's preferred time zone (in My Setup).
- If the above was not defined, use the user's preferred time zone (in SmartOrg > User Accounts > General Preferences).
- If the above was not defined (unlikely), use the user's operating system time zone.

- If the above was not defined, use the default time zone (Configuration > [Career Section] Settings).

Print Function

The print function allows Recruiting Center users to create a PDF version of a requisition file or candidate file that can be saved and/or printed.

The print function is available in the candidates list and requisitions list as well as within candidate files and requisition files. When using the print function, users can decide to print the content in a list format where information is presented in different columns, or they can choose to print the details of the file where content is presented into sections.

- When printing the content in a list format, the content of the file is presented in different columns and the content of each file is displayed in a row. The format of the list (that is, the columns used to display the information) is identical to the requisition or candidate list format used. A maximum of 1000 lines can be printed in the list.
- When printing the details of the file, all sections of the file or only specific sections can be printed. For example, a user can choose to print from a candidate file only prescreening and basic profile information. Sections selected by a user when using the print function are saved as defaults for the next print action, but blocks selected within the main submission file section are not. Also, sections available to a user are based on how the file is configured and on user permissions. This means, if a system administrator wanted to allow users to more precisely control what is printed, he/she can do this by increasing the sections in the file layout. For candidate files, a maximum of 50 files can be printed. For requisition files, a maximum of 15 files can be printed.

When 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 is identical to the data presented to the user for the selected sections while looking at the information in view mode.

When selecting one or several candidate files in a candidates list or requisition-specific candidate list in order to print them, the Submission file is printed. When selecting one or several candidate general profiles in a search results list or folders list, the General Profile file will be printed.

Regarding tracking information in the candidate file History tab, the system displays the 1000 most recent tracking items no matter if printing 1 or 50 candidate files. Therefore, if printing one candidate file, the 1000 most recent tracking items are displayed. If printing five candidate files for example, 200 tracking items are displayed per candidate. For a given candidate, when the maximum is reached, the following message is displayed: "The history contains the {0} most recent items".

Important Note: *(ID 284) When printing a candidate file, it is not possible while printing to include the name of candidate facing attached files. In Taleo 10, attachments appear in the Attachments tab; they are not part of the candidate file and they are no longer printed with the file (In 7.5, these were included on the Resume tab and were therefore visible.).*

History Tracking

The History tab presents useful tracking details on an element.

A History tab is available in candidate files, requisition files, competencies, questions, and disqualification questions. The History tab is a read-only file except for the History tab of the candidate file. See *Candidate File History*.

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.

Rich Text Editor

The Rich Text Editor enables users to edit and format text contained in correspondence, requisitions, requisition templates, etc.

The Rich Text Editor contains standard word processing tools:

- cut, copy and paste functions
- font types and sizes
- bold, italics and underline
- search feature
- spell checker
- text and background color
- left, right and center alignment
- table creation
- numbered and bulleted lists
- etc.

Important Note: *(ID 326) Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as Internet Explorer 7 or Firefox.*

Requisition Management

Requisition List and Requisition File

Requisitions List

The requisitions list displays requisition file information into different columns and provides tools to filter requisitions and to select columns in the list.

The requisitions list is divided into three sections:

The left pane contains the *Show requisitions for* option which allows users to filter requisitions using ownership values. *Quick filters* and *advanced filters* are also provided to filter the requisitions list down to relevant information. The pane can be expanded or collapsed using the icon.

The right pane contains *online help* and *online clips* if these were enabled. The pane can also be expanded or collapsed.

The center pane displays requisitions. The icon allows users to *select the list format* they wish to use to display requisitions in the list. Users can also *create up to three list formats* and select columns to display specific information (if permissions were granted). Several actions can be *performed directly in the list*. A contextual action menu is available by clicking the arrow next to the file title. For information on the tools available in the list, see *List Usage*.

Requisition File

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

A requisition file is organized into three sections:

- The left pane contains the requisition card in the top section and supporting information in the bottom section. The pane can be expanded or collapsed using the icon.
- The right pane contains supporting tools such as the *online help*, the *diagnostic tool*, and the *online clips* if these were enabled. The pane can also be expanded or collapsed.
- The center pane provides a menu bar allowing users to perform actions on the requisition file. It also contains *tabs* that provide complete information about the requisition. The requisition content is presented as a long form. The main content of the requisition file is within the Requisition tab, which includes various sections that can be expanded or collapsed using the icon. The other tabs contain peripheral information.

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.

From the Requisition tab, whether in edit or view mode, users always have access to a table of contents that allows quick jumping to different portions of the file. The table of contents is available via the icon.

Requisition File Tabs

Requisition File Tabs	
Name	**Description**
Requisition	Contains all the details of the job.
Alerts	This is where users can set the *ACE candidate alert* which will inform them when a candidate meets specific required criteria. Users can also specify to request more information about these candidates.
Attachments	Contains *attachments* for the requisition.
Approvals	Displayed when an *approval* request has been generated. The tab appears for all users that can view the requisition. When no approval request has been generated, the Approvals tab is hidden. This tab provides an easy means to access and review the most recent approval information for the requisition. Authorized users can also modify or resend approval requests from this page.
Posting and Sourcing	Provides access to *posting* and sourcing features such as career section posting, job board distribution through eQuest, staffing agents, non-electronic media. Allows users to modify the list of sources associated with the requisition.
Autopooling Criteria	Contains *autopooling* criteria.
History	Contains a *log of all actions* performed on the requisition file, including the date and the user who performed the action.
Reports	Allows users to define if a daily recruiting *report* will be sent to individuals regarding the status of the requisition's progress.

Requisitions

Creating a Requisition

Recruiting Center users have the ability to create requisitions to detail the specific requirements for a job position.

The creation of requisitions is done via the Create Requisition button which is available in the 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.

A best practice when creating a requisition is to select a *requisition template* first; this will auto-populate many of the requisition fields based on the selected template. Users can select from all requisition templates available which align to their user group context or have no user group defined.

When creating a requisition, the Create a Requisition wizard is launched. The content of the wizard will vary depending on how it was configured by the system administrator.

- The first step may be to select a *requisition type*. This step is available if more than one requisition type was enabled and if specific permissions were granted to users.
- The second step will allow users to specify specific elements such as the position, the department, the hiring manager, the job role, and requisition template. When this information is provided, the system fills certain fields in the requisition form.
- The third step is to select an Organization, Location and/or Job Field.

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.

Once the requisition is completed, the requisition goes through an approval process before being posted on internal and/or external career sections or job boards. Once the requisition is posted, candidates can apply for the job and fill the required fields.

Creating a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. 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.
3. Click Save.

Result

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

Creating a Multilingual Requisition

Prerequisite

The user’s preferred languages are activated by default (the languages are displayed in the Activated Languages drop-down list).

Users are not forced to translate non-mandatory fields (a non-mandatory field completed in the base language can be left blank in other languages).

Users can change the value selected for a field (they are not limited to the value selected for the base language).

A user type permission grants users access to this feature.

Steps

1. 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.
3. Complete the fields.
4. Click Save.
5. In the Activated Languages drop-down list, select the language in which you want to translate the requisition.
6. Complete the fields.
7. Click Save.

Result

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

Duplicating a Requisition

Recruiting Center users have the ability to duplicate requisitions to create requisitions similar to an existing one.

A requisition can be duplicated by using the  icon which is available in the requisition form. This icon is available to users if they have been granted the proper user type permission. Any requisition can be duplicated regardless of its status.

When duplicating a requisition, all of the information is duplicated except the Alerts tab information (which defaults to your organization's ACE settings) and except the following fields.

Fields that are not duplicated	
Requisition file section	Field
Logistics - Identification	Requisition Number
Logistics - Identification	Justification
Logistics - Profile - In Contingent Requisition	Target Start Date

Fields that are not duplicated	
Requisition file section	Field
Logistics - Profile - In Contingent Requisition	Target End Date
Logistics - Profile - In Contingent Requisition	Start Time
Logistics - Profile - In Contingent Requisition	End Time
Logistics - Abstract	Abstract
Description (External) - General	Opening Date
Description (External) - General	Closing Date
Description (External) - General	Contact Name
Description (External) - General	Contact Email
Description (Internal) - General	Opening Date
Description (Internal) - General	Closing Date
Description (Internal) - General	Contact Name
Description (Internal) - General	Contact Email

Important Note: *(ID 306) When a requisition is duplicated, it will carry over the list of approvers from the original requisition as the starting point for approvers on the requisition. If in fact the requisition is never routed for approval but is saved as open, these approvers will remain on the Approvals tab with no dates associated with conducting an approval. Users should understand that if an approver appears on a page with no date next to their name, they never approved the requisition. This scenario illustrates how this might come to occur.*

Duplicating a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

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

   Some fields will not duplicated. For details, see *Fields that are not duplicated*.
4. Click Save.

Result

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

Editing a Requisition

Recruiting Center users have the ability to edit requisitions to modify the content of fields in the requisition form.

Users can modify requisitions via the Edit button which is available in the requisition form. This button is available to users if they have been granted the proper user type permission. Users who can edit requisitions also have the ability to enter comments on requisitions they are allowed to edit.

The edition of fields contained in a requisition is controlled by the security level set for each field. However, certain fields are never editable once a requisition is posted.

Fields appearing in these sections are not editable once a requisition is posted
Profile (such as Employee Status, Job Type, Schedule, Job Level, Shift)
Organization-Location-Job Field
Prescreening (Note: Questions or skills cannot be added, but they can be removed.)
Candidate Selection Workflow
Budget (such as Relocation Costs)
Compensation (such as Currency, Pay Basis, Commission, Vacation)
Other (such as Citizenship Status, Overtime Status)
Additional Information
Contact Name, Opening Date, and Closing Date in the Description section

Editing Requisition Fields

Prerequisite

Settings allow the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. Open a requisition.
2. Click Edit.
3. Make changes to the editable fields.
4. Click Save and Close.

Saving a Requisition as a Template

Steps

1. Open a requisition file.

2. Click .

Result

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

Putting a Requisition on Hold

Prerequisite

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

The requisition status must indicate Unposted, Open, or Expired.

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).

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. In the More Actions list, click Put on Hold...
3. Enter comments.
4. Click Done.

Result

Activities related to the requisition are restricted or postponed. The status of the requisition is changed to On Hold.

Reactivating an On Hold Requisition

Prerequisite

The requisition status must be On Hold.

Steps

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

Result

The status of the requisition becomes Draft.

Indicating a Requisition was Filled

Prerequisite

A user type permission grants users access to this feature.

The requisition status must NOT indicate Filled, Draft or On Hold.

The requisition status must not indicate Pending with a status details displaying 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.

Reopening a Requisition

Prerequisite

A user type permission grants users access to this feature.

The requisition status must be Filled.

Steps

1. Open a requisition file.
2. In the More Actions list, select Reopen Requisition.
3. Complete the required information.
4. 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. Open a requisition file.
2. In the More Actions list, click Request Contribution....
3. Select a contributor.
4. Complete desired fields.
5. Click Done.

Result

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

Returning my Contribution

Prerequisite

A contribution must have been requested.

User must have completed the contribution.

Steps

1. Open a requisition file.
2. In the More Actions list, select Return my contribution.
3. Select the contribution.
4. Enter comments.
5. Click Done.

Result

The originator of the request is notified that the user returned his/her contribution (the created work item is flagged).

If the requisition status is not sourcing, not rejected, not in a closing state, then:

- If the requisition status is Draft, a "To be completed" task is created for the requisition.
- If the requisition status is Approved and complete for sourcing, a "Ready for sourcing" task is created for the requisition.
- If the requisition status is Approved and not complete for sourcing, a "To be completed" task is created for the requisition.

The task is assigned to the originator of the contribution request work item and flagged (AIF) in the Tasks list.

Adding a Comment in a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. Click .
3. Enter a comment.
4. Click Done.

Result

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

Adding an Attachment to a Requisition

Prerequisite

The file will be scanned 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. Open a requisition file.
2. Under 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

Steps

1. Open a requisition file.
2. Click the Attachments tab.
3. Move the mouse over the name of an attachment.
4. Click Delete.
5. Confirm your deletion.

Viewing Attachments in a Requisition

Steps

1. Open a requisition file.
2. Click the Attachments tab.
3. Click the name of an attachment.

Printing a Requisition

Prerequisite

A maximum of 15 requisition files can be printed at a time.

Steps

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

Cancelling a Requisition

Prerequisite

A user type permission grants users access to this feature.

The requisition status must not indicate Canceled or Filled.

Steps

1. Open a requisition file.
2. In the More Actions list, click Cancel Requisition...
3. Enter comments.

4. 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.

Reopening a Requisition that Was Cancelled not Filled

Prerequisite

The requisition status must be Cancelled.

A setting activates this feature.

A user type permission grants users access to this feature.

Steps

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

Result

The requisition that was cancelled without being filled is reopened. 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.

Deleting a Requisition

Prerequisite

The requisition status must be Draft.

A user type permission grants users access to this feature.

Steps

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

Result

The requisition no longer appears in the requisition list.

Selecting the Candidate Selection Workflow for a Requisition

Prerequisite

The requisition status 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.

A user type permission grants users access to this feature.

Steps

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

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

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.

Adding a Screening Service to a Requisition

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.

Reopening a Filled Requisition and Adding Openings

Prerequisite

The requisition status must be Filled.

A setting activates this feature.

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. Select Reopen Requisition... in the More Actions list.
3. 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.
4. Enter comments.

5. 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

The requisition status must be Filled.

A setting activates this feature.

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. Select Reopen Requisition... in the More Actions list.
3. Click the radio button next to Cancel the hiring of the candidates.
4. Enter comments.
5. 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.
6. The system displays the candidate list corresponding to the requisition.
7. Click the check box next to the candidate's name and click Revert... in the More Actions list.
8. Enter comments.
9. Click Done.

Result

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.

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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

Previewing Candidates Matching a Requisition

This feature allows Recruiting Center users to select a requisition and to preview candidates who would be a fit for the requisition based certain matching criteria and filters.

When a requisition has been posted to a career section, users can view a list of candidates whose profiles match default matching criteria and filters. This is done using the Preview Matching Candidates button available in the requisition Posting and Sourcing tab.

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 Recruiting Center users using the  icon to find more relevant candidates for a particular requisition. Default matching filters are also set by the system administrator. These default filters can also be modified by users.

Once the user feels that he/she has found the right candidates, an email is sent to these candidates to invite them to apply for the job.

Matching Criteria
Preferred Jobs/Job
Preferred Locations/Locations
Preferred Organizations/Organization
Place of residence/Location
Competencies
Questions
Job Level
Job Type
Schedule
Shift
Employee Status

Matching Criteria
Education Level
Travel
Minimum Annual Salary

Matching criteria (except for competencies and questions) can be set as required or desired:

- 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. Candidates who do not have an asset will be matched as long as they meet 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 candidates do not enter answers for these criteria, the answers will still be considered. The candidates will be matched if they match all the other required criteria. Answering these criteria will help determine the position of the candidates on the candidates list.

Matching Filters
Submission Status: Do not invite candidates who have at least one submission with any of the selected statuses: • New • Reviewed • 1st, 2nd, 3rd Interview • Testing • Offer • Hired • Rejected • Declined
Sourcing: Invite or not candidates: • Who have applied through any source type or source. • Who have applied at least once through any of the source types or sources selected.
Other: Invite candidates living in: • All countries • The requisition country • The requisition state/province • The requisition region
A filter to invite candidates whose information has been modified during the last x months.
A filter to invite internal candidates.

Viewing Candidates Matching a 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.

Result

The Posting Requisitions - Filter Matching Candidates window displays candidates matching the requisition.

Modifying Matching Candidate 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.
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.

Modifying Matching Candidate Filters

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.

Sending an Email to Candidates Matched to a Requisition

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.

Request More Information Alert

The Request More Information alert allows Recruiting Center users to send an email to candidates who meet certain conditions but whose submission is incomplete.

The message invites the candidates to return to their submissions 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, these options are provided:

Option	Description
A candidate meeting all the required criteria achieves a result of at least x% (0/0)	This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates.
A candidate meeting all the required criteria has at least x assets out of y	This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Request information when candidate meets either condition	This option is used to notify candidates who meet the result or asset condition.
Request information when candidate meets both conditions	This option is used to notify candidates who meet the result and asset condition.

Setting the Request More Information Alert

Prerequisite

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

A user type permission grants users access to this feature.

Steps

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

Result

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

Diagnostic Tool and Show Required Fields

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

In the requisition file, in edit mode, the “Show fields required to” feature allows users 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 users 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 represents the information provided to candidates who apply for a job.

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 contact name and email address, 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.

Information on Specific Requisition Fields

Important information regarding specific requisition fields.

Field	Description
Budget	Supports currency symbols, commas, and decimals.
Bonus	Supports commas and decimals.
Salary	Supports commas and decimals.
Opening and closing dates	Refers to when the company offers the position. These dates may differ from the posting (sourcing) dates.

Requisition Templates

Requisition Template

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

Requisition templates are available to Recruiting Center users in the Libraries menu, under Templates.

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 feature which is available in the Requisition Templates library. The Create Template feature 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. The content of the wizard will vary depending on how it was configured by the system administrator. .

- The first step may be to select a *requisition type*. This step is available if more than one requisition type was enabled and if specific permissions were granted to users.
- The second step may be to select an Organization, Location and/or Job Field.

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.

When the requisition template is completed, its status is Draft. The template must be activated to be used. The activation is done during the requisition template creation or later on by selecting the Active status within the template.

If a user creates a requisition using a requisition template that contains data that the user cannot see, the data will appear in the requisition regardless of the access to the data by the user. For example, if a recruiter is not authorized to see prescreening information but the Prescreening section exists in the requisition template, the prescreening information will appear in the requisition and be visible to the recruiter when the recruiter accesses the file (provided the Prescreening section is configured on the file used by the recruiter and the recruiter is authorized to view prescreening information).

Important Note: *(ID 243) Both the recruiter and user group fields can be specified in the requisition template but unlike other fields in the template. These fields will not fill in as defaulted fields in requisitions created from the template. The purpose of the recruiter field in a requisition template is to give a user ownership privilege of the template from a template access viewing and filtering perspective in the Template library. The purpose of the user group field specified in a requisition template is to define which users will be authorized to create* *requisitions using this template. Only those matching the group will see the template if a group has been specified.*

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.

Activating a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

The requisition template must be Inactive or Draft.

Steps

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

Result

The requisition template is available to Recruiting Center users.

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 a template.
3. Click .
4. Modify the information.
5. Click Save and Close.

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 a template.
3. Click Edit.
4. Modify fields as required.
5. Click Save and Close.

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 a template.
3. Click Edit.
4. Select Inactive.
5. Click Save and Close.

Result

The requisition template is no longer available for use.

Deleting a Requisition Template

Prerequisite

A user type permission grants users access to this feature.

The requisition template status must be Draft.

Steps

1. In the Libraries menu, select Templates.
2. Click a draft requisition template.
3. Click .
4. Click Yes in the message box.

Requisition Types

Requisition/Staffing Type

A requisition (or staffing) type allows Recruiting Center users to determine the type of candidates that they want to hire.

These requisition types are available:

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

When creating a requisition, if more than one requisition type is activated, Recruiting Center users are 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.

In the Requisitions list, a column called Requisition Type may be added if system administrators made it available in the requisition list format. Also, Requisition Type may be available as a search criteria in the Advanced Filters if made available by system administrators.

When selecting Requisition Type in the Advanced Filters window, all requisition types are listed even if the Recruiting Center user has no access to some of those requisition types.

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.

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 and Collaboration

Requisition Owner

Requisition ownership refers to the individuals chosen as the recruiter, the hiring manager, the recruiter assistant or the hiring manager assistant for a specific 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 Requisitions list, you can use the “I own” 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.

Changing the Ownership of a Requisition

Prerequisite

The user must be the owner of the requisition or have the appropriate user type permission.

A user type permission grants users access to this feature.

Steps

1. Open a requisition file.
2. Click Edit.
3. In the Owners section, select new individuals as recruiter, hiring manager, recruiter assistant, and hiring manager assistant for the requisition.
4. Click Save and Close.

Result

Notifications will be sent to the new owners of the requisition.

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.

To provide special access to a number of users throughout the requisition's life cycle, a Collaborator role is 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 a permission to reassign requistions to owners and collaborators even if the user is not the owner of the requisition.

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.

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. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. Click Add in the Collaborators section.
4. Select a user.
5. 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. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. Select a collaborator in the Collaborators section.
4. 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. Open a requisition file.
2. In the Requisition tab of the requisition file, click Edit.
3. 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. In the auxiliary navigation bar, click Resources, then My Setup.
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. In the auxiliary navigation bar, click Resources, then My Setup.
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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

Suggested Users

The User Selector may contain an option to display suggested users.

The Suggested Users option is available when accessing the User Selector from a requisition and if the Collaborators field has been activated.

When selecting the Suggested Users option, the *owners* (recruiter, recruiter assistant, hiring manager, hiring manager assistant) and *collaborators* associated to the requisition are displayed. Note that only users who are able to complete the selected action are available for selection. For example, when requesting the approval of a requisition, only users who have the permission to approve requisitions are displayed.

Displaying Suggested Users

Steps

1. In a requisition, click  to open the User Selector.
2. In the Quick Fitlers panel, select the Suggested Users option.

   The list of suggested users is displayed.
3. Select the desired user.

Requisition Prescreening

Prescreening

The Prescreening section of the requisition file may contain disqualification questions, competencies and questions used to find the ideal candidates.

The Prescreening section in a requisition file 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.

The Prescreening section contains questions and competencies. Disqualification questions are displayed 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 Candidates 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 Candidates 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.

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.

Required and Asset Criteria

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	✓	
Master’s Degree	✓	
PhD	✓	
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	✓	

	Required	Asset
3 to 6 years	✓	
6 to 10 years	✓	
More than 10 years		

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. 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.			

	Required	Asset	Weight
MS Access			
MS Word	✓		
MS Excel	✓		
MS Publisher		✓	1 (17%)
MS Project		✓	3 (50%)
Adobe Acrobat		✓	2 (33%)
Adobe Pagemaker		✓	
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	✓		
More than 3 years and less than 5 years	✓		3 (100%)
More than 5 years and less than 7 years	✓		2 (67%)
More than 7 years	✓		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.

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.

ACE Candidates Recruiting

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.

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.

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 *Question Writing Tips*.

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”.

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 *Requisition Precreening*.

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.

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 *ACE Candidate Filtering* .

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?

ACE Candidate Alert

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

The ACE candidate alert allows the system to identify the candidates who achieve or exceed the ACE alert threshold for a job offer. It identifies top candidates based on their responses to the competencies and questions in the Prescreening section of the requisition file. The ACE candidate alert is based on Required and Asset criteria. Candidates are divided into three groups to help users determine which candidate files to review first:

- ACE candidates: Consider these candidates first because they meet all Required criteria and some Asset criteria.
- Minimally qualified candidates: Consider these candidates after the ACE candidates because they meet all Required criteria but not Asset criteria.
- Other candidates: Do not consider these candidates because they do not meet any Required criteria.

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

When setting the ACE candidate alert, these options are provided:

Option	Description
A candidate meeting all the required criteria achieves a result of at least x% (0/0)	This option is used to set the minimum result. Select a percentage from the list. At the right of the percentage, the system displays the number of points the candidate must have to match the selected percentage. When changing the percentage, the value to the right is recalculated. Candidates who meet all the required criteria and the result value will be considered ACE candidates. Do not use the percentage weighting option if you do not use the Weight criterion in the Prescreening section of the requisition file. If you

Option	Description
	utilized weighting on some of the questions you could, if you wish, incorporate into the ACE candidate alert setting as well. For a simple approach, you can start by using 75% weight result and then eventually align that % with your own approach and utilization of weighting that works best for you.
A candidate meeting all the required criteria has at least x assets out of y	This option is used to set the minimum number of assets. Select a value from the list. Candidates who meet all the required criteria and the minimum number of assets will be considered ACE candidates.
Identify a candidate as an ACE when either condition is met	This option is used to identify ACE candidates using the result or asset condition.
Identify a candidate as an ACE when both conditions are met	This option is used to identify ACE candidates using the result and asset conditions.

When setting the ACE candidate alert, users have the option to send an email to notify specific recipients that an ACE candidate was found. To be an ACE Candidate Alert recipient, a user must meet all these criteria:

- The user must be active.
- The user can access the Recruiting Center or eShare Response Center.
- The user has access to the staffing type of the requisition.
- The user belongs to the user group of the requisition.

Users can be set up as an ACE Candidate Alert recipient even if they have limited access to information on the candidate file.

All ACE Candidate Alert recipients receive the same candidate file, regardless of permissions to view candidate information in the system. When an ACE Candidate Alert is set, the recipient receives an email with an attached PDF file that contains data from the candidate file. Sections of the candidate file that contain no data do not appear. All PDF files display information as follows regardless of the user's permissions:

- Fields with the General or Restricted security level are displayed. Fields with the Confidential security level are not displayed.
- Labels in the candidate file are displayed in the Recipient's language if there is only one recipient; otherwise labels are displayed in the requisition's base language.
- Values entered in the candidate file are displayed in the job submission language.
- The Regulations block is not included.
- Passport results are not included.
- Candidate attachments are not included.

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

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.

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.

Setting Up ACE Recruiting

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

Prerequisite

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.

A user type permission grants users access to this feature.

Steps

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

Result

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

Adding a Recipient to an ACE Alert

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

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.

Requisition Posting

Posting of Requisitions

Requisition posting consists of publishing a requisition in order to have candidates applying on the job.

A requisition can be posted on:

- Internal or external career sections.
- eQuest: This is the doorway to post requisitions on any job board. A requisition must be posted on a career section before being posted on eQuest.
- Staffing agents: Users can ask an advertising agency to post an ad.
- Non-electronic media such as newspapers, magazines and trade publications, billboards and broadcasting. A list of preferred non-electronic media can be created in My Setup, under Preferences.

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. 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.

Important Note: *(ID 341) When unposting from all the Career Sections, users are not receiving the message to select to unpost from the Job Boards (eQuest). Therefore, users must also go into the Job Board (eQuest) and select to Unpost All from there as well.*

Important Note: *(ID 343) When posting a requisition to the Non-Electronic Media, the Internet Mining or the Sourcing Strategy, some pieces of information are missing such as default agency, requisition details, OLF, hiring manager, description, qualifications and correspondence preview. It is recommended that users review the requisition details before posting to any of these posting options.*

Important Note: *(ID 344) When posting a requisition to a Career Section, the date used to calculate the end date value is the start date. When extending the posting of a requisition already posted to a Career Section and a new end date value is selected, the date used to calculate the end date is the end date. The functionality is working correctly, but because the posting and extending features are in one screen, it might be confusing for users.*

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.

Unposting a Requisition from all Job Boards

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 Unpost All.

Result

The system will send a request to eQuest to unpost the requisition from all job boards.

Updating a Requisition in all Job Boards

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 Update All.

Result

The system will send a request to eQuest to update the requisition in all job boards with the latest information.

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 the job board.

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

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

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

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.

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 b e 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.

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.

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.

Important Note: *(ID 321) When changing the agent who referred a candidate, if we want to reselect the original referring agent and the original ownership is expired, the change will not take effect unless a different agent is first selected and then another modification is made to reselect the original agent.»*

Candidates being referred receive an email informing them that they were referred by an agent for a job and inviting them to review the profile information submitted by the agent.

Later, when searching through the candidate database, the 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. Once a requisition has been posted to an agent, the Remove button is no longer be available in the Actions column.

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..

Social Job Invite

Ability for both candidates and users to easily share jobs via their social network or by email.

The Social Job Invite feature is available in the Career Sections and in the requisition Posting and Sourcing tab.

Note that this feature is not part of the Taleo Anywhere solution. It does not replace the RSS & Facebook feature which allows the sending of jobs by creating a search query.

Career Section

The Social Job Invite feature replaces the Send this Job to a Friend feature in the Career Section. Candidates have the option to select one of many social job sites or email options to send the job to someone in their friend network list, or to simply post on their wall.

The Social Job Invite feature is available on the client’s Career Sections, in the following portal pages:

- Job List
- Personalized Job List
- Job Description
- Basic Search
- Advanced Search

The system will create a URL link back to the first posted external Career Section Job Description page for the requisition being shared (the Career Section selected will not necessarily be the Career Section where the candidate is, unless that is the first posted external Career Section). The job reference URL will also have the source name embedded in it. When a candidate selects the link to apply, if the source in the URL matches the source name of an active source of type Social Network that is part of the requisition source list then that will be the source that is pre-filled into the submission. If the source is not found in the requisition source list, then the system will pre-fill the source "Other" under the Social Network source type, as long as that source is part of the requisition source list. If that source is also not in the requisition source list, then no source will be pre-filled.

If the job is unposted from the Career Section used in the URL before the candidate selects the link, the standard message indicating that the job is no longer available will be displayed.

Additional sources can be added to support more details in the source tracking in Recruiting Administration. Sources must be created under the Social Network source type. The source name must equal the source name in the provided list. The source name is not case sensitive.

When candidates choose to share jobs through social networks they must be logged in, or have a valid user account to log in to the third party sites and share.

To obtain a list of the social site services currenlty supported by this feature as well as their assigned source name, refer to the document entitled *Source List Names for Social Media.xls*. Note that this list is subject to change without prior notice.

Requisition Posting and Sourcing tab

A Share link is available in the requisition Posting and Sourcing tab. This option is only available when a job is posted to an external Career Section.

The system will create a URL link back to the first posted external Career Section Job Description page for that requisition. If the job becomes unposted from the Career Section used in the URL before candidates select the link, they will receive the standard "Job is no longer available" message.

There is no way to unpost a requisition from the Social Network sites using Taleo. There is no history tracking when requisitions are posted using the Share option

When linking to a social job site, this feature will link to the social site the user is already logged onto, and not something that can be controlled in Taleo. Therefore, the user, if wanting to post to the company fan page/account, will need to log into that social site using the company credentials.

Recruiting Sources

Sources and Events

A source is a medium or event through which a candidate has heard about a job.

Sources may be as diverse as Internet job boards, job fairs, magazines, specialized trade publications, newspapers, professional associations, mailing lists, recruiting agencies, etc. Events are used to track down which event, banner, or campaign are attracting the most candidates to career sections. An event can be a specific advertisement in a trade magazine, a recruiting event on a university campus (job fair), or a special recruiting event at an organization.

In the Recruiting Center, sources are displayed in the requisition Posting and Sourcing tab. When users create a requisition, only the sources that have the same Organization-Location-Job Field structure as the requisition are displayed in the Sources list. Users can modify the list of sources associated to the requisition. If event tracking was enabled, users have the ability to access the list of events related to a source. Once in the Events list, users have the ability to add, modify and delete events in the requisition.

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.

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 Sources section of the requisition.

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 Sources section of the requisition.

Creating an Event

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 Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, click Create.
5. Complete the fields.
6. Click Create.
7. Click Close.

Result

The event is now available for the source. The number located in the Events column increases by one.

Modifying an Event

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 Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, select the event and click Modify.
5. Make required changes.
6. Click Save.
7. Click Close.

Deleting an Event

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 Sources section, for the desired source, click on the number located in the Events column.
4. In the Events window, select the event and click Delete.
5. Click Close.

Result

The event is no longer available for the source. The number located in the Events column decreases by one.

Recruiting Reports

Daily Recruiting Report

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

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.

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.

Candidate Management

Candidate List and Candidate File

Candidate List

The candidates list displays candidate file information into different columns and provides tools to filter candidates and to select columns in the list.

The candidates list is divided into three sections:

The left pane contains three tabs:

- The filters tab contains the *Show candidates for* option which allows users to filter candidates using ownership values. *Quick filters* and *advanced filters* are also provided to filter the candidates list down to relevant information.
- The *folders* tab is used to organize candidate files.
- The *talent pool* tab is used to see talent pools and match employees and candidates to requisitions.

The pane can be expanded or collapsed using the icon.

The right pane contains *online help* and *online clips* if these were enabled. The pane can also be expanded or collapsed.

The center pane displays candidates. The icon allows users to *select the list format* they wish to use to display candidates in the list. Users can also *create up to three list formats* and select columns to display specific information (if permissions were granted). Several actions can be *performed directly in the list*. A contextual action menu is available by clicking the arrow next to the file title. For information on the tools available in the list, see *List Usage*.

Candidate File

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

A candidate file is organized into three sections:

- The left pane contains the *candidate card* in the top section and supporting information in the bottom section. The card can be flipped and the pane can be expanded or collapsed using the icon.
- The right pane contains supporting tools such as the *online help* and the *online clips* if these were enabled. The pane can also be expanded or collapsed.
- The center pane provides 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 content 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 that can be expanded or collapsed using the icon. The other tabs contain peripheral information. From the Job Submission/General Profile tab, whether in edit or view mode, users always have access to a table of contents that allows quick jumping to different portions of the file. The table of contents is available via the icon.

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.

Note that the landing tab when opening a candidate file can be configured in the *My Setup* feature, which is available via the auxiliary navigation bar.

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.

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 by the system administrator. Depending on the candidate card side being viewed, this tab will be either specific Job Submission OR 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 and users must also have been granted the permission to manage self-assigned tasks.
Offers	Displayed if offer management is used. The Offers tab is displayed on a candidate submission once an offer is created. It contains offers submitted to the candidate, offers from competitors, candidate expectations and requisition offer information. The Offers tab and offer content are always job specific and visible only from the job submission view. • Competitive offers and current jobs are linked to the candidate and are thus shared between submissions for this candidate. Context based permission ownership is applied based on the owners of any requisition this candidate has applied to. • Candidate job offers and expectation offers are linked to the submission and can only be viewed by users who can view that submission. The Offers tab and offer content are never displayed when viewing a candidate's general profile.
Offer Approvals	Displayed if offer management and approvals are used. The Offer Approvals tab is displayed once an offer approval request is generated. The Offer Approvals tab is

Candidate File Tabs	
Name	Description
	visible for any user who can view offers for the candidate submission. It contains the most recent offer approval information.
Referrer	Contains both employee/candidate referral and agency referral information and actions. The Referrer tab is always visible if the user can view the candidate's general profile or job submission.
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. See *Candidate File History Tab.*

Candidate Card

The candidate card provides quick information about the candidate.

Located on the left pane 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 pane (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 pane 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 pane. The candidate submission contains information about the candidate specific to that requisition.

Candidate File History

The History tab in the candidate file contains a log of all actions performed on the candidate file, including the date and the name of the user who performed the action.

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 categories:

- Agent and referrer
- Attachments
- Candidate file update
- Candidate information
- Candidate progression
- Comments
- Correspondence
- Questions and competencies
- Regulation
- Resume
- Screening services
- Offer

Attachments and offer history can be seen in the History tab if users have the required permissions.

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

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.

The Show History for list can present information on all job submissions, on job submissions in selection process or on a specific job submission.

Candidate Actions

Candidate

A candidate is a person that applied on a job, that submitted a profile, or that was referred.

A candidate is a person:

- who has submitted a profile
- who has created a job submission
- for which a profile has been created by a user
- for which a job submission has been created 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 referrer
- who has been created by a Recruiting system user

Details regarding internal and 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. In general, candidates applying on a job or submitting their profile from an internal career section are automatically considered internal candidates. All other candidates are considered external candidates by default. However, if coming from an external career section and if the application flow is configured to allow it, candidates applying from external career sections can indicate that they are internal candidates and will receive the internal designation. In addition, Recruiting Center users may have the ability to change the internal/external state of a candidate directly in the candidate file by using the Internal Candidate check box (which is available in the Candidate Personal Information section of the candidate file, under the General Profile tab).

Recruiting Center users may also have the ability 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” 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”.

Creating a Candidate

Recruiting Center users have the ability to create candidate general profiles and job-specific submissions.

The creation of candidates is done via the Create Candidate feature which is available in the home page as well as in the Candidates list via the More Actions list. This feature 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.

When creating a candidate general profile or job-specific submission, the file presented to users does not take into consideration security level permissions in view and edit modes for those users and will allow them to input data into all the fields no matter the security level permissions granted or the security level set for the fields.

After deciding on the type of file to create, users have to select a template to create the candidate file. 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.

During the creation process, the Resume Parsing option is available 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.

Before creating the actual candidate file, a duplicate check has to be performed to find out if the candidate already exists in the database. The following fields can be used for the duplicate check:

- First Name
- Last Name
- Middle Name
- Email Address
- Street Address
- City
- Phone Numbers (home, work, cellular, pager, or fax)
- Social Security Number

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.

Creating a Candidate General Profile

Prerequisite

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

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select Create Candidate... in the More Actions list.
2. Select the Create a general profile option.
3. Select a candidate file creation template.
4. Select the language in which you want to create the candidate file.
5. Select the folder where you want to save the candidate file.
6. Indicate whether or not you want to use the Resume Parsing feature.
   The file must not exceed 100 kilobytes and its format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt). Also, the processing of resumes written in other languages than the submission language might not be supported.
7. In the Duplicate Check step, provide information to make sure the candidate is not already registered into the database.
   a) If duplicates are found, the system displays them in a list. You can select the candidate file and edit the file.
   b) If no duplicates are found or if duplicates are found and the candidate is not on the list, you can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

Creating a Candidate Job-Specific Submission

Prerequisite

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

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, select Create Candidate... in the More Actions list.
2. Select the Create a job-specific submission option.
3. Select the language in which you want to create the candidate submission.
4. Select the requisition for which the candidate is applying.
5. Select a candidate file creation template.
6. Indicate whether or not you want to use the Resume Parsing feature.
   The file must not exceed 100 kilobytes and its format must be one of the following: Word (.doc, .docx), WordPerfect (.wpd), Text (.txt), Rich Text Format (.rtf), Hypertext Markup

Language (.html, .htm), Portable Document Format (.pdf), Excel (.xls, .xlsx), OpenOffice Writer (.odt). Also, the processing of resumes written in other languages than the submission language might not be supported.

7. In the Duplicate Check step, provide information to make sure the candidate is not already registered into the database.
   a) If duplicates are found, the system displays them in a list. You can select the candidate file and edit the file.
   b) If no duplicates are found or if duplicates are found and the candidate is not on the list, you can create a new candidate file OR modify the duplicate search criteria and perform a new duplicate check.

Editing a Candidate File

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the Candidates list, click on the name of a candidate.
2. Click Edit under the Job Submission/General Profile tab.
3. Modify information as needed.
4. Click Save.

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.

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.

Printing a Candidate File

Prerequisite

A maximum of 50 candidate files can be printed at a time.

Steps

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

Unlocking a Candidate Account

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, select the General Profile tab.
2. Confirm the candidate identity.
3. In the Account Information section, click Unlock Account.

Generating a Password for a Candidate Account

Prerequisite

A user type permission grants user access to this feature.

Steps

1. Confirm the 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.

Exporting a Candidate File to SAP

Prerequisite

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

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

Steps

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

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

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

A user type permission grants users access to this feature.

Steps

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

Result

The grade is displayed in the History tab.

Adding an Attachment to a Candidate File

Prerequisite

A user type permission grants users access to this feature.

The file will be scanned 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. Select a candidate file.
2. Click .
3. Click Browse to select a file.

4. Indicate if you want to make the file visible to the candidate.
   By default, a maximum of five files visible to the candidate can be attached by the recruiter and the candidate.
5. Click Done.

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.

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.

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. Comments cannot be seen by the candidate.

Modifying a Comment in the Candidate File History Tab

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.

Modifying Event Categories in the Candidate File History Tab

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click on the History tab.
2. Click Modify.
3. Select the desired event categories.
4. 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 in the Candidate File History Tab

Prerequisite

A setting allows the activation of this feature.

A user type permission grants users access to this feature.

Steps

1. In the candidate file, click on the History tab.
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.

Viewing Candidates who Applied on a Requisition

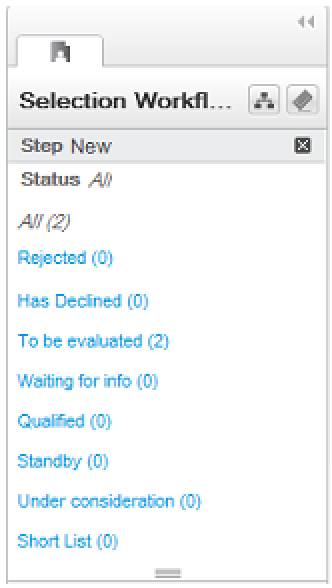
Recruiting Center users have the ability to view a list of candidates who applied on a requisition.

There are two ways for users to access a requisition-specific candidate list to view all the submissions for a requisition:

- When in the requisitions list, by clicking the number displayed in the column.
- When in a requisition, by clicking the number displayed in the left pane, just beside the option "Candidates for this requisition".

All candidates who applied on a requisition are listed on a single page. A scroll bar is available to see more candidates and the total number of submissions is displayed at the bottom of the page (for example: 1 of 42 out of 42).

The candidate selection workflow steps are displayed in the left panel. The icon allows users to see a full view of the workflow steps and statuses. The icon resets the step or status selection to all candidates. The count of candidates in each step is also displayed and it is possible to view the statuses within a step by clicking the name of the step. In the illustration below, two candidates are at step New, and their status is To be evaluated.



Quick filters and *advanced filters* are also available to filter the list down to relevant information.

Moving a Candidate to the Next Step

Prerequisite

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

Candidate must be at a completion status.

Candidate must not be in the RSOffer step.

A user type permission grants users access to this feature.

Steps

1. Select a candidate.
2. Select Change Status/Step in the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
   It is currently not possible to setup a reminder to a self-assigned task when moving a candidate to the next step.
5. Optional: Send a correspondence.
6. Click Done.

Moving Several Candidates to the Next Step

Prerequisite

Candidates must be at the same step.

Candidates must be at a completion status.

Step must include the Move action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

Steps

1. Select several candidates.
2. Select Change Status/Step in the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

Moving a Candidate to Any Step

Prerequisite

Candidate must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

Steps

1. Select a candidate.
2. Select Bypass from the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

Moving Several Candidates to Any Step

Prerequisite

Candidates must be at the same step.

Candidates must be at a completion status.

Step must include the Bypass action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

Steps

1. Select several candidates.
2. Select Bypass in the More Actions list.
3. Select a new step.
4. Optional: Create a self-assigned task by entering a name, due date, and description.
5. Optional: Send a correspondence.
6. Click Done.

Moving Several Candidates to the Hire Step/Status

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

When this feature is activated, users are able to select more than one candidate to move to the Hire step/status. The system performs a verification to see if the number of candidates selected is equal to or less than the number of positions still open.

If additional information is required during the hire action, for example the start date, all the information entered will apply to all candidates hired in that action.

This feature supports candidate selection workflows with or without the RSOffer step.

Changing the Status of a Candidate

Prerequisite

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

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

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 candidate is changed.

Changing the Status of Several Candidates

Prerequisite

Step must include the Change Status action.

Candidate must not be in a RSOffer step.

A user type permission grants users access to this feature.

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.

Changing the Step/Status 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.

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.

The Next Action column contains actions that will give access to the next status or step related to a candidate. Actions available in the new column will allow users to:

- Change the status of a candidate to the next completion status (if the step is not already completed).
- Move the candidate to the initial status of the next step if the current step is completed.

Actions available in the Next Action column are Candidate Selection Workflow (CSW) movements only, either a

- Move to the next step in the CSW
- Change to the completion status within the current step

If the current status is not a completion status, the action displayed will be a move (change status) to the first completion status of the current step.

If the current status is a completion status, then the action will be a move to the next step at the initial status. In a one-step CSW (reference workflow), only statuses configured as a “completion status” will show up as next steps.

Updating Steps and Statuses for Submissions on Different Requisitions

Recruiting Center users can select multiple submissions on different requisitions and update the corresponding step or status.

Recruiting Center users can select several candidate submissions submitted on different requisitions and move them to the next step, bypass the current step, or change the step's status provided all the submissions are at the same step and all the requisitions use the same Candidate Selection Workflow (CSW).

Whichever action users want to perform (move candidate submissions to the next step, change a step's status, or bypass the current step) on multiple submissions, the users require the corresponding user type permission. If users do not have a particular permission, the corresponding action is unavailable for selection.

If users select multiple submissions and some of them do not correspond to the user type permission that governs the action the users want to perform, a message at the end of the updating process indicates which submissions were not updated. Take the case of a user who had a user type that had the **Bypass steps: Only if this user is an owner of the requisitions** permission. Suppose the user selected multiple candidate submissions on different requisitions and all the submissions were at the 1st Interview step. The user then performed the bypass action to advance the submissions directly to the 3rd Interview step. If the selection included submissions from candidates for whom the user was a collaborator rather than the owner, the system would generate a message listing the submissions that were not updated. The submissions of candidates "owned" by the user would be updated to the 3rd Interview step.

If users change the current step of multiple submissions to Hire and some of the requisitions are then filled, a message is displayed for each filled requisition.

- If there are active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. The system will then unpost the requisition. However, you must first rescind all other offers extended to be able to close the requisition.
- If there are no active offers associated with a filled requisition, the following message is displayed: Once this operation is completed, all openings available for the requisition {Requisition ID} will have been filled. If the system is not able to unpost the requisition and change its status to "Filled", the requisition will have to be filled manually and the system will assign a task to {0}. Do you want to hire the selected candidates? If the user answers "No", the action is canceled; none of the submissions selected initially are updated to the Hire step.

While a user is updating the step or status of a selection of submissions on different submissions, the "Send correspondence" check box is available for selection if the individual has a user type that has the following permission and value: **Send correspondence (while changing the status of a candidate in a workflow) - Without restriction**. If the value is instead Only if this user is an owner of the requisitions or a collaborator, the check box is displayed only if the individual is the owner of or a collaborator for all of the submissions selected.

While a user is updating the step or status of a selection of submissions on different submissions, the workflow Event Date calendar is available for selection provided that all the submissions selected satisfy the **Set candidate selection workflow event dates** permission for the user type assigned to the user. For example, if the setting value is **Only if this user is an owner of the requisitions or a collaborator**, the user must be the owner of or a collaborator for all of the submissions or Event Date calendar will not be displayed.

Reverting to the Step/Status Previously Reached

Prerequisite

The step must include the Revert action.

The step must not be an RSOffer step.

The 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

The candidate is moved back to the step and status previously reached.

Candidate Progression Status

The candidate progression status indicates the most advanced progression status of a candidate on other requisitions across all positions where the candidate is being considered.

To see the progression status of a candidate, the Progression Status column, represented by this icon , must be added to the candidate list format. Icons are then used to indicate the furthest active progression status of a candidate across all positions where he/she is being considered. When clicking a progression status icon, a tooltip indicates the active status and a date. For example: "Most advanced progression status: New (as of 2011-Oct-17)".

Progression Status Icon	Description
	New
	Reviewed
, ,	First, second, and third interview
	Testing
	Offer
	Hired
	Pipeline
	Contact

In the 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
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 staircase icon remains available and shows the parallel job applications of the candidate. In a job-specific candidate list, the progression status icon may be displayed while the 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.

Candidate Duplicate Check

Checking for Duplicate Candidates

The Check for Duplicate action in the Recruiting Center allows users to verify if a candidate already exists in the database.

The Check for Duplicates action is available in the:

- Candidates list More Actions menu.
- Candidates list contextual action menu.
- Candidate file More Actions menu.
- Job-specific Candidates list More Actions menu.
- Job-specific Candidates list contextual action callout.

When selecting the Check for Duplicates action, the system performs a duplicate check against a duplicate check condition created by the system administrator. Candidates matching the condition are displayed in a Quick Search Results list. If two candidate files are duplicates, Recruiting Center users then have the ability to merge the files using the  icon.

Checking for Duplicate Candidates

Prerequisite

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 Check for Duplicates...

Result

If duplicates are found, they are listed in a Quick Search Results list.

Next Step

Merging candidate files.

Candidate File Merge

Merging Candidate Files

Recruiting Center users have the ability to combine several candidate files into one file.

When using the Check for Duplicate action, or when in a candidates list, or after performing a quick search or advanced search, Recruiting Center users can select from two to ten candidate files and merge them using the merge icon .

To verify if the selected candidate files are duplicate files, the system performs a duplicate check against a duplicate check condition created by the system administrator. Once the duplicate check is done, the system suggests a "master candidate file" by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.

Users can specify a different file as the master candidate file and remove unwanted candidate files.

Users can also select the order in which the duplicate files will be merged into the master file. Information from a duplicate candidate file added to empty fields in the master candidate file will not be overwritten with corresponding information from other duplicate candidate files positioned later in the merge process. For this reason, the order of files to be merged will affect the results.

When a merge occurs, the content of the duplicate files is added to the content of the master candidate file.

Special rules regarding the Education block, Work Experience block, and Certification block. Each block is evaluated using specific fields (Institution, Program, Education Level, Employer, Job Function, Expiration Date, Issue Date, Number/ID):

- If the content of the fields within each block is different, a new entry is added in the master candidate file and the content is copied over.
- If the content of the fields within each block is identical, the data within the specific block is merged.

For the candidate address, the system considers the Date From and Date To fields.

- If the Date From field is different, the system looks at the Date To field. If the Date To field is also different, a new entry is added in the master candidate file and the content is copied over.
- If no data is available in these fields, a new entry is added in the master candidate file and the content is copied over.
- If the content of the two fields is identical, the data within the specific block is merged.

If the email notification option was selected when merging the candidate files, an email message is sent to the master candidate or agent owning the master candidate to inform the person that the candidate files were merged and to invite him/her to review the new candidate file.

Files attached to the duplicate files are also merged. If the maximum number of attachments allowed per candidate is reached or exceeded, the attachments will be merged but candidates will not be able to add additional files.

The merging action can create multilingual candidate files. When merging candidate files with different languages, the master candidate file will have multiple languages. The language of the master candidate file will be used for the general correspondence. Submission-specific correspondence will be in the candidate's preferred language.

The merge action can be performed with candidate files having the following offer statuses:

- Draft
- Accepted
- Rescinded
- Canceled
- Reneged
- Approval Rejected
- Refused

Duplicate candidate files (that is, files that could be merged into the master file) cannot be merged if:

- The candidate is already in an onboarding process.
- The candidate has a pending interview request.
- The candidate file has an employee file.
- The candidate file contains an incomplete external service request (that is, an open Passport transaction) such as a background check, a tax credit check, an assessment.

Before starting an onboarding process or before hiring a candidate, it is a best practice to use the Duplicate Check function to make sure there is no duplicate file before locking down the current candidate with an onboarding process or by creating an employee file for performance management.

Merging Candidate Files

Prerequisite

A user type permission grants users access to this feature.

The merge feature cannot be used if one of the duplicate candidate file is already in an onboarding process, contains a pending interview request, contains an incomplete external service request such as a background check, or a candidate file has an employee file.

Steps

1. In a candidates list, select candidate files.
   A maximum of ten candidate files can be selected.
2. Click .
   The system performs a duplicate check to verify if a candidate already exists in the database. Once the duplicate check is done, the system suggests a master candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.
3. Optional: Use the Master drop-down list to select a different master candidate file.
4. Optional: Use the  next to the candidate file name to remove unwanted duplicate candidate files.
5. Optional: Use the Reorder button to select the order in which the duplicate files will be merged into the master file.
6. Specify if you want to send an e-mail notification to the master candidate or agent owning the master candidate to inform the person that the candidate files were merged and to invite him/her to review the new candidate file.

7. Click Done.

Candidate Comparison

Comparing Candidate Files

Recruiting Center users have the ability to display candidate files side by side for comparison purposes.

From a requisition-specific candidate list, a user can select two or more candidate files and invoke the Compare action in the More Actions list.

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 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

Section	Field
	• Expected Hourly Pay Rate • Hours per week willing to work • Hours per week, preferred • Willing to work on holidays • Willing to work on weekends
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. Individual actions can also be taken using the drop- down arrow. 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

Comparing Candidate Files

Prerequisite

Candidate files must be linked to the same requisition.

A user type permission grants users access to this feature.

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 candidates as desired.

Candidate Sharing

Sharing Candidate Files

Recruiting Center users have the ability to share candidate files with people via email.

The share action is represented by this icon and is available in the candidates list and the candidate file. A maximum of 30 candidate files can be shared at once.

When a user is sharing a candidate:

- Only the content that the user is allowed to access or that a company allows to share is available.
- The candidate file content that can be shared is defined by what the user can view. If a section is available to view, it will be available to share.
- Attachments can be shared depending on the user's ability to see attached files. See details below.
- Offer content can be selected for sharing if:
  - The user can view offer content.
  - The file being shared is a job submission.
  - The file contains offer data.
- Referrals can be shared.
- The history can be shared. See details below.
- Tasks are never available to share.
- Approvals are never available to share.

When a recipient receives the shared candidate file:

- A PDF of the candidate file is received as an attachment to the Candidate share e-mail message. The content of the PDF reflects the selections made by the user sharing the file. Attachments are directly attached to the email in their original file format.
- Sections that contain no data are removed from the shared file even if they were selected. Passport, eSignature and Regulation sub-sections are never included even if they are within a section of the candidate file that was included by the share sender when sending the share file.
- Shared files follow a restricted profile for field level security. Fields with a Confidential security level are never shared, and fields with the General or Restricted security level are always shared, regardless of the sharing user's permissions. As a result, the shared candidate file may include or exclude content that a user is otherwise able to see while in the Recruiting Center.
- Tasks are never included.
- Approvals are never included.

Attachments in the Share Candidate Feature

Attachments can be included when sharing a candidate file. User permissions are required.

Attachments are listed in two sections: candidate facing and non-candidate facing. If sharing a single candidate, for candidate facing attachments, share senders can individually select which attachment they wish to include. For non-candidate facing attachments, in all cases and even for candidate facing attachments if multiple candidates are selected for share, there is just a single checkbox and if selected all associated files will be included in the share e-mail.

Offer attachments are never included in a candidate share, even if the offer section is selected.

History in the Share Candidate Feature

The history can be included when sharing a candidate file.

If the History option is selected, the tracking events of the shared candidate is included. When sharing a general profile, only the related general profile history is shared. When sharing a job submission, only the history related to that job submission is shared.

Offer history information is included in the file if:

- The user sharing the file has the View offers permission.
- The user selects the Offer option in the Share Candidate assistant.
- The candidate file contains offer data. Note that offer data is not available when sharing multiple candidates.

Sharing a Candidate File

Prerequisite

A user type permission grants users access to this feature.

A maximum of 30 candidate files can be shared at once.

Steps

1. 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 Matching to Requisitions

Matching Candidates to Requisitions

Recruiting Center users have the ability to select one or several candidate files and to match them to one or several requisition files.

The matching action is available via this icon  and can be performed from a candidates 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 email to the candidate to inform him/her that a match has been done and to obtain more information on his/her application. Emails are sent only for posted requisitions, to avoid inviting candidates to requisitions they cannot see on the career section.

Matching Criteria
Preferred Jobs/Job
Preferred Locations/Locations
Preferred Organizations/Organization
Place of residence/Location
Competencies
Questions
Job Level
Job Type
Schedule
Shift
Employee Status
Education Level
Travel
Minimum Annual Salary

Matching criteria (except for competencies and questions) can be set as desired or required:

- Required: The criterion is mandatory. A match must exist between the content of the candidate file and of the requisition file. If a requisition file meets the criterion, it will appear in the list of requisitions presented to the user.
- Desired: The criterion is an asset. A match is not required between the content of the candidate file and of the requisition file. Desired criteria are considered as a plus. A requisition file that does not match a desired criterion is not rejected.

Requisition files that meet all the required criteria and that also meet some desired criteria will appear at the top of the requisitions list presented to the user.

Competencies and questions criteria are considered as wildcards. If these criteria are not selected as required in the requisition, or if a candidate does not enter answers for these criteria, the answers will still be considered.

Matching a Candidate to a Requisition

Prerequisite

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.

A user type permission grants users access to this feature.

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 email 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.

Users can schedule, update and cancel interviews directly in the Recruiting Center. Attendees invited to a meeting receive an interview notification by email and they add the meeting to their calendars. Each time and interview is scheduled, updated or cancelled in Taleo Recruiting, an email message is sent to selected attendees

Here is how the candidate interview scheduling feature basically works.

A recruiter wants to interview a candidate for a job. For that, the candidate must be at the right interview step/status. From the Candidates list or the requisition-specific candidate list, the recruiter selects the candidate file and chooses the Schedule an Interview... action in the More Actions list. The recruiter invites the candidate and can also invite other attendees to the interview meeting. The hiring manager of the requisition is invited by default. However, if the meeting organizer is the hiring manager, the recruiter is invited instead. Non-Taleo Recruiting users can also be invited to the meeting via their email address.

A default interview invitation message is proposed by the system. The most appropriate message template is pre-selected based on the requisition’s Organization-Location-Job Field structure and the application language. However, it is possible to select another message.

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

After the interview meeting has been scheduled, the recruiter can view interview scheduling information in the candidate list Interview column and in the candidate file History tab. 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 generates iCalendar entities that can then be integrated with any mail system that supports this specification, including Microsoft Outlook. 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. 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.

When scheduling or updating a 1st interview, the meeting organizer will not be able to add the appointment to his Outlook calendar using the ics link contained in the interview meeting invitation he will receive. This is a Microsoft Office issue that occurs with Outlook 2007 and Outlook 2010 (version 14). This issue is happening to meeting organizers only.

Files Attached to an Interview Invitation

Users can attach the candidate file and requisition file to the interview being scheduled and the message being sent.

The candidate file attached to the email message only contains information included in these sections:

- Prescreening
- Screening
- Resume
- Profile

The attached file never contains confidential candidate information included in the Offers, History, and Regulations sections. Files attached to the candidate file (for example, a resume) are not included in the interview invitation.

The requisition file attached to the email message only contains information included in these sections:

- Logistics
- Description

User type permissions grant users access to the content of the candidate and requisition files. Depending on the user type permissions granted to the user scheduling the interview, some attendees may not have access to information they normally would have. 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.

Scheduling an Interview

Prerequisite

The candidate must be at an interview step.

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

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 email 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

Only one user at a time can modify interview information.

An interview must have been scheduled.

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

Only one user at a time can modify interview information.

An interview must have been scheduled.

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. You can 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

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.

Candidate Autopooling

Automatic Candidate Pooling

The Automatic Candidate Pooling feature allows customers to add autopooling criteria to a requisition or requisition template to find candidates in the database who are available and qualified for a job. Managers can then access the autopool results with a single click.

The Automatic Candidate Pooling feature is typically used in decentralized hiring environments, for example in high volume retail and hourly hiring where managers may have to quickly identify candidates on their own without the assistance of recruiters.

For the Automatic Candidate Pooling feature to be available, the feature must be enabled by the system administrator. Users creating or defining autopooling criteria must be granted the required user type permissions, but no permission is required to access the autopool results.

Autopooling criteria can be added to a requisition via the Autopooling Criteria tab (if autopooling criteria were added to a requisition template, they will be inherited by the requisition). This is like a saved search that managers can use to find candidates who are both available and qualified. The following autopooling criteria may include any criteria from the Advanced Search, plus an additional set of basic criteria. For example:

- Exclude candidates in selection process
- Candidate's general profile language must match the requisition language
- Exclude expired job submissions (selected by default)
- Exclude rejected candidates - Within the last x days
- Exclude hired candidates - Within the last x days (selected by default)
- Candidate's place of residence - Within a radius of x kilometers/miles from the primary location of the job opening
- Submissions must match the following organization-location-job field structure

As a best practice, when defining autopooling criteria:

- Define autopooling criteria in requisition templates so criteria are inherited as requisitions are created.
- Define the widest possible set of candidates from the database that would be both qualified and available. This way, no time is wasted on unqualified or unavailable candidates. For example:
    - Set Organizations, Locations and Job Fields to only include candidates from other jobs with overlapping skills and/or who applied to nearby locations. Filter by Organization and Location if appropriate (specific country, specific division, etc.).
    - Exclude candidates being considered in another requisition, who were recently hired, whose submissions have expired.
    - Use the parameter to limit results to candidates who live within X kilometers/miles of the primary location of the requisition.

Once autopooling criteria have been defined and enabled, the system will automatically generate a list of candidates matching the criteria anytime on demand. This list of candidates is accessible in the requisition-specific candidate list or in the requisition file via the icon. A maximum of 300 candidates can be displayed. The user then has the ability to:

- View candidate files.

- Match candidates to the current job opening (candidates are moved from the autopool results list to the requisition-specific candidate list, and they can then be moved along the workflow like any other candidate).
- Match candidates to the current job opening and reject them in a single action (which will remove undesired candidates from continuing to appear in the candidate pool for this requisition; note that by default this option is disabled).
- Filter the list of candidates using quick filters defined by the system administrator.
- Sort the list of candidates by clicking a column heading.

When viewing a candidate file, the user may be able to view the other job applications that the candidate has submitted, depending on the permissions he/she was granted.

The user is able to match a candidate to the requisition via the autopooling feature even if he/she was not granted the permission to match candidates to a requisition in general.

The user may also be able to match and reject candidates in one action if he/she was granted the proper permission. When rejecting a candidate, the manager must specify the qualifiers (motives) and provide comments as required by the workflow.

If configured by the system administrator, the Automatic Candidate Pooling feature may also provide the ability to create optional repooling rules which automatically set a candidate's submission to an Inactive status after X days of inactivity. If the autopooling criteria for other jobs include the criteria to exclude candidates who are in a selection process, candidates who are automatically set to an inactive status will no longer be excluded and thus will be included in pool results.

Defining Autopooling Criteria

Prerequisite

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

Steps

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.
3. Click Edit.
4. Select autopooling criteria.
5. Yo can select advanced search criteria by clicking the Customize... button.
6. Click Save.

Next Step

Activating autopooling criteria.

Activating Autopooling Criteria

Prerequisite

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

Steps

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.

3. Click Edit.
4. Select the Enabled status.
5. Click Save.

Viewing Autopooling Criteria

Prerequisite

The automatic candidate pooling feature must be activated.

Steps

1. Click on a requisition or requisition template.
2. Click the Autopooling Criteria tab.

Viewing the List of Automatically Pooled Candidates

Prerequisite

The automatic candidate pooling feature must be activated.

Autopooling criteria must have been defined.

Steps

1. Click on a requisition file or a requisition-specific candidate list.
2. Click  .

Next Step

Viewing candidate files.

Matching candidates to the current job opening.

Rejecting candidates.

Matching a Candidate to a Requisition via Autopooling

Prerequisite

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

Steps

1. Click on a requisition file or a requisition-specific candidate list.
2. Click  .
3. Select a candidate file.
4. Click  .
5. Specify if you wish to send an e-mail to the candidate to request more information.

Result

The candidate is matched to the current job opening. The candidate is moved from the autopool results list to the requisition-specific candidate list, and he/she can then be moved along the workflow like any other candidate.

Rejecting a Candidate Selected via Autopooling

Prerequisite

The automatic candidate pooling feature must be activated.

A user type permission grants users access to this feature.

Steps

1. Click on a requisition file or a requisition-specific candidate list.
2. Click  .
3. Select a candidate file.
4. Click  .
5. Specify the reason why the candidate was rejected.
6. Enter comments.
7. Click Done.

Result

The candidate will no longer in the candidate pool for this requisition.

LinkedIn

LinkedIn Profile Preview

This feature links LinkedIn and Taleo together using the LinkedIn Profile Preview feature in the Recruiting Center and LinkedIn.

LinkedIn in Candidate File and Candidates List

Once the feature is activated, system administrators can define where the LinkedIn Profile Preview is available to Recruiting Center users.

A block called LinkedIn can be added to any candidate files, that is candidate submission and general profile. The LinkedIn block contains a *View link*. When the LinkedIn block is added to the candidate file, the LinkedIn View option becomes available in the Candidate Compare feature as well. Access is controlled via field contextualization, security level, and file setup.

A column called LinkedIn can be added to any candidates lists (including Quick Search Results list) by system administrators. When this column is added, a View link is also available.

LinkedIn View Link

When clicking the View link in the candidate file or candidates list:

- The candidate's LinkedIn Profile is displayed if the candidate's LinkedIn ID is present.
- The candidate's LinkedIn Profile is displayed if an exact match to the candidate's e-mail is present in a LinkedIn Profile.
- The LinkedIn Search feature is displayed if the candidate does not have a LinkedIn ID and an exact match to the candidate's e-mail cannot be found. From there, users can view and then select the correct candidate's profile to view.

When clicking the View link, the system sends the following data to LinkedIn in order to display the candidate's LinkedIn Profile:

- LinkedIn Unique ID that is stored in the candidate file (if available).
- E-mail address of the candidate.
- First name and last name of the candidate.
- Current employer name of the candidate.
- Current job title of the candidate.
- Country and zip/postal code of the candidate.

When clicking the View link and the LinkedIn Search feature is displayed:

- Search results are based on searching the LinkedIn database based on the candidate's first name, last name, current job title, and current employer's name.
- The way the LinkedIn Search works is that only candidates that meet all the requirements are displayed. As a result, users have the ability to remove or change the job title and employer to expand or change search results.
- Once the right candidate's profile is found, users can select to view the profile. This will then store the candidate's LinkedIn ID in the candidate file for future preview. If the client has a LinkedIn corporate account, this action will also send to LinkedIn the Taleo Candidate ID to allow deep linking back to this record from within LinkedIn (provided the user has access to the Taleo Recruiting Center).
- Recruiters can choose to unlink the LinkedIn ID if it is the wrong candidate's LinkedIn Profile. This action will remove the LinkedIn ID from the candidate file in Taleo. If the client has a LinkedIn

corporate account, the action of unlinking will also remove the Taleo Candidate ID from the LinkedIn record.

- The information displayed in the LinkedIn Preview window is entirely owned and defined by LinkedIn. The content presented will vary depending on the user's account level with LinkedIn. No corporate license is required for the LinkedIn Preview window to work, but users must be logged into LinkedIn as a user for content to display.
- If the client has a LinkedIn Corporate Account or a user has a specific Recruiter user account, more information may display in the LinkedIn Preview window.

The actual LinkedIn ID will not be displayed to users. If users can see the field in Taleo, they will only ever see the View link according to any other field contextualization and security behavior.

Users must have a LinkedIn account in order to view the LinkedIn Preview window. The account could just be the basic one that most people have, or could be the higher level of account as well. Users can sign up for a free LinkedIn account simply by going to www.LinkedIn.com.

LinkedIn is responsible for the following:

- The LinkedIn Preview window content.
- The LinkedIn Search window, results and content.
- The storing of the Taleo Candidate ID in LinkedIn.
- The display to see if the candidate is already in Taleo from LinkedIn.

Best Practices

Only activate this feature if there are no concerns regarding the transmission of candidate personal data to LinkedIn. Clients will need to acknowledge this during the activation of the feature on Solution Exchange.

The language in which the LinkedIn Preview window is displayed is determined by the display language selected in the user's LinkedIn account. It is not based on the language in which the user logged into Taleo. Example: A recruiter set the display language in his/her LinkedIn Profile to French. If the recruiter logs into Taleo in English, the LinkedIn Preview window is displayed in French.

The language of the candidate's profile content in the LinkedIn Preview window is determined by the base language selected in the candidate's LinkedIn Profile. Example: A candidate set the base language in his/her LinkedIn profile to French. If the recruiter logs into Taleo in English and views the LinkedIn Profile in the LinkedIn Preview window, the content is displayed in French.

This feature is not supported in the Remote Manager Experience.

The LinkedIn field is not displayed in the print, share, correspondence, forms, ACE alerts, or PDF forms generated for approvals or interview requests.

The LinkedIn ID field is not available for use in Integration or Reporting.

Clients may want to purchase a LinkedIn Corporate Account and/or LinkedIn Recruiter license for more advanced functionalities to appear in the LinkedIn Profile window.

Displaying a Candidate LinkedIn Profile

Prerequisite

For the LinkedIn Preview feature to work, the Internet Explorer option called *Enable Protected Mode (requires restarting Internet Explorer)* must be enabled (Internet Explorer > Internet Options >

Security Tab > Trusted Site). Once enabled, *Trusted Sites - Protected Mode: On* will be displayed at the bottom of your screen.

The LinkedIn block must have been added in candidate files by your system administrator.

A candidate LinkedIn Profile can also be accessed via the Candidates list if the LinkedIn column was enabled by your system administrator.

Steps

1. Open a candidate file.
2. Click the View link located in the LinkedIn block.

Result

The candidate's LinkedIn Profile is displayed if the candidate's LinkedIn ID is present and if an exact match to the candidate's e-mail is present in a LinkedIn Profile. If the candidate does not have a LinkedIn ID and an exact match to the candidate's e-mail cannot be found, the LinkedIn Search feature is displayed. From there, you can view and then select the correct candidate’s profile to view.

Merge Form/Fill Out Form

Merge Form

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

Merge forms are used during the hiring process. For example, during interviews with candidates, a recruiter may use a PDF form as a template to complete a candidate's "Do not disclose" information. PDF forms are most typically used for various new hire paperwork or to print a candidate submission in a particular, customized format.

Merge forms are first built in Adobe Acrobat. System administrators then add them in the Recruiting Administration. If desired, they can also tie them to candidate selection workflows, steps, and statuses to make them available to users. Merge forms can be printed by a user, then further completed if needed and signed by the candidate. (None of this is tracked in the system).

If a field in the form is confidential to the user, a warning message is displayed and that field is left blank.

Merge forms can be pre-populated with variables retained in the system within the Message Template feature. These variables can be added using the Adobe Acrobat Professional Forms feature. For example, you could take a merge form (such as the I-9 form) and insert 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.

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.

Using the Fill Out Form

Prerequisite

The Fill Out Form action is available in a candidate list, a job-specific candidate list, a candidate file submission and a candidate general profile.

Steps

1. Click on 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.

Talent Pools

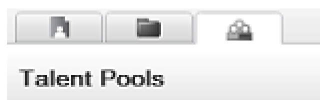
Talent Pool

Talent pools created in Taleo Performance are available in the Recruiting Center.

A talent pool is a list of people nominated by pool collaborators. In Taleo Performance, talent pools can be created at anytime for any purpose, providing the flexibility to track unlimited groups of employees, such as high-potential employees, future leaders, and successors.

In the Recruiting Center, authorized users are able to see talent pools and match employees and candidates to their requisitions, file them into folders for additional pooling functionalities, or contact them directly.

The Talent Pool tab is available in the left panel of the Candidates list.



From the Talent Pool tab, users can select a talent pool to display the candidates and employees included in the pool. Users can also use quick filters (Internal, Referred, In selection process, Employer, Program) and advanced filters to filter the list down to relevant information. An advanced filter of interest is the Employee Potential which allows users to display candidates or employees with a low, medium, or high potential.

As with any other lists, actions can be performed on employees and candidates included in the talent pool using actions in the menu bar, in the More Actions list, and in the contextual action menu. Users can also select another list format or create a personalized list format.

Employee Metrics

Employee Metrics

Recruiting Center users are able to see employee metrics directly in the Candidates list and candidate file, to use employee metrics fields as advanced filters, and to search employee metrics.

The following key employee metrics are available in the Candidates list and candidate file. For these fields to be available, they must be configured and added in the candidate file user-defined form and in the Candidates list format. If included, they are available to anyone based on field level confidentiality definition. If the Show Advanced Filters option is selected for the list format context, employee metrics become available as advanced filters in the Recruiting Center.

Employee Metrics in the Candidates List and Candidate File
Competency Rating
Employee Potential
Employee Risk of Loss
Goal Rating
Last Review Rating
Promotability Readiness
Reassignment Candidate

The following key employee metrics are available in the Advanced Candidate Search page. For these fields to be available in the Advanced Candidate Search page, they must have been configured and added by the system administrator. Once added, they are available to anyone authorized to search internal candidates.

Employee Metrics in the Advanced Search Page	
Field	Available Values
Last Review Rating	Greater than or equal to a % between 0 and 100.
Potential	Low, Medium, High, Not Specified, Does Not Matter.
Reassignment Candidate	Yes, No, Not Specified, Does Not Matter.
Readiness for Promotion	Ready Now, Ready in 6 months, Ready in 1-2-3-4-5 years, Not Specified, Does Not Matter.
Risk of Loss	Low, Medium, High, Not Specified, Does Not Matter.

Note that the Last Review Rating is expressed as a % in the Recruiting Center; in Taleo Performance, it is expressed differently and it is a customizable scale.

Offer Management

Offer Step, CSW, Offer Form

Offer and Candidate Selection Workflow

Candidate selection workflows may be configured to contain an Offer step or an RSOffer step.

CSW and Offer step

Using the Offer step is a simplified way to track offer activity in a candidate hiring process without enabling the entire Offer Management module functionality. Placing this step in a workflow will not enable the use of the Offers tab and Offer Approvals tab. A candidate selection workflow containing an Offer step allows users to move candidates from one step to another using standard actions (Change Step/Status, Move, Revert).

When adding the Offer step to a candidate selection workflow, the following actions are available to Recruiting Center users via the More Actions list.

- Make an offer.
- Reject candidates.
- Candidate has declined.

CSW and RSOffer step

The RSOffer step is a special candidate selection workflow step created for the Offer Management module. The Offer Management module provides the tools for the creation of offers, offer approval, offer extension to the candidate, and capture of the candidate response. Recruiting Center users are also be able to capture competitive offer information, as well as candidate current and future expectations.

With this type of workflow, instead of moving candidates using standard actions (Change Step/Status, Move, Revert), specific offer-related actions are presented in the More Actions list as they become an appropriate next activity in the Offer process.

System administrators are responsible for adding the RSOffer step in the appropriate candidate selection workflows. The RSOffer step must be placed before the Hire step. The RSOffer step cannot be customized or edited (except for qualifier groups and qualifiers that can be added to specific statuses).

When adding the RSOffer step to a candidate selection workflow, authorized Recruiting Center users are able to:

- Create offers.
- Extend offers verbally or in writing.
- Send offers.
- Capture a candidate response.
- Capture a candidate expectations.
- Capture a candidate current job terms.
- Capture competitive offer information.
- Approve offers.
- etc.

Offer Statuses

An offer can go through different statuses.

Status	Description
Offer to be made	Initial status of the Offer step.
Draft	Offer terms have been started and saved, but not approved. If offer approvals are not required, the offer may be extended at this point.
Cancelled	A draft offer has been created and then cancelled prior to routing for approval or extending to the candidate.
Approval in progress	Offer has been routed for approval.
Approval rejected	Offer approval request has been rejected.
Approved	Offer approval request has been approved and the offer is ready to be extended to the candidate.
Extended	Offer has been extended to the candidate.
Rescinded	After the offer has been extended or the candidate has accepted the offer, the user (company) rescinds/revokes the offer.
In negotiation	Offer was extended to the candidate. The user marked the candidate as wanting to negotiate the offer. If a new offer should be created, the user will need to rescind the offer in order to create a new offer. If a new offer is not required, then either recapture the candidate response (accept or refused) or status them as Rejected or Has Declined.
Refused	Offer was extended to the candidate. The user 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, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Rejected in the Offer step. This will allow an offer to another candidate be created and extended.
Has declined	After the offer has been refused or reneged by the candidate, if the user does not wish to create and extend a different offer to the same candidate, the user should status the candidate as Has Declined in the Offer step. This will allow another offer to be created and extended.

Offer Form

The offer form presents the terms and conditions of a job offer.

The offer form is tied to the *RSOffer step in a candidate selection workflow*.

The offer form, available in the candidate file Offers tab, is where all the information is collected to make 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 the current requisition, previous offers, competitive offers, and current candidate expectations.

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 in the offer form, users with the appropriate permissions can look at offers presented to the candidate for other requisitions by clicking the Other Offers link located in the left panel.

Users can also view attachments and offer letters specific to each offer in the offer form.

Offer Actions - CSW and Offer Step

Making an Offer

Prerequisite

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

Steps

1. In the candidate list, open 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.

Rejecting a Candidate for a Job

Prerequisite

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

Steps

1. In the candidate list, open a candidate file.
2. Select Reject Candidate... in the More Actions list.
3. Select the reason explaining the decision.
4. Enter comments.
5. Click Done.

Indicating a Candidate Has Declined a Job

Prerequisite

Candidate must have reached the Offer step.

Candidate selection workflow must NOT contain the RSOffer step.

Steps

1. In the candidate list, open a candidate file.
2. Select Candidates have declined... in the More Actions list.
3. Select the reason explaining why the candidate no longer wants to be considered for the job.

4. Enter comments.
5. Click Done.

Offer Creation Process - CSW and RSOffer Step

Creating Offers

Recruiting Center users have the ability to create offers to detail the specific terms and conditions of a job.

Offer creation is tied to the *RSOffer step in a candidate selection workflow*.

To create an offer, users click Create Offer in the More Actions list. Note that to create an offer, users must have been granted the proper user type permissions. The *offer form* is where all the information is gathered to create an offer.

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, users 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 the offer letter field is copied over, the letter will automatically update to reflect any revised offer terms and the letter will update automatically whenever edits to an offer are made.

When in the offer form, users having the appropriate permissions can 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, users can submit the offer for approval. Users 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 once an approval path exists.

If users have been granted the proper permissions, the Amend Approval Path and Terminate Approval buttons can be available.

Once a job offer has been created for a candidate, offer actions appear in the candidate file More Actions list if the actions are valid given the state of the submission. Offer actions are not possible from the submission list or the general profile.

Creating an Offer

Prerequisite

Candidate must have reached the Offer step.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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.

Editing an Offer

Prerequisite

Candidate must have reached the Offer step.

Offer must be created but not approved or extended.

Steps

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit under an offer.
4. Edit information.
5. Click Save and Close.

Result

The offer is modified before being approved.

Next Step

Requesting an approval.

Cancelling an Offer

Prerequisite

Candidate must have reached the Offer step.

The offer was created but not extended to the candidate.

The action to cancel an offer is not possible while an approval process is underway. If an approval is underway, available actions are Amend Approval, Decide on Approval, or Terminate Approval Path. Cancelling an offer is only possible for draft offers or approved offers.

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 active, and the candidate status is updated to Offer Cancelled.

Extending an Offer in Writing

Prerequisite

Candidate must have an offer created.

If offer approvals are required, the offer must be approved.

Steps

1. In the candidate list, open 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.
5. Complete the steps in the Correspondence Wizard to send the offer letter to the candidate.

Result

An offer letter is generated and is either delivered to the candidate by email or can be printed to mail or fax to the candidate. Written delivery of the offer is tracked in the candidate submission.

Extending an Offer Verbally

Prerequisite

Candidate must have an offer created.

If offer approvals are required, the offer must be approved.

Steps

1. In the candidate list, open 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

The offer is communicated verbally to the candidate. Verbal delivery of the offer is tracked in the candidate submission.

Next Step

Sending an offer.

Sending an Offer

Prerequisite

Offer must have been extended to the candidate.

Steps

1. In the candidate list, open 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 is sent to the candidate with the selected medium.

Capturing the Candidate Response for an Offer

Prerequisite

Offer must have been extended to candidate.

Steps

1. In the candidate list, open 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 to a candidate is entered in the candidate file.

Cancelling an Accepted Offer

Prerequisite

The offer must have been extended to the candidate.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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

The offer must have been extended to the candidate.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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 candidate has declined an offer previously accepted.

Updating the Offer Expiration Date

Prerequisite

An offer must be created.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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

The candidate must be at the Offer step.

Steps

1. In the candidate list, open a candidate file.
2. Click the Offer tab.
3. In the More Actions list, select Create Offer.
4. Under the start date section, select or not the Tentative option.
5. Click Save.

Result

The offer form now indicates if the start date is tentative or not.

Updating the Offer Start Date

Prerequisite

An offer must be created.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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

Steps

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit in a column.
4. Click .
5. Complete fields as required.
6. Click Done.

Result

Salary related values generated by the calculator are automatically included in the file.

Management of Other Offer Types

Capturing Candidate Expectations

Prerequisite

Candidate expectations can be captured throughout the selection process, but most likely during an interview.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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

Candidate expectations must be included in file.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit in the expectations column.
4. Change information.
5. Click Save and Close.

Capturing Candidate Current Job Terms

Users can capture candidate job terms for comparison purposes before a formal offer is made. Candidate current job terms 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, open a candidate file.
2. Select Capture Expectations... from the More Actions list.
3. Select Current Job.
4. Click Create.

5. In the current Job (New) column, complete information.
6. Click Save and Close.

Editing Candidate Current Job Terms

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open a candidate file.
2. Select the Offers tab.
3. Click Edit next to Current Job column.
4. Make changes.
5. Click Save and Close.

Capturing Competitive Offer Information

Prerequisite

Competitive offer information can be entered in the offer form throughout the selection process, during interviews or telephone conversations.

A user type permission grants users access to this feature.

Steps

1. In the candidate list, open 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

Competitive offer must be captured.

A user type permission grants user access to this feature.

Steps

1. In the candidate list, open a candidate file.
2. Select Capture Competitive...from the More Actions list.
3. Click Edit under the Competitive Offer column.
4. Complete the information.
5. Click Save and Close.

Adding an Attachment to an Offer

Prerequisite

A user type permission grants users access to this feature.

The file will be scanned 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 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, click on 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.

Pipeline Management

Pipeline Management

Pipeline Management provides the ability to distinguish between contacts and candidates and to build a pipeline of contacts who can be tracked and managed separately.

The Talent acquisition process includes the development of contacts, which are individuals who have never been considered for a job, but have the skills, background, and experience an organization is looking for. Pipeline Management provides clients with a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition.

The system now differentiates requisitions as follows: job requisitions used to hire candidates, and Pipeline Requisitions to build a pipeline of candidates.

Two Pipeline requisition types are available:

- Pipeline - General
- Pipeline - Executive

Using Pipeline Management

Pipeline Management provides a way to manage the lifecycle of candidates through the state of being a contact in a pipeline to being considered on an open requisition

Pipeline Requisitions

Two Pipeline requisition types are available when creating requisitions and requisition templates:

- Pipeline - General
- Pipeline - Executive

A Pipeline candidate selection workflow is selected by default for Pipeline requisitions. This workflow includes one step tied to the Pipeline reference model. See *Creating Pipeline Requisition*.

Pipeline Requisitions in the Requisitions Channel

The Requisitions channel in the center stage displays requisitions in two groupings: Job Requisitions and Pipeline Requisitions. Note that pipeline requisitions cannot be displayed in the center stage mini requisition list.

When Recruiting Center users click a status link under Job Requisitions, the Requisitions list is filtered by status and also by the following requisition types: Professional, Executives, Hourly, Campus, Contingent.

When Recruiting Center users click a status link under Pipeline Requisitions, the Requisitions list is filtered by status and also by Pipeline - General, and Pipeline - Executive requisition types. For Pipeline Requisitions, the following statuses can be displayed: Draft, Open, On Hold, Pending. Note that if none of the requisitions has one of these statuses, the count will not be displayed in the Requisitions channel.

Matching Candidates to Pipeline Requisitions

Recruiting Center users have the ability to match candidates to Pipeline requisitions. The process is the same as for other types of requisition. See *Matching Candidates to Requisitions.* In the history tracking for requisitions and candidate submissions, the system will record two entries: one in the source requisition and one in the target requisition.

When a candidate is matched to a Pipeline requisition, from a general profile or submission context, an event is added in the requisition History tab:

- Event: Candidates Matched to this Requisition
- Details: Candidates were matched to this requisition from xyz

When a candidate is matched to a Pipeline requisition from a submission, an event is added in the History tab of the requisition from where the candidate was matched:

- Event: Candidates Matched From this Requisition
- Details: Candidates from this requisition were matched to xyz

When a candidate is matched to a Pipeline requisition, from a submission or general profile, the event "Candidate Matched" is added in the History tab of the newly created submission.

Using the Most Advanced Progression Status

The Most Advanced Progression Status feature is used for the Pipeline Management functionality. It allows for easier visibility into those candidates that have not been processed or for which no action has been taken. See *Candidate Progression Status*.

- The Pipeline, Hired, and Contact statuses are supported.
- The Most Advanced Progression Status quick filter is available. Values are:
  - Contact: Available if Pipeline Management is activated. The person has never been considered for a job or pipeline requisition. Or, the person has been considered for a job and pipeline requisition in the past, but has currently no active job or pipeline submission.
  - Pipeline: Available if Pipeline Management is activated. The person is not being considered for an active job requisition but is active in a pipeline requisition.
  - New
  - Interview (1, 2 or 3)
  - Testing
  - Offer
  - Hire
- The Most Advanced Progression Status advanced filter is available.
- The Most Advanced Progression Status search criterion can be included in the Advanced Search if the field was made available for search by the system administrator.

Creating a Pipeline Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Under Requisitions, click Create Requisition.
2. Select the Pipeline - General or the Pipeline - Executive requisition type.
3. Click Next.
4. Follow on-screen instructions and complete the fields.

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

Result

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

Candidate Selection Workflows

Candidate Selection Workflow

Candidate Selection Workflow

A candidate selection workflow (CSW) provides the framework to move a candidate through the hiring process in order to evaluate and find the best candidate for a job.

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 (for example, a candidate submission is analyzed, the candidate is contacted, interviewed, then selected).

The CSW is created by system administrators then selected by Recruiting Center users 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 users 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 users create a requisition.

A CSW can be contextualized, that is organizations, locations, and job fields can be associated by system administrators to the candidate selection workflow. As a result, when creating a requisition, users 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 CSW are supplied with the application which can be used as templates to create customized workflows.

A CSW can be associated to a requisition type (professional, hourly, etc.). As a result, when creating a requisition, users 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 Example

A workflow is composed of one or many steps. And steps are composed of one or many statuses.

Example of a Candidate Selection Workflow			
Step	**Status**	**Status completing the step**	**Status stopping the CSW**

Example of a Candidate Selection Workflow			
New	• To be reviewed • Waiting for info • Under consideration • Phone screen • Candidate declined • Short list* • Rejected	Short list	Rejected
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.
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.

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.

A step can have a Restricted confidentiality level. In many organizations, hiring managers are not involved in the earliest steps of the candidate selection process. Recruiters are responsible for evaluating new applications and only submit qualified candidates to the hiring managers. It is possible to configure steps to prevent hiring managers from viewing specific selection steps (such as New) in the Taleo Recruiting Candidates list.

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

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

Candidate Selection Workflow Status

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

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

Step	Status
	• Under consideration • Phone screen • Candidate declined • Phone screen

Statuses 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.

When selecting the Completed level, the following option becomes available: “Allow completion even if some activities remain pending”. This option allows the move to the next step even if some activities are still pending from a previous step.

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.

When configuring a status used in a step, it is possible to ask the system to automatically change the status once an interview is scheduled during the step. This is done by selecting the **Interview Scheduling Behavior** option in the Status Details page. This option is used with the Interview Scheduling feature only. You can activate the Interview Scheduling Behavior option for statuses related to the 1st, 2nd and 3rd Interview steps. When a recruiter creates a meeting in Taleo Recruiting, if the *Interview Scheduling Behavior* option is selected in more than one status, the recruiter will have to select the appropriate status in the Action Dialog window. The Interview Scheduling permission must be enabled

When configuring a status used in a step, it is also possible to allow candidates to reach the status automatically when specific conditions are met. You can create and edit conditions that will be used to identify candidates who are allowed to reach this status automatically. Passport is responsible for handling requests to and from external service providers. It communicates with other modules in order to maintain requests up to date and interacts with the assessment platform to request assessment evaluations. The automatic progression of applications automates the CSW process based on the results obtained by Passport external services.

Candidate Selection Workflow Action

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

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.
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.
Reset Selection Process	***Important Note:*** *(ID 222) The rules for the "Reset Selection Process" action are not well implemented and for now it is*

Candidate Selection Workflow Actions	
Action	Description
	best to not implement this action. This manual candidate feature is activated via the permission "Reset the selection process of an existing submission".
Revert	Undo the last action in a step.
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.

Approvals

Approvals

Approval

An approval is the act of a user approving an element or asking others to approve an element.

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 of the active users of the database. The user will also be able to create a list of frequent approvers via the My Setup feature.
- If Dynamic Approval Routing is used within an organization, the list of approvers will be pre-populated upon clicking the Request Approval button. The list of approvers to be generated is configured by the system administrator within the Dynamic Approval Routing feature. These approvers are displayed based on the configured rules and conditions.

Important Note: *(ID 301) In the Request Approval window, there is a checkbox to add the approvers as frequent collaborators. This function will only add these users as frequent collaborators under My Setup > Preferences. It will not add these users as collaborators on the requisition currently open. Also note that users will need to log out and log back in to see the change applied to their list of frequent collaborators under My Setup > Preferences.*

Important Note: *(ID 353) As of Feature Pack 11A.4, the “Notify me once this task is complete" checkbox has been removed from the Request Approval window for requisitions and offers because this option did not have any purpose. Notifications about the progress of approvals can be configured by system administrators if desired.*

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

Settings allow the selection of the default approval model for a requisition or for an offer.

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 list and/or eShare. System administrators can choose the method(s) of approval for different users:

- eShare: available to users when the *Access response center* user type permission is granted (Configuration > [SmartOrg] Administration > User Types > Recruiting > General) and when

the user's preference for *Enable eShare Center E-mail* is set to True (Recruiting > My Setup > Preferences).
- Tasks list: Tasks are 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.
- Either eShare or Tasks list: if eShare and the Tasks channel are both configured for the user, the user can receive both eShare approval requests and also track them in the Tasks list. Users can decide on approval from either location. Tasks executed from the eShare center will be automatically updated in the user's Tasks list as well. If an approval is executed from the Tasks list, the eShare request will indicate that the decision has already been made and the eShare is no longer active.

All approval files are PDF files. When conducting the approval from either the Tasks list or from eShare, the user will receive a PDF print version of the file to review (rather than the actual file being visible in the system). Also, approval files are generated according to the user's permissions to view fields having specific security levels.

Approval via a BlackBerry

Users may have the ability to approve or decline requisitions and offers via a BlackBerry.

Users who have the required user type permissions can approve and decline requisitions and offers using any BlackBerry model regardless of whether Java script is enabled. The only exception is if login authentication has been activated via eShare; in this case, Java script is still required on the login page.

When creating a requisition or offer and then requesting its approval (via the Request Approval action), the user must select an approver. If the approver selected is an eShare user (as defined by the system administrator), an e-mail is sent and the user will receive an approval request via his/her BlackBerry. To approve the requisition or offer, the user must click Respond included in the e-mail. Once the requisition or offer is approved, the History tab indicates that the requisition or offer was approved.

To use a BlackBerry to approve or decline requisitions and offers, the BlackBerry browser must have the following configuration options activated:

- Support Java script
- Allow Java script Popups
- Support HTML Tables
- Use Foreground and Background Colors
- Use Background Images
- Support Style Sheets

To receive approvals via a BlackBerry, users must also have a valid e-mail address (set by the system administrator in the SmartOrg User Account Personal Information section). If the e-mail address entered is the same as the one configured on the user's BlackBerry, the user will receive approvals directly on his/her BlackBerry.

eShare User Approval Acknowledgment

eShare users have the ability to receive a confirmation of their requisition or offer approvals.

This feature is automatically available on all Response Center approvals. When users respond to an eShare approval request, there is a check box to trigger the receiving of an approval acknowledgment. If users choose to receive the acknowledgment, upon completing their decision on the request, the users will receive an e-mail message confirming their 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 acknowledgment sent will depend on the decision of the approver:

- Requisition Approved Acknowledgment
- Requisition Rejected Acknowledgment
- Requisition Passed Acknowledgment
- Offer Approved Acknowledgment
- Offer Rejected Acknowledgment
- Offer Passed Acknowledgment

Note that approvals decided via the Tasks channel do not have an acknowledgment option; users can view their completed tasks in the Tasks channel by clearing the *Hide completed tasks* option.

Approval Request Reminder

Users may have the ability to send a requisition or an offer approval request reminder to currently assigned eShare approvers.

Users who have the required permission can click the Send Reminder button on the Approvals tab within a candidate file or requisition file when an active approval is pending. Another approval request notification is then sent to the active approver only. Approval reminders are sent by email and will therefore only reach eShare users. Taleo Recruiting users who only access approvals via the Tasks channel will not receive a reminder.

Attachments in Approvals

Attachments in requisition and offer approvals are outlined in the following table.

Attachment	Requisition Approval	Offer Approval
Requisition	✓	
Offer		
Offer Letter		✓
Job-specific, Candidate facing = yes		✓
Job specific, Candidate facing = no		✓
Other, Candidate facing = yes		
Other, Candidate facing = no		

Approvers

Approver

An approver is a Recruiting Center user who will approve requisitions and/or offers.

A list of approvers can be defined by the system administrator at the department level. A list of personal default approvers, called frequent approvers, can also be defined by the user in the My Setup feature. When a requisition and/or offer is ready to be approved (by selecting the Request Approval action), the approval path is selected by default as follows:

- If frequent approvers are selected under My Setup, these approvers will be automatically selected.
- If frequent 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.

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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

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. In the auxiliary navigation bar, click Resources, then My Setup.
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. In the auxiliary navigation bar, click Resources, then My Setup.
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.

Requisition Approvals

Approving Your 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.

Requesting the Approval of a Requisition

Prerequisite

A user type permission grants users access to this feature.

To approve a requisition, an approver must be in the same group as the requisition.

Steps

1. In the requisition file, select Request Approval... in the More Actions list.
2. Select the approvers.
3. You can 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 requisition to the first approver in the sequence.

- If the approver is a Taleo Recruiting user, an Approve Requisition task is assigned to the user.
- If the approver is not a Taleo Recruiting user, the approver receives an e-share approver message.

Next Step

- If the approver is a Taleo Recruiting user, the user can select the following actions: Approve, Reject, Pass, Pending.

- If the approver is not a Taleo Recruiting user, the user 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, an approver must be in the same group as the requisition.

Steps

1. In your Tasks list, click Approve Requisition.
2. In the Decide on Approval window, indicate your decision.
3. Enter comments if mandatory.
4. Click Done.

Approving 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.

Resending a Requisition Approval Request

Prerequisite

This feature is only relevant to use if approvers are eShare users and are therefore receiving email 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. Select Send an approval request reminder...from the More Actions list.

Result

A requisition approval request reminder is sent to the currently assigned eShare approver.

Requisition Approval Rerouting

Requisition Approval Rerouting After Changes

Configuration options when activated can force requisitions to automatically be rerouted for approval when certain business scenarios occur.

The system administrator can configure certain settings to force requisitions to automatically be rerouted for approval when certain business scenarios occur. The system administrator defines 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 canceled.
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.

Immediately upon a Recruiting Center user has performed an action that makes true one of the above activated settings:

- The requisition status will return back to Draft.
- The requisition will be unposted.
- The requisition tasks will be deleted.

Also, if the requisition was posted and the Recruiting Center user modifies the requisition file, the requisition will be re-routed to the Draft status and it will also be unposted.

Example: If a Recruiting Center user re-opens a canceled requisition and if the *Restart Approval Process After "Cancel" Step* setting has been activated, rather than the requisition reverting back to it's original state, the requisition will revert back to the status of To be approved. The requisition must be reapproved before sourcing for the position can be restarted. The prior approval process will still be visible from the tracking history, but the approval tab will reflect the most current approval cycle. If the requisition had originally been canceled during the approval process, the prior approval cycle that was in process will be terminated and will be replaced by the new one which must be initiated from the beginning.

Amending a Requisition Approval Path Created by Another User

Prerequisite

A user type permission grants users access to this feature.

The Status Details column must indicate To be Approved.

Steps

1. In the requisition file, select Amend Approval Path... in the More Actions list.
2. Select the approvers.
3. You can change the order of the approvers.
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 is assigned to the user.
- If the approver is an eShare user, the approver receives an e-share approver message.

Next Step

Selecting the following actions: Approve, Reject, Pass.

Requesting an Approval Path Amendment

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.

Terminating an Approval Path

Prerequisite

This action is used when a position has been cancelled or if the requisition is no longer required.

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.

Offer Approvals

Requesting the Approval of an Offer

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.
4. You can change the order of the approvers.
5. Select a user in the Assign the next task to field.
6. Enter comments.
7. Complete other necessary fields.
8. 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 is assigned to the user.
- If the approver is an eShare user, the approver receives an e-share approver message.

Next Step

Selecting the following actions: Approve, Reject, Pass.

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.

Modifying an Offer Approval Path Created by a User

Prerequisite

A user type permission grants users access to this feature.

The decision of the approver must be pending.

An offer must be created for the candidate.

Steps

1. In the candidate list, click on a candidate file.
2. Select Amend Approval Path in the More Actions list.
3. Add or remove approvers.
4. You can change the order of the approvers.
5. Enter comments.

6. Complete other necessary fields.
7. 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 is assigned to the user.
- If the approver is an eShare user, the approver receives an e-share approver message.

Next Step

Selecting the following actions: Approve, Reject, Pass.

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 type permission will receive a task to amend an approval path.

Resending an Offer Approval Request

Prerequisite

This feature is only relevant to use if approvers are eShare users and are therefore receiving email based task requests.

A user type permission grants users access to this feature.

Steps

1. In a requisition file, click on the Offer Approvals tab.
2. Click Send Reminder.

Result

An offer approval request reminder is sent to the currently assigned eShare approver.

Candidate Hiring and Onboarding

Candidate Hiring

Hiring a Candidate

Prerequisite

The candidate must be at the completion status of a step.

The candidate selection workflow must include the Hire step.

A user type permission grants user access to this feature.

Steps

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

Result

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 and on hourly requisitions (this is the only type of requisitions for which the selection process can be restarted).

The action can be performed on a candidate with the following status: Rejected, Declined, Offer, Hired.

The action cannot be performed if the application is flagged as deleted, and if the Offer management step is part of the workflow (active or not active step), if it brings the hiring manager to a restricted step.

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.

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 candidate has completed a selection process and is ready to be hired.

Next Step

Onboarding process can be started.

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.

Contingent Hiring

Contingent Hiring

Contingent hiring is used to hire people when needed and for a limited period of time from a third party agency specialized in submitting pre-qualified workers. Contingent hiring may include part-time, temporary and contractor work.

The Taleo Contingent Hiring solution is meant to support the first sourcing part of the typical contingent process, where specific requisitions are created and invitations to refer candidates are performed. Once the candidate submitted by an agent is selected for a limited term, there is usually a time sheet and billing process involved, not done within the Taleo Recruiting Center.

Once the Contingent Hiring feature has been purchased, the feature must be activated by Taleo Support. When the feature is activated and configured by the system administrator, users can start acquiring contingent workers. When creating a requisition, users can choose a Contingent requisition type which offers specific contingent functionalities like a candidate selection workflow built for contingent hiring, a Contingent Terms section, supplier invitation to submit candidates using the agency portal, confirmation of availability and specific candidate ownership rules, different from the rules associated with other agent submitted candidates. Once the candidate is hired, the system does not provide additional support like time sheet and billing. To feed such systems, integration with worker information, billing rate and suppliers (agents) can be done upon hiring.

Contingent Hiring Process Overview

Below are basic steps performed by a recruiter to hire contingent workers.

Creating the Contingent Requisition

When creating a requisition, recruiters should choose the Contingent requisition type because it provides specific functionalities like a candidate selection workflow built for contingent hiring (less prescreening, interview, or background check), and contingent specific fields such as:

- Target Start Date: Date when the worker will start working on the job.
- Target End Date: Date when the worker will complete its mandate on the job.
- Start Time: Time when the job will start, default based on the offer start date setting. Such start time is modifiable and is saved based on the current user time zone and converted upon display on the current user time zone.
- End Time: Time when the job ends every day, based on the current user time zone.
- Maximum Hourly Rate: Maximum hourly rate allowed for the current requisition.
- Requested Hourly Rate: Requested hourly rate used to inform the agent about what should be submitted.
- Estimated Expenses: Expenses that can be added in order to calculate the total estimated cost.
- Estimated Labor Cost: Hourly rate paid to the agency multiplied by the estimated number of hours per days, times the number of estimated days. This is only an estimation based on a fix number of hours per day and a fix number of days per week.
- Estimated Labor Cost and Expenses: Total estimated cost by adding the expenses to the estimated labor cost, when the expenses are reimbursable.
- Expenses Reimbursable: Checkbox field used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the Calculate button or saving the requisition.

In the requisition Contingent Terms section, a Calculate button is available. When the Calculate button is pressed, the system calculates the value of the "Estimated Labor Cost" and "Estimated Labor Cost and Expenses" fields. This is based on the number of days the worker is hired based on the start date and end date, using the number of days per week (*Calculator Default Daily* setting), multiplied by the number of hours per day (*Calculator Default Hourly* setting). This number of hours is then multiplied by the requested hourly rate for the "Estimated Labor Cost" and will add the expense to this into the field "Estimated Labor Cost and Expenses" if the Expenses Reimbursable field is checked.

For details, refer to *Creating a Requisition*.

Posting the Contingent Requisition

Once the requisition is completed and approved, it can be posted. The only place where to send contingent requisitions is to agencies. In the contingent requisition Posting and Sourcing tab, the recruiter can only select agencies (all other options are never visible). There is no possibility to post directly to career sections and let candidate apply. The entire sourcing process depends on the agents submitting candidates.

The invitation process is slightly different for contingent requisitions. The invitation is done at the agency level, not at the agent level (for all other staffing types, each agent is invited individually). Invitations are sent to all matching agents associated to the selected contingent agencies, based on their Organization-Location-Job Field (OLF).

When the posting process is completed, selected agents receive an invitation to refer a candidate. Agents then go to the agency portal and submit their candidates.

For details, see *Inviting an Agent to Refer a Candidate*.

Important Note: *(ID 345) When posting contingent requisitions, users are able to post to non-contingent agents and the MWBE field is not displayed for contingent agents. Until this is fixed, users could put the word Contingent and the missing field information in the agency name.*

Viewing Referred Candidate Submissions

Once candidates have been submitted, the recruiter can review candidate submissions. To identify candidates that were submitted, the agency icon is used in the candidates list. In the candidate file Submission tab, the recruiter can see the rate submitted by the supplier, the worker type and the information about charging or not the sales tax.

The recruiter can then move the candidate in the selection workflow according to workflow configuration. If activated by the system administrator, a confirmation email is sent to the agent when a predefined status is reached.

Important Note: *(ID 335) Ownership can exist at the candidate submission level for contingent workers. Once the general ownership is expired, another agent can submit the same candidate again on a new requisition. But while manually changing the agent in the candidate or submission file in the Recruiting Center, the referring agent is changed everywhere, impacting existing requisitions where another agent submitted the same candidate originally. Customer should not change the agent for candidates being active on at least one requisition with another agent.*

Editing the Contingent Requisition

The edition of contingent requisition is based on standard permissions and field security.

The requested hourly rate can never be saved above the maximum hourly rate. This is why we recommend to only allow some user types to change the maximum hourly rate.

Some contingent fields cannot be modified once the requisition is posted:

- Estimated Expenses
- Estimated Labor Cost
- Estimated Labor Cost and Expenses
- Expenses Reimbursable
- Requested Hourly Rate

Duplicating a Contingent Requisition

When duplicating a contingent requisition, certain fields are not duplicated. For details, see *Requisition Duplicate*

Creating and Editing a Candidate File

When creating a candidate file, it is possible to capture contingent fields placed in the create candidate flow. Note that contingent fields are submission specific, thus only available for configuration into job specific capture flows.

Contingent specific candidate fields are specific to each submission and as such, are visible or modifiable only within the submission file. For details, see *Candidate Fields to be Used for Contingent*.

Contingent Hiring - Exceptions to Standard Behavior

Important information regarding the behavior of specific features if used with contingent hiring.

Feature	Exception
Sourcing and posting	For contingent requisitions, sourcing is achieved exclusively through invitations sent to agents. There is no direct posting to career sections. This is because contingent hiring process relies on the association between a worker and an agent, and such association is requested at all time to correctly support contingent. To be able to invite an agent, the agent must be associated to an agency portal.
Matching candidates	Although matching candidates is allowed, matching a non-contingent candidate to a contingent requisition will generate a worker without an associated agent. This situation, which is probably an exception, can be corrected by adding the agent once the candidate is matched. Matching a contingent worker to a non-contingent requisition is also allowed, but can generate surprises to those workers since they might start to receive direct correspondences if they have an email in their candidate file (for example, invitations to complete their file and overwrite values entered originally by the agent). This should be considered carefully to avoid generating surprises to candidates. This might also look as an attempt to bypass the agent if this was not discussed previously.
Number of positions	For a contingent requisition, the start date and end date are managed within the requisition. As such, all positions of a single requisition will always have the same rate boundaries and start and end dates. If different boundaries are needed, different requisitions must be created.
Resume parsing	Resume parsing can be used within the agency portal. It can also be used by sending attachments through emails. However, if the agent sending the email is associated to a portal without a general

Feature	Exception
	profile flow, the system will not be able to parse the attachment. This is because all email based parsing is profile based and never for a specific job. This is why there is a standard message template that informs agents associated to a portal without a profile flow that if they ever send a resume to the zonename@resumeparsing.taleo.net address, the email parsing is not supported for them. If a profile flow is active, then all standard parsing responses might be triggered. The message template is named *Resume Parsing Service Unavailable to Agents*. This message is triggered when the profile flow is not activated in the agency portal associated with the agent.
Offer module	The offer module can be used with contingent hiring, although conceptually, the interaction between the organization and the candidate is done by the agent, thus the offer module, meant to serve as a contractual agreement between the candidate and the organization, is not the natural path. While most standard fields and user-defined fields can be made available for contingent specific offers, the contingent-specific fields such as Start Date, End Date, Start Time, End Time and Staffing Agency Hourly Rate are not available in the offer module. This aligns to the original design of contingent and is the current expected behavior.
Agency with both Staffing and Contingent Staffing services	When both the Staffing and Contingent Staffing services are selected for a specific agency, the system will act as contingent or not based on the requisition where the candidate is submitted. But if the agents associated to such agencies are submitting new candidates as general profiles - through either a profile flow or resume parsing by email - then the system will consider those candidates as non-contingent candidates. It is recommended to have only job-specific application flows when agencies serving both contingent and non contingent are required. If an agent associated to a contingent only agency is submitting a candidate profile, then the ownership delay of the contingent definition will be applied.
Hiring contingent candidates	In order to hire a candidate on a contingent requisition, the candidate must be associated to an agent. All candidates submitted through the agency portal will get such association. However, candidates created manually, matched to a contingent requisition or imported might not have such agent association at first and it must be added before being able to hire the candidate on any contingent requisition.

Requisition Fields to be Used for Contingent

Field	Block/Form Where Available	Rules
Start Date	Profile	Mandatory by default, but it can be made optional.

Field	Block/Form Where Available	Rules
Start Time	Profile	The Recruiting setting *Offer Default Start Date Hour* defines the value of this field. Default is 8 a.m.
Target End Date	Profile	Mandatory by default, but it can be made optional.
End Time	Profile	The Recruiting settings *Offer Default Start Date Hour* and *Calculator Default Hourly* define the value of this field. Default is 8 a.m and 8 hours per day.
Estimated Expenses	Contingent Terms	Represents expenses that can be added in order to calculate the total estimated cost.
Estimated Labor Cost	Contingent Terms	This is a read-only calculated field and it cannot be configured as an input field. The cost is a result of the number of hours per day (*Calculator Default Hourly* setting) and the number of days the requisition is open, based on the difference between the end date and the start date and the number of days per week, defined in the setting *Calculator Default Daily*, with 5 days a week being the default. Since it is a calculated field, this field cannot be configured by the system administrator.
Estimated Labor Cost and Expenses	Contingent Terms	This is a calculated field, and will include the Estimated Labor Cost plus the Estimated Expenses, if the Expenses Reimbursable field is checked. Since it is a calculated field, this field cannot be configured by the system administrator.
Expenses Reimbursable	Contingent Terms	This check box field is used to decide whether or not the expenses are included in the Estimated Labor Cost and Expenses field upon clicking the calculation option or saving the requisition.
Maximum Hourly Rate	Contingent Terms	Configure the field such that it is read only for managers – do not allow editing of this field by managers. Defines the maximum hourly rate allowed for the current requisition. This value should in theory come from the template if possible, since it serves to limit the

Field	Block/Form Where Available	Rules
		requested hourly rate amount. It also controls the maximum rate an agent can ask while submitting a candidate.
Requested Hourly Rate	Contingent Terms	This is the requested hourly rate used to inform the agent about what should be submitted.

Candidates Field to be Used for Contingent

Field	Default Field Visibility
Staffing Agency Hourly Rate	Career Section (not relevant to recruiters, for integration purpose only).
Sales Tax must be charged	Career Section, Taleo Recruiting.
Hourly Rate Paid to the Worker	Career Section (not relevant to recruiters, for integration purpose only).
Agency Requisition Number	Career Section (not relevant to recruiters, for integration purpose only).
Worker ID	Career Section (not relevant to recruiters, for integration purpose only).
Worker Type	Career Section, Taleo Recruiting.

Hourly Hiring

Evergreen Hiring

Evergreen hiring is used in continuous hiring situations such as retail stores where employers want to enable candidates to apply at all times, and also want a ready supply of candidates available to move quickly when a need is identified.

Often such employers will want to implement a definite validity period and expiration for the candidate's submission, with the easy ability for the candidate to re-apply after his/her submission expires. It is not uncommon for workers in the hourly retail world to have held several different jobs within the span of a year. Employers need to ensure they are collecting all of the most recent information regarding a candidate's relevant history. This may also help to limit legal exposures in addition to confirming candidate's continued interest in employment with the employer.

A submission validity period may be enabled for any requisition, before that requisition reaches the Sourcing status. The number of days for the validity period is inherited from a default setting (initially 90 days), but may be changed for specific requisitions by users with sufficient permissions. The Validity Period and Validity Period Enabled fields may also be inherited from a requisition template. The submission validity period must be between 1 and 730 days (2 years).

The validity period starts when a candidate submits his/her completed submission. The candidate submission remains valid for the number of days defined in the requisition. For submissions created when matching or referring a candidate, the period starts on the date that the candidate was matched or referred. If a submission is incomplete and the candidate later completes it, the validity period is restarted.

The Evergreen Hiring feature basically works as follows:

For the Evergreen Hiring feature to be available, the system administrator must make the following two requisition fields available in the Recruiting application:

- Validity Period Enabled
- Validity Period

If desired, the security level can be set for those fields to hide them from some users. Once these fields are activated, the system administrator can add them to the requisition and/or requisition template, in the Identification block. It is necessary to have the Validity Period Enabled field in either the requisition template and/or the requisition file in order to enable submission expiration.

If the expiration for all requisitions is the same (following the default setting), consider to either not display the Validity Period field in the requisition file, or to set the field to read-only. If different validity periods are needed for different jobs, consider adding the Validity Period field in the requisition template where authorized users can set it, but not in the requisition file itself.

In the Recruiting application, when creating a requisition or requisition template, users can use the default validity period set by the system administrator or set a different validity period for the requisition or requisition template being created. The validity period must be set before the requisition is posted. The submission validity period is displayed in the requisition card (located on the left hand side of the requisition), when hovering the mouse over the icon.

Once the requisition is posted, candidates applying on the requisition will be informed of the expiration date of their submission on the Thank You page. Within Taleo Recruiting, the submission validity period is displayed in the candidate submission card, when hovering the mouse over the icon.

If the candidate's submission has expired and the requisition is still posted, the Modify link is replaced with the Reapply link on the candidate's My Jobs page. When candidates re-apply for a job:

- The submission's validity period and expiration date are reset.
- A summary of the candidate's current information will be displayed to allow him/her to make any necessary changes.
- Depending on how the zone was configured, the candidate selection workflow of the submission may be reset back to the beginning.
- A tracking history is automatically added in candidate file History tab. If during the reapply process, the system forces the candidate selection workflow to be reset, a second tracking history is added in the History tab stating that.

Once candidates have applied on the requisition, the column in the Requisitions list indicating the candidate count considers if the submission validity period is enabled or not for the requisition. If the validity period is enabled, the count only includes candidate submissions that are not expired.

The system administrator also has the ability to add the following columns in the candidate lists and requisition lists. When these columns are made available in list formats, users can select them to display the desired information:

Candidate List Columns	Description
Submission Expired	This column is represented by the icon. When a submission is expired, the icon is displayed.
Latest Submission Date	Date when the candidate has submitted his/her submission or has reapplied.
Submission Expiration Date	Date when the candidate submission expires/expired.
Days before Submission Expiration	Displays as a countdown the number of days left before the expiration of the submission.

Requisition List Columns	Description
Submission Validity Period Enabled	This column is represented by the icon.
Submission Validity Period	Number of days of the validity period.

The *Hide expired submissions* quick filter can be added to Candidates list to let users show or hide expired candidate submissions. Expired submissions are hidden by default. This filter is only available for requisition-specific candidate list formats.

The system administrator can also enable a setting to determine under which conditions the Candidate Selection Workflow (CSW) is reset to the initial step/status after a candidate re-applies for the same requisition (after submission expiration). Note that the CSW will never change if the submission has reached the *Offer* step or if an interview has been scheduled.

Onboarding

Employee Onboarding

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

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

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

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

An onboarding process must be started for the candidate.

A user type permission grants users access to this feature.

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.

Candidate and Requisition Search

Candidate Search

Candidate Quick Search

The candidate quick search allows Recruiting Center users to quickly find specific candidates.

The candidate quick search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

When performing a candidate quick search, the search engine searches for candidates who applied on a job, submitted a profile, or are registered but did not apply on a job (could be a person who referred a friend for a job and who had to register himself/herself as a new user, or a person who registered himself/herself while clicking My Account).

The candidate quick search engine searches information in the following fields:

- first name
- last name
- middle name
- email address
- candidate identification number (you must use at least three numbers (coupled with wildcards) of the total identification number, otherwise the search will not work)

Using the Candidate Quick Search

The candidate quick search allows Recruiting Center users to quickly find specific candidates.

When performing a candidate search, users can enter partial (either the first or last name with the * wildcard) or complete names in the field. However, a best practice is to enter complete names to obtain 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 name, it is not required to enter both names. Let's say Smith-Jones is the name you are looking for. Entering Smith, Jones, Smith space Jones or Smith-Jones, will bring back Smith-Jones.

The candidate quick search searches for all the search terms in all five fields. Note that it works only for users having access to all the fields. For example, if the email field is hidden for a user type, searching by name will not work. For this reason, the *specific candidate search* often produces search results that are more relevant than those generated by the candidate quick search.

Performing a Candidate Quick 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 e-mail address.
3. Click .

Result

Users can quickly find a specific candidate file. Candidates who satisfy search criteria are displayed in the search results list.

Next Step

Filtering the list of candidates using quick filters.

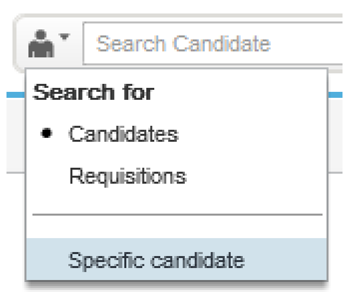
Putting search results in a folder or printing them.

Viewing a candidate file.

Candidate Specific Search

The specific candidate search can be considered to be an extension of the candidate quick search in that it offers greater searching precision.

The specific candidate search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.



If Recruiting Center users have the permission to access candidate identification information, the candidate search will allow them to search by:

- candidate identification number only (you must use at least two numbers of the total identification number or more, otherwise the search will not work)
- candidate first name
- candidate last name
- candidate first and last names
- 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 quick 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. See *Wild Card in the Advanced Search with Keywords*.

Performing a Candidate Specific 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

Editing a candidate file.

Printing search results.

Matching candidate to requisition.

Candidate Advanced Search

The Candidate Advanced Search allows Recruiting Center users to search for candidates using an array of criteria that are different than the ones used in the quick search function.

The Candidate Advanced Search enables users to find and match relevant candidates to their open requisitions. Users can create *search queries using keywords* to search across numerous text fields of the candidate file and combine them with specific fields such as prescreening questions and skills that typically produce search that have a higher degree of precision.

The Candidate Advanced Search is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center users if settings were configured and if user type permissions were granted.

Performing a Candidate Advanced Search

Prerequisite

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 displayed fields.
3. Click Customize... if you want to use other search fields.
4. Click Search.

Result

Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Filtering the list of requisitions using quick filters.

Putting search results in a folder or printing them.

Setting Default Advanced Search Criteria

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Click Resources, then My Setup 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.

Example of a Candidate Advanced Search

Example showing search criteria used to perform an advanced search and the results of such a search.

Field	Value
Disqualified Candidate	Excluded.
Place of Residence	Within 25 miles of location; US > FL > Jacksonville. Required.

Field	Value
Preferred Job	Category: Technology; Function: Network Engineering. Required.
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.

Candidates Retrieved by the Advanced Search

Candidates retrieved by the advanced search may differ depending on different scenarios.

For most clients, the default maximum number of retrieved candidates is set to 300. Some clients are using a smaller set, usually because they consider those candidates are typically qualified for a specific position. Regardless of the number of candidates matching the search criteria, if the query does find more than the maximum number, which candidates are actually displayed in the advanced search results?

There are three scenarios:

- If any relevancy is calculated, based on keywords and Desired criteria, then the most relevant candidates are displayed and then sorted.
- Search with randomization will also return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any of 300 matching candidates, with no predetermined priority, and will sort them based on the sorting criteria set for the list. Any candidate matching the search criteria can be returned. Two subsequent searches using the exact same criteria typically retrieve two different result sets when randomization is used.
- If no relevancy is associated with candidates, for example if only Required and Excluded criteria are used, then the list of displayed candidates is not random and is based on an internal key. When a user executes two searches in a row without using the randomized option, the system will retrieve the same set of candidates. But if the user executes two searches in a row with the randomized option, the system will return two different sets of candidates. Of course, this is true if the number of matching candidates is higher than the list size maximum, usually 300, and if the conditions are the same, thus no change in the criteria list and no new matching candidates.

Candidate Advanced Search with Keywords

Keywords can be used when performing a Candidate Advanced Search.

When using the Keywords field, 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 wild card (*) can be used as a keyword.

Content Searched by the Advanced Search with Keywords
Personal information fields: • first name • last name • middle initial • employee number • street address • city • phone numbers • email address • postal code
Text-based user-defined field answers.
Pasted cover letter from the general profile.
Pasted resume from the general profile.
Career objectives from the general profile.
Additional information from the general profile.
The three most recent file attachments per candidate provided the attachments have one of the following supported file formats: • .doc, .docx (Word) • .txt (standard text file) • .rtf (rich text format) • .pdf (Adobe Portable Document Format) • .htm or .html (hypertext markup language documents) • .wpd (Word Perfect) • .odt (if Oracle 11G is used)
The two most recent file attachments from users (displayed in the Attachments tab), limited to supported file format type.
Education (Other institution, Other Program and text-based user defined fields) from the general profile.

Content Searched by the Advanced Search with Keywords
Work Experience (Other Employer, Other Job Function, Achievements, and text-based user defined fields) from the general profile.
Text-based answers to questions from the library.
Comments (from the History tab).
Source and event names.
User name.

Keywords and Boolean Operators

Keyword search is considered to provide exact matches. However, if a user includes OR in a search query, the search engine looks of course for exact matches for one word or the other. Boolean operators are pretty straightforward but when a complex search query using multiple Boolean operators is incorrectly formulated, results are unpredictable. The Keywords search supports the following boolean operators:

Boolean Operator	Description
AND	By default, words entered in the Keywords field are linked (transparently) by the AND operator. If you searched for "product manager" (without the double quotation marks) or for "product and manager" (without the double quotation marks), the search results would be the same. The search engine would retrieve all candidates whose file contains both words (the words will not necessarily be next to each other).
OR	You can use the OR operator to change the default behavior (AND) or to build more complex queries. For example, if you searched for "competitor1 OR competitor2 OR competitor3" (without the double quotation marks), the system will retrieve candidates whose file contains at least one of the competitors' names.
NOT	You can use the NOT operator to exclude specific keywords from a query. For example, if you wanted to exclude from the search results candidates whose file contained the name of a specific company, but did refer to a specific competitor, you could search for "competitor1 NOT company1" (without the double quotation marks).
Parentheses	Operations enclosed in parentheses are performed before other operations. For example, a search query for candidates who worked as marketing or advertising consultants could look like the following: (market* or advertis*) and (consult* or agent or representative). The search engine would retrieve candidate files that satisfy the two conditions: • Candidate files containing a word that begins with market or advertis such as market, markets, marketing, advertise, advertising, advertisement AND, • Candidate files containing agent, representative, or a word beginning with consult such as agent, representative, consult, consults, consulting, consulted, consultant.

Boolean Operator	Description
Wild Card	The wild card "*" (asterisk) can be placed at the end of a word. For example, a search for comput* will retrieve all words that begin with comput such as computer, computing, computers, computation. Wild cards within double quotation marks are not supported. : An update to the Lucene search server engine slightly modified the behavior when using the wild card * in the quick search, specific search, and advanced search. If the number of words returned by the query reaches 5000, no warning message will be displayed asking you to refine the search. Be aware that it might take a while for the search engine to return any result when the query is too generic. Also note that when performing a quick search using the wild card * at the beginning of a word, such request is heavier on the search server and you might have a longer response time.
Double quotation marks around strings	You can use double quotation marks to search for a specific string. For example, if you wanted to find product managers but not product specialists who are also assistant managers, you could type "product manager" (*with* the double quotation marks). : You need to *type* the double quotes in the Keywords field; do not copy them from other applications such as Word and paste them into the field. Also note that double quotes can vary from one keyboard language to another. If you use a French keyboard and use these «quotes», the search engine does not recognize them as double quotes in the Keywords field.

Keywords and Stop Words

Stop words are small words not included in the index and excluded from the Keyword search because they are not considered to be significant. For example, words such as "not, the, one, and, or" and all single letters are stop words. Including (or excluding) stop words in your search query has no effect on search results. Because Taleo does not publish the list of stop words, it might not always be easy to know which words the system excludes automatically from a search. However, be assured that only insignificant words are excluded.

To illustrate the impact of stop words, some examples are provided here.

If you searched for "Gestionnaire de produit", the French version of "Product manager" or for "Gestionnaire Produit", the search results would be the same because "de" is a stop word. Because the results would be the same, the stop word "de" would have no negative impact in this case.

The following two examples are searches that Taleo clients wanted to perform and stop words did have a negative impact.

Example 1: A client searched for "bank one" (the name of a bank that has since been bought by another bank). "Bank" is a valid word but not "one" because it is a stop word. Consequently, the search engine retrieved candidates whose file contained the word "bank".

Example 2: A client searched for "no fit" as a recruiter comment, wanting to find the "no fit" candidates. Because "no" is a stop word, it was impossible to exclude candidates whose file contained the comment "no fit".

Keywords and Special Characters

In general, special characters used as punctuation or separators are not included in the search index and cannot be used to retrieve information. This is the case for the following characters:

:	;	.	,	"	'	-	_	&	*

Exception: When used in email and phone number fields, some special characters are supported. For example, john.smith@taleo.net is supported as is, because the system recognizes this is an email address.

Keywords and Exact Term

When you perform a Keywords search with Exact Term selected, words that match exactly the terms you entered are returned and highlighted. You can use the wild card *, quotation marks, parentheses, and Boolean operators (AND, OR, NOT) to construct sophisticated candidate search queries. The system applies the AND operator between words.

Keywords and Related Terms

The OR operator is applied transparently when the Related Term option is selected. The search engine searches for occurrences of the word you entered but also searches for occurrences of related terms determined by the system. Such related terms might be particularly relevant to your search while other related terms might be less pertinent.

You should use the Related Terms feature when your initial query did not retrieve a lot of candidates. The Related Term feature enables you to retrieve candidates whose file contains a word that is similar in meaning to your search word in addition to candidates whose file contains your exact search word. In addition to retrieving similar words, it retrieves words with the same first 6 letters, since those words are most likely in the same family. For example, if you search for “Administration” using related terms, the engine will also search for “administrative”, “administrator”, etc.

Keywords and Highlighting

Keyword highlighting is activated by your system administrator and is limited to Advanced Search results. Each occurrence of the keyword is highlighted in yellow on all tabs in the candidate file and in the attached files. Up to fifty different terms can be highlighted. A private setting is used to limit the number of highlighted words (contact Taleo Support for details). The search will highlight words together when the search keyword includes double quotes, to better match what is really retrieved by the search engine. For example, searching for "product manager" displays only candidates with "product manager" in their file. 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.

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. For details, see *Conceptual Search*.

Advanced Candidate Search Page Layout

Because system administrators can customize the Advanced Candidate Search page, the search page might have a different layout in different zones and even for different users, based on their configuration profile.

By default, the following search criteria are included in the Advanced Candidate Search page:

- Keywords
- External/Internal Candidate
- Last Update
- Place of Residence
- Disqualified Candidate

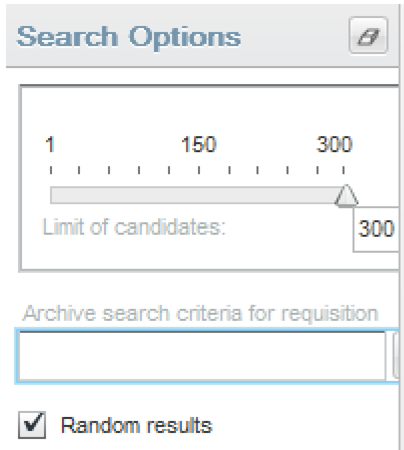
Users who have the required permission can add other search criteria provided they were made available by the system administrator. This is done using the Customize... button. For a list of fields available for the Candidate Advanced Search, see *Advanced Search Fields*.

For many search fields, users can specify an additional criterion:

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

Users may also have the ability to search on precise Organization-Location-Job Field (OLF) elements without incorporating candidates with parent preferences or null values in preferences. When this feature is enabled, if a user is performing a Candidate Advanced Search using Place of Residence as a Required criteria or Organization-Location-Job Field as a Required criteria, search results will display only candidates with an exact match at the same level. No parent or empty value will be returned. For example, searching for San Francisco will no longer return candidates within California, United States or that have an empty preference value.

Two search options are available on the left side of the Advanced Candidate Search page: “Archive search criteria for requisition” and “Random results”. These options support OFCCP requirements and are usually activated only for clients located in the United States through protected settings. The Archive search criteria for requisition field, once activated, can be optional or mandatory. Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years. The Random results option generates a different set of candidates who match the required fields every time you run the same search if the total number of candidates matching your criteria is above the number of displayed candidates, usually set to 300. For details, see *Search Results Archiving* and *Randomized Search Results*.



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

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

The search engine can retrieve any number of candidate files although, for performance and management reasons, only 300 are displayed. By default, we suggest to display the top 300 by relevancy.

Candidate Advanced Search Fields

The table presents fields available in the Advanced Candidate Search page.

To be available to Recruiting Center users, these fields must first be made available by system administrators. Then, users who have the required permission can add these fields in the Advanced Candidate Search page using the Customize... button.

<table>
<tr><th>Fields Available in the Advanced Candidate Search Page</th></tr>
<tr><td>All user-defined fields (UDF) marked as “Candidate Search” at the field property level.</td></tr>
<tr><td>Personal information:
• Accepts Job Posting Notifications
• Date of Birth
• Email Address (or User Name)
• Employee Number
• First Name
• Last Name</td></tr>
</table>

Fields Available in the Advanced Candidate Search Page
• Middle Name • Place of Residence (RSLocation) - Note that using radius search around a zip code should be done when a zip code is required from candidates. If it is optional, many candidates might be discarded even if they are good candidates. • Prefix • Referred/Not Referred • Social Security Number • Work Phone Number
Basic profile from the profile: • Advance Notice • Date of Availability is • Employee Status • Job Level • Job Shift • Job Type • Schedule • Travel • Preferred Job • Preferred Location • Preferred Organization • Shift Availability Grid • Willing to work on holidays • Willing to work on weekends • Expected Hourly Pay Rate • Hours per week willing to work • Hours per week, preferred
Education from the profile: • Institution • Other Institution • Program • Other Program • Education level (Achieved) • Graduation date • Start Date • GPA (normalized value) • Graduated • Any searchable education user-defined field
Experience from the profile: • Current Job • Employer • Other Employer • Job Function

Fields Available in the Advanced Candidate Search Page
• Other Function • Any searchable experience user-defined field
Questionnaires: • Questions from library (no local questions from requisition) • Skills
Requisition Number/Title
Sources and mediums from all submissions: • Application Medium • Event ID • Source Name • Source Type
Certification: • Certification • Other Certification • Location • Certification ID • Issuing Organization • Issue Date is between • Expiration Date is between

Candidate Advanced Search and Structured Fields

If your company is using specific fields to capture experience or competencies, using the corresponding fields will generally produce better results than using the Keyword search.

For example, an advanced search that included java skills in the competencies section of the search page and specifying both a minimum proficiency and experience level would retrieve candidates who met those criteria. A Keyword search for “java”, on the other hand, might include candidates who liked this type of coffee in addition to candidates who had experience with the java programming language.

There is an important “logical” grouping function that applies only to structured data. For example, if you wanted to search for candidates who had obtained a Master’s degree in business administration from Harvard University, this would be possible using the Education block. If you used the Keyword search, however, to search for “Harvard university masters business administration”, the search results might include candidates who were studying in sociology at any university but living in Harvard, Illinois and considered themselves “masters” in business administration!

In conclusion, the use of structured fields can significantly reduce the number of irrelevant search results.

Candidate Advanced Search and Multiple Occurrences of Blocks

When performing a Candidate Advanced Search, it is possible to use multiple occurrences of the Education and Work Experience blocks.

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 Block 1 - Search Field	Education Block 1 - Search Value
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.

Randomized Search Result

The randomized search result feature allows Recruiting Center users to specify that the information contained in the advanced search result list be returned in random order.

The randomized search results feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for clients located in the United Stated through protected settings. Randomized search means that candidates displayed in the advanced search result list are picked randomly in the overall list of candidates matching search criteria. An advanced candidate search done with randomization will return a list of 300 candidates or less, but instead of displaying the first 300 candidates, it will display any 300 of the matching candidates, with no predetermined priority, and will sort them based according to the sorting criterion set for the list. Any candidate matching the search criteria can be returned.

Randomizing Search Results

Prerequisite

This feature supports OFCCP requirements and is usually activated only for clients located in the United States through protected settings.

Steps

1. In the top right-hand corner, click Advanced Search.
2. In the Search Option panel located on the left-hand side, select the Random results option.
3. Select a requisition.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

Search Result Archiving

The search result archiving feature allows Recruiting Center users to select the requisition for which they want to archive search criteria and results.

The search result archiving feature supports requirements from the Office of Federal Contract Compliance Programs (OFCCP) and is usually activated only for clients located in the United Stated through protected settings. When performing an advanced search, search criteria and/or results are archived in the database. The information is kept in the database for two years for audit purposes and prevents candidates from hard deletion.

When the feature is activated, all search results, even those done for requisitions outside the US will be archived.

Archiving Search Results

Prerequisite

This feature supports OFCCP requirements and is usually activated only for clients located in the United States through protected settings.

Steps

1. In the top right-hand corner, click Advanced Search.
2. In the Search Option panel located on the left-hand side, click next to Archive seearch criteria for requisition.
   Once a requisition is entered in this field, the search query and search results are kept in a log file and the retrieved candidates cannot be hard deleted from the database for the next two years.
3. Select a requisition.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

Why Advanced Search is Filtering Candidates on Your Behalf

Certain elements could have an impact on advanced search results.

Data segmentation: If your organization has activated data segmentation, this might exclude a lot of candidates from your search results. For this reason, it is important to verify if your organization has implemented such restrictions and, if this is the case, ask how they affect which candidates you are entitled to view. There are two dimensions to data segmentation: a user type permission whereby the candidates displayed to a user is determined by the person's staffing type; and the Organization, Location and Job Field (OLF) associated with groups that the user is a member of. While it might be easy to manage only a few groups around specific organizations, the effect of segmentation can be difficult to clearly understand if users are associated with multiple groups incorporating various OLF. Ask your system administrator if he/she has activated the *Activate Segmentation in Search* setting.

Incomplete submissions: Many candidates never complete their submissions for various reasons. An incomplete general profile will not be retrieved during a search if your organization has configured the system that way. Note that in average, 33% of candidates might not have completed a job specific submission or a general profile. An interesting alternative to not displaying such candidates is to display them and add an Incomplete Submission column.

Remember that the "incomplete submission" flag refers to the online submission process, not to the completeness of the candidate file overall. If your organization does not display incomplete submissions, incomplete submissions that might contain a lot of information are obviously not displayed. On the other hand, you might have partial submissions, that were captured or imported, and those partial submissions have the "complete" flag, even if only few fields were captured. Thus, incomplete submission refers to online submissions or online profiles that have not passed the submission page, regardless of whether all the content has been provided or not. Ask your system administrator if he/she has activated the *Display Incomplete Application* setting.

Identification missing: "Identification missing" candidate files are missing a candidate's first and last name and do not have the official "anonymous" flag. Ask your system administrator if 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 *Threshold CSW Step - Hide from Search* setting works in tandem with the *Allow users to view candidates that are 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). 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.

Conceptual Search

Conceptual Search is an alternative way to search candidate files that broadens the search result by including documents that are similar based on concepts and proximities. The retrieved documents do not need to contain everything entered as search criteria, only related concepts.

In a Conceptual Search, most of the structured data elements are not part of the candidate file and are leveraged by the Advanced Search engine. Although Conceptual Search might be the preferred search method of some users, the Conceptual Search engine was built to complement the Advanced Search. Advanced Search can retrieve candidate files with more precision, using mandatory criteria used to source candidates for a specific requisition and can clearly define the required criteria set for a specific job. But what if you don’t have precise criteria for a search? What if you have candidates without structured data and who have simply a pasted resume or an attached file? Or perhaps you cannot find any candidates using the Advanced Search and want to know what your database holds with regard to a hard-to-fill job description or candidates used as a basis to find other candidates. These are scenarios for which the Conceptual Search is most suitable.

Once the Conceptual Search module is enabled, the system administrator can control which users will have access to Conceptual Search by granting them a user type permission.

Even if Conceptual Search was not activated, the conceptual search user type permission is available in the 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 field (typically taken from a candidate's resume or a job description) to search for candidates. The search engine then looks through the following content of the candidate file:

Content Searched by the Conceptual Search
Pasted resume from the general profile.
Career objectives from the general profile.
Additional information from the general profile.
Education (Other Institution, Other Program, Education Level (Achieved), and text-based User Defined Fields) from the general profile.
Work Experience (Other Employer, Other Job Function, Achievements, and text-based User Defined Fields) from the general profile.
Text-based answers to questions from the library.
Text-based user-defined field answers.
The last three attachments per candidate provided the attachments use one of the following supported file formats: • .doc, .docx (Word) • .txt (standard text file) • .rtf (rich text format) • .pdf (Adobe Portable Document Format) • .htm or .html (hypertext markup language documents) • .wpd (Word Perfect) • .odt (if Oracle 11G is used)

On top of that, users can increase the Conceptual Search with any specific search criteria made available to them. This provides the possibility to mine the database on various concepts to find interesting candidates, but also restricts the result with more precise criteria, which was not available before.

The conceptual search cannot retrieve disqualified candidates because they are not indexed in the database.

Below are a few tips when using Conceptual Search.

Tip 1: Provide enough text in the Keywords field

If you only need to type a few words, it is usually advisable to perform a Keyword search or Related Terms search instead of a Conceptual Search. The Conceptual Search analyzes a text, extracts the most significant elements and compares them with significant words and relationships between words extracted from a sample of about 100,000 candidate files from your database. The system discards non-significant words from its reference list in the knowledge base. A word used by only a few candidates or another used by almost all candidates might not have any weight in the Conceptual Search “brain”. For example, if you searched for the word “consultant” in a consultant database, then the word would occur so many times that it might not even share any concept with other words. The search engine would perform a search using the exact word “consultant” and most or all of the candidates would have this criterion.

If you performed a Conceptual Search using only a few words, chances are that some of the words would be non-significant. You would better off pasting entire paragraphs and let the system determine what is important in each one and identify the best candidates based on this information.

Tip 2: Sort results by decreasing relevancy

The Conceptual Search engine tends to retrieve a lot of candidates. What distinguishes them is the relevancy between the candidate file and the Conceptual text box. You will typically want to sort the retrieved candidates from most relevant to least relevant.

Performing a Conceptual Search

Prerequisite

A user type permission grants users access to this feature.

Steps

1. In the top right-hand corner, click Advanced Search.
2. Enter text in the Keywords field.
   You can enter large blocks of text (typically from a candidate's resume or a job description) to search for candidates.
3. Select the Conceptual option.
4. Enter information in the displayed fields.
5. Click Customize... if you want to use other search fields.
6. Click Search.

Result

Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Filtering the list of requisitions using quick filters.

Putting search results in a folder or printing them.

Candidate Search Based on a Requisition

Recruiting Center users can create a search query based on a requisition.

This search is available via the  icon available in the requisition file. Clicking this icon creates an advanced candidate search query automatically. The default location and last update originate from the user preferences (available in the My Setup feature). In addition to the last update and place of residence default configuration, the search query will default to:

- Requisition in the archiving field, if activated.).
- Keyword: will be filled by the job title. Default is Exact Term.
- Last update: user preference from My Setup or default value.
- Place of residence: user preference from My Setup or Network location based on the mapping of the primary location, as done in the foundation data by the system administrator. Default is Required.
- Preferred location: all locations are included; primary and additional ones. Default is Required.
- Preferred job. Default is Required.
- Employee Status: a Desired value affecting relevancy.
- Schedule: a Desired value affecting relevancy.

- Job Shift: a Desired value affecting relevancy.
- Job Type: a Desired value affecting relevancy.
- Travel (Willing to travel up to...): a Desired value affecting relevancy.
- Competencies: Desired values affecting relevancy and based on minimal criteria definition.
- Questions if from the library. Requisition-specific questions cannot be searched for.

Once the user executes the candidate search based on the requisition, the user has the option of matching any or all of the retrieved candidates to the requisition. To do this, the user selects the appropriate candidates in the results list and click the Match… icon. Because the criteria of the advanced search performed were based on a requisition, that requisition is typically displayed (along with others perhaps) in the Requisition Selector window. Make your selections and click Done to match the candidates you selected with the requisitions you selected.

Searching for Candidates Based on a Requisition

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Open a requisition.
2. Click .
3. Enter information in the displayed fields.
4. Click Customize... if you want to use other search fields.
5. Click Search.

Result

Candidates who satisfy the search criteria are displayed in the search results list.

Next Step

Matching candidates to the requisition.

Similar Candidate Search

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

This type of search (often referred to as “more like this” search) can be performed from a candidate list or from within a candidate file by using the  icon.

The “find similar candidates” search uses the candidate file, which includes the fields used in the *Conceptual Search*, as the search criteria.

In addition to this information, the system uses default values for the Last Update and all the underlying search parameters applied in the Conceptual Search. The candidate’s location is ignored because the system cannot assume you want to search for the current candidate location. You can, however, direct the “find similar candidates” search in your preferences to use your default search location. The 2,500 character limitation that applies to the Conceptual Search does not apply to the “find similar candidates” search. The Last Update value and Place of Residence (location) are user preferences that can be defined in My Setup.

Note that performing a “find similar candidates” search using a candidate file that contains no information in any of the list of fields used in the Conceptual Search retrieves no candidates and even displays a message informing the end user that the selected candidate cannot return any candidate. A candidate selected as a reference for a Conceptual Search must have significant text information, like an attached resume or a plain text pasted resume.

The “find similar candidates” search can be performed for one candidate file at a time.

The “find similar candidates” is available for all types of job submissions, including hourly candidate job submissions.

Finding Similar Candidates

Prerequisite

A user type permission grants users access to this feature.

Steps

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

Result

The Search Results list displays a list of candidates that match the selected candidate file.

Searching for Candidates Matching Job Description and Qualifications

Users can find candidates who match the external job description and qualifications of a requisition.

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. It is as if you could paste the entire description and the qualifications in the Keywords field in the advanced search and there was no 2,500–character limit. In addition to these two fields, the system uses the default value for the Last Update field and Place of Residence field coming from the user's preferences in My Setup. If no place of residence is specified in the user's preferences, the location specified in the requisition is used.

Note that the place of residence used for searching is based on the Taleo Network Locations, while the location specified in a requisition is associated with a customer-defined location. The latter location is usually mapped to a Network location and this is the location used for searches.

This type of search can be performed for one requisition file at a time.

Searching for Candidates Matching Job Description and Qualifications

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.

General Profile Search

It is possible to return search results of candidates who have only submitted a general profile but have not yet applied on any specific requisition.

When this feature is enabled, users may add the “Exclude candidates who applied on requisitions” search criteria in the advanced search form and decide to search only for candidates who have submitted a general profile but have not yet applied for a specific position. This feature helps to ensure candidates who do not apply for a specific job are also considered.

Exclusion of Agency Owned Candidates in Search Results

Agency owned candidates can be excluded from candidate search results.

When this feature is enabled, users may add the “Exclude candidates owned by agencies” search criteria in the advanced search form and decide to include or not agency owned candidates in search results.

Requisition Search

Requisition Quick Search

The requisition search allows Recruiting Center users to quickly find specific requisitions.

The requisition quick search tool is available at the top right hand corner of the Recruiting Center pages. It is available to Recruiting Center 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 Recruiting Center users to enter the title, the number, or a keyword to find the desired requisition. A wild card search may also be used. The search engine only returns results appropriate to the user's permissions and group association.

When performing a requisition search using a keyword, the search engine looks through all the content of the requisition file, that is:

- Requisition number
- Requisition title
- Requisition title by manager
- Requisition internal description
- Requisition external description
- Job board summary description
- Internal qualifications
- External qualifications
- Abstract
- Additional information
- Department
- Position
- Offer UDF
- Department UDF

For the requisition search, the system automatically applies the boolean operator AND. The AND, OR, and NOT operators can be entered manually.

The search is not case sensitive.

For performance and management reasons, a maximum of 300 matching files are displayed.

Performing a Requisition Quick Search

Prerequisite

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

Requisitions that satisfy the search criteria are displayed in the search results list.

Next Step

Filtering the list of requisitions using quick filters.

Printing search results.

Search Queries

Search Query

A search query is an advanced candidate search that has been saved in order to be used repetitively and potentially shared with other Recruiting Center users.

A search query is a set of search criteria selected by a Recruiting Center user to perform an advanced candidate search. Each time an advanced search is performed, a search query can be created. A search query can be used as a basis for future searches and can be changed to narrow or broaden search results when needed.

The search query feature is available at the top right hand corner of the Recruiting Center pages.

Users can save a search query if the feature is activated in the user's configuration profile and if the user type permission has been granted. The fields that can be selected in the Recruiting Center to customize a search query are set by the system administrator for each configuration profile. If a user is not linked to a configuration profile or is linked to a configuration profile for which the system administrator has not selected additional fields, then only the set of default fields are displayed when customizing a search query in the Recruiting Center.

Two types of queries can be created:

- Personal search queries will remain available only to the user that created the query.
- Shared search queries are queries that are made available to selected users.

Saving an Advanced Candidate Search Query

Prerequisite

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. Users 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 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 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.

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.

Steps

1. Click Search Query.
2. Open a search query.
3. Click Properties.
4. Make desired changes.
5. Click Done.

Deleting an Advanced Candidate Search Query

Prerequisite

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 and Competency Libraries

Libraries

Library

The Recruiting Center offers libraries containing questions, disqualification questions as well as competencies.

When accessing a library, the screen is organized into three panes:

- The right pane contains the *online help* and *online clips* if these were enabled. The pane can be expanded or collapsed.
- The central pane presents the list of elements. Elements displayed depend on the filters and options selected in the left pane. A menu bar allows users to perform specific actions on elements.
- The left pane contains the following three tabs. The pane can be expanded or collapsed.

Tab	Description
Library	Contains quick filters to filter a list down to relevant information.
Job Field	Contains filters to display elements associated to one or more job fields. A tree structure allows users to display elements associated to all job fields, or elements associated to a specific job field.
Location	Contains filters to display elements associated to one or more locations. A tree structure allows users to display elements associated to all locations, or elements associated to a specific location.

Important Note: *(ID 251) Users that have access to a library (Questions, Disqualification Questions and Competencies libraries) can access all items in the library. The system provides a flat list view option which help reduce duplication and mis-alignment of similar elements across the organization. Therefore, when users are in the tree structure view for Job or Location, they are not constrained by Job and Location elements that are linked to their group. They can navigate and interact with the entire tree structure.*

Questions

Question

A question is used to prescreen candidates and find the best candidates for a job.

Questions can be created in the Question Library as well as directly in a requisition.

Questions created in the Question library are available in the Question Library and 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 Question Library.

Questions created directly in a requisition 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 in the requisition 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. A user type permission grants users access to the actions that can be performed on questions in the requisition Prescreening section.

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

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.

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/or job fields. Associating questions to locations and/or job fields helps the user to select the appropriate questions while using the selector window. If questions associated to locations and/or job fields are included in models, the Apply Model function available in the requisition will bring the appropriate questions into the requisition based on the locations and 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 applied to requisitions when users click the Apply Model function in 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. Fewer 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).

Important Note: *(ID 248) It is possible to edit a library question from within a requisition or requisition template. Please be aware that by doing that the question is also modified in all the requisitions using that question. To avoid any confusion, refrain from editing library questions. Editing local questions can only be done within requisitions.*

Important Note: *(ID 258) It is not possible to delete questions in the Question Library. Instead, use the Deactivate Question option*.

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

Tip	Description
	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.

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 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.

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 Questions

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.

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 disqualification question can be viewed by internal candidates, external candidates or all candidates.

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 possible 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.

Unanswered disqualification questions are considered as being passed and will not affect the disqualification status of the candidate.

Explanations for Disqualification Questions

If configured by your system administrator, you can have the ability to configure disqualification questions (active, draft or inactive) 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.

Association to Locations and Job Fields

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.

Disqualification Question Translation

The translation of a disqualification question in all languages is not forced by the system (this behavior exists since Taleo 10). The content writer or library administrator should make sure to translate the disqualification question in all appropriate languages. Note that disqualification questions that are not associated to a Location of Job Field must be translated in all languages (since they can be displayed to all candidates). Disqualification questions associated to locations of job fields can now be translated only in the appropriate languages; it is no longer needed to translate them into unused languages.

History Tracking

The system tracks changes done to the answer of a disqualification question. Changes are visible in the History tab.

Answers to library based questions, be prescreening questions or disqualification questions, are unique, meaning they are shared across all requisitions using the questions. Tracking of changes done to an answer is propagated for prescreening questions, disqualification questions and competencies.

Changes done to the answer of a disqualification question in the context of a job submission will produce a tracking entry in the History tab of all job submissions where the question is used.

Regarding changes done by the disqualification question library manager, the behavior is:

- Changes done to a question in the library are tracked in the library. In the History tab, users can see who changed a question and when the change was done.
- Changes to questions or possible answers are visible right away into requisitions and candidate files, but do not propagate any tracking within the job specific submission.
- To ensure data integrity, the status of a disqualification question answer cannot be changed.

The possible results to a disqualification question answer (that is, the candidate passes, the candidate is disqualified, to be verified), cannot be modified once the disqualification question has been used.

A disqualification question that is not associated to a Location or Job Field does not propagate tracking changes. As a result, a change to an answer is visible everywhere the question is presented, but the change is tracked only in the history tracking of the context where the change was made, either the profile or the job submission. The goal is to propagate the tracking history everywhere it applies. This is done already for questions and competencies and it will be done in the future for disqualification questions.

Explanations for Disqualification Questions

This feature provides users the ability to configure disqualification questions so that candidates are prompted for explanations for specific answers.

When creating a disqualification question, when this feature is activated, the system administrator may specify that an explanation is required for certain answers.

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.

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 profile or their submission.

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.

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 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.

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.

Competencies

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.

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.

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

Proficiency	None	-1 year	1-3 years	3-4 years	5+ year
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

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 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.

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.

Tasks

Task and Self-Assigned Task

Task

A task is an action a user needs to perform regarding requisitions, candidate files, or offers.

Tasks are generated by the system and displayed in the Tasks channel of the center stage and in the Tasks list.

Tasks Channel

The Tasks channel may display tasks related to requisitions, offers, onboarding, and *self-assigned tasks*. Clicking an hyperlink in the Tasks channel gives access to the Tasks list where users can see all tasks in one list view and use quick filters to filter the list. For details regarding elements in the Tasks channel, see *Center Stage*.

Tasks List

The Tasks list provides quick filters and presents information in different columns. Quick filters and columns are not configurable.

Available Quick Filters
Show tasks for (Assigned to me, Requisitions I own, Requisitions I collaborate on, etc.).
Requiring attention
Hide completed tasks (by default, the Hide completed tasks option is selected).
Due date
Task type (for example, tasks to be completed, tasks ready for sourcing, self-assigned tasks, duplicate check, etc.)
Related to Candidate
Related to Requisition
Related to Assignee

Available Columns
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 email address)

Available Columns
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

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.

In the Tasks list, when selecting the “I own” filter, tasks related to requisitions the user owns (as a user and user assistant) are displayed. If a system-generated task is assigned to the user, both the user and user’s assistant will be able to perform the task. If a system-generated task is assigned to the user assistant, both the user assistant and user will be able to perform the task. In both cases the task will be displayed as a link.

Available Tasks

Tasks are related to requisition files, candidates files, and offers. 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	Duplicate Check	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		

Rules Regarding Task Assignment

Tasks are assigned to a user or to the user's assistant according to these rules:

- When a system-generated task is created, the assignee is always the "user's assistant" (if a user assistant is identified). Otherwise, the assignee is always the user. However, the user also has access to these tasks even though they were assigned to the assistant.
- Both the user and the user's assistant can access the linked task regardless to whom (user or assistant) the task was assigned to.
- If a user assistant is identified after a system-generated task was created, the task will remain assigned to the user, but the linked task will be available to both the user and user's assistant.
- If a user assistant was assigned a task and the user assistant was later removed, the task will automatically be re-assigned to the user.

"Task assigned to me" Filter

A filter called "Tasks assigned to me" was created to eliminate the confusion of mixing tasks that users own with tasks that users might not own, but are for requisitions they own. This filter is available in the Tasks channel as well as in the Tasks list. In the Tasks channel, the "Tasks assigned to me" filter is available to quickly access tasks assigned to the user. In the Tasks list, the filter is available via the "Show tasks for" list. "Assigned to me" is the default value when accessing the Tasks list.

When any of the Self-assigned Task link is selected in the Tasks channel, users are brought to the Tasks list; the "Assigned to me" value is selected in the "Show tasks for" filter no matter what the "Show information for" filter on the My Taleo page is set to.

When any of other task link is selected (for example, under Requisition, Candidate, Offer), users are brought to the Tasks list; the value in the "Show tasks for" filter is identical to the value selected in the "Show information for" filter of the My Taleo page. Example: If "I own" is selected in the "Show information for" filter on the My Taleo page, then "Requisitions I own" is selected in the "Show tasks for" filter in the Tasks list. If a group is selected in the "Show information for" filter on the My Taleo page, then the same group is selected in the Tasks list.

If users have the ability to see and change the "Show information for" filter setting, once in the Tasks list they can change it to what they wish to see. If they don't have access to this filter, then they will need to navigate back to the Tasks channel and click on the task they want to see in order to have the Tasks list filtered for them.

Note that the *Show information for Default Value* setting available in the SmartOrg Configuration Profile feature has no effect on the Tasks list view and the Tasks channel view.

Viewing Tasks

Prerequisite

A user type permission grants users access to this feature.

Steps

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.

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.

Confirming Employee 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. Click the Tasks tab.
2. In the Quick Filters panel, under Task Type, select Confirm Employee Presence.

Self-assigned Task

A self-assigned task is a task a Recruiting Center user creates for himself.

Recruiting Center users can select a candidate file, create a self-assigned task to act on at a later time, and activate a reminder to ensure the task is completed on time. The self-assigned task feature is also available while changing the step of a candidate.

For example, let say that you want to call the candidate John Doyle by the end of the week to invite him for an interview the following Monday. You need to open John Doyle candidate file, create a self-assigned task (for example "Confirm Monday's Interview") and set a reminder for Friday. On Friday morning, you will receive an email message reminding you to call John to see if he is available for an interview the following Monday. The email message contains a link that you can click in order to access all the information regarding this task. Then, in your list of tasks, click on the task regarding John Doyle to obtain details regarding this task as well as information regarding the candidate and the requisition he applied to. Look at John's phone number in his candidate file and can call him to invite him for the interview. When the task is completed (i.e., you phoned John), you simply need to indicate that the task is completed by selecting the Completed status. The Confirm Monday's Interview task is no longer displayed in the Tasks list.

A self-assigned task can also be created for several candidate files. For example, you could have a pre-filtered lists of candidates that are to be phone screened and create a single self-assigned task to perform an initial phone screen. The system automatically creates a separate self-assigned task for each candidate that was selected.

Self-assigned tasks can only be viewed by their creator. They cannot be redirected to delegates or transferred to a new user taking over.

Reminders are sent daily and users receive them in the morning (according to the appropriate time zone).

Self-assigned tasks are not reportable; reports showing self-assigned tasks cannot be created.

Creating a Self-Assigned Task

Prerequisite

A user type permission grants users access to this feature.

Steps

1. Select a candidate file.
2. Select the Create Self Assigned Task in the More Actions list.
3. In the Task window, complete the information as required.
4. Click Save and Close.

Result

An email message is sent to you. The message contains a link that redirects you to the information of the task. The task is listed in the Tasks list.

Removing a Self-Assigned 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.

Duplicate Check Task

The Duplicate Check task in the Recruiting Center Tasks list can be performed on any potential duplicates found within flows where the duplicate check action is activated, that is agency, referrer, or candidate flows.

When this feature is enabled, if a potential duplicate is found by the system, a Duplicate Check task is sent to the requisition’s owner that is the recruiter assistant. If no recruiter assistant was defined, it is sent to the recruiter. For a duplicate check task performed in a profile context, if a potential duplicate is found, since there is no recruiter the task is redirected to the person defined in a setting configured by the system administrator.

The task assignee runs the Duplicate Check task. Duplicates are displayed in a Quick Search Results list. The task assignee can then merge the duplicate files.

Running the Duplicate Check Task

Steps

1. Click the Tasks tab.

2. In the Quick Filters panel, under Task Type, select Duplicate Check.

Work Item Delegation

Work item delegation allows a user to delegate work items to another user for a short preset period of time.

A user delegates work items to an alternate 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 as the current owner.
- If the current owner is an eShare user (not a Taleo application user), the new owner must also be an eShare user.

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 My Setup in the Resources menu 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.

Correspondence

Correspondence

Correspondence

A correspondence is a message sent to a recipient or multiple recipients.

A correspondence can be sent to one or several recipients at a time. The limit is 150 recipients, all selected on the same list.

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 to a *secure message center*, 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.

Secure Message Delivery

Customers who wish to have increased control over the information sent to Career Section users via email may choose to enable the Secure Message Delivery feature. When enabled, all messages are delivered to a secure Message Center accessible from any of the customer's Career Sections. Message recipients are directed to the Message Center to retrieve their messages.

The Secure Message Delivery feature applies only to messages sent to Career Section users, that is candidates, agents, and referrers. It does not impact Recruiting Center users or messages sent with other Taleo products.

If a message is sent via email (whether it is an automated message or the sender selected to send it via email), rather than receiving the actual message via email the message recipient receives a notification of message delivery containing a deeplink. To receive a notification of message delivery, message recipients must have a valid email address on file and the notification template message must be active.

To access the Message Center, the message recipient clicks on the deeplink in the message and must then authenticate himself by entering his user name and password. If the user does not yet have an account, he must create one prior to being able to access his messages. Alternatively, the Message Center can be directly accessed via any active Career Section by clicking the My Messages tab.

Once in the Message Center, the message recipient can read his messages, delete them, and download the files attached to the messages in order to view them. Before accessing an attachment, the recipient must accept a download agreement. Messages are displayed in a print friendly format should Career Section users wish to print a message using the browser's print functionality.

When viewing a specific message, the recipient can navigate from one message to the next without returning to the list view by using the Previous or Next links. The message may also be deleted. Clicking Back returns the user to the message list.

For Career Section users who do not have an email address, the message sender can still send them messages and these users can access their messages from within the Message Center. For example, a candidate exists in the system and did not supply an email address. A recruiter will still be able to send an email message to the candidate using the Recruiting Center correspondence wizard.

The Message Center

The Message Center has the same look and feel as the Career Section; it adopts the theme and branding of the Career Section.

Help text is displayed in the right-hand side of the Message Center. Default universal help text, which can be edited via TexTool, is provided by Taleo. If desired, the text can be customized by a Career Section administrator using the Career Portal Page user-defined labels feature. This text change only affects the Message Center on that particular Career Section.

The Message Center language matches the language from where the Message Center was originally accessed. If the user is coming from a Career Section, the Message Center is presented in the same language as the Career Section. If coming from the deeplink contained in the notification, the Message Center is presented in the same language as the notification sent to the user. Messages inside the Message Center are in the language used to transmit the message.

The Message Center stores messages sent within the past 6 months to a maximum of 100 messages. If more than 100 messages have been delivered, only the most recent 100 messages are accessible.

Messages that do not have a subject cannot be opened from the Message Center.

When the Message Center is enabled, the "To", "Cc", and "Bcc" fields in the message header are not available when sending correspondence; therefore, Recruiting Center users cannot edit the message recipients. Also, Recruiting Center users cannot add additional recipients while manually sending a correspondence.

When Recruiting Center users are resending messages from the candidate file History tab, the system will replicate the method of delivery used for the original message. If a message was sent prior to enabling the Message Center, when the user chooses to resend such a message, the system will not deliver the resent message to the Message Center, it will send the message to the original email address.

Sending a Standard Correspondence

Prerequisite

A user type permission grants users access to this feature.

Correspondence can be sent to a maximum of 150 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.

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.

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.
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 via email 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.

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.

Screening Services

Screening Services

Screening Service

An organization can choose to have external partners provide specialized screening services.

A screening services partner can supply services such as:

- candidate assessment
- background check
- tax credit eligibility
- interview guides
- interview scheduling
- validated tests to identify and measure a candidate's qualifications, motivations, abilities and eligibility

Screening services must be activated by Taleo Support before they can be used in a requisition flow. Services are sourced to the application using an external tool, and enabled by default if the service does not require any additional configuration.

Once a service is made available by Taleo Support, the service can be activated or deactivated by system administrators and made available or not to Recruiting Center users when creating a requisition.

All screening services have the same properties, however, the settings of these properties will vary according to the service. System administrators can configure the screening service that is, modify input fields, phases, etc.

The languages in which an external service is available depend on the languages used by the service providers and vendors.

Screening services are available to Recruiting Center users provided they have been granted the proper user type permission.

Requesting a Screening Service

Prerequisite

A screening service must be available in the application.

A user type permission grants users access to this feature.

The candidate must be in a selection process.

Steps

1. In the Candidates 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. Click Done.

Result

The candidate will receive a request from a screening service.

Screening Results

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

Screening information is displayed in columns 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.

A Previous Requests link gives access to the previous transactions with the same provider.

For background checks, Recruiting Center users cannot see the data that the candidate filled in, they can only see if the candidate accepted the background check consent.

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.

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

In 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.

Taleo Assessments

Assessments

Assessments in the workplace are used to measure the knowledge, skills, abilities and behavioral attributes related to a job or corporate culture. They can also be referred to as screening services, tests, surveys, exams, evaluations, simulations, work samples, assessment centers, interview guides, or realistic job previews. Employers use assessments to hire applicants, develop and promote employees, and collect talent intelligence on internal and external talent pools.

Professional fields related to the scientific research, development and use of workplace assessments include Industrial Organizational (I/O) Psychology and Organizational Development (OD). Also, the fair use of workplace assessments is overseen at the state and federal level or the territory, national and regional/multinational level by various government organizations, such as the U.S. Equal Employment Opportunity Commission (EEOC).

Depending on their professional credentials, authors may also be involved with the following assessment services:

- Job Analysis – determines job-related competencies to include in the assessment.
- Validation Study – determines if the assessment is a reliable and valid measure of the selected competencies and to what degree it predicts job performance.
- Adverse Impact Analysis – determines if the assessment could potentially impact protected groups or promote unfair bias.
- Business Impact Study – determines the cost and time savings, or return on investment, from using a validated assessment over a period of time.

Using Taleo Assessment Results to Evaluate Candidates

Following best practices when using assessment results to evaluate a candidate will result in high quality hires.

The assessment summary is available in the candidate submission, in the Screening section of the Job Submission tab.

By default Taleo puts candidates in three *bands*: red, yellow, and green. The band names may vary by company preference.

The first step in evaluating a candidate is to focus on the global band. Candidates with green global results should be reviewed first. Yellow candidates can be reviewed. We highly recommend against considering candidates that have a global band of red.

The next step is to review the candidate’s individual dimension results. Candidates with more green dimension bands should be considered before candidates with fewer green dimension bands. For example, a candidate with 6 green dimension bands is a better candidate to proceed to the interview than a candidate with 4 green dimension bands.

When planning the interview, the hiring manager should review the dimension results from the assessment. Any yellow or red dimension areas should receive more focus during the interview. Using behavioral-based interview questions is the best technique to evaluate a candidates competence in the dimension topic areas. An automatically generated *interview guide*is an optional feature that can be included with assessment results.

A final evaluation is the determination of fit between the role being filled and the candidate's dimension results from the assessment. A hiring manager or recruiter should have a good idea of the specific competency requirements for the specific position being filled. This knowledge should be used to compare a candidate's assessment results to the specific competency requirements of the given role.

Assessment Results Fields in the Candidate Submission

Field	Description
Requester	Name of the person requesting the screening service. In the case of assessments, it is usually the name of the candidate since the request is made during the application through the Career Section.
Request Date	Date when the assessment was requested.
Provider Status	Status of the request on the partner's side. The field can be empty and values displayed may differ for each partner.
Status	Status of the request on Taleo side. See *Assessment Status*.
Result Summary	In the partner certification, it is possible to mark one field as the Result Summary field. Values come from the assessment partner. Values displayed may differ for each partner.
Details	The Details link opens the Details view which provides an overview of the dimensions assessed and the candidate's dimension bands. To go back to the summary view, click Back.
Previous Requests	The Previous Requests link gives access to the previous transactions with the same provider.
Results Expiration Date	Validity of the results. When the date is passed, the results expire.
Last Activity Date	Date when last activity took place.
Reference Number (Internal)	Taleo ID for the request.
Reference Number (External)	Partner ID for the request.
Online Assessment Solution	The input parameter specified on the corresponding requisition.
Results	This section presents assessment result fields coming back from the partner.
Provider Detailed Results	The Provider Detailed Results link opens a window to navigate in the partner's site where further details are provided regarding the assessment results.

Assessment Status in the Candidate Submission

Status	Description
Waiting For Provider Response	When a candidate attempts to take an assessment by clicking a link a request is sent to the assessment provider. Once the response is received the status will change to Unable to Process, Service Requested, or Sent to Candidate.
Unable to Process	The connection between the request and acknowledgment of assessment request was not successful. Contact Taleo Support.
Service Requested	The candidate has clicked a link to take the assessment.
Sent to Candidate	The system has fulfilled a request to send a link to the assessment to the candidate via email.
In progress	
Acknowledged by Provider	The assessment has been completed. If the assessment was completed by the candidate a score is now available. If a score is not available the candidate completed the assessment by timing out.
Partner Didn't Respond within Set Time	The *Delay to wait before timing out a request (in hours)* time limit has been met.
Candidate Didn't answer email within Set Time	The *Candidate must answer email within (in hours)* time limit has been met.
Declined By Candidate	The candidate declined to take the assessment.

Assessment Versions

Assessments can have multiple versions.

The questions on the assessment are the same for all versions but can have different properties and scoring methods. Assessment versions affect *Assessment Retakes and Scoring*.

Bands

Bands are score divisions.

When a candidate takes an assessment, dimension scores and a global score are calculated for the version of the assessment he or she took. The candidate's dimension scores and global scores fall within a range. This range is referred to as a band in Taleo Assessment.

Band names may vary by organization. By default, Taleo assessments are designed to separate candidate assessment score ranges into three groups: red, yellow, and green.

- Red candidates have a poor to below average score.
- Yellow candidates have a score that is slightly below the average.

- Green candidates have an above average to exceptional score. The top 40% of applicants receive this global band. Candidates best suited for hiring are usually located in this band.

  Example:

  ABC Corporation has an assessment measuring three dimensions: interpersonal skills, honesty, and loyalty. The cashier version of the assessment has the following properties: Honesty has a -20 to 30 point range and is weighted at 40% importance; Loyalty has a -10 to 10 point range and is weighted at 10%; and interpersonal skills has a -40 to 30 point range and is weighted at 50%. The global range is -29 to 28.

  Each dimension score has three bands: red, yellow, and green. The ranges of the bands must include all possible scores.

  The breakdown of the bands for the honesty dimension is:

  - Red has a range of -20 to -5 points.
  - Yellow has a range of -5.1 to 15 points.
  - Green has a range of 15.1 to 30 points.

Interview Guides

An interview guide is an optional screening tool that provides recruiters and hiring manager with specific candidate assessment answers and interview questions that relate to the candidate's assessment results.

When an assessment version is created, the assessment author can choose to activate interview guide generation. If this option is enabled the system generates an interview guide for employees who take that version of the assessment.

Enabling Interview Guide generation is determined when assigning *assessment version properties*.

Interview Guide Content

Name	Description
Applicant Information	
Job name	Auto-filled with the job name from Recruiting.
Applicant name	Auto-filled with the applicant name from Recruiting.
Application date	Auto-filled with the application date from Recruiting.
Assessment completed	Auto-filled with the date the assessment was completed from Recruiting.
Prescreening result	Auto-filled with prescreening results from Recruiting.
Overall Match to Job	
Dimension Text	Assessment version specific text to describe the overall the assessment. This text is not labeled dimension text.

Name	Description
Pass	If a global band has been marked as failed and a candidate fell into that band this value is no. If the candidate's global band does not have a failed marker this value is yes.
Exceptional	If a global band has been marked as exceptional and a candidate falls into that band this value is yes.
Global Band	The candidate's global band based on the global score.
Global Interpretation	Description of how to interpret the global band result.
Results Summary Table	Lists the dimensions measured and the candidate's dimension band.
Interview Guideline	Instructions to the interviewer.
Interview Guide Questions	Default interview questions asked to all candidates.
Dimension Specific Information	
Impact	A rating scale a hiring manager can use to note his or her personal perception of the candidate.
Job Fit Personality rating	A rating scale a hiring manager can use to note his or her personal perception of the candidate.
Dimension description	Information on the dimension that was measured.
Interpretation for	Information on how to interpret the candidate's dimension band.
Interview Questions for the Dimension	Two types of interview questions make up this portion of the interview guide: interview questions configured to show up on all assessments with the dimension, and interview questions configured to show up based on the dimension band the candidate receives.
Assessment Questions	Assessment question and answer combinations for answers marked to validate. These questions and answers only show up on a candidate's interview guide if the candidate has selected the answer marked for validation.

Reports

Report

A wide range of custom and standard reports are available via Taleo Recruiting.

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

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

Problem	Solution	Keywords
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
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

Problem	Solution	Keywords
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,
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.	Log in

Problem	Solution	Keywords
	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.	
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

Appendix

Table Referencing Tips Included in the Document

The following table provides an overview of the tips that were added throughout the document to provide useful information on some features. These tips are represented with this icon . You can click on an ID to be taken to the specific part of the document containing the tip. Note that the ID number is an internal reference number.

ID	Status	Area Impacted	Date Last Modified
321	Expected behavior	Agency - Referral Tab on General Profile	January 2011
301	Expected behavior	Approvals	January 2011
306	Expected behavior	Approvals	January 2011
284	Expected behavior	Candidate - Print	December 2010
222	Change Planned – Time still TBD	Candidate - Reset CSW Action	December 2010
335	Change Planned – Time still TBD	Contingent Hiring	April 2011
345	Change Planned – Time still TBD	Contingent Hiring	April 2011
248	Expected behavior	Prescreening	December 2010
251	Expected behavior	Prescreening	December 2010
258	Change Planned – Time still TBD	Prescreening	December 2010
317	Expected behavior	Quick Filters	January 2011
341	Change Planned – Time still TBD	Requisition - Posting	April 2011
343	Change Planned – Time still TBD	Requisition - Posting	April 2011
344	Change Planned – Time still TBD	Requisition - Posting	April 2011
243	Expected behavior	Requisition - Template - Owner/Group	December 2010
326	Expected behavior	Rich Text Editor	April 2011