Taleo Business Edition
User Guide
11.4

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Introduction

Welcome to Taleo Recruit, an easy-to-use online Hiring Management service designed for the web. With Taleo Recruit you can manage all aspects of your staffing operations online, combining a powerful front end to your employment web site with an enterprise-class candidate and requisition management system behind the scenes.

Taleo Recruit allows you to manage your critical candidate and requisition information from any internet-enabled computer with a web browser. You can securely login anytime to access the following key features:

- Candidate Management
- Requisition Management
- Careers Website Management
- Reporting & Analysis
- Approval Processes
- Interview Management
- Ranking & PreScreening
- Employee Referrals

In addition, you can track and manage the following:

- Candidate Contact Management
- Comments, Expenses and Attachments
- Interview Feedback, References and Background Checks
- Offer Letter Creation and Revision
- Candidate and Requisition Activity
- Job Postings

Your Taleo Recruit Administrator can customize most aspects of the system to match your organization's recruiting and hiring processes.

Premium Service

Taleo Business Edition's Premium Services are designed to meet the needs of larger, more complex businesses. In addition to all of the functionality available in Plus Service, Premium Service customers get advanced customization and administration tools that can support larger-scale deployments. Premium Service also includes access to the Web API so you can easily integrate Taleo Business Edition with other enterprise applications.

The following exclusive features are offered at no additional cost to Premium Service customers:

- Unlimited Careers Websites
- Up to 250 custom candidate and requisition fields
- Unlimited Custom Reports
- Unlimited storage
- Taleo Business Edition Web Services API for back-office integration; contact your Account Executive to learn more.
- Outlook Plug-in for TBE, eQuest Tools*, Facebook Application Platform, and LinkedIn Plug-in Company Insider
- Taleo Scheduling Center*
- Access to Solution Exchange

  *Additional charges apply

Plus Service

Taleo Business Edition Plus Service is designed for organizations that need full-featured hiring management functionality. Plus Service includes straightforward and easy-to-use customization and administration tools to facilitate any small- to mid-sized deployment.

Some of the features described in the online help are not included in Standard Service. Such features are marked as Plus or Premium Service only. To determine which Service you are using, check the title bar of your browser.

Standard Service

Taleo Business Edition Standard Service is an easy-to-use hiring management solution for teams that want to quickly and affordably centralize and share candidate and requisition information to immediately become more productive.

Some of the features described in the online help are not included in Standard Service. Such features are marked as Plus or Premium Service only. To determine which Service you are using, check the title bar of your browser.

Security

Taleo Business Edition employs state-of-the art technology, management practices, and physical security to keep your data safe. We have a total commitment to a secure, scalable, private system.

- 24 hours a day, 7 days a week, 365 days a year, Taleo Business Edition uses:
- 128-bit Verisign SSL (Secure Sockets Layer) for data and password confidentiality
- Secure firewalls with anti-spoofing technology
- Intrusion detection software and hardware
- Proprietary security products developed specifically for Taleo Business Edition
- Physically-guarded access
- Security breach alarms
- Real-time data backup and delivery

We perform frequent hardware and software upgrades, providing you with the highest possible levels of availability, performance, and disaster recovery. Regular backups of your data are also an important part of our standard service. In addition, if you'd prefer to maintain a physical copy of your Taleo Business Edition data in your own office, we offer an On-Demand Backup Service via secure download allowing you to export a full backup of your data as often as you like.

Taleo Business Edition's anti-virus scan runs in the background and scans all resume documents and other attachments. If a suspicious file is identified, the user receives a warning message before they attempt to download the file. In the rare case a user attempts to open or download a file that has not been scanned, a message appears informing the user the virus scan is in progress. The file will open upon completion unless the file is deemed suspicious.

System Requirements

For optimal performance with Taleo Business Edition the following is recommended:

- Browsers Supported For Authorized Users: Taleo currently supports use of Internet Explorer ("IE"), Firefox, and Safari browsers by Authorized Users. For candidates, Taleo will at all times support browsers versions which comprise at least ninety percent (90%) of the total browser usage in the marketplace. Browser usage percentages will be based on actual measurement of browsers attempting access and accessing Taleo's servers in the immediately preceding calendar quarter.
- Bandwidth: Minimum dial-up; Recommended Broadband/LAN
- Specifications for Desktops: Minimum 256 RAM; Recommended 1-2GB RAM
- Specifications for Network: Minimum Dial-up Connection (may cause issues depending on tasks performed); Recommended Broadband/LAN
- Firewall – Required: Ability to send/receive data via SSL (HTTPS)
- Adobe Flash Player 9 (9.0.124.0) or above

Privacy

Taleo believes your private information should stay that way. Therefore, we have adopted strict guidelines and best practices to ensure that your confidential personal and business information remains secure. For more information, see the Taleo Privacy statement on our website.

Data Ownership

In addition to our comprehensive privacy policy, Taleo Business Edition guarantees exclusive ownership of your data. Our employees do not have direct access to the Taleo Business Edition production equipment, except where necessary for system management, maintenance, monitoring, and backups.

As a standard part of our Service Subscription Agreement, if at any point your organization chooses to cancel its Taleo Business Edition subscription, we will provide you with a full copy of your Taleo Business Edition data via our On-Demand Backup Service.

Access to Solution Exchange (Premium Only)

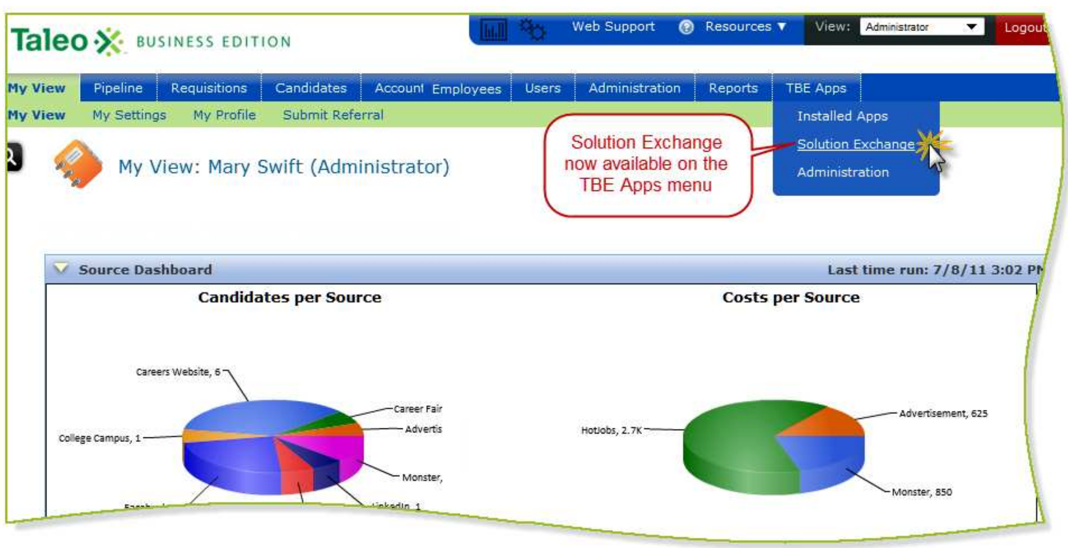
If you're a Taleo Business Edition Premium subscriber, you can access Taleo Solution Exchange via the TBE Apps menu, and get instant access to hundreds of integrated solutions.

When you access Solution Exchange your Taleo Business Edition User Name and Password are used to instantly authenticate your credentials.

NOTE: Solution Exchange is currently only available in English.

Proceed as follows to access Solution Exchange:

1 From the TBE Apps menu, click **Solution Exchange**:



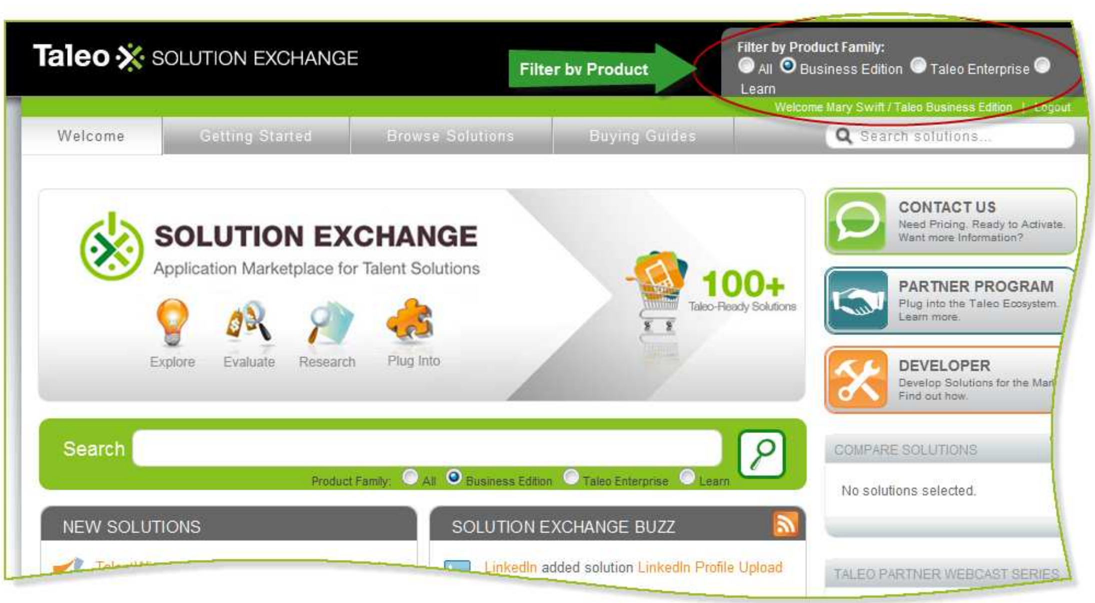
2 The Solution Exchange banner displays, with an overview of offerings:

3 Click **Installed Apps** to access integrated solutions, such as Talent Exchange.

4 Click the Solution Exchange banner to launch Solution Exchange. Administrators can also access Solution Exchange via the Recently Viewed Items menu.

Solution Exchange defaults to the Taleo Business Edition filter, showing you only the pre-integrated solutions associated with Taleo Business Edition, where you can learn about innovative new apps, quickly inquire, try or buy any of our solution offerings.

5 To see all available solutions, set the filter at the top of the Solution Exchange page to All and view what's available on Taleo Learn or Taleo Enterprise:



Getting Started

This chapter describes how to get stated using Taleo Business Edition, and contains the following topics:

- First Time Users
- Logging In
- TBE Announcements
- Error Messages
- Entering Data
- Using Taleo Recruit
- Navigating
- Getting Help

First Time Users

By default, the first person in your organization to sign up is assigned the role of Administrator. The Administrator is responsible for setting up your Taleo Business Edition system.

You can assign another user as an Administrator when you are up and running with the system, after the initial setup phase.

Quick Start Guide and Video Tutorial

For first time users, a Quick Start Guide is provided in the online help; the same information is provided in video format on the Resource Center. The Quick Start Guide and video tutorial are designed to get you up to speed with the initial setup of your system quickly and easily.

To access the Quick Start Guide:

1. Go to the Resources menu.
2. Click Help for the product you are using, Help Recruit for example.
3. Expand the table of contents in the left navigation pane by clicking on it.
4. Scroll down and click Quick Start.

A Quick Start Video is provided via the Resource Center containing all the information from the Quick Start Guide, with step-by-step, on-screen demonstration and voice narration.

To access the Quick Start Video:

1. Go to the Resources menu.
2. Click Resource Center.
3. Go to the End User Basics tab and scroll down to Getting Started with Taleo Business Edition.
4. Click Watch Video.

Logging In

Your Administrator must first add you as a user before you can log in to the service. A welcome email is sent to you with your username, temporary password, and company code. When you first log in, you must change your password.

TBE Announcements

When we have important information to share with our customers, you will receive an Announcement upon login to your Taleo Business Edition system. Announcements are presented to you in a pop-up window, allowing you to close the announcement after it's been read – and an option to Close and Not Show Again.

Each new release of Taleo Business Edition is announced on your login page, with details of the new features and enhancements being deployed in that release. An Administrator may need to configure the new features before they can be enjoyed by end users. Full details are always provided in the days and weeks leading up to the release.

Error Messages

While using Taleo Business Edition, you may occasionally receive an error message. Typically, this occurs when you attempt to view, edit, or delete information to which you do not have access. The message page that displays should explain the reason for the error. Simply click your browser's Back button to return to the previous page. If you feel you have incorrectly received an error, click the Web Support link at the top of any page to submit your issue directly to Taleo Business Edition's Customer Support.

Entering Data

Entering data in Taleo Business Edition is much like entering data in any web page. As you enter and edit data, remember to save the page so you don't lose your changes.

Required fields on edit pages are shown in red. All other fields are optional and may be left blank.

Taleo Business Edition is a very flexible service that allows you to create, edit, and track data in many ways. Experiment with how the system will work best for you and your organization.

Entering Dates

Many fields allow you to enter a date. You can click the calendar icon and choose a date from the pop-up calendar, or you can manually enter a date in the form of MM/DD/YYYYY where MM is two digits representing the month, DD is two digits representing the day, and YYYY is four digits representing the year. For example, March 16, 2008 should be input as 03/16/2008. (This example assumes your locale setting is set to "English (United States)"; using the United Kingdom locale this same date can be entered as 16/03/2008.)

When you click the calendar icon or Date Picker, you are presented with a month at a glance and may navigate by month and year by selecting from the drop-down list. In addition, the Date Picker is keyboard enabled.

Use the following keys to navigate when using the Date Picker:

- Page up/down —previous/next month
- Ctrl+Page up/down —previous/next year
- Ctrl+Home —current month or open when closed
- Ctrl+left/right arrows —previous/next day
- Ctrl+up/down arrows —previous/next week
- Enter —accept the selected date
- Ctrl+End —close and erase the date
- Escape —close the Date Picker without making a selection

Entering Currency

When you enter a monetary amount (or any other type of number), you can use a decimal point and the “$” sign to represent US dollars.

Do not use “,” commas to separate digits.

Entering Phone Numbers

When you enter phone numbers in various phone fields, Taleo Business Edition preserves whatever phone number format you enter. You can enter extension numbers and use parentheses as needed.

Using Taleo Recruit

With Taleo Recruit’s web-based interface, you typically start at the My View page and preview your scheduled interviews, approval tasks, activate candidates and requisitions. From there, you can choose one of the major tabs to add, edit, or review information.

When you first start using the service, you may want to do the following:

- Edit your personal setup. (See *Chapter 3 - Personal Setup*.)
- Import existing resumes from your computer. (See Importing Resumes from a ZIP file)
- Import candidate data from Excel, ACT! or other applications. (See Importing Candidates from a CSV file)

The Taleo Recruit tabbed interface allows you to navigate to My Views, Pipeline views, Requisitions, Candidates, Accounts, Contacts, Users, Administration and Report information. Notice that the first tab on each sub-tab section is the name of that section. This allows you to return to the home page of a section without going to the top level menu.

Navigating

Throughout the application you can expand and collapse sections of your screen by clicking on the expand/collapse icon: 

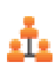
The system remembers the sections you collapse for the next time you return to the screen.

The History Log section is collapsed by default. You must expand this section upon each visit to view History Log records.

The mouse-over display lets you know where you are and which row(s) you have selected by changing the color of the entire row.

Just to the left of each Recently Viewed Item, you will see an icon which represents the record type. The icons and record types that display will vary based on the Taleo Business Edition product you are using.

Record type icons in Taleo Business Edition

Icon	Description
	**User**
	**Employee**
	**Candidate**
	**Requisition**
	**Contact**
	**Account**

You can navigate between pages and select options using links, buttons, and arrow selectors. On individual pages, you can edit or update information using text fields, drop-down menus, and popup menus.

On any details page you can click the **Back To List** link to return to your most recently viewed list page. For example, if the last list page you viewed was the third page in a list of Candidates, clicking Back To List on any candidate details page returns you to that page of the Candidates list. This link is not available if you have not yet viewed any list pages in your current session.

Printing

To print the current page, click the **Printable View** button, which opens the current page in a separate window for cleaner printing. You can then click Print This Page, which opens the printing option of your operating system.

Searching and Recently Viewed Items

The left navigation pane contains the Search feature, along with Recently Viewed Items options. This section can be collapsed and expanded based on your preference.

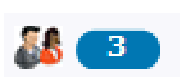
Recently Viewed Items allows you to navigate back to a recently viewed item.

The Search Candidates option is located directly above Recently Viewed Items in the left navigation pane. It allows you to search for keywords within candidate records or click on the Advanced Search to provide more detailed search criteria.

Candidate by Requisition Navigation

When working with candidates associated to a requisition, a candidate icon displays giving users a visual indicator of existing and new candidates who have applied for a position.

Candidate by Requisition Icons

	A green Candidate Icon indicates there are one or more new candidates.
	A blue Candidate Icon indicates there are no new candidates.

The number in the icon represents the total number of candidates associated to the requisition, minus any candidates in a rejected status. When hovering over the icon, you get a total count of candidates, and the number of candidate who are new. If your requisition has no candidates, no icon is displayed.

NOTE: Rejected Status is considered any status where the “Rejection Prompt Presented” checkbox is selected.

The candidate icon also acts as a button giving you a quick link to the Candidate List by Requisition view. The candidate icon can be added to Requisition List Views and to Requisition Page Layouts.

Using Smart Views

Your Taleo Recruit Administrator has the ability to assign multiple views on any List View page; these are referred to as Smart Views. This allows you to toggle between views to quickly access information at a glance. Using Candidate Views as an example, today when you click the **Candidates** main tab, you are presented with a default view of candidate summary data (this is based on your assigned Role and default List View settings). With Smart Views, depending on your current activities, you can quickly change the view to see Candidates in different regions, departments, or even statuses (e.g. All New Candidates, All Candidates in My Region, etc.).

If you have been assigned Smart Views, you will see the addition of a drop-down box at the top right corner of the List View page. When the drop down box is clicked, you are able to choose the best view based on your immediate needs. And, you can quickly toggle to another view as needed.

Your Taleo Recruit Administrator has complete control over which fields are displayed in your List Views and Smart Views; see Assigning Smart Views to List Views.

Using Quick Views

Quick Views allow you to hover over links and view data contained within a record. For example, from any tab or page hover over a Candidate or Employee Name link to view information contained within that candidate record.

The Quick Views feature is available with the following record types: Requisitions, Candidates, Accounts, Contacts, Users, Calendar Events, Tasks, and Interviews.

Your Taleo Business Edition Administrator has complete control over which data displays in Quick Views; see Configuring Quick Views.

Using Spell Check

Spell check is available for fields designated as “Text Area” field types. Where a text area field is used, a Check Spelling link will be present. Clicking the Check Spelling link will identify spelling errors by underlining the text in red; grammar errors are underlined in green; and style suggestions are underlined in blue. Double-click the underlined word(s) and select the most appropriate option to update the text, or click the Edit Text link to modify the text manually.

NOTE: The Spell Check feature is supported for English only.

Getting Help

Taleo Business Edition offers the following help and support options.

Using Online Help

Click the **Resources** menu at the top of each page, and select the Help option for the product you are using. Online help includes a table of contents, FAQs, Search, and tutorials on how to perform specific tasks.

Printing Online Help

To print the entire help manual, click the Adobe PDF icon in the upper left of the help window. This opens a PDF version of the help, which you can then print.

Viewing Video Help and Tutorials

Click the **Resources** menu at the top of each page, and then select **Resource Center.** The Resource Center is a valuable source of Video Help and Tutorials, Release Notes, Executive Summaries, and other useful information.

Contacting Taleo Business Edition Support

You can contact customer service by using the Internet or by using the phone.

Web Support (Administrators only)

Click **Web Support** at the top of any page to be redirected to our Customer Support Portal to create, track, and manage support incidents.

Additionally, from the Customer Support Portal, you can easily access product documentation, register for training, and obtain up-to-the-minute system information. You also have the ability to join our user community and interact with other Taleo Business Edition customers.

This multi-channel application delivers self-service capabilities, a variety of content on demand, and the flexibility to access your support-related activities whenever you want.

Phone Support

Phone support is only available to paying Plus and Premium Service customers. Phone support is not available for Trial customers. For accurate logging and tracking of your request, the preferred method of support for each new case is via the online Support form. Once you have established a case you may contact phone support to discuss the case at 1-888-560-1717. Alternatively, you can email Taleo Business Edition support directly at tbesupport@taleo.com.

Turnaround Time

We guarantee a 24-hour turnaround on all support submissions. If for some reason Taleo support staff cannot address your issue within 24 hours, you will be contacted with an explanation and suggested course of action.

Support Hours

Phone support is available during regular Taleo business hours:

8:00AM through 8:00PM Eastern Standard Time.

If you cannot reach a support representative, please leave a detailed message including your name, company name, company code, and description of your issue. A support representative will return your call within 24 hours.

TBE Status Center

To check the status for any TBE system issues you may be encountering, cut and paste the following URL into your browser address bar http://status.tbe.taleo.net/. We recommend that you bookmark this site, and check this site should you encounter any system issues. This site always has the most up-to-date information.

Personal Setup

This chapter describes how to set up your personal settings, the My View page, and Tabbed Pages, which help you customize how content is displayed in your Taleo Business Edition system. This chapter contains the following topics:

- My View
- My Settings
- My Profile
- Setting Up Tabbed Pages on page 36
- Submit Referral

My View

The My View page provides a summary of staffing activities you are currently responsible for such as interviews, feedback, requisitions, approvals, etc.

- My Calendar
- My Tasks
- My Interviews
- Awaiting My Approval
- My Active Candidates
- My Requisitions

My Calendar

The My Calendar section shows all of the events and interviews you are involved in over the next 7 days. Events that involve more than one person are shown with a small group icon in front of them.

The built-in calendar on the right allows quick access to other calendar views. You will notice that there are two icons, which represent individual and group view mode. By default the individual view mode is selected (shown in yellow) which means you only see interviews and events you are scheduled for. Click on the group mode icon to switch to group mode where you can see all events and interviews scheduled throughout the company.

Clicking on the month icon takes you to a page that shows all of the events and interviews scheduled throughout any given month. You can click on an event to view its details, or click on links in this monthly view to drill down to a specific day or week—you can also create new events and view existing event details.

Clicking on the Week icon takes you to a page that shows all of the events and interviews scheduled throughout a given week. You can use links to drill down on a specific day, create a new event, or view event details.

Clicking on a day takes you to a page that shows all of the events and interviews scheduled throughout that selected day. You can use links to create a new event or view existing event details.

When you click on a specific event you are taken to the Event view page where you can easily add the event to your Microsoft Outlook calendar. Clicking the **Add to Outlook** button automatically opens that event in Outlook. In order to save it to your Outlook calendar all you need to do is click the “Save and Close” button.

To create a new event you can just click one of the “New” links, and fill out the new event form. An event can be assigned to any users or contacts in the system. Next you provide a subject and location. And then you can select an object, which this event is related to.

By default you can select any Candidate, Requisition, Account, Contact or User. Lastly you can select a date, time and duration for the event. Once saved this event will immediately show up in your calendar views.

Events affiliated with objects such as candidates or requisitions also show up in that object's View page. For example, if you create an event associated with a candidate, you will see that event in the "Events" section of that candidate's View page.

My Tasks

The My Tasks section shows all of the tasks you have due over the next 7 days as well as any overdue tasks that you have not yet completed. Events with a due date older than the current date, and with a Status of either "Not Started" or "Overdue", are considered overdue by the system and the due date is shown in red.

Clicking on the tasks icon underneath the calendar section takes you to a full list of tasks that have been assigned to you. You can easily see when tasks are due, as well as check priority and status, and view what each task is related to.

When creating a New Task you can assign the task to one or more users, and give the task a Subject and Priority. You can then select an object, which this task is associated with, any Candidate, Requisition, Account, Contact or User in the system.

Tasks affiliated with objects such as candidates or requisitions also show up in that object's View page. For example, if you create a task associated with a candidate, you will see that task in the "Tasks" section of that candidate's View page.

My Interviews

The Interviews table shows all of the interviews that are either scheduled or awaiting feedback from you or other members of the interview team. The **Type** column displays whether it is a phone or in-person interview. The Date/Time column shows the scheduled date and time of the interview; clicking on the data/time link will display the interview details.

The **Status** column shows the overall status of each interview: "Feedback Pending" means that one or more interviewers has not yet either submitted feedback or declined, "Scheduled" means that the interview is pending (i.e. has not yet occurred).

The **Action** column contains action links allowing you to view, edit, cancel, accept, decline, submit feedback, complete or delete your interview(s).

Awaiting My Approval

The Awaiting My Approval table contains all of the items that are currently pending approval or rejection from you. The **Item Type** columns shows the type of object awaiting your input, this can be either a Requisition or an Offer Letter.

The **Action** column contains action links allowing you Approve or Reject the item(s) pending approval.

My Active Candidates

The My Active Candidates table contains a list of candidates that are currently active in the hiring process for any of your open requisitions. Candidates that have made it past the initial screening process and are active within the hiring workflow are shown here to provide a snapshot of all your current Active Candidates.

The **Name** column shows the name of the candidate which, when clicked, brings you to that candidate's details page. The **Main Status** column shows the stage each candidate is at in the hiring process.

The **Requisition** column contains a link to the associated Requisition.

My Requisitions

The My Requisitions table contains all of the requisitions you are assigned as owner of sorted by most recently updated. The **Title** column shows the title of each requisition and whether or not that requisition is currently shown on your careers website.

The **Next Steps** column contains action links allowing you to view all of the candidates that have applied to a requisition, or change a requisition's status. The "Candidates" link shows a number in parentheses representing the number of candidates that have applied to that requisition.

My Settings

Your "My Settings" page is accessible through the My Settings link in your My View tab.

Display Preferences

The "Number of rows per page" setting specifies how many entries you would like to view at a time on the Employees and Users main pages. This defaults to 20, which is the recommended setting.

The TBE style allows you to select the color template of your Taleo Business Edition system. You can select Blue Steel, TBE Classic, Coming Home, Something Blue, Pretty in Pink, Spring into Summer, or Vurv Orange, then click the Save button.

Referred By

Specifies whether the person who referred the candidate is presented along with the Candidate Name in List Views.

Quick Views

You can disable Quick Views by deselecting the check box 'Quick Views appear when hovering on links to other entities'. If this option is not available to you, the feature has been disabled by your Administrator.

Bubble Notifications

Bubble notifications are used to alert users that an Insight report is available for viewing. Deselect the checkbox “Bubble notification message appears for finished reports (run in the background)” to disable the bubble notification.

System Settings

Automatic Owner

To add simplicity to the process of creating requisitions and requisition templates, you can set up your Taleo Recruit system to automatically designate a single user as the owner of new requisitions and requisition templates. Proceed as follows to implement this feature:

1. Go to My View > My Settings.
2. In the System Settings section, check the option “Automatically add me as an Owner to any New Requisition or Requisition Template that I create.”
3. Click Save.

Radius Search

To enable the Radius Search in your Taleo Business Edition system to search for employees by zip or postal code, you must first designate the relevant countries to be searched in your system. Once enabled, Radius Search can be initiated from the Search sub-menu of the Employees tab.

Email Settings

Your email address is used by Taleo Business Edition to send automatic notifications such as interview schedules, approval requests, and other important communication. The check boxes specify whether or not Taleo Business Edition will automatically send you an email to notify you of Administrator Email Announcements, General Email Announcements or to notify you whenever a candidate applies to one of your requisitions (if you are assigned as a requisition owner.) You may also add an Email Signature to be used for your outgoing emails.

Global Settings

The Time zone setting adjusts all recorded timestamps to your selected time zone. Similarly the Locale setting adjusts all datestamp formats according to your selection. In this way Taleo Business Edition adapts to each user regardless of location.

Taleo Business Edition supports English, French (Canada), French (France), German, Spanish (Mexico), and Spanish (Spain).

Change Password

To change your password, enter your current password in the field marked “Old Password” and enter your new password twice (for verification purposes), then click the **Save** button.

My Profile

Your “My Profile” page is accessible through the My Profile link in your My View tab.

Profile Information

Your profile is information about yourself that you would like to expose to other users of your Taleo Business Edition system. You can also attach a resume with your profile, which enables hiring managers and recruiters throughout your organization to find you when performing a related keyword search.

My Feedback

The feedback table displays a record of all the interview feedback you have submitted.

My Attachments

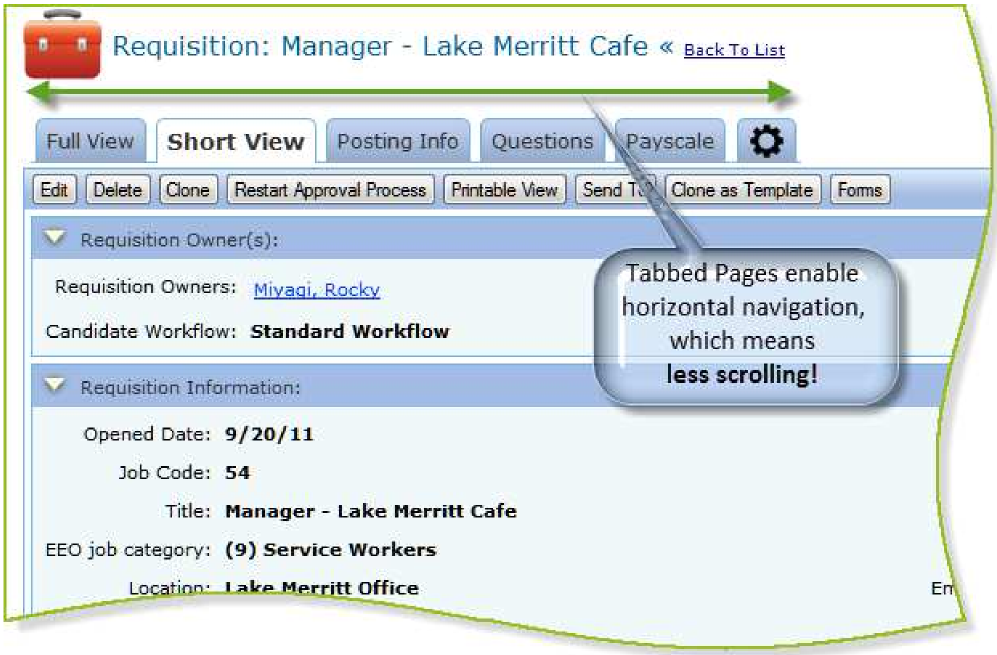
The attachments table displays all file attachments associated with your account. You can add new attachments by clicking the **New Attachment** link.

Setting Up Tabbed Pages

Tabbed Pages are a unique way of presenting content within Taleo Business Edition. Users and Administrators can configure Tabbed Pages to present Taleo content in a way that is relevant for their specific business objectives.

Tabbed Pages enable you to quickly navigate to the information you need, without a lot of scrolling and searching for information. Administrators can create up to four tabs that are available globally across the system and Users can create up to three tabs for their own specific preferences. Tabbed Pages created and assigned by Administrators are viewable by everyone; Tabbed Pages created by Users are only viewable by the User who created them.

The following example illustrates how you can set up a Requisition tab with content displayed horizontally across the page, providing easier navigation and less need for scrolling:



Creating New Tabbed Pages (Users)

The following procedure describes how Users can create Tabbed Pages to display content according to their personal preference. Administrators, refer to "Configuring Tabbed Pages (Administrators)," for instructions on creating Tabbed Pages to deploy across your user base.

A total of seven Tabbed Pages are allowed; Administrators can create four and Users can create three.

Tabbed Pages can be created on any page where you see this icon: , which includes the following Page Layouts:

- My View
- Pipeline
- Requisitions
- Candidates
- Accounts
- Contacts
- Employees
- Performance Reviews
- Users

Tabbed Pages cannot be created on List View pages. For example, if you want to create a tab for Employee or User information, you must first open an Employee or User record.

Items that are hidden on the Page Layout are not eligible for inclusion on Tabbed Pages.

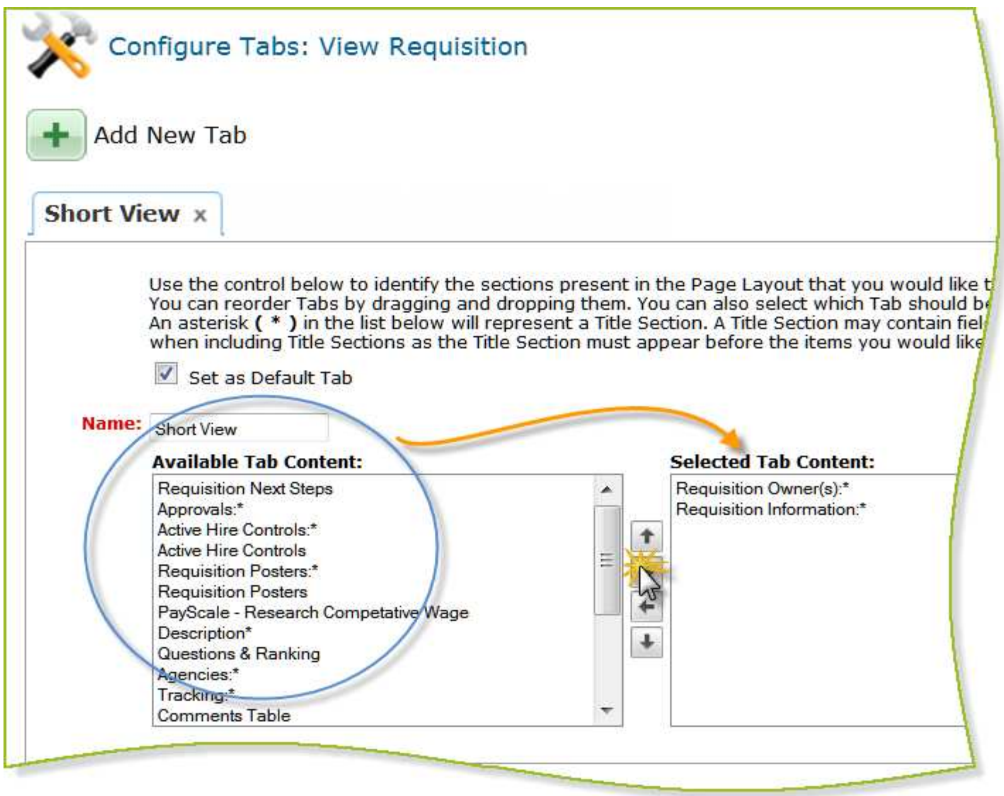
Users, proceed as follows to create new Tabbed Pages:

In this example, we are creating a Tabbed Page for Requisitions.

1 Click the Requisition menu, then click any Requisition.

2 Click the Tabbed Pages icon:  on the left side of the page.

3 Click **Add New Tab.** The following window displays:



4 Enter a **Name** for the tab.

5 To designate this tab as the active tab you see when you open the page, click **Set as Default Tab.**

6 To populate the tab with content, select one or more items from the Available Tab Content list on the left and use the arrow keys to move the items to the Selected Tab Content list on the right. Use the up and down arrows to change the order in which the content displays on the tab. Items that are hidden on the Page Layout will not appear in Available Tab Content list.

NOTE: Items indicated with asterisks (*) correspond to the section titles available in the Page Layout. Often this includes both the title and the associated content. In the case of Placeholders, however, it is important to include the title (indicated with an asterisk) above the fields that represent Placeholders within the title section, otherwise your tab will not display as intended.

7 Click **Save**.

8 Click **Close**. The new Tabbed Page displays next to the standard Page Layout

view, labeled Full View, as shown in the example below.

In this example the new Tabbed Page is the active view you will see when you open a Requisition, because it was set as the default tab in step 5 above. To see the Page Layout out in the standard style, as it was in previous releases, click the Full View tab.

The Full View Tab

The Full View tab represents the Page Layout as designed in previous releases -- without Tabbed Pages. The presence of the Full View tab ensures that all data remains available to the end user.

Deleting Tabbed Pages

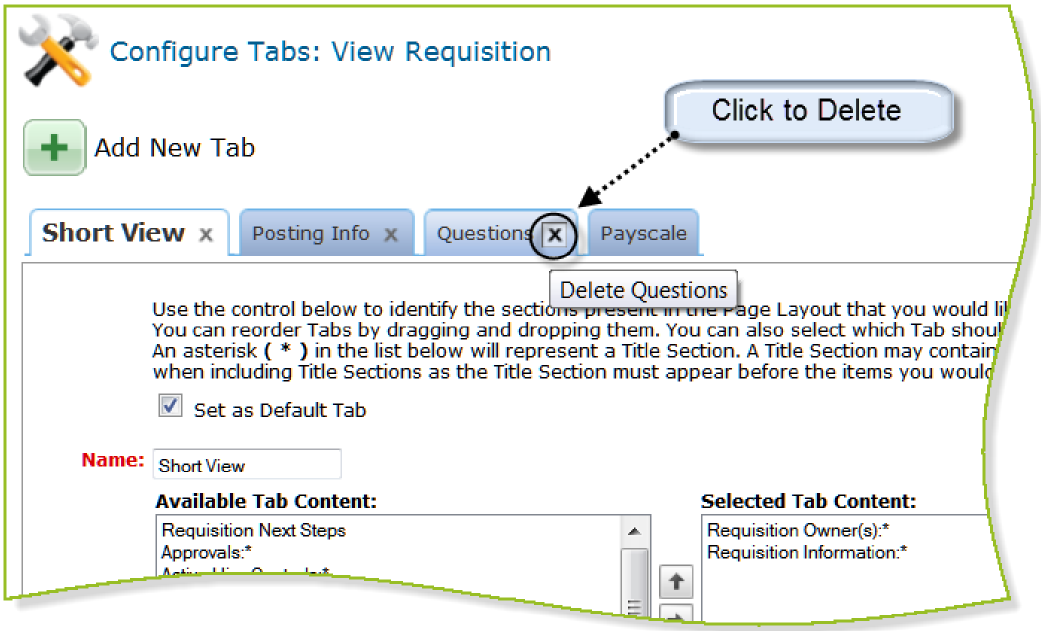
Users can delete Tabbed Pages they create, but not Tabbed Pages created by Administrators.

Proceed as follows to delete a Tabbed Page:

1 Go to the page containing the Tabbed Page you want to delete.

2 Click the Tabbed Page icon:  .

3 Click the **X** on the tab you want to delete:



4 A confirmation message displays. Deletion cannot be undone. Click **OK** to proceed.

5 Click **Close** on the Tabbed Pages Configuration page. You are returned to the previous page and the tab is no longer present.

Re-ordering Tabbed Pages

You can change the order in which Tabbed Pages display using standard drag-and-drop functionality. The Full View tab is always the left-most tab and cannot be moved.

NOTE: This option is only available if Users are allowed to create and re-order tabs. If an Administrator disables these settings in Organization > System & Email Settings, Users will not be able to reposition tabs.

Proceed as follows to rearrange Tabbed Pages:

1 Select the tab you want to re-order.

2 Drag and drop the tab according to your preferred placement. The re-ordering takes place instantly.

Submit Referral

The Submit Referral page allows employees to submit candidates for general consideration or for a specific requisition.

The Referred By, Last Name, and Email fields are required. You may associate the candidate you are referring to a specific requisition by clicking on the requisitions **Add** button. You may also include the candidate's resume, then click **Save**.

Pipeline

This chapter describes how to use the Pipeline page to track your organization's current and upcoming activities. It contains the following sections:

- Pipeline Overview
- Interviews
- Items Awaiting Approval
- Active Candidates
- Open Requisitions

Pipeline Overview

The Pipeline page provides an overall summary of your organization’s current and upcoming hiring activities including interview schedules, pending feedback, approval requests, and active candidates for each open requisition. Only Administrator, Hiring Manager, and Recruiter users have access to this page by default.

Interviews

The Interviews table shows all of the interviews that are either scheduled or awaiting feedback throughout your organization. The Type column displays whether it is a phone or in-person interview. The Date/Time column shows the scheduled date and time of the interview; clicking on the data/time link will display the interview details.

The **Status** column shows the overall status of each interview: “Feedback Pending” means that one or more interviewers has not yet either submitted feedback or declined, “Scheduled” means that the interview is pending (i.e. has not yet occurred).

The **Action** column contains action links allowing you to view, edit, cancel, accept, decline, submit, complete or delete an interview.

Items Awaiting Approval

The Items Awaiting Approval table contains all of the items that are currently pending approval or rejection throughout your organization. The Item Type columns show the type of object awaiting approval, this can be either a Requisition or an Offer Letter.

The **Action** column contains action links allowing you to view, Approve, or Reject the items pending approval.

Active Candidates

The Active Candidates table contains a list of candidates that are currently active in the hiring process for any open requisitions throughout your company. Candidates that have made it past the initial screening process and are active within the hiring workflow are shown here to provide a snapshot of all current Active Candidates.

The **Name** column shows the name of the candidate which, when clicked, brings you to that candidate’s details page. The **Main Status** column shows the stage each candidate is at in the hiring process.

Open Requisitions

The Open Requisitions table contains all of the requisitions that are currently in the “Open” status throughout your organization. The Title column shows the title of each requisition and whether or not that requisition is currently shown on your careers website.

The **Next Steps** column contains action links allowing you to view all of the candidates that have applied to a requisition, or change a requisition's status. The "Candidates" link shows a number in parentheses representing the number of candidates that have applied to that requisition.

Employees

This chapter describes how to create, view, change and track all information about employees in Taleo , and contains the subjects listed below.

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

- Employees Overview
- Viewing Employees
- Displaying and Editing Employees
- Adding Employees
- Converting Candidates to Employees
- Employee Fields
- Adding Employee Comments
- Adding Employee Attachments
- Adding Tasks
- Employee History Log
- Applying for Internal Job Opportunities
- Deleting Employees
- Emailing and Printing Employee Forms
- Searching for Employees
- Importing Employees from a CSV file
- Updating Employee Codes via CSV File Upload
- Mass Email

Employees Overview

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

Employees are all of the people employed by your company who you want to track in Taleo . Each employee record stores information such as name, address, contact information, employee status, department, location, etc. For each employee you can view employee goals, performance reviews, comments, attachments, tasks, and track all activity.

The Employees tab displays a home page that lets you quickly view employees. You can also sort and filter your employees by clicking a column header or by using the Search tool.

In addition, this tab lets you view and edit detailed information on each employee to whom you have access (i.e. direct and indirect reports), as follows:

- Click the **New Employee** link to create a new employee. See Adding Employees.
- Click the **Employee Search** link to search through your employees database and find a subset of desired employees. See Searching for Employees.
- Click the **Import** link to import employee data. See Importing Employees from a CSV file.
- Click the **Email Templates** link to create and store commonly used email messages. See Updating Employee Codes via CSV File Upload.

Viewing Employees

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

The main Employees page displays a scrollable list of employees. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all employee records by entering keywords in the “Search” field and clicking the **Go!** button. The **Name** column shows the name of the employee which, when clicked, brings you to that employee's details page. The **Status** column shows the employee's current status in the system.

Displaying and Editing Employees

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

From the main Employees page, clicking an employee's **Name** link brings you to that employee's details page.

The Employee Information, Job Information, Compensation, and Tracking sections contain employee contact information, job related information, as well as Employee Website Login information.

The Position Information section contains details about the employee's current position within your organization, including their Manager Name (who they report directly to) and Indirect Manager (who they indirectly report to). If applicable, dotted-line managers are listed under the Indirectly Reports To field. An Administrator must set up Indirect Management Hierarchy before the Indirectly Reports To field will be available to Hiring Managers.

Just above the Employee Information section, you will see several buttons (the number of buttons shown varies depending on your user role and whether or not you are assigned as Manager for this employee):

Edit: Edit this employee's details (only assigned Managers can edit employees).

Delete: Delete this employee (only available to Administrators).

Printable View: Display this employee's details in a printer-friendly window.

Reset Password: Reset this employee's password.

Forms: Create an employee Data Sheet based on employee data.

The following sections allow you to store, track, and manage other information specific to this employee:

Employee Goals: The goals assigned to this employee.

Performance Reviews: The performance reviews associated with this employee.

Compensation Review History *(Comp only)* Comp events and history associated with this employee.

Tasks: A list of tasks associated with this employee.

Comments: A list of plain text notes and comments about this employee.

Attachments: A list of attachments associated with this employee.

History Log: Historical trail of employee-related activities.

Adding Employees

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

To add a new employee, click the **New Employee** link in the Employees tab.

Fill out the employee form with as much information as you can. By default the **Employee Code**, **Last name,** and **Status** fields are required (your Taleo Administrator has complete control over which fields are required; refer to the Administration chapter of this guide for complete instructions.) When a new employee is added, the employee is sent an automated email with an Employee Login and temporary password giving them access to the Employee Website.

Employees are uniquely identified by email address. You are not able to add multiple records for an employee using the same email address.

Converting Candidates to Employees

NOTE: This section applies to Perform and OnBoard customers who also have Recruit. This feature must be enabled and configured by an Administrator.

To convert a candidate to an employee, go to the Candidates tab, select the candidate, then click **Convert to Employee.**

The Candidate to Employee conversion page displays, where you supply information for the Employee record.

The fields on this page represent information you can supply that may not have been relevant during the candidate phase of the employee lifecycle; but for the Employee record the information has value. For example:

- Supplying a Manager Name during the conversion process eliminates the necessity for an Administrator to specify who the employee reports to, enabling Managers to have immediate access to their newly hired employees' records without requiring Administrator intervention.
- The Job Title that was used in the Requisition, for which you are hiring the candidate, may not match the Job Title within your organization. You now have the flexibility to record this information during the conversion process.
- Supplying the Employee Website Login during the conversion process provides easy access and a better user experience for new employees.

By default the Employee Code, Last name, and Status fields are required. Your Administrator has complete control over which fields display on this page and which of those fields are required; see Customize: Candidate Fields for more information.

Employee Fields

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

Employee Code Employee's unique ID#

First name Employee's first name

Middle Employee's middle name

Last name Employee's surname (required)

Address Employee's street address

City The City the employee currently resides in

State/Region The state or region the employee currently resides in

ZIP/Postal code The postal code of the area the employee currently resides in

Country The country the employee currently resides in

Phone # Employee's primary land line

Mobile # Employee's mobile phone number

Email Employee's email address (used to uniquely identify each employee).

Job Code Employee's job code

Job Title Employee's job title

Location The Location the employee works in

Department The Department the employee work in

Manager Name The employee's immediate supervisor

Indirectly Reports To The employee’s dotted-line manager, if appropriate

Status The employee's current status with the company

Gender: Sex of the employee

Race: Race of the employee

Hired date Used to track employee's date of hire

Start date Used to track employee's start date

Salary grade Employee's salary grade

Salary Employee's stated current salary (must be populated if using the Pay Range Modifier in the Comp module)

Pay Range Employee's assigned pay range (must be populated if using the Pay Range Modifier in the Comp module). By clicking the money icon next to the Pay Range field, you can view a graphic showing the employee’s current salary and how it compares to the minimum, mean, and maximum of the Pay Range

Pay Frequency: How often the employee is paid

Review Manager: The person responsible for conducting the employee's performance review

Employee Website Login: The login assigned to an employee to access the Employee Website

Adding Employee Comments

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

You can attach comments to any employee in the Comments section by clicking the **New Comment** link. Enter your comments in the text area and click the **Save** button when finished.

Comments can be edited and deleted by comment creators and Administrators only.

Adding Employee Attachments

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

You can attach any number of files and documents to an employee in the Attachments section by clicking the **New Attachment** link. Select the file to attach by clicking the **Browse** button, and enter a description of the file in the **Description** field. Click the **Save** button when finished.

Attachments can be edited and deleted by attachment creators and Administrators only.

Adding Tasks

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

Adding Tasks is always optional. Tasks are action items that can be scheduled and associated with an employee. To add a Task, click the **New Task** link next to the “Tasks” label. In the Task Details section you are asked to provide a Subject, Priority, Status, Due Date, and a Description.

Employee History Log

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

An employee's **History Log** section shows all of the activities that have occurred involving that employee, and the associated user that invoked each action. Each status change, email communication, etc, is logged and displayed in this section to form a complete historical activity trail. Links are used to access users and email content where appropriate. Activities are sorted by most recent first.

Applying for Internal Job Opportunities

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

Your Administrator can set up your Employee Website to include an Internal Opportunities Tab, where employees can search for internal job postings and apply for them using the information stored in their Employee record.

The Internal Opportunities tab can be customized to display your external Careers Website or any of the websites you have configured within your Taleo system. When a user clicks the tab to access the site, they are asked to verify that they want to enter, and then they are automatically signed in with the login information from their Employee record.

A link back to the Employee Website is provided from the Careers Website. If clicked, the user is required to re-enter their login credentials to return to the Employee Website as a security measure to protect their confidential information.

Deleting Employees

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

To delete an employee:

1. Log in as Administrator in Taleo ; employees can only be deleted by Administrators.
2. Open the Employee record you want to delete.
3. Click the Delete button at the top of the page.

4 If you are sure you want to delete the Employee record, confirm the delete action by clicking Yes when prompted.

WARNING: All comments, goals, performance reviews, review feedback, and other data associated with this employee will be deleted. For accurate reporting purposes, it is highly recommended that employees not be deleted from your system.

Emailing and Printing Employee Forms

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

The Forms button allows you to email and print employee-specific forms from the Taleo Business Edition Perform system.

Clicking the **Forms** button from the main Employees tab allows you to select multiple employee's from which to create, print, and email forms. Clicking the **Forms** button from a specific employee's details page allows you to print and email forms from a single employee.

Clicking the **Forms** button opens a wizard. The first step of the wizard allows you to select the Form(s) you wish to email or print, and then click **Next**. You are presented with both printing and mailing options. The printing option sends all selected files to the printer. You may also select to collate the forms when printing. The mailing option provides the ability to send the selected Form(s) via email to the Manager or another third-party recipient.

Several Email Options are available. **Email Each Form Individually** emails a single attachment in each email. This might be used if you are selecting so many attachments that you are concerned the email will not get past email filtering.

The **Attach all forms that pertain to a single Employee to a single Email** option sends one Email per Employee. The **Compressed** option bundles all of the attachments into a single ZIP file and attaches it to one email. Headers and Footers are supported in Forms. The top left header will display the Employee Name, and the top right header will display page numbers (e.g. “Jane Doe Page 1 of 10”). The footer will display the Company / Zone Name.

Email Templates may also be used, and merge fields are supported. Last, you can add users as an email recipient by clicking the **Add User** button. Emailed Forms are tracked in the Contact and History Logs. The Forms made available to you in the Forms wizard are configurable by your Taleo Business Edition HR Administrator.

Searching for Employees

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

There are several ways to perform a search through your employee database.

Quick Search To quickly locate employees by keyword, in the main **Employees** tab, enter your keywords in the text field labeled “Search” and click the **Go!** button.The Employee Quick Search searches the resume and profile text as well as the Title, Job Code, ID, Manager, and Location fields.

Advanced Search To search for employees based on any combination of specific employee fields, keywords, start dates, status, etc., click the **Employee Search** link in the Employees tab. In the Advanced Search screen select the desired search criteria and click the **Search** button.

Radius Search If Radius Search has been activated in your Taleo Business Edition system, you can search for employees by zip/postal code and distance. Enter a zip or postal code in the ZIP/Postal code field. Click the drop-down arrow on the Distance field and select the distance within which you would like to search for employees. Add any additional search criteria, and then click the **Search** button. The Exact Match option searches for only those employees with an exact zip/postal code match.

Importing Employees from a CSV file

If you have employee data stored in an Excel spreadsheet, ACT!, GoldMine, or other application, and you would like to import this data into your Taleo Perform system, you can use the Employee Import Wizard to do so quickly and easily.

Following is an overview of how to import account information from a CSV (comma delimited text) file into your Taleo Perform system.

Preparing a CSV file

NOTE: By default MS Excel files are stored in the .XLS format. If you are importing directly from Excel, you will need to convert from XLS to CSV before performing an import. Please read this section before continuing

Converting to CSV from XLS and other formats:

If you have a Microsoft Excel file in the .XLS or other format, open this file in Excel and:

1 Select the **File** menu.

2 Select **Save As...**.

3 In the popup dialog, choose **CSV (Comma delimited)(*.csv)** from the **Save as type**: field.

4 You may see another popup dialog asking "**yourfile.csv may contain features that are incompatible with CSV (Comma delimited). Do you want to keep the workbook in this format?"**. Click the **Yes** button.

Importing

One you have prepared a CSV file, you can upload this file with the Employee Import Wizard:

NOTE: Before importing a large number of records, we highly recommend running a test import with 2 or 3 rows of data only to make sure your data is formatted properly.

1 Login and go to the **Employees** section. Click the **Import** link and in the first screen of the Employee Import Wizard, select the **Import from CSV file** option. Click the **Next** button to move to the next screen.

2 Click the **Browse** button to locate the CSV file you created in Step 1.

3 Click the **Next >>** button to go to the **Map Columns to Employee Fields** screen.

The Taleo Business Edition Import Wizard allows you to map any column of data in your CSV file to a Standard or Custom Employee Field. This includes picklists, checkboxes, and all supported data types. Once you have your CSV file prepared, look at all the fields in your Taleo Perform Employee form and determine which column in your CSV file should map to each employee field. By default the Employee Code and Last Name fields are required.

When mapping a column to a picklist such as "State/Region", "Country", or a custom picklist field, the import wizard looks for a text match (case insensitive). If no text match is found, the picklist value is not set.

When mapping a column to a checkbox field, the import wizard looks for "True" values. If "True" is found the checkbox is checked; otherwise it will be unchecked.

Click the **Import** button when finished.

When a new Employee is imported, the Employee is sent an automated email with an Employee Login and temporary password giving them access to the Employee Website. (This action is controlled by the 'New Employee Notification' System Email Template assignment managed by your Taleo Business Edition Perform HR Administrator. See Customize: System Templates.)

When using the CSV Employee Import, an Employee record can be automatically mapped to an existing User record. This is accomplished using the optional field 'Email Address' in the CSV import file. If the 'Email Address' field is populated and matches an existing User record in the system with the same email address, the records will be linked. This process assumes that a User record with an identical email address already exists in the Taleo Business Edition system.

NOTE: There is a one-to-one relationship between a User record and an Employee record such that a User record can only be linked to one employee record.

Updating Employee Codes via CSV File Upload

You can update your Employee records by importing the Employee Code from a third-party software, using the Employee Import Wizard.

NOTE: Duplicate Codes: If your CSV upload introduces a duplicate Employee Code, it will be ignored.

Size Limit: Taleo Business Edition Perform will not accept CSV files larger than 4 megabytes. If you have a larger file to import, you may need to create multiple CSV files and import them separately.

To update Employee Codes via CSV File Upload:

1 Go to the Employees tab and choose Import.

2 Click Update Employee Codes.

3 Create a comma delimited text file in CSV format, containing only 2 columns of data (see Preparing a CSV file):
  - The current Employee Code you would like to replace must be in the first column.
  - The desired Employee Code must be in the second column.

4 Click the Browse button to locate and select the import file on your computer.

5 Click Update.

Email Templates

Email templates are pre-defined emails that can be used to send individual or in mass emails to one or more employees. Email templates provide a simple way to standardize communication with employees, and can be in either plain text or HTML formats.

NOTE: In the Employees tab, click the **Email Templates** link to manage your company's employee email templates. Merge fields can be used to insert employee-specific data into the email when it is sent.Merge fields are used to merge data from your Taleo Perform system into outbound emails. For example, **<<COMPANY_NAME>>** will be replaced by your company name when the email is sent. A full list of available merge fields is shown in each template edit screen.

Merge Fields Language Options

Email template merge fields can be localized into English, French, German, and Spanish languages.

Proceed as follows to specify the language for merge fields used in System Templates:

1. Go to **Administration > Customize Perform.**
2. In the Customize System Templates section, click **System Email Templates.**
3. Click **Edit** to modify the email template.
4. On the Edit System Template page, open the Merge Fields Language drop-down menu and select the language in which you want the merge fields to display.
5. Click **Save**.

Mass Email

Mass emails are personalized, targeted emails sent to a specific subset of your employee pool to serve as notification of goals, performance reviews, etc. This feature provides a powerful way for you to zero in on and communicate with a group of employees that match certain criteria.

Mass emails can be sent by selecting one or more employees using the checkboxes in the left-most column.

The first screen shows all of the employees in your target list—you can further refine the list of recipients by using arrow buttons to move undesired recipients from the **Will receive email** list on the right to the **Will NOT receive email** list on the left. Double-clicking an employee's name in the list shows that employee's details in a popup window.

The second and final screen is where you actually compose the email that will be sent to each recipient. You can use Email Templates when sending mass emails by clicking the use template drop-down and selecting the appropriate email template. You may also mark an email as high importance, and add attachments by clicking the **Add Attachments** link.

Mass emails are recorded in each employee's Contact Log section for future reference.

Requisitions

This chapter describes how to create, view, change and track requisitions in the Taleo Recruit system.

- Requisitions Overview
- Viewing Requisitions
- Displaying and Editing Requisitions
- Adding Requisitions
- Assigning Owners
- Requisition Fields
- Assigning Requisition Approvers
- Assigning Offer Letter Approvers
- Posting to a Website
- Assigning Agencies
- Writing a Description
- Using the PayScale Widget for Checking Market Compensation Ranges
- Attaching Accounts
- Attaching Contacts
- Adding Tasks
- Adding Events
- Creating Requisition Questionnaires
- Requisition Ranking Template
- Requisition Ranking Criteria
- Requisition Comments
- Requisition Attachments
- Requisition Expenses
- Requisition History Log
- Emailing Requisition Information
- Deleting Requisitions
- Emailing and Printing Requisition Forms
- Job Library Overview
- Searching for Requisitions
- Online Questions

Requisitions Overview

Requisitions are the job openings that your organization is either looking to fill or has already filled. Each requisition stores information such as job code, title, location, description, etc. For each requisition you can access all candidates that have applied, assign online questions, customize approval processes, attach notes and expenses, and track all activity in a history log.

The Requisitions tab displays a home page that lets you quickly view requisitions. You can also sort and filter your requisitions by clicking on a column header or by using the Search tool. In addition, by clicking on a requisition's Title you can view and edit detailed information on each requisition to which you have access (i.e. requisitions you are assigned to as an owner).

Click the **New Requisition** link to create a new requisition. See Creating Requisitions.

Click the **Job Library** link to create a New Requisition from a pre-loaded Template. See Job Library Overview.

Click the **Search** link to search through your requisitions database and narrow in on a subset of desired requisitions. See Searching for Requisitions.

Click the **Questions** link to create online questions that can be attached to requisitions. See Online Questions.

Viewing Requisitions

The main Requisitions page displays a scrollable list of Requisitions sorted by date/time of last update. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all requisitions by entering keywords in the “Search” field and clicking the **Go** button.

The **Title** column shows the title of each requisition and whether or not that requisition is currently shown on your careers website. Click a requisition title to display that requisition’s details. See Displaying and Editing Requisitions.

The **Status** column shows the current status of each requisition. Each status and its meaning are described in the table below. Your Taleo Recruit Administrator can add custom statuses. See Customize Processes: Requisition Workflow.

The following table summarizes the default requisition statuses:

Requisition Statuses

Waiting For Approval A requisition in this state has not yet been approved by the assigned requisition approvers.

Open A requisition in this state has been approved and is actively being recruited for.

Rejected A requisition in this state has been rejected by one or more assigned requisition approvers.

Filled A requisition in this state has been filled.

On Hold A requisition in this state has been temporarily placed on hold.

Closed A requisition in this state has been closed and is most likely not going to be reopened anytime soon.

The **Requisition Owners** section displays the assigned owner(s) of the requisition.

The **Next Steps** section contains next step action links allowing you to view all of the candidates that have applied to a requisition, or change a requisition's status. The particular set of Next Step links shown for each requisition depends on the requisition's status and can be customized by your Taleo Recruit Administrator. See Customize Processes: Requisition Workflow.

The **Active Hire Controls** section displays the settings available based on how the Administrator set up the Automated Hiring Processes. See Active Hire Controls on page 61

The **Requisition Posters** section shows whether or not this position is currently available on any of your company's careers websites. See Posting to a Website.

Requisition Next Step Actions

Candidates(XX) The Candidates link shows a number in parentheses representing the number of candidates that have applied to that requisition. Clicking on this link will bring you to a scrollable list of all these applicants.

Search Click this link to run an Advanced Search.

Add new candidate Click this link to add a new candidate into your Taleo Recruit candidate's database. The newly added candidate will automatically be submitted to this requisition.

Filled Click this link to change the status of the requisition to Filled.

Approve If a requisition is in the Waiting for Approval state, and if you are an assigned requisition approver, you can click this link to approve the requisition.

Reject If a requisition is in the Waiting for Approval state, and if you are an assigned requisition approver, you can click this link to reject the requisition.

Place on hold Click this link to change the status of the requisition to Place on hold.

Re-open Click this link to change the status of the requisition to Re-open.

Close Click this link to change the status of the requisition to Close.

Displaying and Editing Requisitions

From the main Requisitions page, clicking on a requisition's Title link will bring you to that requisition's details page. At the top of the screen you will see several buttons (varies depending on your user role and whether or not you are assigned as an owner to this requisition.)

Edit: Edit this requisition's details.

Delete: Delete this requisition (only available to Administrators).

Clone: Create a new requisition using all of this requisition's details as a template.

Restart Approval Process: Restart the Approval Process for this requisition. Requisitions in the 'Waiting for Approval' status that have been routed for approval when a Requisition is modified will automatically restart the approval process.

Printable View: Display this requisition's details in a printer-friendly window.

Send To: Send this requisition's details to one or more recipients.

Clone as Template: Clone this requisition as a Template, which will add this Template to the Job Library.

Forms: Print and email forms based on requisition fields. See Emailing and Printing Requisition Forms.

The **Next Steps** section shows all of the available next step actions based on the current status of the requisition (this section is not shown in the Edit screen).

The information section below this contains all of the requisition's core data fields. See Requisition Fields.

The **Owners, Approvals & Agencies** sections display assigned requisition privileges and responsibilities. See Assigning Owners.

The **Active Hire Controls** section displays the settings available based on how the Administrator set up the Automated Hiring Processes. See Active Hire Controls on page 61

The **Requisition Posters** section shows whether or not this position is currently available on any of your company's careers websites. See Posting to a Website.

The **Description** section contains a complete description for this requisition i.e. job overview, required skills, duties, preferred experience, education, etc.

The **Tracking** section contains the dates this requisition was added to the system and last updated, as well as the ID for this requisition.

The **Accounts, Contacts, Tasks, and Events** section displays an association or action associated with this requisition.

The **Questions & Ranking** section is an ordered list of questions assigned to this requisition. These questions are presented as part of the online application form whenever a candidate applies to this position (see Creating Requisition Questionnaires). This section also contains links to edit the Requisition Ranking Template and review the overall Requisition Ranking Criteria.

The **Comments** section is a list of plain text notes and comments about this requisition (see Requisition Comments).

The **Attachments** section is a list of document attachments associated with this requisition (see Requisition Attachments).

The **Expenses** section is a list of expenses associated with this requisition (see Requisition Expenses).

The **History Log** section is a historical trail of requisition-related activities (see Requisition History Log).

Adding Requisitions

To add a new requisition, click the **New Requisition** link in the Requisitions tab. See the Creating Requisitions tutorial.

Assigning Owners

Each requisition must have at least one Requisition Owner. Requisition Owners are the only users (other than Administrators) who will have complete access to candidates that apply to this requisition.

To add owners, click the **Add/Remove** link next to the “Requisition Owners” label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons. Only users with the following roles are allowed to be requisition owners: Administrator, Hiring Manager, and Recruiter.

Active Hire Controls

Based on how your Administrator set up your automated hiring process you can edit or view the following:

Set Candidate Hired Date to Today's Date: Automatically populates the hired candidate's Hired Date with today's date.

Decrement Number of openings by 1: When a candidate is marked Hired, reduces the number of openings by one until there are zero openings.

NOTE: You must select this option if you want to select any of the next three options, which are contingent on this option being enabled.

Email non-hired candidates on 0 openings: Send a system email to automatically notify candidates in specific statuses that the position has been filled when marking someone as hired reduces the number of openings to 0.

Change status of non-hired candidates on 0 openings: Move some of the remaining candidates who are in specific statuses into a different status when the number of openings is 0.

Change status of posting on 0 openings: The status of requisitions can be changed (for example, to "Filled") when the number of openings is 0.

Requisition Fields

Requisition Owners

The user(s) who have complete access to and responsibility for this requisition.

Candidate Workflow

The workflow that defines the process steps a candidate goes through in consideration for a position.

Opened Date

The date you actively began recruiting against this requisition.

Budget Status

The budget status of this requisition, i.e. Budgeted, Not Budgeted.

Job Code

A 20-character or less abbreviation for this requisition.

Reason for Opening

The reason for the opening of this requisition, i.e. New Position, Internal Transfer, Resignation, Termination, Absence, Maternity Leave, etc.

Title

A short two or three word title for this requisition.

Replacement for

The employee's name who previously occupied this position.

Location

The location of this requisition as defined in your Taleo Recruit Organization structure.

Employment Duration

Job duration, i.e. Full time, Contract, etc.

EEO job category

EEO job classification for this requisition. This can be one of the following:

- (1.1) Executive/Senior Level Officials and Managers
- (1.2) First/Mid Level Officials and Managers
- (2) Professionals
- (3) Technicians
- (4) Sales Workers
- (5) Administrative Support Workers
- (6) Craft Workers
- (7) Operatives
- (8) Laborers and Helpers
- (9) Service Workers

Pay Range

Range of possible salaries or hourly wages. (optional)

All picklist values can be customized. In addition, custom requisition fields can be added to the requisition form or may be moved by your Taleo Recruit Administrator. See Customize: Requisition Fields.

Status

Status of this requisition in the requisition workflow process.

ID

A unique sequence of digits assigned to this requisition automatically by Taleo Business Edition for identification purposes.

# of openings

Number of open positions corresponding to this requisition.

Filled Date

The date a candidate(s) was hired for this requisition.

Assigning Requisition Approvers

If one or more users have the “Requisition Approval” privilege, you are required to assign at least one Requisition Approver. Requisition Approvers are the users who are responsible for approving this requisition before it is opened.

To add approvers, click the **Add/Remove** link next to the “Requisition Approvers” label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons. Only users with the “Requisition Approval” privilege can be assigned (to give this privilege to a user, an Administrator must edit the user’s account).

If a Requisition is associated with Departments, Locations, and/or Regions where default approvers are assigned, the approvers are listed in the following order: any approvers manually added to the requisition at time of creation, approvers that are associated via the approval work flow, any approvers that are associated to the Department, any approvers that are associated to the Location, and any approvers that are associated to the Region.

Requisition Owners have the ability to resort this list using the up and down arrows in the selector box.

Approvers are not required to login to the Taleo Recruit system. Approvers can approve or reject Requisitions from their email inbox or from a mobile device.

NOTE: Requisition approvals that are routed via email expire after 5 days, at which time Approvers get a message when they click on the Approve/Reject link telling them their email approval has expired and they need to login to the system to approve/reject a Requisition.

Requisition Approvals are tracked in the Requisition History Log.

Assigning Offer Letter Approvers

If one or more users have the “Offer Approval” privilege, you are required to assign at least one Offer Letter Approver. Offer Letter Approvers are the users who are responsible for approving any offer letters made to candidates for this requisition.

To add offer letter approvers, click the **Add/Remove** link next to the “Offer Letter Approvers” label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons. Only users with the “Offer Approval” privilege can be assigned (to give this privilege to a user, an Administrator must edit that user’s account).

Approvers are not required to login to the Taleo Recruit system. Approvers can approve or reject Offers from their email inbox or from a mobile device.

NOTE: Offer approvals that are routed via email expire after 5 days, at which time Approvers get a message when they click on the Approve/Reject link telling them their email approval has expired and they need to login to the system to approve/reject an Offer.

Posting to a Website

By default the Requisition Posters section contains a check box displaying "Post this requisition on **Careers Website**". If you would like a requisition to be displayed on your careers web site, check this check box. When checked, Requisitions will only appear on your careers web site after they have been approved, and only when they are in the "Open" state.

Additional features available in **Plus** and **Premium** Services

With Taleo Recruit Plus or Premium Service, your organization can have multiple Taleo Recruit-powered careers websites. In this case you will see multiple checkboxes allowing to post a requisition to any number/combination of careers sites.

Plus and Premium Service also provide the ability to create multiple different online application forms. If your organization has more than one version of an online application form, you can select which application form to use for each careers website posting by selecting from the picklist to the right of each careers website checkbox.

Careers Website Automatic Posting Options

- Change the status of this Requisition to <status> when <number> more candidates meet or exceed a rank of <percent>

  This option enables you to automatically change the status of a requisition based on the number of candidates who score above a specified percentage in their answers to the questions on the application form.

- Post this requisition on Careers Website using <application form>
- Post to this Careers Website Effective <date> (If in Open Status)
- Unpost to this Careers Website Effective <date>

  These options enable you to automatically post and unpost requisitions to any of your Careers Websites on specified dates. For each Careers Website where you want the requisition to be posted, specify the Post and/or Unpost Effective dates. Your selections will take effect after the requisition is approved and in an Open status.

NOTE: The posting and unposting dates are based on your Organization's time zone, as set by your Administrator (Administration > Organization > Company Profile). All changes will trigger at 12:01 AM on the date assigned, and may take several minutes to take effect, based on processing time.

Assigning Agencies

Assigning Agencies is always optional. Any user with the Agency role can be assigned to a requisition so they can submit candidates and track the status of their previously submitted candidates in your Taleo Recruit system.

To add Agencies, click the **Add/Remove** link next to the “Agencies” label. In the popup dialog, select the users you would like to assign as agencies from the left list and move them to the right list with the arrow buttons. Only users with the Agency role can be assigned.

Writing a Description

The primary purpose of a job description is to identify the essential functions of the position. According to the Equal Employment Opportunity Commission (EEOC), essential functions are those tasks or functions of a particular position that are fundamental to the position (as opposed to marginal). In identifying essential functions, be sure to consider (1) whether employees in the position actually are required to perform the function, and (2) whether removing that function would fundamentally change the job.

The Americans with Disabilities Act of 1990, from which the issue of essential functions has come into focus, lists several reasons why a function could be considered essential:

- **The position exists to perform the function** (e.g., if you hire someone to proofread documents, the ability to proofread accurately is an essential function, since this is the reason that the position exists).
- **There are a limited number of other employees available to perform the function, or among whom the function can be distributed** (e.g., it may be an essential function for a file clerk to answer the telephone if there are only three employees in a very busy office, and each employee has to perform many different tasks).
- **A function is highly specialized, and the person in the position is hired for special expertise or ability to perform it** (e.g., a company expanding its business with Japan is hiring a new salesperson, so requires someone not only with sales experience, but also with the ability to communicate fluently in the Japanese language).

Overall recommendations (your organization's guidelines should take precedence):

- List all the knowledge, skills, and abilities necessary to perform the job; divide them into requirements and preferences. The requirements listed on the job description must support the essential functions, and serve as the primary criteria for selecting/ rejecting candidates
- Don't lock yourself into strict requirements that may prevent you from considering qualified candidates.
- Consider substitutions (ex., 4 years of professional experience or a bachelor's degree)
- Keep in mind that, under the ADA, you cannot refuse to hire a qualified candidate who meets the requirements and whose disability can be reasonably accommodated.

Formatting Recommendations

- Where possible, use the WSYWIG Editor to create and format job descriptions in your Taleo Recruit system.
- If you are cutting and pasting a job description from a Word document, use the WSYWIG Editor to clean up any extraneous characters that may have been introduced by Microsoft Word when adding colors or special formatting. (Click the **Source** button to view formatting.)

Extraneous characters may interfere with the file format when exporting data to a CSV file.

Using the PayScale Widget for Checking Market Compensation Ranges

PayScale, a Taleo Business Edition partner, provides online and real-time salary and compensation data from within your Taleo Recruit system.

Click on a Requisition or Requisition Template to view the requisition's details page. Now, click on the Research Salary button to view a PayScale Market Rate Summary based on the Job Title and Location of your requisition.

If the Job Title or Location information (city, state and country) information does not match or is not available, you can choose the closest match from a suggested set of job titles presented by the PayScale widget.

Your Taleo Recruit Administrator must activate this feature for it to be available. See Activating the PayScale Widget for Checking Market Compensation Ranges.

Attaching Accounts

Attaching Accounts is always optional. Related accounts are accounts associated in some way with this requisition. Accounts may be companies and organizations involved with your business such as employers, customers, search firms, etc.

To attach Accounts, click the **Attach Account** or **New Account** link next to the "Accounts" label. In the popup dialog, select the Accounts you would like to assign as Accounts from the left list and move them to the right list with the arrow buttons.

Attaching Contacts

Attaching Contacts is always optional. Related contacts are contacts associated in some way with this requisition. Contacts are all individuals associated with your Accounts.

To attach Contacts, click the **Attach Contact** or **New Contact** link next to the "Contacts" label. In the popup dialog, select the Contacts you would like to assign as Contacts from the left list and move them to the right list with the arrow buttons.

Adding Tasks

Adding Tasks is always optional. Tasks are action items that can be scheduled and associated with a requisition. To add a Task, click the **New Task** link next to the "Tasks" label. In the Task Details section you are asked to provide a Subject, Priority, Status, Due Date, and a Description.

Adding Events

Adding Events is always optional. Events are a scheduled calendar event associated with a requisition candidate, account, contact, or user. To add an Event, click the **New Event** link next to the "Events" label. In the Event Details section you are asked to provide a Subject, Date, Time, Duration, and Description. You may also assign additional attendees.

Creating Requisition Questionnaires

Once you have created online questions (See Online Questions), the next step is to attach them to the appropriate requisitions. Click on the **Requisitions** tab and select the appropriate requisition. Scroll down to the **Questions & Ranking** section and click **Attach Question**.

In the popup window you will see a listing of all available questions sorted by category. Click the **Append** link next to any question you would like to add to this requisition. Click the **Close** button when finished to close the popup window.

Now you should see all the questions you added in the Questions List. The questions are listed in the order in which they will appear to candidates applying online. Use the **Move Up** and **Move Down** links in the Actions column to reorder the questions.

Requisition Ranking Template

In addition to ranking candidates based on answers to online questions, you can also assign scores to data fields and resume keywords that contribute to a candidate's overall ranking when they apply online. Workflow actions may also be associated with online questions, data fields and keywords. In the **Questions & Ranking** section, click **Edit Ranking Template**.

The **Questions** section allows you to set criteria and score answers based on the specific requirements for this Requisition. (Criteria and scores that have been defaulted from the Online Questions Library may be modified when attached to an individual requisition.)

The **Resume Keywords** section allows you to give a candidate points if their resume contains certain keywords. Type the desired keywords (up to 10) and select a score (between 0 and 10).

The **Fields** section allows you to give a candidate points if they supply matching City, State/Region, Country, and/or Source values during the application process.

The **Workflow Action** section allows you to automatically flag ACE candidates and screen out candidates who do not match your defined criteria. Based on the action you choose, automatic notifications may be sent and candidate statuses are updated. (See Online Questions.)

To find out how much a particular keyword or field match affects candidates overall ranking score see Requisition Ranking Criteria.

Requisition Ranking Criteria

Because many things can contribute to how candidates are ranked for a specific requisition, the **Ranking Criteria** screen is available to summarize exactly how applicants are ranked when they apply.

In the **Questions & Ranking** section, click **View Ranking Criteria**.

For each question attached to this requisition, a table shows available answers with associated **Score** and **Rank** values. The Rank value is the percentage value that is added to a candidate's overall ranking if they provide a matching answer. The **Max Score** illustrates the highest possible number of points a candidate can score on this question, and **Max Rank** shows the highest possible percentage value that can contribute to a candidate's overall ranking. The **Answer Criteria** shows which criteria defines an ACE candidate or a candidate who is automatically disqualified from the requisition (KO-R), as a candidate (KO-C), or both.

Additional sections called **Resume Keywords**, **Standard Fields**, and **Additional Fields** illustrate how candidate ranking values are determined based on matches with resume keywords, standard candidate fields, and custom candidate fields respectively.

The bottom of the Ranking Criteria screen shows the maximum number of points any candidate can score, and the maximum ranking percentage (which always adds up to 100%).

Requisition Comments

You can attach comments to any requisition in the **Comments** section by clicking the **New Comment** link. Enter your comment in the text area and click the **Save** button when finished.

Comments can be edited and deleted by comment creators and Administrators.

Requisition Attachments

You can attach any number of files to a requisition in the **Attachments** section by clicking the **New Attachment** link. Select the file to attach by clicking the **Browse** button, and enter a description of the file in the **Description** field. Click the **Save** button when finished.

Attachments can be updated and deleted by attachment creators and Administrators.

Requisition Expenses

You can track costs and expenses associated with any requisition in the **Expenses** section by clicking the **New Expense** link. Enter the amount of the expense in the **Amount** field and select the type of the expense from the **Type** picklist (the values in this picklist can be customized by your Taleo Recruit Administrator; see Customize: Requisition Fields).

Select the appropriate candidate source to associate this expense with, date the expense was incurred, and a brief description. Click the **Save** button when finished.

Expenses can be edited and deleted by expense creators and Administrators.

Requisition History Log

A requisition's **History Log** section shows all of the activities that have occurred involving that requisition, and the associated user that invoked each action. Each status change, approval, candidate submission, and associated email is logged and displayed on this page. Links are used to access candidates, users and email content where appropriate. Activities are sorted by most recent first.

Emailing Requisition Information

To email requisition information to another user or recipient, click the **Send To** button and select the type of email you would like to send. If you would like to email a link to the requisition's details page to another user, select the **Link to View page** item. If you would rather send the requisition data inline in the email, select the **Requisition data** item.

Next choose the other Taleo Recruit users you would like to send the information to. If you would like to send this information to non-users, you can do so in the next screen. Click the **Next** button to continue.

Enter any additional recipients manually in the **To:** and **Cc:** fields. Multiple email addresses can be separated by ";" semicolons. Enter the subject and body of the message in the corresponding fields and click the **Send** button when finished.

Deleting Requisitions

Requisitions can only be deleted by Administrators. **Warning:** All candidates who have applied to a requisition will no longer be associated with that requisition if it is deleted. Requisition comments, interviews, feedback, and other data associated with a deleted requisition will also be deleted. For accurate reporting purposes, it is highly recommended that requisitions not be deleted from your system.

Before deleting a requisition, consider the following alternatives: If the requisition has been filled or is no longer open, you can move it to the Filled, Closed or On-Hold states - it will no longer appear on your careers web site. If you would like to leave this position in the Open state but do not want it to appear on your careers web site, uncheck the “Post this requisition...” checkbox in the Edit screen.

Emailing and Printing Requisition Forms

The Forms button allows you to email and print requisition- specific forms from the Taleo Recruit system.

Clicking the **Forms** button from the main Requisitions tab allows you to select multiple requisition's from which to create, print, and email forms.

Clicking the **Forms** button from a specific requisition's details page allows you to print and email forms from a single requisition.

Clicking the **Forms** button from the requisition view or from the requisition detail's page will open a wizard. The first step of the wizard allows you to select the Form(s) you wish to email or print, and then click **Next**.

You are presented with both printing and mailing options. The printing option sends all selected files to the printer. You may also select to collate the forms when printing. The mailing option provides the ability to send the selected Form(s) via email to the Manager or another third-party recipient (e.g., Staffing Agency, or local Job Board, etc.)

Several Email Options are available. **Email Each Form Individually** emails a single attachment in each email. This might be used if you are selecting so many attachments that you are concerned the email will not get past email filtering.

The **Attach all forms that pertain to a single Requisition to a single Email** option sends one Email per Requisition. The **Compressed** option bundles all of the attachments into a single ZIP file and attaches it to one email.

Email Templates may also be used with requisition Forms, and merge fields are supported.

Last, you can add users or add contacts as an email recipient by clicking the **Add User** and **Add Contact** buttons. Emailed Forms are tracked in the History Log.

The Forms made available to you in the Forms wizard are configurable by your Taleo Recruit Administrator.

Job Library Overview

The Job Library allows Taleo Recruit Administrators to assign Requisition Templates in a repository that Hiring Managers and Recruiters can use to initiate new requisitions. As a user, you can access the Job Library from the Requisitions tab which can be filtered to limit access only to the Templates to which you have assigned privileges.

When viewing a Requisition Template in the Job Library, you will have the ability to create a new requisition from it. Conversely, you can create a Template from an existing requisition to add to the Job Library assuming you have assigned privileges to do so.

Creating a New Requisition from a Template

From the main Requisitions tab click **Job Library**. You will see a list of Requisition Templates to which you have assigned privileges. Templates are the available jobs preloaded in your Taleo Recruit system for you to create and post new requisitions easily with consistency.

To create a new requisition from a Template, click the appropriate **Title** link to start the process of composing a requisition. At the top of the Requisition Template page, click the **Create Requisition** button. This will open the Convert Requisition Template to Requisition **"***Job Title***"** page. Many of the field elements from the Job Template have been pre-populated for you in this screen. Your Taleo Recruit Administrator can enforce the requisition to inherit not only the data that is set in the fields of the Requisition Template but also Approvers which can be associated with the Department, Location or Region of the requisition. The Administrator is also able to enforce the starting status of the requisition by setting the desired fields as read only thereby forcing requisitions created from a Template to begin in a pre-determined status, such as Pending Approval.

NOTE: If a Requisition Template is associated with Departments, Locations, and/or Regions where default approvers are assigned, the approvers are listed in the following order: any approvers manually added to the requisition at time of creation, approvers that are associated via the approval work flow, any approvers that are associated to the Department, any approvers that are associated to the location, and any approvers that are associated to the region.

Requisition Owners have the ability to resort this list using the up and down arrows in the selector box.)

Populate as many fields as possible in the requisition. The Opened date is required by default. Other required fields are highlighted in red. To assign Requisition and Offer Approvers, select the Requisition Posters check box to post this new requisition to your careers website, and assign any associated Agencies if not already done so by your Taleo Recruit Administrator. Click **Save**. You now have access to your new requisition in the main **Requisitions** view.

The ability to initiate a New Requisition by the traditional New Requisition and Clone methods will remain in place and available—but your Taleo Recruit Administrator will have the ability to restrict access to this functionality, and enable access for users to use the Job Library to initiate requisitions.

Creating a New Template

From the main Requisitions tab click **Job Library**. You will see a list of Requisition Templates to which you have assigned privileges.

To create a new template, click the **New Template** button to open the New Requisition Template screen. Populate as many fields as possible. The Title, EEO Job Category, and Status fields are required by default. Add the Requisition Owners, Approvers and Agencies, if appropriate. Additionally, you will want to add the job description, and then click **Save**.

Your new Template will now be accessible from the Job Library page.

Creating a New Template from a Requisition

From the main Requisitions tab click the **Title** of the requisition from which you want to create a new template. At the top of the requisition page, click **Clone as Template**. The Clone Requisition as Template page will appear. Many of the fields from the requisition are pre-populated for you, with the exception of Requisition Posters. You can now make changes to the template and click **Save**. The new template will now be accessible from the Job Library page.

Searching for Requisitions

There are two ways to perform a search through your users database.

Quick Search To quickly locate requisitions by keyword, in the main **Requisitions** tab, enter your keywords in the text field labeled “Search” and click the **Go!** button. The Requisition Quick Search searches the job description text as well as the Title, Job Code, ID, and Location fields.

Advanced Search

To search for requisitions based on any combination of specific requisition fields, description keywords, etc., click the **Search** link in the Requisitions tab. In the **Advanced Search** screen select the desired search criteria and click the **Search** button. Examples of performing boolean keyword searches are shown in this screen (boolean searches can also be performed in the quick search field described above).

Online Questions

With Taleo Recruit you can attach questions to each requisition, which are then presented to candidates when they apply online. Questions are categorized and stored in a shared Online Questions Library in your Taleo Recruit system for reuse by any number of requisitions. Answers to online questions are stored with each candidate's profile.

The Taleo Recruit Online Questions Library is a shared repository of categorized questions that can be attached to requisitions to form online questionnaires. These questions are used for the purpose of pre-screening candidates. See Creating Requisition Questionnaires.

To view, add, and update questions in the library, click the **Questions** link in the Requisitions tab to go to the **Online Questions Library page**.

To add a new question:

1. Click the **Add Question** button.
2. In the Add Question form, select the appropriate **Category** for your question. If you would like to create a new category for this question, type the new category name in the text field to the right of the list.
3. Select the **Type** of question you would like to create. Available types are Text Field, Text Box, Pick List, and Check Box.

   Depending on what type of question you are working with you will have a different number of possible answers:

   - Check Box questions have only two possible answers.
   - Text Field and Text Box questions allow for up to five text match answers.
   - Text Box questions have an expanded character limit of 7000 characters, enabling answers to be provided in paragraph form.
   - Pick List questions allow for up to 30 items to select from.
4. Type the question in the **Question** text area.
5. The **Required** checkbox at the bottom of the form specifies whether or not candidates are required to supply an answer to this question.
6. Click the **Save** button when finished.

Once you have created a question you can optionally assign desired answers and scoring to that question for candidate ranking purposes. To assign answers and scoring, click **Answers** for that question.

- For each possible answer you can assign a score (or no score) by selecting a value between 0 and 10 in the **Score** picklist. This indicates how many points to give this candidate if they provide a matching answer to this question. A zero score allows an answer to not count against the overall score if that is desired, or to not score per the available answer. Additionally, you can have multiple scoring per question by answer. For example, a user can score 4 multiple choice answers on the same question by having 4 individual scores. To find out how much a particular question/answer combination affects candidates overall ranking score see Requisition Ranking Criteria.

- Taleo Recruit makes it easy for you to set up and maintain “knock out” or “disqualification” answers, as well as identify “ACE” candidates, that can help automate the pre-screening process even further.

  You are able to automatically screen out a candidate that does not meet a certain criteria, minimal requirement, or whatever the situation may call for. For example, if a certain job requisition needs the candidate to be eligible to work in a specific county; you can set the answer to that question to predetermine if that candidate meets that requirement. If they do not, the status of the candidate will automatically get flagged as “not qualified”. Similarly, you can flag an answer to any question in the screening process as an “ACE.” For example, you can set a group of answers up in different questions as “ACE” answers. When you view your available candidates, the candidate who answers ALL the answers flagged as “ACE” will be highlighted in the Taleo Recruit system with an “ACE” icon. This allows the Requisition Owner or hiring authority to quickly prioritize the interview scheduling process.

  Knock Out Answers can be flagged at the requisition level (KO-R), at the candidate level (KO-C), or both. The consequence of the level you set the KO answer will affect the status that gets triggered by the answer.

  There are two statuses in the Taleo Recruit system for a candidate, the main status and a requisition specific status. Depending on how you set the KO flag answer, you can trigger just the requisition status, the main candidate status, or both to disqualify the candidate. If you set an answer to knock out, or disqualify the candidate at the main status level, it will automatically change the requisition/candidate status to disqualify at the same time.

  All answers in the Taleo Recruit system are available to use for KO answers. Whether it is a user defined field, pre-screening question, or questions from the library, they can have answers flag a disqualification status. Answer types available for knock out flags are check boxes, list, ranges, but not open text fields.

  The disqualification statuses and associated workflow, such as automated candidate messaging, can be customized by your Taleo Business Edition Administrator.
- Scores that get set in the Online Question Library are default settings only. You can change a score once a question is added to a specific requisition.

Candidates

This chapter describes how to create, view, change and track all information about candidates and prospects in the Taleo Recruit system.

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Candidates Overview

Candidates are all of the people you want to track in Taleo Recruit who are applicants, employee referrals, sourced prospects, agency submissions, contacts, etc. Each candidate stores information such as name, address, contact information, status in the recruiting process, requisitions applied to, source, resume, cover letter, answers to online questions, etc.

For each candidate you can view the resume in its original format, schedule interviews, collect and review interview feedback, manage reference and background check results, create and route offer letters for approval, attach comments, expenses, files and documents, and track all activity.

The Candidates tab displays a home page that lets you quickly view candidates. You can also sort and filter your candidates by clicking on a column header or by using the Search tool. In addition, by clicking on a candidate's Name you can view and edit detailed information on each candidate to which you have access (i.e. those that have applied to requisitions you are assigned to as an owner).

Click the **New Candidate** link to create a new candidate record. See Adding Candidates.

Click the **Search** link to search through your candidates database and narrow in on a subset of desired candidates. See Searching for Candidates.

Click the **Sources** link to create and manage candidate sources. Each candidate added to your Taleo Recruit database can be associated with a particular candidate source. See Candidate Sources.

Click the **Import** link to import candidate data. See Importing Candidates from a CSV file.

Click **Email Template** to create and store commonly used emails. See Email Templates.

Viewing Candidates

The main Candidates page displays a scrollable list of Candidates sorted by date/time of last update or submission. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all candidate resumes by entering keywords in the “Search” field and clicking the **Go!** button.

The **Name** column shows the name of the candidate which, when clicked, brings you to that candidate’s details page. The **Main Status** column shows the candidate’s general status in the system. The **Requisitions** column shows to which requisitions this candidate is attached.

The following summarizes the default Main Statuses. The Main Status is intended to reflect the Candidate’s relationship to your company overall.

Main Statuses

New: The candidate is new to your system and may or may not be associated with a specific requisition

In Process: Actively being considered for one or more positions

Available: Available for consideration and not currently active against an open position

Hired: Hired for a position

Do Not Pursue: Not currently eligible for any position

Disqualified - Failed KO-C: Candidate has been disqualified for failing a candidate-specific “knock out” question.

The Main Statuses can be customized by your Taleo Recruit Administrator. See Customize Processes: Candidate Workflow.

The Requisition column displays the requisition(s) each candidate is being considered for.

Click on the candidate's Name link to display that candidate's details. See Displaying and Editing Candidates.

Req-Specific Candidate Statuses

In the Requisition's table of the Candidate screen, the **Title** column will list the name of the requisition(s) a candidate is attached to. The **Req. Status** column is the status of the requisition. The **Candidate Status** column is the status of the candidate as it pertains to a requisition.

The following list summarizes the default Req-specific Candidate Statuses and the associated Next Step actions. The Req-specific Candidate Statuses are used to define the status of a candidate as it relates to a specific Requisition:

- Application Received
- Phone Screen
- Interview
- Offer Extended
- Rejected
- Hired

The **Next Step** column contains several next step action links. The particular set of Next Step links shown for each candidate depends on the candidate's status and can be customized by your Taleo Recruit Administrator. See Customize Processes: Candidate Workflow.

Candidate “Next Step” Actions

Submit for requisition Used to submit a candidate to one or more requisitions for consideration

Phone Screen Moves candidate to the status of Phone Screen

Phone Screen Pending Awaiting phone screen from one or more interviewers

Reject Moves the candidate to the Rejected status. You are prompted to select a reason for rejection. The Rejected status signifies that you have determined a candidate is not a fit for any open positions

Approve for interview Moves the candidate to the Approved for Interview status signifying that you have approved this candidate for further review

Schedule interview Clicking this link brings you to an interview schedule form for this candidate (see Interviews.)

Submit feedback Submit interview feedback on a candidate

Make offer Create a new candidate offer letter

Interview Pending In-person interview scheduled with one or more interviewers

Interviewing Moves a candidate to the Interview Pending status signifying the candidate is currently scheduled for an interview

Add reference Submit candidate reference check results

Add background Submit candidate background check results

Add expense Attach an expense record to this candidate

Add contact log Send an email to this candidate and save it in the candidate's Contact Log section for future reference

Set start date reminder Prompts you to enter a start date so that a reminder can be sent to the appropriate people in your organization before the candidate is scheduled to start

Approve for review Moves the candidate to the Approved for Review status signifying that you have approved this candidate for further review

Feedback pending Awaiting interview feedback

Decision pending Awaiting decision on whether or not to move forward

Reference check process One or more reference checks are in process

Background check process One or more background checks are in process

Pre-employment Moves the candidate to the Pre-employment status

Offer process An offer is being created, negotiated and/or presented

Offer negotiation Moves candidate to the Offer Extended status

Offer accepted An offer has been accepted

Offer declined Moves a candidate to the Offer Declined status signifying the candidate has rejected an offer letter

Hired Candidate has been hired

Not Minimally Qualified Moves the candidate to a Not Minimally Qualified status

No Longer Available Candidate is no longer available for consideration

Remove from requisition Remove a candidate from consideration for one or more requisitions

NOTE: The Req-Specific Candidate Statuses and Next-Step Actions are determined by the Candidate Workflow selected in the Requisition. Steps may vary depending on the Statuses and Actions configured for a particular workflow.

Displaying and Editing Candidates

From the main Candidates page, clicking on a candidate's Name link will bring you to that candidate's details page.

At the top of the candidate page you will see the Requisition(s) to which this candidate is currently assigned and the candidate's current status in this Requisition. You may also attach this candidate to a Requisition by clicking on the **Attach Requisition** link.

Just above the candidate information section, you will see several buttons (varies depending on your user role and whether or not you are assigned as an owner to a requisition this candidate applied for):

Edit: Edit this candidate's details (only assigned requisition owners can edit candidates that have applied for their requisitions).

Delete: Delete this candidate (only available to Administrators).

Printable View: Display this candidate's details in a printer-friendly window.

Send To: Send this candidate's details and resume to one or more recipients.

Forms: Print and email forms based on candidate fields. See Emailing and Printing Candidate Forms.

Merge: Merge this candidate's record when another record for the same candidate exists in the system.

At the top of the screen next to the candidates name you will see a link called "flag". Clicking this link will add a red flag next to the candidate's name. This flag will also be shown next to the candidate in all candidate lists. The flag is an easy way to mark a candidate record that you would like to track closely or that you know you will want to revisit again. Note that unlike other actions, flagging a candidate is specific to your user account (i.e. other users will not see a flag next to candidates you have flagged, and likewise, you will not see a flag next to candidates other users have flagged).

The information section below this contains all of the candidate’s core data fields. See Candidate Fields.

The **Candidate Information** section contains the candidate's contact information.

The **Main Status Details** section contains the candidate's current Main Status, Start date and Hired date fields.

The **Work History/Employment Summary** section displays a summary of the candidate's work experience captured at the time of application.

The **Education History** section displays a summary of the candidate's education captured at the time of application.

The **Residence History** section displays a summary of the candidate's current and prior residences captured at the time of application.

The **References** section displays the candidate's references captured at the time of application.

The **Certificates and Licenses** section displays a summary of the candidate's professional certifications and licenses captured at the time of application.

The **Resume & Cover Letter** section contains a link to the candidate’s resume and/or a plain text resume and cover letter. See Resume and Cover Letter.

The **Attachments** section is a list of document attachments associated with this candidate (see Candidate Attachments).

The **Online Questions** section displays answers to any online questions this candidate answered if the candidate applied through your careers website. See Online Questions.

The **Additional Details** section contains Work Authorization, Current Salary, and Highest Educational Level information captured at the time of application.

The **Web Links** section displays links to this candidate’s profiles on LinkedIN, Google, Facebook, etc.

The **Source** section is the source from which the candidate heard about the opportunity and/or the referral information.

The **Tracking** section contains the dates the candidate was added to the Taleo Recruit system and when they were last updated.

The **Employment History** section contains a candidate's employment history detail captured at the time of application.

The following sections allow you to store, track, and manage other information specific to this requisition:

Contact Log: A list of all emails, phone call notes, and responses for a complete communication trail with this candidate.

Tasks: Actions items associated with this contact.

Events: Events associated with this candidate.

Comments: A list of plain text notes and comments about this requisition (see Candidate Comments).

Interviews: Interview schedules (see Interviews).

Interview Feedback: All feedback submitted on this candidate (see Interview Feedback).

Reference Checks: A list of reference check results and contact information (see Reference Checks).

Background Checks: A list of background check results and contact information (see Background Checks).

Offer Letters: All offer letters created for this candidate (see Offer Letters).

Expenses: A list of expenses associated with this requisition (see Candidate Expenses).

History Log: Historical trail of candidate-related activities (see Candidate History Log).

Adding Candidates

To add a new candidate, click the **New Candidate** link in the Candidates tab. Fill out the form with as much information as you can. By default the **Last Name, Email,** and **Main status** fields are required (your Taleo Recruit Administrator has complete control over which fields are required; see Customize: Candidate Fields.

You may also add a candidate by importing and selecting a single resume. Click the **Import** link in the Candidate tab and select the **Import Single Resume** option, then click **Next**. In the Select File field, browse for the resume you would like to upload. Select a Source and Main Status, and click the **Requisition** link if you would like to attach this candidate to a specific requisition. Now, click **Import**. A confirmation screen displays.

When you import a single resume you automatically create a candidate record and auto-populate the candidate contact fields, as well as attach the resume to that record.

Candidates are uniquely identified by email address. You will not be able to add multiple records for a candidate using the same email address. Similarly, if a candidate applies through your website or via email more than once, the candidate will receive an email or web response showing that their information is already in your database. They will then be redirected to your careers site where they can log in to update their information.

When adding a candidate, you can select the appropriate requisitions to submit the candidate for using the **Add/Remove** link. Once submitted, the appropriate requisition owners are immediately notified.

EEO data can only be entered by Administrators.

Candidate Fields

Candidate Information:

ID: Candidate's unique ID# (automatically assigned; read-only).

First name: Candidate's first name.

Last name: Candidate's surname (required).

Middle: Middle initial.

Street address: Candidate's street address.

City: City candidate currently resides in.

State/Region: The state or region candidate currently resides in.

ZIP/Postal code: The postal code of the area candidate currently resides in.

Country: The country candidate currently resides in.

Phone #: Candidate's primary land line.

Mobile #: Candidate's mobile phone number.

Email: Candidate's email address (used to uniquely identify each candidate).

Main Status: Status of candidate in the recruiting process.

Work Authorization: Candidate's legal eligibility to work for your organization.

Current Salary: Candidates's stated current salary.

Highest Education Level: Candidate's stated highest level of education.

Referred By: Name of the person who referred the candidate.

Source of resume: The candidate source representing where this candidate came from. See Candidate Sources.

Other: Source details if values in Source list are not appropriate.

EEO Data Gender: Sex of the candidate (only available to Administrators).

EEO Data Race: Race of the candidate (only available to Administrators).

EEO Data: Veteran/Disability Veteran and disability status of the candidate (only available to Administrators).

Rank (%) Candidate's rank (may be automatically assigned during application process).

Reason for rejection Used to track the reason this candidate was rejected, if applicable. *(If this field is enabled and set to required, the user will be required to select a "requisition-specific reason for rejection" at the time a candidate is rejected. The system does not support a default value. This ensures that valid data is captured and tracked for reporting and compliance purposes.)*

Hired date Used to track candidate's date of hire, if applicable.

Start date Used to track candidate's start date, if applicable.

All picklist values can be customized. In addition, custom requisition fields can be added to the requisition form by your Taleo Recruit Administrator. See Customize: Candidate Fields.

Resume and Cover Letter

If a resume file was attached to the candidate's record during submission, a link to this file is displayed at the top of this section. Click the link to view the resume in its original format.

The following file types are supported: DOC, DOCX, RTF, PDF, HTML and TXT. To view DOC and RTF resumes you must have Microsoft Word installed on the computer you are currently using. To view DOCX you must have Word 2007 installed on your computer or you can install Microsoft Office Word Viewer on your system. To view PDF resumes you must have the Adobe Acrobat reader, which is available for free via the Adobe website.

A plain text resume and/or cover letter may also be shown in this section, depending on how the candidate chose to submit information.

Candidate Attachments

You can attach any number of files and documents to a candidate in the **Attachments** section by clicking the **New Attachment** link. Select the file to attach by clicking the **Browse** button, and enter a description of the file in the **Description** field. Click the **Save** button when finished.

Attachments can be edited and deleted by attachment creators and Administrators. User attachments can also be added, viewed, updated and deleted in each user's **My Profile** screen.

Online Questions

If the candidate applied through your careers website, and the requisition the candidate applied to has online questions attached, answers to these online questions are shown in this section.

If a candidate submitted themselves to more than one requisition, this section will only show answers to the first requisition the candidate applied to.

Candidate Sources

Sources are all of the places where your candidates come from, including job boards, staffing agencies, your careers website, employee referrals, etc. Each candidate in your Taleo Recruit candidate's database has a field called "Source" which identifies where that candidate came from. Candidates that apply through your Careers Website will automatically be tagged with the **Careers Website** source. Similarly, candidates submitted as referrals will have a source of **Referral**.

A unique source should be created for each source of candidates. When importing candidates from disk or another data source, you are able to associate the candidates with a specific source. This enables you and your team to track where each candidate came from, and ultimately report on source effectiveness.

To add a new candidate source click the **Sources** link in the Candidates tab and then click the **Add Source** button. Name the source appropriately: for example, if you'll be adding candidates from HotJobs, you may want to call the new source "HotJobs". Click the **Save** button when finished.

Now when candidates are automatically imported with the import tool (see Importing Resumes from a ZIP file and Importing Candidates from a CSV file, or manually added by a Taleo Recruit user, they can be associated with the correct source they originated from. The source field can also be exposed to applications as part of the online application form so that candidates can select the source they came from during the submission process.

To edit a source, click its name or click the corresponding **Edit** link in the Action column on the main Sources page.

NOTE: The Employee Referral source can not be modified as it is tied to the Referral report as well as to the Referral Portal.

Contacts and **Expenses** can be associated with each source in each source's details or Edit pages. Contacts are used to store contact information about specific people your business works with at the source organization. Expenses are used to track spending activity associated with each source so that you and your team can accurately report on recruiting costs.

Email Templates

Email templates are pre-defined emails that can be used to send individual or in mass emails to one or more candidates. Email templates provide a simple way to standardize communication with candidates, and can be in either plain text or HTML formats

In the Candidates tab, click the **Email Templates** link to manage your company's candidate email templates. Merge fields can be used to insert candidate-specific data into the email when it is sent.

NOTE: Merge fields are used to merge data from your Taleo Recruit system into outbound emails. For example, **<<COMPANY_NAME>>** will be replaced by your company name when the email is sent. A full list of available merge fields is shown in each template edit screen.

Merge Fields Language Options

Email template merge fields can be localized into English, French, German, and Spanish languages.

Proceed as follows to specify the language for merge fields used in System Templates:

1. Go to **Administration > Customize Recruit.**
2. In the Customize System Templates section, click **System Email Templates.**
3. Click **Edit** to modify the email template.
4. On the Edit System Template page, open the Merge Fields Language drop-down menu and select the language in which you want the merge fields to display.
5. Click **Save**.

Mass Email

Mass emails are personalized, targeted emails sent to a specific subset of your contact pool to serve as notification of new job openings, company news, etc. This feature provides a powerful way for you to zero in on and communicate with a group of contacts that match certain criteria.

Mass emails can be sent by selecting one or more contacts from a list of contacts using the checkboxes in the left-most column.

The first screen shows all of the candidates in your target list—you can further refine the list of recipients by using arrow buttons to move undesired recipients from the **Will receive email** list on the right to the **Will NOT receive email** list on the left. Double-clicking on a candidate's name in the list will show that candidate's details in a popup window.

The second and final screen is where you actually compose the email that is sent to each recipient. You can use Email Templates when sending mass emails by clicking on the use template drop-down and selecting the appropriate email template. You may also mark an email as high importance, and add attachments by clicking on the **Add Attachments** link.

Mass emails are recorded in each candidate's Contact Log section for future reference.

Emailing and Printing Candidate Forms

The Forms button allows you to email and print candidate- specific forms from the Taleo Recruit system.

Clicking the **Forms** button from the main Candidates tab allows you to select multiple candidate's from which to create, print, and email forms.

Clicking the Forms button from a specific candidate's details page allows you to print and email forms from a single candidate record.

Clicking the Forms button from the candidate view or from the candidates detail's page opens a wizard. The first step of the wizard allows you to select the Form(s) you wish to email or print, and then click **Next**.

The printing option sends all selected files to the printer. You may also select to collate the forms when printing.

The mailing options include the ability to send the selected Form(s) via email to the associated Candidate(s), and the ability to send the Form(s) via email to the Manager or another third-party recipient (e.g., Staffing Agency, Background Check Vendor, etc.)

Several Email Options are available. **Email Each Form Individually** emails a single attachment in each email. This might be used if you are selecting so many attachments for a Candidate that you are concerned the email will not get past email filtering. The **Attach all forms that pertain to a single candidate to a single Email** option sends one Email per Candidate with all of the Forms selected for that Candidate attached. The **Compressed** option bundles all of the attachments into a single ZIP file and attaches it to one email.

Email Templates may also be used with Candidate Forms, and merge fields are supported. Headers and Footers are also supported in Forms. The top left header will display the Candidate Name, and the top right header will display page numbers (e.g. “Jane Doe Page 1 of 10”). The footer will display the Company / Zone Name.

Last, you can add users or add contacts as an email recipient by clicking the **Add User** and **Add Contact** buttons. Emailed Forms are tracked in the Contact and History Logs.

Government Forms

Government I9 and W-4 forms are stored within your Taleo Recruit system. To print an I9 or W-4 Form, simply select one or more candidates from a Candidate List View, or from a specific candidate's record, and click **Next**. Select the **W-4** and/or **I9** check boxes. The forms will auto-populate pulling in the required information from the Candidate record(s). The same printing and email options outlined in the Candidate Forms section apply to government forms.

The forms made available to you in the Forms wizard are configurable by your Taleo Recruit Administrator.

NOTE: The Application Form is available only when selecting a specific candidate record or when creating Forms from a requisition -specific candidate view. In this case, the Application Form will include any requisition-specific questions and responses in the Application Form.

Contact Log

The Contact Log section is a central location for managing all communication with each candidate. You can use the **Send An Email** feature to send an email to the candidate manually or by using pre-defined Email Templates.

The **Log A Call** and **Log A Response** features provide a simple way to record notes on phone calls and candidate responses respectively. All items in the Contact Log section are shared among requisition owners so that each team member is kept up-to-date with candidate communication.

Adding Tasks

Adding Tasks is always optional. Tasks are action items that can be scheduled and associated with a candidate. To add a Task, click the **New Task** link next to the “Tasks” label. In the Task Details section you are asked to provide a Subject, Priority, Status, Due Date, and a Description.

Adding Events

Adding Events is always optional. Events are a scheduled calendar event associated with a candidate. To add an Event, click the **New Event** link next to the “Events” label. In the Event Details section you are asked to provide a Subject, Date, Time, Duration, and Description. You may also assign additional attendees.

Candidate Comments

You can attach comments to any candidate in the **Comments** section by clicking the **New Comment** link. Enter your comment in the text area and click the **Save** button when finished.

Comments can be edited and deleted by comment creators and Administrators.

Interviews

Taleo Recruit makes it quick and easy to schedule interviews by automatically emailing all interview and candidate information to interviewers (including resume), and automatically booking each interviewer's MS Outlook calendar.

Interviews can be scheduled for a candidate in the **Interviews** section by clicking the **New Interview** link and filling out the Schedule Interview form. Select the requisition the candidate is interviewing for, followed by the interview type (phone screen or in-person), date, time, and interview room.

To add interviewers to a schedule, click the **Add Interviewer** link in the Interviewers section. In the **Organization Chart** popup, select the interviewers you would like on the schedule in the order you would like them to appear. Note that in order to be included in an interview schedule, each interviewer must have an account in your Taleo Recruit system (see your Taleo Recruit Administrator if any users are missing from your Organization Chart popup).

When interviewers are added to the schedule you will see them added sequentially in the Interviews section of the Schedule Interview form. By default they are assigned 30 minute interview time slots (your Taleo Recruit Administrator can change the default interview time slot; see Organizational Setup: System & Email Settings). You can change the assigned times manually by selecting different start times for each interviewer in the **Time** column. You can also remove an interviewer from a schedule by clicking the **Delete** link in the **Action** column.

NOTE: If you would like to send this interview schedule information to each participant, make sure to check the checkbox labeled "Send interview schedule and candidate resume to interviewers".

In the **Comments From Interview Scheduler** section, enter any notes about this interview you would like included when a schedule is sent to each interviewer. The check box labeled "Send interview schedule email to candidate" allows you to send an automatic notification to the candidate when the interview is scheduled. Click **View Email Template** link to preview what this email will look like, and note that all items surrounded by brackets << >> will be replaced by real values when the interview is scheduled. The check box labeled "CC Myself with Interviewer Email" allows you to send a copy of the email you sent to the Interviewer to yourself.

To schedule the interview click the **Save** button at the bottom of the form. An email will automatically be sent to each interviewer containing all interview and candidate information, including a link to update each recipient's calendar.

Using the Outlook Plug-in for Scheduling

Additional features available in **Premium** Services

NOTE: To use Outlook Plug-in for Scheduling you must be running Internet Explorer 7, Microsoft Exchange 2003, and Outlook must be running or you must have your credentials saved within Outlook. Additionally, if your IT Department prohibits Active X you will not be able to use this tool.

With the Outlook Plug-in for Scheduling, you can view Interviewers' Microsoft Outlook Free/Busy time from within the Taleo Recruit system.

The first time you use this tool you will need to Allow Active X to run on your computer. When you click the **Candidates** tab, you will notice a prompt at the top of the screen asking for you to allow Active X to run; left-mouse click the message, and click **Allow Active X**.

After you have added your Interviewer(s), you will see the addition of a **View Schedules** button that allows you to view the interviewer(s) availability. To create a new Interview, see Interviews.

It will take a few seconds for the Free/Busy schedule to appear, and you can monitor the progress at the top of the screen.

The Free/Busy schedule appears in the middle of the screen in the Interview section. Now that you can see the Interviewer(s) availability, select the time for your interview(s) and click **Save**.

The Outlook Plugin for Scheduling can also be used when you initiate an Interview from the My View page.

Interview and Feedback Reminders

At pre-specified times before an interview, Taleo Recruit will automatically send out interview reminder emails to each interviewer on the schedule. Similarly, after the interview is finished, Taleo Recruit will send feedback reminder messages to all interviews that have not yet submitted interview feedback. Your Taleo Recruit Administrator can customize these messages, as well as when and if they are sent. See Interview and Feedback Reminders.

Accepting and Declining Interviews

When each interviewer logs into Taleo Recruit, the **My Interviews** table in their My View screen will display the interview schedule in the **Scheduled** state. Each interviewer can select an **Accept** action to confirm participation in the interview, or a **Decline** action to deny participation in the interview. Each member of the interview team will automatically be kept up to date with these responses.

When an interview is completed it will move to the **Feedback Pending** status, and each interviewer can select a **Submit** action to submit interview feedback. When all feedback is submitted, the interview is automatically moved to the **Completed** status, and is no longer shown in each interviewer's **My Interviews** table.

Updating an Interview Schedule

To update an interview schedule, go to the Interview page and select the **Edit** option. Make the appropriate changes in the Schedule Interview form, and click the **Save** button. If you check the checkbox labeled "Send interview schedule and candidate resume to interviewers", each interviewer will automatically receive an updated interview schedule email with all necessary information and a link to update their MS Outlook calendar.

Interview Feedback

When interviewers submit feedback on an interview, they are presented with a feedback form. The feedback form contains two sections:

- **Recommendation**: A picklist used to select the overall recommendation for the candidate. By default you can choose from "No" "Yes" "Maybe" "More interviewers". Your Taleo Recruit Administrator can customize the options available in this picklist.
- **Feedback**: A text area containing an interview evaluation form. The contents and structure of this form can be customized by your Taleo Recruit Administrator.

Once feedback is submitted, it is available for review in the candidate's **Feedback** section only by requisition owners (i.e. owners of the requisition this candidate applied to).

Reference Checks

References and reference check results can be stored in the candidate's **Reference Checks** section by clicking the **New Reference** link and filling out the Reference Data and Reference Feedback sections of the form.

The Reference Feedback section consists of a text area containing a reference check form. The contents and structure of this form can be customized by your Taleo Recruit Administrator. Refer to the Administration chapter of this guide for complete details.

Background Checks

Background check results can be stored in a candidate's **Background Checks** section by clicking the **New Background** link and filling out the Background Check Data and Background Check Results sections of the form.

Offer Letters

Taleo Recruit provides an easy way to automatically generate MS Word offer letters, create and track revisions, and route offer letters through an email-based approval process.

Creating Offer Letters

To create an Offer Letter for a candidate, go to that candidate's **Offer Letters** section and click the **New Offer** link. A form called **Offer Letter Details** will appear requesting selection of requisition, title, manager, employment type, pay rate, and several other fields. This form also requires selection of an Offer template (your Taleo Recruit Administrator can customize and add MS Word offer templates; refer to the Administration chapter of this guide for complete details). Click the **Save** button when finished.

You are then taken back to that candidate's details page. Scroll down to the Offer Letters section which lists all of the offer letters and offer letter revisions that have been created. The **Status** column indicates the stage of each offer letter, and can be one of the following values:

Offer Letter Statuses

Draft Offer letter is in the drafting process and has not been routed for approval.

Waiting for Approval Offer letter has been routed for approval, and is currently in the approval process (the **Approval** column shows where the offer letter is in the approval process).

Rejected One or more offer approvers has rejected this offer letter.

Accepted All offer approvers have approved this offer letter.

Create and Track Revisions

To revise an offer letter you can either click the **Modify** link in the Action column, or click the **New Offer** link to create a completely new offer letter.

If you select **Modify**, you are taken to the **Revise Offer Letter** screen where you can change offer information and upload a revised Offer Letter document.

NOTE: When performing an offer letter revision, you must make changes to the offer fields as well as the offer document itself. Taleo Recruit will not automatically update the fields in the offer letter document.

Offer Letter Approval Process

To route an offer letter through the email-based approval process, select the **Submit for Approval** link in the Action column. You are presented with a confirmation screen that shows the ordered list of approvers who will need to approve or reject this offer letter. The list of offer approvers is defined by the requisition corresponding to the offer letter. To change the list of approvers, edit the corresponding requisition (your Taleo Recruit Administrator can also specify a default list of approvers; refer to the Administration chapter of this guide for complete details).

Once the approval process is started, Taleo Recruit will automatically email each approver in turn requesting a decision. Each requisition owner is kept up to date via email whenever a decision is made by an approver.

Candidate Expenses

You can track costs and expenses associated with any candidate in the **Expenses** section by clicking the **New Expense** link. Enter the amount of the expense in the **Amount** field and select the type of the expense from the **Type** picklist (the values in this picklist can be customized by your Taleo Recruit Administrator; see Customize: Candidate Fields).

Select the appropriate requisition to associate this expense with (if applicable), date the expense was incurred, and a brief description. Click the **Save** button when finished.

Expenses can be edited and deleted by expense creators and Administrators.

Emailing Candidate Information

To email candidate information and resume to another user or recipient, click the **Send To** button and select the type of email you would like to send. If you would like to email a link to the candidate's details page to another user, select the **Link to View page** item. If you would rather send the candidate's data in line in the email with resume as an attachment, select the **Candidate data and resume attachment** item. You can also send **Candidate and User provided attachments** that are part of the Candidate's record.

Next choose the other Taleo Recruit users you would like to send the information to. If you would like to send this information to non-users, you can do so in the next screen. Click the **Next** button to continue.

Enter any additional recipients manually in the **To:** and **Cc:** fields. Multiple email addresses can be separated by ";" semicolons. Enter the subject and body of the message in the corresponding fields and click the **Send** button when finished.

Candidate History Log

A candidate's **History Log** section shows all of the activities that have occurred involving that candidate, and the associated user that invoked each action. Each status change, submission or removal from a requisition, email communication, etc, is logged and displayed in this section to form a complete historical activity trail. Links are used to access requisitions, users, and email content where appropriate. Activities are sorted by most recent first.

Deleting Candidates

Candidates can only be deleted by Administrators. **Warning:** All comments, interviews, feedback, and other data associated with this candidate will be deleted. For accurate reporting purposes, it is highly recommended that candidates not be deleted from your system.

Searching for Candidates

There are two ways to perform a search through your database.

Quick Search To quickly locate candidates by keyword, in the main **Candidates** tab, enter your keywords in the text field labeled "Search" and click the **Go!** button.

Advanced Search To search for candidates based on any combination of specific candidate fields, resume keywords, submission dates, status, etc., click the **Search** link in the Candidates tab. In the Advanced Search screen select the desired search criteria and click the **Search** button. Examples of performing boolean keyword searches are shown in this screen (boolean searches can also be performed in the quick search field described above).

When searching Rolling Entity keywords (work history, education, residence history, etc.), the system will search and return results for candidates whose Rolling Entities contain **all** of the keywords that have been entered.

Tips for Searching Candidates

- When searching for a candidate using Quick Search by typing in FirstName MiddleName LastName you are doing an OR type of search. An OR search queries for anything with FirstName OR MiddleName OR LastName.
- The syntax for searching for multiple words is +FirstName +LastName.
- To search for an entire phrase use quotes i.e. “FirstName Lastname”.

Syntax searches can be used with Quick Search as well as Advanced Search.

To search for Jane Doe, you should type +Jane +Doe and click **Search**. This performs a search for the candidate and looks within the first and last name fields. Or, you can perform an Advanced Candidate Search using the fields.

Typing the name Jane Doe or “Jane Doe” only looks in the resume. But when typing +Jane +Doe it looks at the resume as well as the fields to see where Jane and Doe are within the profile.

To improve your results using the search functionality we recommend adding the plus sign “+” at the beginning of the name of the candidate.

Radius Search If Radius Search is activated in your Taleo Business Edition system, you can search for candidates by zip/postal code and distance. Enter a zip or postal code in the ZIP/Postal code field. Click the drop-down arrow on the Distance field and select the distance within which you would like to search for candidates. Add any additional search criteria and click the **Search** button. The Exact Match option searches for only those candidates with an exact zip/postal code match.

For OFCCP Service Customers

The OFCCP Compliance section of Advanced Search allows users to associate candidate searches to a specific position/requisition. In the OFCCP Compliance section of Advanced Search, click the Add Requisitions link to associate your search to one or more requisitions. All searches run from Advanced Search are automatically tracked for reporting purposes. The OFCCP Search Compliance report is available from the Insight menu, in the Compliance section of the list of available reports.

Accounts

This chapter describes how to create, view, change and track all information about accounts in the Taleo Recruit system.

- Accounts Overview on page 101
- Viewing Accounts on page 101
- Displaying and Editing Accounts on page 101
- Adding Accounts on page 102
- Account Fields on page 103
- Related Contacts on page 104
- Related Contacts on page 104
- Related Requisitions on page 104
- Account Comments on page 104
- Account Attachments on page 105
- Account History Log on page 105
- Deleting Accounts on page 105
- Searching for Accounts on page 105
- Importing Accounts on page 106

Accounts Overview

Accounts are the companies and organizations involved with your business such as employers, customers, search firms, agencies, etc. Each account stores information such as account name, account owners, type, industry, phone #, website, address information, description, etc.

For each account you can view information, associate Contacts and Requisitions with that Account, comments, files and documents, and track all activity.

The Accounts tab displays a home page that lets you quickly view accounts. You can also sort and filter your accounts by clicking on a column header or by using the Search tool. In addition, by clicking on an Account Name you can view and edit detailed information on each account to which you have access.

Click the **New Account** link to create a new account record. See Adding Accounts.

Click the **Search** link to search through your accounts database and narrow in on a subset of desired accounts. See Searching for Accounts.

Click the **Import** link to import account data. See Related Contacts.

Viewing Accounts

The main Accounts page displays a scrollable list of Accounts sorted by date/time of last update or creation. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all accounts by entering keywords in the “Search” field and clicking the Go! button.

The **Account name** column shows the name of each account. Click an account name to display that account’s details. See Displaying and Editing Accounts

The **Type** column shows the type of account you are working with (i.e. Employer, Customer, Partner, etc.)

Displaying and Editing Accounts

From the main Accounts page, clicking on an account name link will bring you to that account’s details page. At the top of the screen you will see several buttons (varies depending on your user role and whether or not you are assigned as an owner to an account):

Edit: Edit this account’s details.

Delete: Delete this account (only available to Administrators).

Printable View: Display this account's details in a printer-friendly window.

The information section below these buttons contains all of the account's core data fields. See Account Fields.

The **Address Information** section contains street address, city, state/region, zip/postal code and country information.

The **Description Information** section displays general information about this account.

The **Web Links** section contains web integration links to Google and LinkedIn allowing you to perform quick searches for this account.

The following sections allow you to store, track, and manage other information specific to this requisition:

- **Contacts**: A list of all Contacts associated with this account (see Related Contacts).
- **Requisitions**: A list of all Requisitions associated with this account (see Related Requisitions).
- **Tasks**: A list of all Tasks associated with this account.
- **Events**: A list of all Events associated with this account.
- **Comments**: A list of plain text notes and comments about this account
- **Attachments**: A list of document attachments associated with this account (see Account Attachments).
- **History Log**: Historical trail of account-related activities (see Account History Log).

Adding Accounts

To add a new account, click the New Account link in the Accounts tab. Fill out the form with as much information as you can. By default the Account Name field is required (your Taleo Recruit Administrator has complete control over which fields are required; see Customize: Account Fields.)

When adding an account, you can select the appropriate users who should be assigned as owners of this account, and you can also select a Parent Account if this account happens to be a subsidiary or department within a larger organization you are already tracking.

Account Fields

All picklist values can be customized. In addition, custom account fields can be added to the account form by your Taleo Recruit Administrator. See Customize: Account Fields.

Field	Description
ID	Account's unique ID# (automatically assigned; read-only).
Account Name	Company, subsidiary or business unit name.
Account Owners	Users assigned to this account as owners.
Parent Account	Account that contains this account as a subsidiary, business unit or other subdivision.
Type	Type of the account (e.g. Partner, Customer, Vendor, etc).
Industry	Primary industry this account does business in.
Phone #	The main phone # for this account.
Fax #	The main fax # for this account.
Website	The main website address/URL for this account.
Street Address	Account's street address.
City	Main city this account currently resides in.
State/Region	Main state or region this account currently resides in.
ZIP/Postal Code	The postal code of the area this account currently resides in.
Country	The main country account currently resides in.
Description	General information about this account
Map this location	Link to a map of this account's address.
Google Search	Search Google for this account name.
LinkedIn Search	Search LinkedIn for this account name.

Related Contacts

Related contacts are people associated directly with this account. Each account can have an arbitrary number of related contacts. To add a new contact to an account, click the **New Contact** link. Each contact can only be associated with one account. To change the account a contact is associated with you must edit that contact.

Related Requisitions

Related requisitions are requisitions associated in some way with this account. Each account can have an arbitrary number of related requisitions. To add a new requisition to an account, click the **New Requisition** link. Each requisition can be associated with any number of accounts. To associate an existing requisition with an account go to the requisition's view page, scroll down to the "Accounts" section and click **Attach Account**.

Related Tasks

Related tasks are tasks associated in some way with this account. To add a new task to an account, click the **New Task** link. The task subject, priority, status and due date fields are required. Click the **Save** button when finished.

Related Events

Related events are events associated in some way with this account. To add a new event to an account, click the **New Event** link. The event attendees, subject, date, time, and duration fields are required. Click the **Save** button when finished.

Account Comments

You can attach comments to any account in the **Comments** section by clicking the **New Comment** link. Enter your comment in the text area and click the **Save** button when finished.

Comments can be edited and deleted by comment creators and Administrators.

Account Attachments

You can attach any number of files to an account in the **Attachments** section by clicking the **New Attachment** link. Select the file to attach by clicking the **Browse** button, and enter a description of the file in the **Description** field. Click the **Save** button when finished.

Attachments can be updated and deleted by attachment creators and Administrators.

Account History Log

An account's **History Log** section shows all of the activities that have occurred involving that account, and the associated user that invoked each action. Each update is logged and displayed on this page. Links are used to access content where appropriate. Activities are sorted by most recent first.

Deleting Accounts

Accounts can only be deleted by Administrators. **Warning**: All historical data and associations involving this account will be deleted. Account comments, attachments and other data associated with a deleted account will also be deleted. For accurate reporting purposes, it is highly recommended that accounts not be deleted from your system.

Searching for Accounts

There are two ways to perform a search through your accounts database.

Quick Search

To quickly locate accounts by description keyword, in the main Accounts tab, enter your keywords in the text field labeled "Search" and click the **Go!** button. The Accounts Quick Search searches the account description text as well as the Account Name field.

Advanced Search

To search for accounts based on any combination of specific account fields, description keywords, etc., click the Search link in the **Accounts** tab. In the Advanced Search screen select the desired search criteria and click the **Search** button.

Importing Accounts

If you have account data stored in an Excel spreadsheet, ACT!, GoldMine, or other application, and you would like to import this data into your Taleo Recruit system, you can use the Account Import Wizard to do so quickly and easily.

NOTE: If you also plan to import contacts which are related to accounts, you should import your accounts first.

This tutorial provides an overview of how to upload accounts from your computer into your Taleo Recruit system.

Steps:

1. Preparing a CSV file

2. Importing

1. Preparing a CSV file

NOTE: By default MS Excel files are stored in XLS format. If you are importing directly from Excel, you will need to convert from XLS to CSV before performing an import. Please read this section before continuing.

Converting to CSV from XLS and other formats:

If you have a Microsoft Excel file in XLS or other format, open this file in Excel and:

1. Select the **File** menu.
2. Select **Save As**....
3. In the popup dialog, choose **CSV (Comma delimited) (*.csv)** from the **Save as** type: field.
4. You may see another popup dialog asking **“yourfile.csv may contain features that are incompatible with CSV (Comma delimited). Do you want to keep the workbook in this format?”**. Click the **Yes** button.

2. Importing

Once you have prepared a CSV file, you need to upload this file with the Account Import tool. Before importing a large number of records, we highly recommend running a test import with 2 or 3 rows of data only to make sure your data is formatted properly.

NOTE: Taleo Business Edition will not accept CSV files larger than 4 megabytes. If you have a larger file to import, you may need to create multiple CSV files and import them separately.

To upload the CSV file:

1 Login to Taleo Recruit and go to **Accounts** > **Import**.

The Account Import Wizard displays.

2 Click **Browse** and then navigate to the CSV file that you created in the previous task.

3 Click **Next.**

The **Map Columns to Contact Fields** screen displays.

4 Map the columns from your CSV file to the account fields in your Taleo system, according to the following guidelines:

- The Taleo Business Edition Import Wizard allows you to map any column of data in your CSV file to a Standard or Custom Contact Field. This includes picklists, checkboxes, and all supported data types.
- Once you have your CSV file prepared, look at all the fields in your Taleo Business Edition Contact form and determine which column in your CSV file should map to each account field.
- When mapping a column to a picklist such as “Status”, “State”, “Country”, or a custom picklist field, the import wizard will look for a text match (case insensitive). If no text match is found, the picklist value will not be set.
- When mapping a column to a checkbox field, the import wizard will look for “True” values. If “True” is found the checkbox is checked; otherwise it is unchecked.

5 Click the **Import** button when finished mapping the fields and the import process begins.

Contacts

This chapter describes how to create, view, change and track all information about contacts associated with your accounts in Taleo Business Edition.

This chapter is relevant only to Taleo Recruit and OnBoard customers.

- Contacts Overview on page 109
- Viewing Contacts on page 109
- Displaying and Editing Contacts on page 109
- Adding Contacts on page 111
- Contact Fields on page 111
- Related Requisitions on page 112
- Contact Comments on page 113
- Related Tasks on page 112
- Related Events on page 113
- Contact Comments on page 113
- Contact Attachments on page 113
- Contact History Log on page 113
- Deleting Contacts on page 114
- Searching for Contacts on page 114
- Importing Contacts on page 114
- Email Templates on page 116

Contacts Overview

Contacts are all of the individuals associated with your Accounts that you need to track in Taleo Recruit.

Each contact stores information such as first name, last name, address, phone, email, Account, description, etc.

For each contact you can view information, send email and log phone call notes, store comments, attach files, and track all related activity.

The Contacts tab displays a home page that lets you quickly view contacts. You can also sort and filter your contacts by clicking on a column header or by using the Search tool. In addition, by clicking the contact Name link you can view and edit detailed information on each contact to which you have access.

Click the **New Contacts** link to create a new contact record. See Adding Contacts.

Click the **Search** link to search through your contacts database and narrow in on a subset of desired contacts. See Searching for Contacts.

Click the **Import** link to import contact data. See Importing Contacts.

Click the **Email Templates** link to create or locate an Email Template.

Viewing Contacts

The main Contacts page displays a scrollable list of Contacts sorted by date/time of last update or creation. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all contacts by entering keywords in the “Search” field and clicking the **Go!** button.

The **Name** column shows the name of the contact which, when clicked, brings you to that contact’s details page.

The **Account** column shows to which Account each contact is associated.

Displaying and Editing Contacts

From the main Contacts page, clicking on a contact name will bring you to that contact’s details page. At the top of the screen you will see several buttons (varies depending on your user role and access privileges):

Edit: Edit this contact’s details.

Delete: Delete this contact (only available to Administrators).

Printable View: Display this contact's details in a printer-friendly window.

The information section below these buttons contains all of the contact's core data fields. See Contact Fields.

The **Address Information** section contains street address, city, state/region, zip/postal code and country information.

The **Description Information** section displays general information about this contact.

The **Web Links** section contains web integration links to Google and LinkedIn allowing you to perform quick searches for this contact.

The following sections allow you to store, track, and manage other information specific to this contact:

- **Requisitions:** A list of all requisitions associated with this contact.
- **Contact Log**: A list of all emails, phone call notes, and responses for a complete communication trail with this contact (see Related Tasks).
- **Tasks**: A list of tasks associated with this contact.
- **Events**: A list of events associated with this contact.
- **Comments**: A list of plain text notes and comments about this contact (see Contact Comments).
- **Attachments**: A list of document attachments associated with this contact (see Contact Attachments).
- **History Log**: Historical trail of contact-related activities (see Contact History Log).

Adding Contacts

To add a new contact, click the **New Contact** link in the Contacts tab. Fill out the form with as much information as you can. By default the Last Name field is required (your Taleo Recruit Administrator has complete control over which fields are required; refer to the Administration chapter of this guide for complete details).

When adding a contact you can select an Account to associate the contact with, and you can also select another contact that this contact reports to in the associated account's organizational hierarchy.

Contact Fields

All picklist values can be customized. In addition, custom requisition fields can be added to the requisition form by your Taleo Recruit Administrator. Refer to the Administration chapter of this guide for complete details on customizing and working with Contact fields.

Field	Description
ID	Contact's unique ID# (automatically assigned; read-only).
First Name	Contact's first name.
Last Name	Contact's last name.
Account	Link to the Account this contact is associated with.
Title	Contact's current title.
Department	Department contact works in.
Reports To	Link to Contact this contact reports to.
Phone #	The main phone # for this contact.
Mobile #	The main mobile # for this contact.
Fax #	The main fax # for this contact.
Email	Contact's main email address.
Assistant	Name of contact's assistant.
Asst. Phone	Phone number of contact's assistant.
Asst. Email	Email address of contact's assistant.

Field	Description
Street Address	Contact's street address.
City	Main city this contact currently resides in.
State/Region	Main state or region this contact currently resides in.
ZIP/Postal Code	The postal code of the area this contact currently resides in.
Country	The main country contract currently resides in.
Description	General information about this contact
Map this location	Link to a map of this contact's address.
Google Search	Search Google for this contact name.
LinkedIn Search	Search LinkedIn for this contact name.

Related Requisitions

Related requisitions are requisitions associated in some way with this contact. Each contact can have an arbitrary number of related requisitions. To add a new requisition to a contact, click the **New Requisition** link. Each requisition can be associated with any number of contacts. To associate an existing requisition with a contact go to the requisition's page, scroll down to the "Contacts" section and click **Attach Contact**.

Contact Log

The Contact Log section is a central location for managing all communication with each contact. You can use the Send An Email feature to send an email to the contact manually or by using pre-defined Email Templates.

The Log A Call and Log A Response features provide a simple way to record notes on phone calls and contact responses respectively.

Related Tasks

Related tasks are tasks associated in some way with this contact. To add a new task to a contact, click the **New Task** link. The task subject, priority, status and due date fields are required. Click the **Save** button when finished.

Related Events

Related events are events associated in some way with this contact. To add a new event to a contact, click the **New Event** link. The event attendees, subject, date, time, and duration fields are required. Click the **Save** button when finished.

Contact Comments

You can attach comments to any contact in the Comments section by clicking the **New Comment** link. Enter your comment in the text area and click the **Save** button when finished.

Comments can be edited and deleted by comment creators and Administrators.

Contact Attachments

You can attach any number of files to a contact in the Attachments section by clicking the **New Attachment** link.

Select the file to attach by clicking the Browse button, and enter a description of the file in the **Description** field.

Click the **Save** button when finished.

Attachments can be updated and deleted by attachment creators and Administrators.

Contact History Log

A contact’s History Log section shows all of the activities that have occurred involving that contact, and the associated user that invoked each action. Each update is logged and displayed on this page. Links are used to access content where appropriate. Activities are sorted by most recent first.

Deleting Contacts

Contacts can only be deleted by Administrators. **Warning**: All historical data and associations involving this contact will be deleted. Contact comments, attachments and other data associated with a deleted contact will also be deleted. For accurate reporting purposes, it is highly recommended that contacts not be deleted from your system.

Searching for Contacts

There are two ways to perform a search through your contacts database.

Quick Search

To quickly locate contacts by description keyword, in the main **Contacts** tab, enter your keywords in the text field labeled “Search” and click the **Go!** button. The Quick Search for Contacts is searching the description text as well as the Contact First Name, Last Name, Title, Department, and Assistant Name fields.

Advanced Search

To search for contacts based on any combination of specific contact fields, description keywords, etc., click the **Search** link in the Contacts tab. In the **Advanced Search** screen select the desired search criteria and click the **Search** button.

Importing Contacts

If you have contact data stored in an Excel spreadsheet, ACT!, GoldMine, or other application, and you would like to import this data into your Taleo Recruit system, you can use the Contact Import Wizard to do so quickly and easily.

NOTE: If you plan to import contacts that are related to accounts, import your accounts first.

This tutorial provides an overview of how to upload contacts from your computer into your Taleo Recruit system.

Steps:

1. Preparing a CSV file

2. Importing

1. Preparing a CSV file

By default MS Excel files are stored in XLS format. If you are importing directly from Excel, you will need to convert from XLS to CSV before performing an import. Please read this section before continuing.

Converting to CSV from XLS and other formats:

If you have a Microsoft Excel file in XLS or other Excel format:

1. Open the file in Excel.
2. Select the **File** menu.
3. Select **Save As.**..
4. In the popup dialog, choose **CSV (Comma delimited) (*.csv)** from the **Save as type** field.
5. You may see another popup dialog asking **"yourfile.csv may contain features that are incompatible with CSV (Comma delimited). Do you want to keep the workbook in this format?"**. Click the **Yes** button.

2. Importing

One you have prepared a CSV file, you need to upload this file with the Contact Import Wizard. Before importing a large number of records, we highly recommend running a test import with 2 or 3 rows of data only to make sure your data is formatted properly.

NOTE: Taleo Business Edition will not accept CSV files larger than 4 megabytes. If you have a larger file to import, you may need to create multiple CSV files and import them separately.

To upload the CSV file:

1. Login to Taleo Recruit and select **Contacts > Import**.
2. The Contact Import Wizard displays.
3. Click **Browse** and navigate to the CSV file you created in the previous task.
4. Click **Next**.

   The **Map Columns to Contact Fields** screen displays.
5. Map the columns from your CSV file to the contacts fields in your Taleo system, according to the following guidelines:

- The Taleo Business Edition Import Wizard allows you to map any column of data in your CSV file to a Standard or Custom Contact Field. This includes picklists, checkboxes, and all supported data types.
- Once you have your CSV file prepared, look at all the fields in your Taleo Business Edition Contact form and determine which column in your CSV file should map to each account field.

- When mapping a column to a picklist such as “Status”, “State”, “Country”, or a custom picklist field, the import wizard will look for a text match (case insensitive). If no text match is found, the picklist value will not be set.
- When mapping a column to a checkbox field, the import wizard will look for “True” values. If “True” is found the checkbox is checked; otherwise it is unchecked.

6 Click the **Import** button when finished mapping the fields and the import process begins.

Email Templates

Email templates are pre-defined emails that can be used to send individually or in mass emails to one or more contacts. Email templates provide a simple way to standardize communication with contacts, and can be in either plain text or HTML formats

In the Contacts tab, click the **Email Templates** link to manage your company’s contact email templates. Merge fields can be used to insert contact-specific data into the email when it is sent.

Users

This chapter describes how to administer the roles, features and functionality for the users of your Taleo Business Edition system.

- Users Overview
- Viewing Users
- Displaying and Editing Users
- Adding Users
- User Fields
- Adding Users in Bulk with the User Import Wizard
- Cloning User Settings
- Re-Assigning Job Functions to a Successor
- Mass Email
- Related Tasks
- Related Events
- Related Tasks
- Related Events
- User Attachments
- User History Log
- User Login History
- Deleting Users
- Searching for Users
- Using the Org Chart
- User Roles
- Assigning Role-Based Access for Candidate Conversion
- Email Templates

Users Overview

Users are all the people with access to your Taleo Business Edition system. Each user record consists of information such as name, title, email address, role, login username, password, etc. For each user you can assign a role that determines which features and functionality that user has access to.

The Users tab displays a home page that lets you quickly view users. You can also sort and filter your users by clicking on a column header or by using the Search tool. In addition, by clicking on the user's name you can view and edit detailed information on each user (if you are an Administrator).

Click the **New User** link to create a new user. See Adding Users.

Click the **Search** link to search through your user's database and narrow in on a subset of desired users. See Searching for Users.

Click the **Org Chart** link to browse the users list based on organizational hierarchy and location. See Using the Org Chart.

Click the **Roles** link to view and assign page layouts, list views, application views, and access control for each role.

Click the **Email Templates** link to create or locate an Email Template.

Viewing Users

The main Users page displays a scrollable list of Users sorted by date/time of last update or submission. You can resort this list by clicking a column header, and scroll through the list using the arrow buttons. You can also do a quick text search through all user resumes and profiles by entering keywords in the "Search" field and clicking the **Go!** button.

The **User** column shows the name of each user. The **Role** column shows each user's assigned role. A user's role determines which Taleo Recruit resources and features that user has access to. There are six possible roles:

User Roles

Administrator: This role has access to everything, including all global settings such as organization structure, data back up services, as well as customization rights to features and functionality of Taleo Business Edition. Administrators can view all employee and candidate records, and other confidential information. Only Administrators can create new users and reset user passwords. Administrators are the only users with access to the "Administration" tab.

HR Administrator: This role has access to all records, but no access to Administration. Essentially, the HR Administrator role is similar to a Hiring Manager role with visibility into all records and a global view of your system.

Hiring Manager: This role can search through the candidates database, but only has full access to candidates who are unassigned or who have applied to requisitions they own.
Recruiter: Recruiters can search through the candidates database, but only have full access to candidates who are unassigned or who have applied to requisitions they own.

Passive User: This role can view open requisitions, accept or decline participation in interviews, submit interview feedback, and submit employee referrals. Passive Users cannot view any candidate information other than candidates they are scheduled to interview. If a Passive User has been designated as a Requisition Approver and/or Offer Approver, the Passive User will also have access to the Requisitions and Offers that have been assigned to them.

Agency: This role can submit candidates to requisitions they have been assigned to, and check the status of previously submitted candidates.

No Access: This role is used when you want to temporarily prevent a user from accessing the system. Users in the No Access role do not consume a user license.Users assigned this role can not be assigned as Requisition or Offer Approvers.

User Licenses

You can assign roles based on the number of **Active User** and **Passive User** licenses your organization has purchased. To find out how many licenses your organization has, go to the **Resources** menu and click **About**. A summary screen displays with an overview of your licenses.

Active Users: Are users with the following roles: Administrator, Hiring Manager or Recruiter.

Passive Users Passive Users are users with the following role(s): Passive User and Agency.

Displaying and Editing Users

From the main Users page, clicking on a user's Name link will bring you to that user's details page. At the top of the screen you will see several buttons:

Edit: Edit this user's details.

Clone: You can clone settings from an existing user and apply them to a new user.

Delete: Delete this user (only available to Administrators).

Printable View: Display this user's details in a printer-friendly window.

Reset Password: Reset this user's password (automatically sends an email to the user with new temporary password).

Page Layouts: Assign page layouts for this user.

List Views: Assign list views for this user.

Application Views: Assign application views for this user. Administrators will be unable to remove any application views from a specific user if they are also assigned to a role.

The information section below these buttons contains all of the user's core data fields. See User Fields.

The **User Preferences** section contains time zone and locale information, as well as information about user auto-notifications.

The **Profile** section shows any personal information this user chose to make publicly available, such as resume, brief bio, etc.

Adding Users

To add a new user, click the **New User** link in the Users tab. Fill out the form with as much information as you can. The **Last Name**, **Email**, **User Name**, **Role**, and **Status** fields are required.

Users are uniquely identified by email address. You will not be able to add multiple user accounts for a user using the same email address.

When adding a user make sure to select the appropriate role from the **Role** picklist. See User Roles.

The "Requisition Approval" and "Offer Approval" checkboxes determine whether the user can be assigned to a requisition as a Requisition Approver or Offer Approver.

The **Manager** field can be used to specify another Taleo Recruit user this user reports to. This creates an implied hierarchy which is illustrated in the Org Chart screen.

User Fields

First name: User's first name.

Last name: User's surname (required).

Middle: Middle initial.

Email: User's email address.

User Name: User's login name.

Title: User's title within the organization.

Manager: Specifies user's manager within the organization.

Location: User's location (office).

Role: Determines access rights and privileges.

Status: Used to show whether user is an employee, consultant or contractor.

Phone #: User's primary land line.

Fax: User's fax number.

Mobile #: User's mobile phone number.

Employee (Select Employee): Select an Employee record to associate your User record with your Employee record.

Requisition Approver: Specifies whether or not user can be assigned to a requisition as a Requisition Approver to approve requisitions. Refer to the Administration chapter of this guide for complete details on Assigning Requisition Approvers.

Offer Approver: Specifies whether or not user can be assigned to a requisition as an Offer Approver to approve offer letters. Refer to the Administration chapter of this guide for complete details on Assigning Offer Letter Approvers.

Time Zone: Time zone setting based on user's geographic location; adjusts all recorded timestamps to match the user's selected time zone.

Locale: The Locale setting adjusts all date stamp formats according to the user's assigned selection.

Candidate Auto Notifications: Indicates this user is automatically notified when a candidate is assigned to them.

Administrator Email Announcements: Indicates this user is automatically notified of administrator email announcements.

General Email Announcements: Indicates this user is automatically notified of general email announcements.

Adding Users in Bulk with the User Import Wizard

With the User Import Wizard you can import users into your Taleo Business Edition system in bulk, as described below.

Preparing to Import

Prior to using the User Import Wizard review and perform the following prerequisites:

- Create a CSV (Comma Separated Value) file that contains the user data you want to import into your Taleo Business Edition system.
- If your user data is stored in an Excel spreadsheet, simply save the file as a CSV file, using the Save As command in Excel.
- If your user data is stored in a different third-party software program, you'll need to export the data to Excel first, then save it as a CSV file.
- Once you have prepared your CSV file, review all the fields available in a User record in Taleo Business Edition. Determine which column in your CSV file maps to each field in the sample User record. Check with your Administrator if you need custom fields or custom picklist values.
- The size limit for CSV files is 4 megabytes or approximately 5,000 records. If you have a larger file to import, you must create multiple CSV files and import them separately.
- Highly recommended: Consider testing the import process by importing a small test file of 5 records before importing all of your data to ensure that your file is properly formatted.
- If you are importing blocks of text containing commas, it is important to properly format the commas by enclosing them in quotes so they can be differentiated from comma delimiters.
- Ensure that any values you want to store as picklist selections match the picklist value exactly, as non-matching values will be discarded.
- All Users can be imported with a default role and status as defined in the wizard. You can also identify an alternative status in the CSV contents, however if it does not match an existing status it will be discarded.
- When mapping a column to a picklist such as "State/Region", "Country", or a custom picklist field, the Import Wizard looks for a text match (case insensitive). If no text match is found, the picklist value will not be set.
- When mapping a column to a checkbox field, the import wizard will accept values of "y", "yes", "true", and "1" – regardless of upper or lowercase – to indicate that the checkbox should be checked; otherwise it will be unchecked.

Importing Users

Proceed as follows to import users in bulk:

1 From the Users menu, select **Import**. Page 1 of the User Import Wizard displays.

2 To copy the settings of a donor user and apply their settings to new users that are being created during the import process:

   a Click **Copy settings from existing User.**

   b Click **Select User.**

   c Select the appropriate user to use as a donor user whose settings will be inherited by the users that are being created.

   d Click **Close** in the Select User Dialog.

3 Choose the settings you want to copy from the donor user and apply to the users that are being created. The settings that are explicitly defined in the User record of the donor user will be applied to the new User records you are creating, according to your selections here:

   a Copy List View Assignments

   b Copy Page Layout Assignments

   c Copy Role and Access Assignments

   d Copy Location / Region / Department Assignments

4 In addition to User records, you can create Employee records during the User Import process.

NOTE: Employee records are required for conducting performance reviews.

Your options are:

- Create an Employee: Select this option if you want the Import Wizard to create a corresponding Employee record for each User record.
- Connect Existing Employees: This option is only available if you chose Create an Employee in option 4a above. If checked, the system will use the Employee Code to connect Users contained in the CSV file with Employees that currently exist in your system.

5 Click **Next**. Page 2 of the User Import Wizard displays.

6 In the Locate File area, click **Browse** and navigate to the CSV file containing the user data. Select the file, and then click **Open**.

7 In the Choose Role area, specify which default User Role and Status you want to use on an exception basis. For example, in case the:

- CSV file is not formatted properly or if it contains an error preventing the matching of data
- Information is not mapped properly on Page 3 of the Import Wizard.

In these scenarios, the system will use the defaults you specify in this step.

8 Click **Next**. Page 3 of the User Import Wizard displays.

9 For each Standard User and Employee Field, choose the column in your CSV file that maps to that field. This includes picklists, checkboxes, and all supported data types.

10 Click **Import** when you're finished mapping fields and columns.

11 If your CSV file contains User records that already exist in the system, the following warning displays:

Warning! Some of the users that you are uploading already exist in the system. This may be intentional if you are attempting to update the User information. If you proceed, the existing information will be overwritten, and will not be recoverable. These changes will not be logged in the User Change history. Clicking Proceed will overwrite all data to match your CSV file.

12 If you intend to update the User data in your system, click **Proceed**. Otherwise, click **Cancel**, modify the data in your CSV file, and then restart the Import process.

When your CSV file is accepted, the import process begins and a confirmation message displays.

13 You will receive an email when the import process is complete; review the email for details of any exceptions that may have occurred during the import process.

Cloning User Settings

You can clone settings from one user to another, to simplify the process of setting up users in your Taleo Business Edition system. This feature is available for Administrators and other users who have the access rights to create new users.

Proceed as follows to apply the settings from a donor user to a new user:

1 From the Users menu, select **Users**.

2 On the main Users page, open a donor user record.

3 Click **Clone**.

4 The donor user is automatically populated in the Select User area. If you want to change the donor user, click **Select User** and select a different donor user.

5 Choose the settings from the donor user you want to copy to the new user:

- Copy List View Assignments
- Copy Page Layout Assignments
- Copy Role and Access Assignments
- Copy Location / Region / Department Assignments

6 Click **Next**.

7 Enter the remaining fields of the recipient's User record, as in previous releases.

8 Click **Save** or **Save and Create Employee Record**.

NOTE: Employee records are required for all users who will be participating in a performance review process.

Re-Assigning Job Functions to a Successor

When an employee leaves your company, you can specify a new user that will inherit ownership of the departed user's job functions.

You can also use this feature to reset a user's Page Layout and List View settings to the defaults for their role or apply settings from a "donor user" to another user.

Proceed as follows:

1 From the main Users page, open a User record, and then click Change Settings.

NOTE: There is no undo, but you will have an opportunity to confirm your selections in Step 3 below.

2 If you want to reset the user selected in step 1 to their role-based defaults, or apply settings from one user to another, review the options available and make selections in the Page Layouts and List Views areas.

3 If you want to re-assign a user's job functions to another user, review the options available and make changes in these product areas:

- **Taleo Business Edition Recruit Settings**

  You can allow this user to inherit Requisition Ownership and Approval settings from another user. This is particularly useful when you have a change in staffing.

  This requires that the user is a Requisition Owner or Approver. If you continue, the user will be updated to be shown as an Owner or Approver.

- **Taleo Business Edition OnBoarding/OffBoarding Settings**

  You can allow this user to inherit OnBoarding Packets from another user. This will only affect incomplete packets.

  This requires that the user is a OnBoarding/OffBoarding Owner. If you continue, the user will be updated to be shown as an Owner.

  You can allow this user to inherit Onboarding Activities from another user. This will only affect incomplete packets.

- **Taleo Business Edition Organization Settings**

You can change the reporting structure of your subordinates by changing who other Employees “Report To.”

You can change the reporting structure of Indirect Reports by changing who other Employees “Indirectly Report To.”

- **Taleo Business Edition Perform Settings**

  You can change the Review Manager on assigned reviews that are not in the Final state.

  This requires that the user is a Performance Review Manager. If you continue, the user will be updated to be shown as a Manager.

  You can change the Review Approver on assigned reviews that are not in the Final state.

  This requires that the user is a Performance Review Approver. If you continue, the user will be updated to be shown as an Approver.

- **Taleo Business Edition Compensation Settings**

  You can allow this user to inherit Cycle Ownership. Changes to the Cycle Owner will only affect cycles that have not already been finalized.

  This requires that the user is a Compensation Manager. If you continue, the user will be updated to be shown as a Manager.

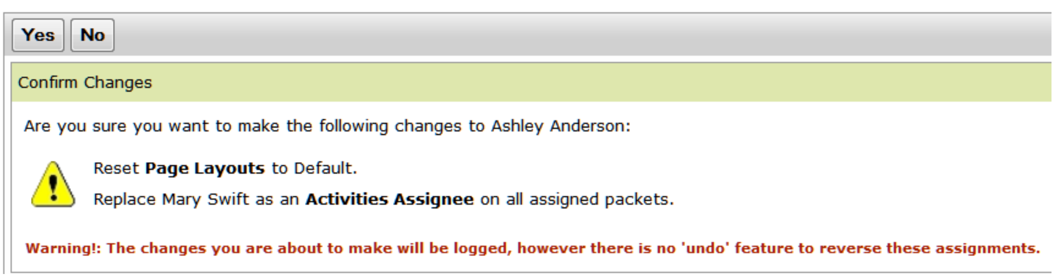
  Changes to Plan Manager will only affect plans that have not already been approved.

  This requires that the user is a Compensation Manager. If you continue, the user will be updated to be shown as a Manager.

  Changes to the Cycle Approvers will only affect cycles that still require approval by the user selected.

  This requires that the user is a Compensation Approver. If you continue, the user will be updated to be shown as an Approver.

4 Click **Next** when you’re finished making selections in all of the appropriate areas, and a confirmation message displays:



5 Review the confirmation message and click **Yes** if you’re satisfied with your changes and are ready to finalize them; click **No** to cancel changes and return to the main User’s page.

Mass Email

Mass emails are personalized, targeted emails sent to a specific subset of your user pool to serve as notification of system changes, reminders, etc.

This feature provides a powerful way for you to zero in on and communicate with a group of users or contacts that match certain criteria.

Mass emails can be sent by selecting one or more users or contacts using the checkboxes in the left-most column.

The first screen shows all of the users in your target list—you can further refine the list of recipients by using arrow buttons to move undesired recipients from the **Will receive email** list on the right to the **Will NOT receive email** list on the left. Double-clicking a user's name in the list shows that user's details in a popup window.

The second and final screen is where you actually compose the email that is sent to each recipient. You can use Email Templates when sending mass emails.

Mass emails are recorded in each user's or contact's History Log section for future reference.

NOTE: Mass emails to contacts are available for Taleo Recruit and OnBoard only, as Taleo Perform does not have Contact records.

Related Tasks

Related tasks are tasks associated in some way with this user. To add a new task to a user, go to **My View** and click the **New Task** link. The task subject, priority, status and due date fields are required. Click the **Save** button when finished.

Related Events

Related events are events associated in some way with this user. To add a new event to a user, go to **My View** and click the **New Event** link. The event attendees, subject, date, time, and duration fields are required. Click the **Save** button when finished.

User Attachments

You can attach any number of files or documents to a user's account in the **Attachments** section by clicking the **New Attachment** link. Select the file to attach by clicking the **Browse** button, and enter a description of the file in the Description field. Click the **Save** button when finished.

Attachments can be edited and deleted by attachment creators and Administrators. User attachments can also be added, viewed, updated and deleted in each user's **My Profile** screen.

User History Log

A user's **History Log** section shows all of the activities that have occurred to this user's record, as well as all of the deletions this user has performed. Links are used to access requisitions, users, and email content where appropriate. Activities are sorted by most recent first.

User Login History

A user's **Login History** section shows a complete log of all successful logins performed by this user, including date & time, IP address, and logout time (if any).

Deleting Users

Users can only be deleted by Administrators. **Warning:** All candidates, requisitions, history logs, reports, etc. will no longer properly reference this user. For accurate reporting and reference purposes it is highly recommended that users not be deleted from your system.

Instead of deleting a user, consider changing that user's role to **No Access**. Users with the No Access role do not consume a user license.

Searching for Users

There are two ways to perform a search through your users database.

Quick Search To quickly locate users by keyword, in the main **Users** tab, enter your keywords in the text field labeled "Search" and click the **Go!** button. The Users Quick Search searches the user resume and profile text as well as the First Name, Last Name, Title, Role, and Location fields.

Advanced Search

To search for users based on any combination of specific user fields, resume or profile keywords, role, status, etc., click the **Search** link in the Users tab. In the **Advanced Search** screen select the desired search criteria and click the **Search** button. Examples of performing boolean keyword searches are shown in this screen (boolean searches can also be performed in the quick search field described above).

Using the Org Chart

Select the **Org Chart** link in the main Users tab. You will see a picklist allowing selection of location. By selecting a value from this picklist you can filter the number of users shown in the user hierarchy below.

Clicking on any user name will display that user's public information and profile in the screen on the right. Each user can update personal profile information in the My Profile screen.

User Roles

Select the **Roles** link in the main Users tab. You will see a list of Roles and the assigned default page layouts, default list views, assigned application views, and assigned access control for each role.

Clicking on any role's links will allow you to select the version of each web page you would like to assign to this role by default.

The Page Layout Settings for all roles include:

- General Page Layouts
- Candidate Page Layouts
- Requisition Page Layouts
- Offer Page Layouts
- Work History Page Layouts
- Interview Page Layouts
- Feedback Page Layouts
- Reference Check Page Layouts
- Background Check Page Layouts
- Account Page Layouts
- Contact Page Layouts
- User Page Layouts
- Calendar Event Page Layouts
- Task Page Layouts

The List View Settings for all roles include:

- Candidate List Views
- Requisition List Views
- Work History List Views
- Interview List Views
- Feedback List Views
- Account List Views
- Contact List Views
- User List Views
- Task List Views

The Application Views are assigned by role.

The Access Control settings determine which roles can create new requisitions, which roles can create new requisitions through the Job Library, and which roles can view and update the Main Status of a candidate. Select the checkbox to enable access, and deselect the checkbox to disable access. All roles have these options added by default.

Assigning Role-Based Access for Candidate Conversion

You have complete control over which Roles have the ability to create Employee records from Candidate records. Employee records can be automatically created at the time a Candidate Status is changed to 'Hired', or manually created by pressing the 'Convert to Employee' button that is located on the Candidate record and Candidate-related List Views.

To enable this functionality:

1. From the Users tab, select the Roles sub-tab.
2. Select the Access Control option for any of the Roles that you would like to modify. You will notice that there are two options at the bottom of the list that pertain to the creation of Employee Records.
3. Check 'Create an Employee Record by 'Hiring' a Candidate' to control whether this option is presented to the user at the time of setting the candidate into a 'Hired' status. The associated drop down list allows for you to optionally Require that the Employee record is always created.
4. Check 'Convert to Employee button available on Candidate Record' to control the ability for the users to simply press a button to create an Employee record from any candidate. It is recommended that this setting NOT be checked for non-Administrator roles.

Email Templates

Email templates are pre-defined emails that can be used to send individually or in mass emails to one or more users. Email templates provide a simple way to standardize communication with users, and can be in either plain text or HTML formats.

From the **Users** tab, click the **Email Templates** tab to manage your company's user email templates. Merge fields can be used to insert user-specific data into the email when it is sent.

Employee Website

This chapter describes the features and functionality of the Employee Website in Taleo , and contains the subjects listed below.

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

- Employee Website Overview
- Employee Website Home
- Employee Website Settings
- Employee Website Internal Opportunities
- Career Planning

Employee Website Overview

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

Access to basic employee data, assigned goals, performance reviews, and the ability to submit employee self-assessments online is delivered through a secure Employee Website. This capability helps to ensure performance expectations are in alignment and that information and feedback is accessible to all stakeholders.

As a new employee, you will receive a link to the Taleo Perform Employee Website along with Login instructions from your Manager. Enter your Employee Login and Employee Password and click the **Login** button.

The first time you Login, you will be asked to create and confirm your new password, then click **Save**.

NOTE: Your password must be a minimum of 8 characters, and the first 6 characters must be letters.

Employee Website Home

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

The Employee Website Home Page has an Employee Information section.

The Employee Information section of the Employee Home Page allows the employee to view and modify their contact information. By clicking the **Edit** link, the employee is able to update his/her information. The **Save** or **Cancel** link allows the employee to discard or save changes. The Taleo Business Edition HR Administrator can configure this page to allow for viewing of this information only.

Employee Website Settings

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

The Employee Website Settings page allows employees to manage and modify their Employee Website Login and Password settings.

Employee Website Internal Opportunities

NOTE: This section does not apply to the Taleo Recruit service; it is intended only for users of Taleo Perform and OnBoard.

If you are using Taleo Recruit in addition to Taleo Perform, your Administrator can configure your Employee Website to display an Internal Opportunities tab.

The Internal Opportunities tab enables you to search for opportunities within your company and apply for them using information parsed from your Employee record.

To use this feature:

1. Login to your Employee Website.
2. Click the **Internal Opportunities** tab.

NOTE: This feature must be configured by your Administrator before it is available for end users. If you do not see an Internal Opportunities tab, notify your Administrator.

3. When prompted, click **YES - Take me to the Employee Intranet.**
4. Search for open job requisitions using the search options provided.
5. Click a requisition title to view and/or apply for the position.
6. To apply for a position, click **Apply for this Position.**
7. Click the **Employee Record** icon to populate the application form with data from your Employee record, such as your name, address, work history and employment history.
8. Complete and submit the application form.

Administration

This chapter describes how to customize and configure Taleo Business Edition for your organization.

- Administration Overview
- Customizing Taleo Recruit
- Organization Setup
- Adding Regions, Divisions, Departments, and Locations
- Email Reminders
- Creating On-Demand Backups
- Configuring Tabbed Pages (Administrators)
- Customize: Candidate Fields
- Customize: Candidate Special Fields
- Customize: Requisition Fields
- Customize: Offer Fields
- Customize: Interview Fields
- Customize: Feedback Fields
- Customize: Calendar Event Fields
- Customize: Reference Check Fields
- Customize: Background Check Fields
- Customize: User Fields
- Customize: Contact Fields
- Customize: Account Fields
- Customize: Task Fields
- Customizing Page Layouts
- Activating the Outlook Plug-in for Scheduling
- Activating the PayScale Widget for Checking Market Compensation Ranges
- Customize: List Views
- Customizing List Views
- Job Library Administration Controls Overview
- Customize: Careers Website Pages
- Customize: Manage Careers Websites

- Customize: System Templates
- Image Management
- Re-branding Taleo Business Edition
- Customize: Configurable Forms
- Customize Processes: Approval Processes
- Customize Processes: Candidate Workflow
- Customize Processes: Req-Specific Candidate Workflow
- Customize Processes: Requisition Workflow
- Customize Processes: Active Hire Controls
- Customize Processes: Interview Workflow
- Customize Processes: Feedback Workflow
- Customize Processes: Offer Workflow
- Customize Processes: Menu Items
- Customize Processes: Status Mappings
- Customize Processes: Referral Notification
- Customize Taleo Insight
- Customize Tabs: Custom Tabs
- Customize Tabs: Application Views
- Customize Tabs: Relationships
- Customize: Taleo Business Edition Web API
- Creating Custom Roles
- Resetting a User's Role-based Defaults
- Enhanced Employee Record Access

Administration Overview

The Administration home page is your starting point for customizing and configuring Taleo Business Edition to meet the unique needs of your organization. The options available vary based on the specific Taleo services to which you're subscribed. For example, if your company is not subscribed to the OnDemand Backup service, your Taleo Business Edition system will not display that option on the Administration page.

Click **Customize Taleo Business Edition Recruit, Perform, or OnBoard** (depending on the services you're subscribed to) to modify the default settings of your Taleo Business Edition services to meet your specific hiring, performance, and onboarding needs. Administrators can create custom fields and email templates, configure careers and employee websites, define approval processes, workflows, access controls, and more. You can even re-brand Taleo Business Edition to reflect your company logo.

Click **Organization Set Up** to configure and maintain your organization's locations, company profile, and system settings. Administrators can designate Security Managers and restrict access to Taleo Business Edition according to your company policies. Additionally, you can edit company information and manage features such as default time zone and locale settings.

Click **On-Demand Backup Service** to schedule and download full Taleo Business Edition backups. This service creates a Zip archive containing all resumes, employment applications, documents, performance reviews, and data stored in your Taleo Business Edition system.

Customizing Taleo Recruit

From the Administration home page, click **Customize Taleo Business Edition Recruit** to access a comprehensive list of customization options available in Taleo Recruit. These customization tools allow you to configure your system to meet the specific needs of your organization.

Using the customization tools, your Taleo Recruit Administrator can:

- Customize the fields that your organization uses throughout your Taleo Recruit system. You can create custom fields for information that is relevant to your company's specific business objectives and/or hide any standard fields that are not relevant to your business. Below is a list of the categories of fields that Administrators can customize:
  - Customize: Candidate Fields
  - Customize: Requisition Fields
  - Customize: Offer Fields
  - Customize: Interview Fields
  - Customize: Feedback Fields
  - Customize: Calendar Event Fields
  - Customize: Reference Check Fields
  - Customize: Background Check Fields
  - Customize: User Fields
  - Customize: Contact Fields
  - Customize: Account Fields
  - Customize: Task Fields
- Customizing Page Layouts: Page Layouts define what fields of information display on pages within Taleo Business Edition. You can customize the fields by showing or hiding them, and change the order in which they appear.
- Customize: List Views: List Views are collections of lists that are used throughout your Taleo Business Edition system. You can customize these List Views so that they appear differently depending on the context of where they are being viewed in the system and by whom. You can also customize List Views to add or remove relevant information (fields) and change the way the list is sorted.
- Customize: Careers Website Pages: Customize your Careers Website forms such as the application form, job search, search results, and more.
- Customize: Manage Careers Websites: Customize the look and feel of your Taleo Recruit-powered careers website(s).
- Manage your company's Taleo Voice Response information. (This is an additional cost module. To become a subscriber, contact your Customer Sales Manager at tbecsmsales@taleo.com.

- Standardize your company's inbound and outbound email communications, interview feedback, and offer letters by creating and customizing reusable templates. See Customize: System Templates.
- Upload and manage images – and re-brand Taleo Business Edition with your own company logo. See Image Management and Re-branding Taleo Business Edition.
- Configure your base Requisition and Offer Letter Approval processes. See Customize Processes: Approval Processes.
- Configure Candidate and Requisition Workflow by customizing statuses and their associated “Next Step” actions. See Customize Processes: Candidate Workflow and Customize Processes: Requisition Workflow.
- Configure Interview, Interview Feedback, and Offer Workflow processes.
- Configure Menu Item names to match your company’s nomenclature and naming conventions.
- Configure Status Mappings to configure which statuses represent Hired candidates, Open requisitions, etc. See Customize Processes: Status Mappings.
- Manage your Referral Notifications.
- Create and edit Custom Tabs, Application Views, and Relationships.
- More information about accessing the Taleo Business Edition Web API. See Customize: Taleo Business Edition Web API.

Organization Setup

From the main Administration page, click **Organization Setup** to see the Organization details page.

Company Profile

The Organization Setup page contains a link to your **Company Profile**. Click this link to make changes to your company profile, which includes your main location, time zone, website, industry and locale settings. Make sure to complete as many of the fields as possible in the **Company Information** section.

NOTE: The State/Region and Country picklists are populated with default values pulled from the Candidate fields. These picklists can be modified; see Customize: Candidate Fields**.**

In the **Company Settings** section select the default time zone and locale settings each user should be assigned by default when their account is created. Each user can then set their own time zone and locale settings if they need adjustment (i.e. based on their geographic location) from their My Settings page.

All times and dates in Taleo Business Edition are stored in Greenwich Mean Time (GMT-00:00) and adjusted based on the user's time/date settings when displayed. This way, users in any country or region are kept in correct synchronization with each action and event in Taleo Business Edition. In addition, the locale setting allows adjustment between 12hr and 24hr timestamps, as well as adjustment between MM/DD/YYYY and DD/MM/YYYYY date formatting.

The default Locale setting determines the base language and date/time display characteristics. This locale will also be used as the default locale for all new users.

System & Email Settings

In the Organization Setup screen you will see a link called **System & Email Settings**. Click this link to go to the System & Email Settings page where you can edit standard Taleo Business Edition settings.

System Settings

In this section you can specify how locations are sorted. By default locations are sorted by Name. Locations can also be sorted by State, then City and by Country.

The Team viewing checkbox allows you to enable shared viewing of Candidate record among all Taleo Recruit users. In Taleo Recruit each candidate is shown in bold if the user logged in has not viewed that candidate's details yet. Team viewing marks a candidate as viewed for all users as soon as any single user views that candidate.

Email Settings

This section allows you to specify the Sender address to be used by Taleo Business Edition when automated system emails are sent (such as automatic thank you emails, approval requests, interview reminders, etc). The 'Do Not Spoof Email' option allows Administrators to disable email spoofing. When you use this option, emails sent from the Taleo Business Edition system display a `From' address of donotreply@invalidemail.com. Additionally, the `Reply to' field contains by default the user's valid email address or it can be changed to the generic system address identified by your Administrator in the Email Settings `Sender Address' and `Sender Display Name' fields. If the `Do Not Spoof Email' checkbox is unchecked, outgoing emails default with a `From' address containing the sender's valid email address or can be changed to the generic system address identified by your Administrator in the Email Settings `Sender Address' and `Sender Display Name' fields. User's can set their email `Return Address' in the **My Settings** page accessed from the main **My View** tab.

The standard header can be used if you would like to always include specific text at the beginning of each email sent from Taleo Business Edition. The standard footer is always included at the bottom of each email sent from Taleo Business Edition (except for emails based on HTML templates). The Encoding drop-down list allows you to select the settings that will control the headers for outgoing emails. The recommended setting for North American customers is US-ASCII. If you require support for German and French extended characters, the recommended setting is ISO-8859-1. The recommended setting for multilingual support is UTF-8. (This setting may cause some issues for Cut and Pasted templates from Word.)

User Interface Settings

This section allows you to display the Referral Name with the Candidate Name in List Views and allows you to enable Quick Views in your Taleo Business Edition system. Deselect the check boxes to disable these features. Disabling the Quick View feature removes the option to turn on / off Quick Views at the user level.

Interview Settings

In this section you can specify the default time slot for interviewers. When assigning interviewers to an interview this time interval is automatically used. In addition, you can specify whether or not the system should include a Microsoft Outlook calendar file with each interview schedule email. When clicked the calendar file will book the interviewer's individual time slot in their Outlook calendar.

In the **Candidate Workflow Settings** section you can specify whether or not the system should update a Candidate's Main Status and Main Reason for Rejection when this value is updated for a specific requisition. By default these options are enabled.

Form Header and Footer

In this section you can specify whether or not the system should display a Candidate’s or Employee’s Name, the Page Counter, and the Company Name when viewing or printing Configurable Forms. By default these options are enabled.

Security Level

In the Organization Setup screen you will see a link called **Security Level**. Click this link to go to the Security Level page where you can select your desired Taleo Business Edition security level.

In this screen you can choose between four security levels (Low, Medium, High, and Custom) based on how strict you would like to handle user passwords, unsuccessful login attempts, data locks, and session expiration. Defaults are provided for the Low, Medium, and High security settings and can not be modified. Choose the Custom option to modify the security settings.

NOTE: Modifications to the security levels affect only new users and passwords added to Taleo Business Edition. To apply your new security levels to all users, click the Reset Password option in each user record. Security settings do not apply to Careers Website or Employee Website logins and passwords.

Security Manager Assignments

This section allows you to identify which Administrators have the ability to make security changes pertaining to confidential data in the system. This setting is used in conjunction with the Field Level Encryption feature, which gives Administrators the ability to use the encrypted fields provided for social security/insurance numbers and date of birth, and create custom encrypted fields for other sensitive information, like salary. See Setting Up Field-level Encryption for more information.

Access Control for Login IP Blocking

This setting adds an additional layer of security by blocking all IP addresses except those that are deemed allowed by the administrator. After you enable this feature, you can restrict which IP addresses can gain access to your Taleo Business Edition system. Remote users attempting to login from an IP address that is not deemed secure will be presented with a Non-Access Notification. The notification displays on-screen and is customizable, as described below.

To enable login IP blocking:

NOTE: Do this only if you intend to restrict users from being able to login from any internet connection:

1. From the Administration tab, click Organization Setup, and then click Security Level.
2. Check the Enable Access Control checkbox. By default your current IP address is listed in the Allowed IPs section.
3. **IMPORTANT:** Enter your *corporate* IP address or range in the Allowed IPs section. Your *current* IP address is automatically entered for you. Ensuring that both your current IP address and your corporate IP address are listed eliminates the possibility of blocking your own access after you click Save.
4. Enter the IP addresses from which you want to allow remote access to your Taleo system. You may also enter a CIDR Block using the syntax shown in the sample text of the Access Control screen. Refer to your Internet Protocol Networking documentation for more information about CIDR Block Notations.

   The IP addresses or CIDR Block addresses you enter here designate the locations from which you are allowing access to your Taleo system. If your corporate IP address is the only address entered in this field, it is the only location from which users will be allowed access.
5. In the Non-Access Notice section, enter the text for the on-screen notification that will advise remote users who have attempted to access the system from a non-allowed IP address that they are not allowed to login from their current location. You can use the Merge fields provided to craft the message using relevant data from your Taleo system.
6. **IMPORTANT:** Designate an emergency contact user, preferably an Administrator, who can reset the IP blocking feature and safeguard against unintentional blocking**.** This enables you to have specific users who can login and reset the restrictions in the event that you need to make corrections to your IP restrictions.

7 In the Allowed Users field, click Add/Remove Users. Choose one or more emergency contacts from the list of users and then click Save to assign the emergency contact (s).

   If an emergency contact user is presented with a Non-Access Notice, a modal window displays where they can request unrestricted access by entering their email address. They will then receive an IP Restriction Lockout Notification Email with a link enabling them to login to the Taleo system and reset IP restrictions as appropriate.

8 Click Save.

Setting Up Field-level Encryption

Taleo Business Edition provides field-level encryption to secure the personal information contained in the Date of Birth (DOB) and Social Security Number/Social Insurance Number (SSN/SIN) fields.To further enhance data security, Administrators can create custom encrypted fields in addition to the two standard encrypted fields.

Field-level encryption means that when the data is written to the database it is masked and completely indiscernible without the decryption key. Taleo has undertaken this measure to ensure that your employee's data is safe and secure.

To facilitate the management of encrypted data, you must assign one or more Security Managers within your organization. Any Administrator who has Security Manager access can decide which users or roles can:

- Access the confidential data in Insight reports
- Run a decrypted On-Demand Backup

Implementing this feature involves the following tasks:

- Administrator: Designate a Security Manager(s) within your organization.
- Security Manager: Set up role-based access to confidential data.
- Security Manager: Set up masking options.
- Security Manager: Create custom encrypted fields (optional).

Step-by-step instructions are provided for each of these tasks in the following sections.

Designating Security Manager(s)

Security Managers control who has access to the confidential data contained in encrypted fields within the organization. Users with Access to Confidential Data will see unmasked confidential data in reports, and if they are Administrators they will have the ability to run a decrypted On-demand Backup.

NOTE: The assignment of the first Security Manager and any subsequent changes to the list of Security Managers is broadcast to all Security Managers and Administrators within your organization.

1 Go to the Administration page and click Organization Setup.

2 Click Security Level.

3 Click Add in the Security Manager Assignments section.

4 Click the names of the users you want to assign as Security Managers. Only Administrators are eligible for this assignment. Click Close when you are finished.

5 Click Save on the Organization Setup page.

WARNING: You are about to save changes to the assigned Security Managers; as a precaution, all other Security Managers will be notified of this change.

6 Click Continue**.**

Setting Up Role-Based Access Controls for Encrypted Fields

Security Managers can delegate permission to assign access to confidential data to users and roles within the organization. These users will be able to create reports with unmasked confidential data, and will have the ability to run a decrypted On-demand Backup. To set up role-based access to encrypted fields:

1 Login as Security Manager in Taleo Business Edition.

2 Go to Users > Roles.

3 For each role that you want to delegate access to confidential data, click Assign Access Control.

4 Select Allow access to Confidential Data (Encrypted fields).

5 Click Save.

NOTE: If an encrypted field is specified for inclusion on a scheduled report, a warning displays in the Sending Options section of the Report Scheduler: “WARNING! This report may include confidential information that might not be appropriate to distribute to e-mail recipients”

Encrypted fields are not searchable in the database.

Setting Up User-Based Access Controls

To grant confidential data access to an individual user:

1 Go to Administration > Customize Taleo Business Edition Recruit

2 In the Customize Pages section, click Page Layouts.

3 Scroll to the Add/Edit User page layout and click Edit from the Action menu on the right.

4 Click Insert.

5 Select Input Field as the type of field and then click Next.

6 Select the Confidential Data Access input field and then click Save.

7 For each user you want to grant access to confidential data, open their User record and click Edit.

8 Check the Confidential Data Access box and then click Save.

Setting Up Masking Options for Encrypted Fields

Display masking options determine which characters in encrypted fields are masked upon user entry into the system and when viewed in the system. Security Managers have the ability to modify the display masking options in the DOB and SSN/SIN fields of the Candidate and Employee records, as follows:

1. Go to Administration > Customize Taleo Business Edition Recruit
2. In the Customize Fields section, click Candidate Fields.
3. Locate the SSN/SIN field and click Edit from the Action menu on the right.
4. Specify the following display and edit masking options:

   Choose a Display Mask option. This option enables you to set the level at which encrypted data is obscured in the database.

   Encrypted Text display masking options:

- Hide all but the first ___ characters
- Hide all but the last ___ characters
- Do not hide

   Encrypted Date display masking options:

- Hide Day of Month
- Hide the Month
- Hide the Year

   Encrypted Integer display masking options:

- Hidden
- Visible

   Choose Edit Mask options. This option enables you to choose how the system displays data upon entry into encrypted fields.

- Hide As You Type: User input is hidden; encrypted characters display instead.
- Add Check Input Field: This option is only available if Hide As You Type is selected. This selection creates an additional input field labeled “re-enter,” where the user must re-enter the same information. If identical information is not entered in both fields, the system returns an error: “Entered check value does not match entered value.”

5. In the Integration (Web API) section enter an External name and Field description.
6. Click Save.
7. Repeat this procedure for the DOB field according to your business objectives.
8. If you are using these fields for the first time, add the fields to the Candidate and/or Employee Add, Edit, and View page layouts.

When the fields are added to the Page Layouts you must indicate whether or not you want to apply field masking. If you elect to ignore the field masking option, unencrypted data will be visible through the system user interface for users assigned to that page layout.

Creating Custom Encrypted Fields

Taleo Business Edition provides the ability for Security Managers to create custom encrypted date, text, and numeric integer fields. To create custom encrypted fields:

1. Log in as Security Manager in Taleo Business Edition.
2. Go to Administration > Customize Taleo Business Edition Recruit
3. In the Customize Fields section, click Candidate Fields.
4. Scroll to the Candidate/Employee Custom Fields section and click New Field.
5. In the Data Type drop-down list, select the type of encrypted field:

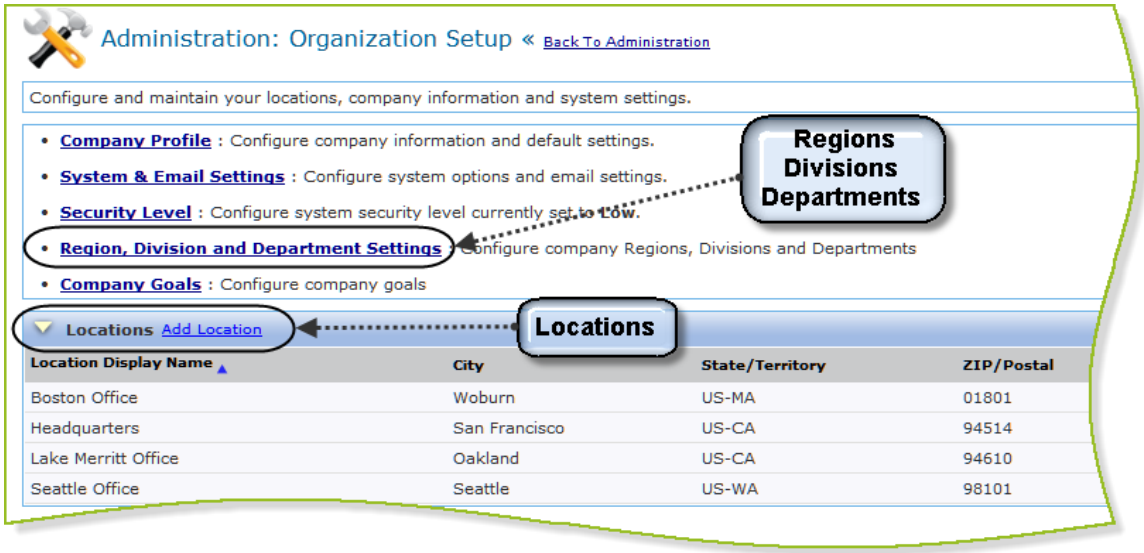
- Encrypted Text
- Encrypted Date
- Encrypted Integer

NOTE: If you do not see the above options in the Data Type drop-down list, you do not have sufficient permission levels to add encrypted fields. Refer to Designating Security Manager(s) .

6. Click Next.
7. Specify display and edit masking options (refer to Setting Up Masking Options for Encrypted Fields).
8. In the Integration (Web API) section enter an External name and Field description.
9. Click Create.

Adding Regions, Divisions, Departments, and Locations

Set up your organization in Taleo Business Edition to include the Regions, Divisions, Departments, and Locations that comprise the geographic and organizational business units within your company. Go to Administration > Organization Set Up.



Click **Region, Division and Department Settings,** or click **Add Location.** Refer to the sections below for additional details about each of these organizational elements.

Regions

Click **Add Region** to add a region to your organization. Regions allow locations to be grouped together and allow users to assign multiple location rights to Regional/Territorial Managers. In general, users and locations can be assigned to regions.

Enter the new Region Name, and then select the Associated Locations and Users by moving the selections from the “Available” list to the “Associated” list. Additionally, you may assign default requisitions approvers for any requisition created within this region by moving the selections from the “Available” list to the “Associated” list. You may also reorder your list of default requisition approvers for Regions by using the up and down arrows.

Users can be associated with one region or multiple regions.

Divisions

Click **Add Division** to add a division to your organization. Divisions allow departments to be grouped together and allow users to assign multiple department rights to Division Managers. In general, users and departments can be assigned to divisions.

Enter the new Division Name and Description, then select the Associated Departments and Users by moving the selections from the “Available” list to the “Associated” list. Additionally, you may assign default requisition approvers for any requisition created within this division by moving the selections from the “Available” list to the “Associated” list. You may also reorder the list of default requisition approvers by using the up and down arrows.

Users can be associated with one division or multiple divisions.

Departments

Click **Add Department** to add a department to your organization. Departments allow the grouping of jobs within a location and allow you to assign specific groups of jobs to a user in the system.

Enter the new Department Name. The Department Name field should consist of a short name of the department. The Department Name is used to describe the departments on your careers site and throughout your Taleo Business Edition system. Select the Associated Users by moving one or more selections from the “Available” list to the “Associated” list. Additionally, you may assign default requisitions approvers for any requisition created within this department by moving the selections from the “Available” list to the “Associated” list. You may also reorder your list of default requisition approvers for Departments by using the up and down arrows.

Users can be associated with one department or multiple departments.

Locations

Click **Add Location** to add a location corresponding to each geographic location where your company has job openings.

For each location you must specify a Location Name (required) and Description (optional). When choosing a location name, keep in mind that this name is used throughout your Taleo Business Edition system and on your careers website to display the location of your job openings. For this reason, it is common to use a full location abbreviation such as **US -- Mountain View, CA** if you are a global organization, or just **Mountain View, CA** if you are a domestic organization.

NOTE: The State/Territory and Country picklists are populated with default values pulled from the Candidate fields. These picklists can be modified; see Customize: Candidate Fields**.**

If you are including MS Outlook appointments in your interview schedules (see System & Email Settings), the time zone field is important because MS Outlook relies on this information to properly book appointments. If you do not select the correct time zone for this location, interview schedules sent by Taleo Business Edition may have incorrect time values.

Directions to this location can be mailed as part of an interview notification email to each candidate prior to an interview. It is common to include directions from two or more central travel destinations such as airports or major highways. Alternatively, if directions to this location are published on your web site, you can place a link to the appropriate web page in the directions field.

For each location, add the rooms that interviews normally take place in (add one per line). Typically these are the names of conference rooms and designated meeting rooms. Interview rooms are used by hiring managers and recruiters when scheduling interviews for requisitions at this location.

Additionally, you may assign default requisition approvers for any requisition created within this Location by moving one or more selections from the “Available” list to the “Associated” list. You may also reorder your list of default requisition approvers for this Location by using the up and down arrows.

Adding a Location Description Merge Field

You can use the location description as a merge field in system email templates by adding Requisition Location Description as a Requisition merge field.

Proceed as follows to add the location description as a merge field on system email templates:

1. Go to Administration > Customize Recruit > System Email Templates.
2. Select an email template and click Edit from the Action menu on the right.
3. In the Available Merge Fields section, select Requisition fields.
4. In the Select Field area, choose Requisition Location Description.
5. Copy and paste the merge field value into the body of the email template.
6. Click Save.

Similarly, you can display the location description for requisitions posted on your careers website.

Proceed as follows to add location description as a merge field on your careers website:

1. Go to Administration > Customize Recruit > Careers Website Pages.
2. Scroll to the Requisition View page and click Edit from the Action menu on the right.
3. In the Location area click Insert.
4. Select Template HTML as the type of web page field you want to insert, and then click Next.
5. In the Select Field Type, keep the default value of Data Fields.
6. In the Select Field area, choose Requisition Location Description.
7. Copy and paste the merge field value into the body of the requisition.
8. Click Save on the Template HTML.
9. Click Save on the Page Layout.

Email Reminders

The Email Reminders page allows you to configure automatic interview reminders, feedback reminders, and new employee start date reminders.

Email Reminders

The email reminders and events summarized in the table below can be configured to send notifications or perform activities based on your organizations needs. To edit an email reminder, click the **Edit** link next to its name.

Interview Reminder Interview reminder emails are sent out to all interviewers at a predetermined number of minutes prior to each interview. The default setting of 60 minutes is usually adequate.

Interview Auto Status Change The interview status change event does not send any emails. This is simply used to specify how long yourTaleo Recruit system will wait after an interview ends to change the interview status to “Feedback Pending”. The default setting of 30 minutes is usually adequate.

First Feedback Reminder The first feedback reminder email is sent to all interviewers who have not yet submitted feedback on a completed interview. The default setting of 2 hours is usually adequate. You can also choose to notify an overdue interviewer's manager by checking the “CC employee's manager” checkbox.

Second Feedback Reminder The second feedback reminder email is sent to all interviewers who have not yet submitted feedback on a completed interview. The default setting of 24 hours is usually adequate. You can also choose to notify an overdue interviewer's manager by checking the “CC employee's manager” checkbox.

First New Employee Reminder The first new employee reminder email is sent to a specific list of recipients to serve as notification of an upcoming new employee start date. Specify all recipients this reminder should be sent to in the “Send to” field, separating email addresses with spaces. In the “Send reminder” field, enter the number of days prior to the employee’s Start Date you want the first reminder to be sent. For example, if you want the reminder to be sent a week before the employee starts, enter 7 in this field.

Second New Employee Reminder The second new employee reminder email is sent to a specific list of recipients to serve as notification of an upcoming new employee start date. Specify all recipients this reminder should be sent to in the “Send to” field, separating email addresses with spaces. In the “Send reminder” field, enter the number of days prior to the employee’s Start Date you want the second reminder to be sent. For example, if you want the second reminder to be sent two days before the employee starts, enter 2 in this field.

Creating On-Demand Backups

The On-Demand Backup Service allows you to create and download complete backups of the following:

- All resumes in their original formats (DOC, DOCX, RTF, PDF, HTML, TXT).
- All Taleo Business Edition data in CSV files suitable for viewing in MS Excel or import into another database.
- All ancillary documents such as attachments, offer letters, etc.

NOTE: Attachments more than 60 days old will be automatically converted to compressed files. A desktop decompression tool such as WinZip (http://www.winzip.com) may be used to decompress files contained in the backup file.

On-Demand backups are queued to run during off-peak hours to enhance overall system performance during peak hours. A notification is sent when your On-Demand Backup is ready the following day.

To create an On-Demand Backup:

Your Taleo Business Edition Administrator logs in, navigates to the Administration tab, selects the Backup menu item and clicks “Create Backup.”

A ZIP archive is created and available for secure download containing:

Key Benefits:

- Complete backups as often as you need them - your data is entirely in your hands
- The ability to store backups at your company site
- Write custom applications that leverage your Taleo Business Edition data
- Import candidate, requisition and new hire data into other internal systems

If you are already a Taleo Business Edition subscriber and would like to add the On-Demand Backup Service to your subscription, contact us at 1-888-836-3669 or tbesales@taleo.com.

NOTE: The On-Demand Backup Service is only available to customers with less than 886MB of combined file and database data. (You can check your aggregate space usage anytime by clicking Resources > About in the upper right corner of your Taleo Business Edition screen).

If/when your space usage exceeds 886MB, you will receive a message indicating that you must contact Taleo Business Edition Support to create a backup for you. Customers with over 1.5GB of usage cannot receive backups via this method. In this case, you can log a ticket with Support through the Web Support link accessible from the top menu of your Taleo Business Edition system. Support will run the backup after peak hours and will notify you when the backup has been completed.

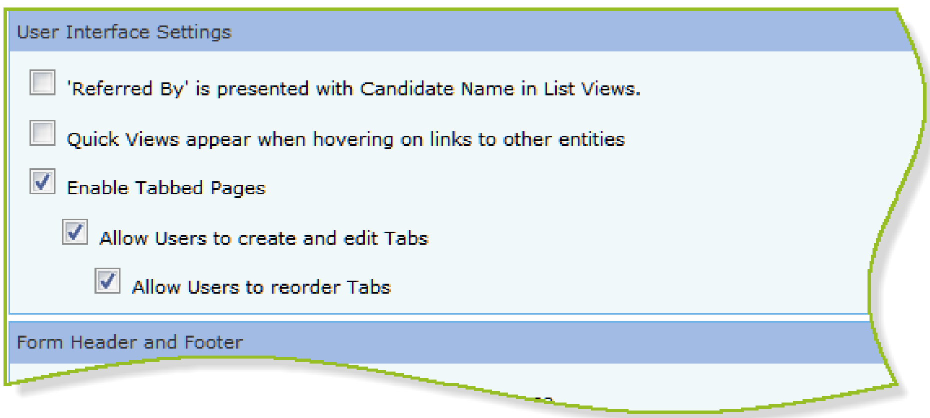
Configuring Tabbed Pages (Administrators)

Tabbed Pages are enabled by default.You can disable Tabbed Pages or modify the settings using the procedure below.

Proceed as follows to configure Tabbed Page settings:

1 Go to **Administration > Organization > System & Email Settings**.

2 Scroll down to **User Interface Settings** and check or uncheck the following settings:



- **Enable Tabbed Pages:** This setting enables or disables the ability for both Users and Administrators to create Tabbed Pages. The default for this setting is enabled; to turn the feature off deselect this check box.
- **Allow Users to Create and Edit Tabs:** This setting enables or disables the ability for Users to create and modify Tabbed Pages. The default for this setting is enabled; to disable the ability for Users to create Tabbed Pages deselect this check box.

  NOTE: This setting also effects Users' ability to re-order tabs. If this setting is disabled you cannot select the setting below, Allow Users to Reorder Tabs.
- **Allow Users to Reorder Tabs:** The default for this setting is enabled; to disable User's ability to change the order in which Tabbed Pages display deselect this check box.

3 Click **Save.**

Creating New Tabbed Pages (Administrators)

A total of seven Tabbed Pages are allowed; Administrators can create four and Users can create three.

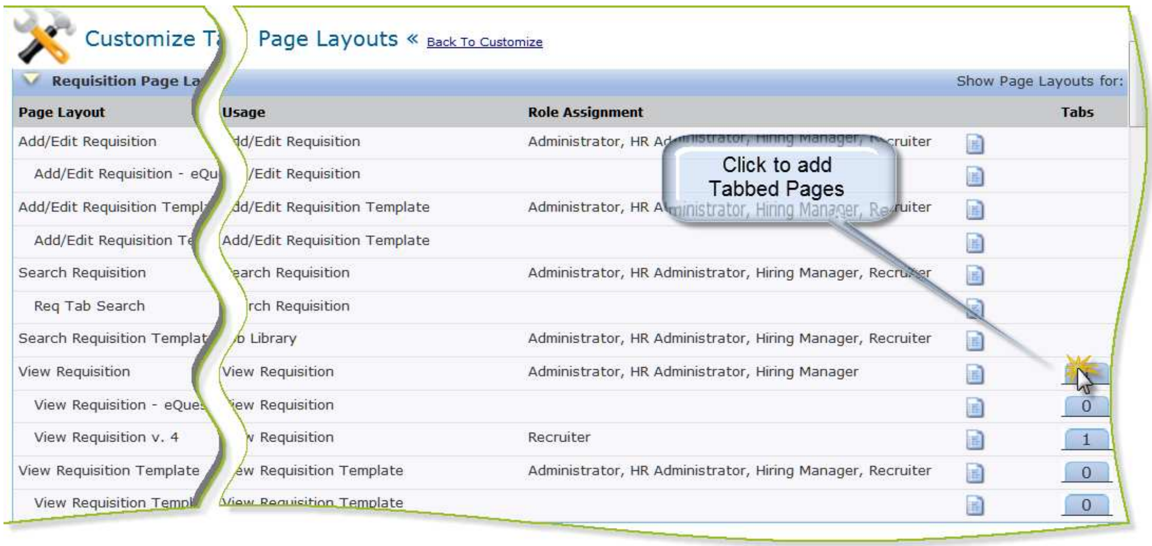
Tabs created by Administrators can be deployed to Users system-wide. Administrators can also assign Tabbed Pages to User Roles; for example, a Hiring Manager might require a different Tabbed Page view than a Recruiter would. Users cannot modify tabs created by Administrators.

To create new Tabbed Pages that are viewable system-wide:

1 Go to **Administration** > **Customize Recruit/Perform/OnBoard.**

2 Click **Page Layouts**.

3 Click the Tab icon or open the Action menu and choose Manage Tabs:



NOTE: You can only create Tabbed Pages on View pages, not on Edit pages.

4 Complete steps 4-8 of Setting Up Tabbed Pages .

5 Assign the new Tabbed Pages to User Roles, as described below.

Assigning Tabbed Pages to User Roles

To assign the new Tabbed Page to a User Role:

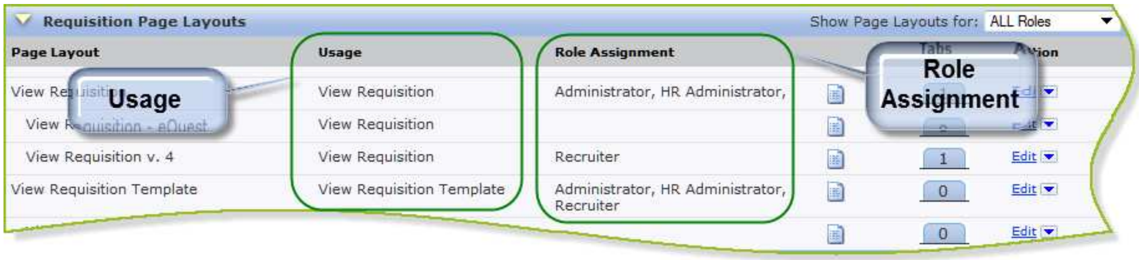
1 Create a Page Layout version: Open the Action menu, click **Add Version**, enter a version name, then click **Save**.

2 Assign the Page Layout version to the Role: Go to **Users** > **Roles**, and then select the Page Layout version you created in step 1.

3 Click **Save**.

The following message displays: “By saving these changes, you will change the access of all of the Users that are assigned to this role.”

4 Click **OK**. The Usage and Role Assignments display on the Page Layout customization page:



Customize: Candidate Fields

To tailor Taleo Recruit candidate records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Candidate Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Careers Website Setup.

Candidate Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Candidate Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL

- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Candidate Page Layouts.

Other Fields

This section allows editing of the following picklists:

- **Candidate expense type:** Used when logging candidate expenses to specify the type of expense.
- **Source expense type:** Used when logging source expenses to specify the type of expense.

Customize: Candidate Special Fields

To tailor Taleo Business Edition candidate records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Candidate Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Customize: Careers Website Pages.

The Candidate Special Fields section allows you to create and edit fields that we refer to as 'Rolling Entities'. Rolling Entities are any commonly collected and presented data set that has a many-to-one relationship to a candidate. An example of a Rolling Entity is Work History, whereby the same fielded information is collected on each of the candidate’s previous employers and positions. Rolling Entities allow for flexibility in the collection of data. In addition to collecting Work History data, you can also collect multiples sets of data related to references, education, certifications, and current and former residences.

Candidate Standard Special Fields

The Standard Special Fields section shows all special fields that are included by default. The **Action** column shows an **Edit** link if the standard special field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Candidate Standard Special date fields are unique and are presented as drop-down fields allowing applicants to select ‘To’ and ‘From’ dates for month and year, including the ability to select ‘To Present’.

Candidate Custom Special Fields

The custom special fields section shows any custom special fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text**, a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an Input Mask allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##- #### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Candidate Page Layouts.

Customize: Requisition Fields

To tailor Taleo Recruit requisition records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each requisition screen using Requisition Page Layouts. You can also specify whether or not the field should be included as part of any job search and display pages on your careers websites by editing your Customize: Careers Website Pages.

Requisition Standard Fields

The Standard Fields section shows all of the requisition fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Requisition Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date

- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Requisition Page Layouts.

Other Fields

This section allows editing of the following picklists:

- **Requisition expense type:** Used when logging requisition expenses to specify the type of expense.
- **Question Category type**: Used to organize your Online Question Library questions by category. For example, you could categorize screening questions for your accounting or financial positions under a category called Finance.

Customize: Offer Fields

To tailor Taleo Recruit offer letter records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each offer letter screen using Offer Page Layouts.

Offer Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Offer Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Offer Page Layouts.

Customize: Interview Fields

To tailor Taleo Recruit interview records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Interview Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Customize: Careers Website Pages.

Interview Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Interview Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Interview Page Layouts.

Customize: Feedback Fields

To tailor Taleo Recruit feedback records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Feedback Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Customize: Careers Website Pages.

Feedback Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Feedback Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Feedback Page Layouts.

Customize: Calendar Event Fields

To tailor Taleo Business Edition calendar event records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Calendar Event Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Careers Website Pages.

Calendar Event Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Calendar Event Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Calendar Event Page Layouts.

Customize: Reference Check Fields

To tailor Taleo Recruit reference check records for your organization, you can add Reference Check Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Customize: Careers Website Pages

Reference Check Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Reference Check Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text

- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Reference Check Page Layouts.

Customize: Background Check Fields

To tailor Taleo Recruit background check records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Background Check Page Layouts. You can also specify whether or not the field should be included as part of any online application forms on your careers websites by editing your Customize: Careers Website Pages

Background Check Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Background Check Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area

- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Recruit and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Background Check Page Layouts.

Customize: User Fields

To tailor Taleo Business Edition user records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each User screen using Customizing Page Layouts.

User Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

WARNING: Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

User Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist

- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Customizing Page Layouts.

Customize: Contact Fields

To tailor Taleo Recruit contact records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each offer letter screen using Contact Page Layouts.

Contact Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Contact Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal

- Currency
- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Contact Page Layouts.

Customize: Account Fields

To tailor Taleo Recruit account records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, and so on, for each offer letter screen using Account Page Layouts.

Account Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

Account Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency
- Date
- Picklist

- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

For fields of type **Picklist (multiple)** you can check the box to Set Maximum Selected Items Limit. This enables you to set a maximum number of items Users can choose from on picklists that allow multiple selections. For example, you may want to restrict a candidate to choosing only their top three preferred work Locations or restrict Employees to choosing their top two paths for development.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Account Page Layouts.

Customize: Task Fields

To tailor Taleo Business Edition task records for your organization, you can add custom fields as well as edit standard fields and picklists. Once created, you can reposition each field, show or hide them, change field properties such as whether or not it is required, etc, for each candidate screen using Task Page Layouts.

Task Standard Fields

The Standard Fields section shows all fields that are included by default. The **Action** column shows an **Edit** link if the standard field is a picklist allowing you to edit the possible values. Picklist values can be made Active or Inactive using the arrow icons. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

Task Custom Fields

The custom fields section shows any custom fields that have been created. To add a custom field, click the **New Field** link.

To add a custom encrypted field, refer to Creating Custom Encrypted Fields .

Step 1 of the new field wizard is where you choose the type of field to create and then click the **Next** button. You can create any of the following types of custom fields:

- Text
- Email
- URL
- Integer
- Decimal
- Currency

- Date
- Picklist
- Picklist (multiple)
- Check Box
- Text Area
- Web Link
- Encrypted Text
- Encrypted Date
- Encrypted Integer

Step 2 of the new field wizard asks for a Display Label for the field which is used to identify this field in any page containing it. The label must be 25 characters or less.

For some field types an Additional Information section contains optional field parameters that can be specified.

For fields of type **Text** a *Max length* property allows you to restrict the length of the input to a certain number of characters. The maximum allowed length is 100 characters. Also an *Input Mask* allows you to associate a mask that strictly enforces input. For example, a mask defined as ###-##-#### will only allow values in a valid social security number format. A mask defined as ENG-### will only allow values of the form ENG-123. Masking with leading zeros (00-) is not supported by Taleo Business Edition and will result in a validation error.

For fields of type **Picklist** and **Picklist (multiple)** you can specify each value of the picklist. Checkboxes are also included here allowing you to sort the picklist alphabetically and optionally use the first value in the list as the default selection.

Picklist values can be made Active or Inactive using the arrow icons. Values listed in the Inactive box are no longer available for selection by users, but where this value exists in a current record the value is maintained. This allows you to hide any outdated or no longer relevant values. Use the **Add new values** link to add new values and use the **Rename selected value** to change an existing picklist value.

> **WARNING:** Whenever a change needs to be made to an existing picklist value, the Rename selected value or Inactive action should be used. While Inactive values can be deleted, it is recommended that values be maintained as Inactive to avoid unnecessary data loss.

NOTE: When defining picklist values, you can define an unique integration code with each value for integration purposes. This integration code can be accessed via the Customize: Taleo Business Edition Web API to ensure proper value mappings with any other application.

For fields of type **Web Link** the *Web Integration Link Template* section is where you can specify a URL and use merge fields to use field values from that object as URL parameters.

Step 3 of the new field wizard allows you to choose which page layouts this field is added to. By default all of the page layouts are selected. You can always add or remove fields to each page layout in the future if you need to make changes; see Task Page Layouts.

Customizing Page Layouts

The **Page Layouts** section provides a way to customize and configure what Users will see on the various pages that comprise Taleo Business Edition. A full list of Page Layouts is provided in the table below.

Using the Page Layouts Customization page you can:

- Insert and remove fields
- Edit field properties and parameters, as appropriate to the field type
- Hide and unhide fields
- Reposition items on the page using standard drag & drop techniques

Following is a full list of the Page Layouts in your Taleo Business Edition system:

- General
- Candidate
- Requisition
- Offer
- Embedded Candidate
- Interview
- Feedback
- Reference Check
- Background Check
- Account
- Contact
- User
- Calendar Event
- Task

Assigning Role Based Page Layouts

Different page layouts can be assigned on a role and user basis in the **Roles** section of the **Users** tab. Once assigned, the Usage and Role Assignments display on the Page Layouts Customization page:

General Page Layouts

The Page Layout section provides a way to customize and configure all add/edit, view and search page layouts using an easy drag & drop interface.

- **My View**: Form used to insert and hide title sections on your My View page.
- **Outlook My View**: Form used to display a 'read only' view of the My View page in Outlook.
- **Pipeline**: Form used to insert and hide title sections on your Pipeline page.
- **Reports**: Form used to insert and hide the Reports that are visible from the Reports tab.

Candidate Page Layouts

The Page Layouts section provides a way to customize and configure all add/edit, view and search page layouts using an easy drag & drop interface.

- **Add/Edit Candidate**: Form used to Add and Edit Candidates
- **Outlook Add/Edit Candidate**: Form used to Add and Edit Candidates from Outlook.
- **Search Candidate**: Form used for Advanced Candidate Search
- **Submit Referral**: Form used to submit employee referrals
- **View Candidate**: Page used to display a Candidate's information

Requisition Page Layouts

The Requisition Page Layouts section provides access to the following page layouts:

- **Add/Edit Requisition**: Form used to Add and Edit Requisitions
- **Add/Edit Requisition Template**: Form used to Add and Edit Requisition Templates
- **Search Requisition**: Form used for Advanced Requisition Search
- **Search Requisition Template**: Form used for Advanced Requisition Template Search

- **View Requisition**: Page used to display a Requisition's information
- **View Requisition Template**: Page used to display a Requisition Template's information.

Automated Hiring Processes: Active Hire Controls

Active Hire Controls give you the power and flexibility to automate certain hiring processes in your Taleo Business Edition System. This enables you to easily manage the lifecycle stages of requisitions posted on your Careers Website, from their initial posting until the position is either filled or the number of candidates received is sufficient for your hiring needs. This provides you with tighter control over the hiring process and can simplify your ability to manage candidates and requisitions in high-volume environments.

By modifying the Requisition page layouts, you can configure your Taleo Recruit system to automatically:

- Change the status of a requisition based on the number of qualified candidates received
- Set the candidate's hire date when their status is changed to hired
- Decrement the number of openings when a candidate is hired
- Email non-hired candidates when the position is filled
- Change the status of non-hired candidates when the position is filled
- Change the status of a requisition when the position is filled

Setting up Automated Hiring Processes involves the following tasks:

- Configuring Page Layouts: Add/Edit Requisition and View Requisition (described in this section)
- Customizing the Active Hire Controls (refer to Customize Processes: Active Hire Controls

NOTE: These features default to disabled until an Administrator configures them in your system.

Configuring Automated Hiring Processes

The settings you choose in the Requisition page layouts determine the options available when a new requisition is created or an existing requisition is modified.

1. Go to **Administration > Customize Recruit**.
2. In the Customize Pages section, click **Page Layouts.**
3. In the Requisition Page Layouts section, locate the Add/Edit Requisition page layout and click **Edit** from the Action menu on the right.
4. If you are certain no users are accessing this page, click **Proceed** when you see this message: **WARNING** Modifying Page Layouts while users are accessing this page can result in data corruption. It is highly recommended that Page Layout modifications be made during off hours when users are not accessing this page.

5 Click **Unhide** on the Active Hire Controls [Placeholder] and its title.

6 Click **Edit** on the Active Hire Controls [Placeholder].

7 Click **Allow Changes** to give users assigned to this page layout the ability to modify the settings of new and existing requisitions. Refer to the table below for details.

8 Click **Default Settings** to specify whether the control is enabled by default when a new requisition or a new requisition template is created. Refer to the table below for details:

Setting	Description
Set Candidate Hired Date to Today's Date	Automatically populate the hired candidate's Hired Date with today's date.
Decrement Number of openings by 1	When a candidate is marked Hired, reduce the number of openings by one until there are zero openings. NOTE: You must select this option if you want to select any of the next three options, which are contingent on this option being enabled.
Email non-hired candidates on 0 openings	Send a system email to automatically notify candidates in specific statuses that the position has been filled when marking someone as hired reduces the number of openings to 0.
Change status of non-hired candidates on 0 openings	Move some of the remaining candidates who are in specific statuses into a different status when the number of openings is 0.
Change status of posting on 0 openings	The status of requisitions can be changed (for example, to "Filled") when the number of openings is 0.

9 Click **Submit** to save your settings to the Active Hire Controls [Placeholder].

10 Click **Save** to save your changes to the page layout.

11 Repeat these steps on the View Requisition page layout.

Offer Page Layouts

The Offer Page Layouts section provides access to the following page layouts:

- **Add Offer**: Form used to Add a new Offer Letter

- **Modify Offer**: Form used to Modify an existing Offer Letter
- **View Offer**: Page used to view Offer Letter details

Embedded Candidate Page Layouts

The Embedded Candidate Page Layouts is where you design the layout of the Rolling Entities:

- **Add/Edit Certificates and Licenses:** Form used to Add and Edit Certificates and Licenses
- **View Certificates and Licenses:** Page used to display Certificates and Licenses
- **Add/Edit Education:** Form used to Add and Edit Education
- **View Education**: Page used to display Education
- **Add/Edit References:** Form used to Add and Edit References
- **View References**: Page used to display References
- **Add/Edit Residence History:** Form used to Add and Edit Residence History
- **View Residence History:** Page used to display Residence History
- **Add/Edit Work History**: Form used to Add and Edit Work History
- **View Work History:** Page used to display Work History.

One you have designed your Embedded Candidate Page Layouts, you can display one or all of the Rolling Entities in your Candidate Page Layouts.

To display a Rolling Entity in a Candidate Page Layout, click **Edit** from the **Action** column for the Page Layout to which you want to add a Rolling Entity. Scroll to the 'Placeholder' for each Rolling Entity and click **Unhide**. Click **Edit** from the **Action** column to define the number of fields displayed and required for each Rolling Entity type.

The Minimum number of entries defines the number of data sets required for a Rolling Entity. The Default number of entries defines the number of data sets and corresponding fields that are displayed for a Rolling Entity. The Maximum number of entries defines the limit for the number of data sets for a Rolling Entity.

When setting a Minimum number of entries for a Rolling Entity, the required field denotation will only appear on the minimum required data sets. However, if a user should provide any data into a non-required Rolling Entity data set, the system will validate the provided data when the user attempts to save, and will denote and require all fields that are flagged as required in the page layout. The intent is that a certain number of the data sets are required; however, any optional data that is provided must be complete.

Interview Page Layouts

The Interview Page Layouts section provides access to the following page layouts:

- **Add/Edit Interview**: Form used to Add and Edit Interviews
- **View Interview**: Page used to display an Interview's information

Feedback Page Layouts

The Feedback Page Layouts section provides access to the following page layouts:

- **Add/Edit Feedback**: Form used to Add and Edit Feedback
- **View Feedback**: Page used to display Feedback information

Reference Check Page Layouts

The Reference Check Page Layouts section provides access to the following page layouts:

- **Add/Edit Reference Check**: Form used to Add and Edit Reference Checks
- **View Reference Check**: Page used to display Reference Check information

Background Check Page Layouts

The Background Check Page Layouts section provides access to the following page layouts:

- **Add/Edit Background Check**: Form used to Add and Edit Background Checks
- **View Background Check**: Page used to display Background Check information

Account Page Layouts

The Account Page Layouts section provides access to the following page layouts:

- **Add/Edit Account**: Form used to Add and Edit Accounts
- **Search Account**: Form used for Advanced Account Search
- **View Account**: Page used to display an Account's information

Contact Page Layouts

The Contact Page Layouts section provides access to the following page layouts:

- **Add/Edit Contact**: Form used to Add and Edit Contacts
- **Search Contact**: Form used for Advanced Contact Search
- **View Contact**: Page used to display a Contact's information

User Page Layouts

The User Page Layouts section provides access to the following page layouts:

- **Add/Edit User**: Form used to Add and Edit Users
- **Search User**: Form used for Advanced User Search
- **View User**: Page used to display a User's information

Calendar Event Page Layouts

The Calendar Event Page Layouts section provides access to the following page layouts:

- **Add/Edit Calendar Event**: Form used to Add and Edit Events
- **View Calendar Event**: Page used to display an Event's information

Task Page Layouts

The Task Page Layouts section provides access to the following page layouts:

- **Add/Edit Task**: Form used to Add and Edit Tasks
- **View Task**: Page used to display a Tasks's information
-

Repositioning and Drag & Drop

When editing page layouts you can reposition each element using simple drag & drop operations. Move your mouse over a field's label text, left click and drag the item until you see a black line where you would like to move the element, then release the mouse.

Title fields

You can create and edit title headers to create distinct sections in any page layout. To create a new title field, click **Insert** above where you would like the section title to appear. In the Insert Form Field page, enter the section title text in the Title field and click the **Save** button.

When editing a title field you can specify whether the fields below it (i.e. the fields in this section) should be arranged in a single or double column layout. You can also specify whether this section is the default section where newly created fields should be placed when they are added to this page layout.

HTML fields

You can create and edit HTML elements to contain each paragraph of text or HTML you would like to add into a page layout. To add a new HTML field, click **Insert** above where you would like that content to appear. In the Insert Form Field page, enter the content in the HTML field and click the **Save** button. Any HTML content is valid as long as you do not use relative URLs. Note that each page layout also contains a **Show actual HTML code** checkbox in case you enter HTML which distorts the design-time view of the page layout editor itself.

It is not required that you know HTML to make your Taleo Business Edition pages look polished. There is a WYSIWYG Editor in all HTML and HTML Template fields allowing you to enter and format text.

NOTE: To enter HTML codes (or more specifically JavaScript), Administrators must click the Source button on the top left of the editor window to preserve the HTML/JavaScript content properly. After you enter additional code click the Source button again to render the content.

Input fields

Before a new field can be added to a page layout, it must first be created if it does not already exist in the appropriate Fields section. For example, to add a new field to the Employee View/Edit pages, you must first create that field in the Employee Custom Fields section.

To add a field to the layout, click **Insert** above where you would like that field to appear. In the Insert Form Field page, select the field you would like to add in the Input field picklist and click the **Save** button. To avoid clutter we recommend that you not add too many fields or change to a multi-column layout format.

Specifying an IFrame

An IFrame is a browser window that is embedded into the current page, providing the user with a view of another web site. Within Taleo Business Edition, you can specify an IFrame to be placed within any page layout where you see the Iframe Placeholder as an insertable field type.

To set up an IFrame:

1. Click an **Insert** link at a page layout with an insertable field type.

   The *Insert Web Page Field* dialog appears.
2. Select **IFrame**.
3. Click **Next**.

   The *Insert Web Page Field: Step 2 of 2* dialog appears.
4. In the **Available Merge Fields** section, select the **Field Type** and **Field** from the corresponding drop-down lists.

   Depending on your selection in the **Select Field** drop-down list, the system displays a value in the **Copy Merge Field Value** field.
5. In the **IFrame placeholder** section, type the title header in the **Title** field.
6. Type the URL of the web site in the **IFrame Link** field.
7. Specify the height (in pixels) of the IFrame window in the **IFrame Height** field.
8. Click **Save**.

The IFrame will appear as a collapsed section on the page. When you open the section, the content from the IFrame link is displayed.

IE Sourcebar Candidate Form

The IE Sourcebar section allows you to modify the layout of your IE Sourcebar input form. Click on the **Edit** link to customize this web page.

Configuring Quick Views

Using Page Layout settings, Administrators control which data elements from a record display in Quick Views (see Using Quick Views).

1. From the main **Administration** tab, click **Customize Taleo Business Edition**.
2. In the Customize Pages section, click the **Page Layouts** link.
3. Click the **Edit** link for the Page Layout you want to modify, 'View Candidate' for example. By default, Quick Views will display the section identified by a check mark.

To change which section is displayed in a Quick View, click **Edit** next to the desired Quick View section, and select the checkbox for ‘Set for Quick View’. Click **Submit**, and then click **Save** to save your changes to the Page Layout.

The Quick Views feature is available with the following record types: Requisitions, Candidates, Candidate Work History Summary, Accounts, Contacts, Users, Calendar Events, Tasks, and Interviews.

Disabling Quick Views

If your preference is to disable Quick Views in your Taleo Business Edition system, you have the option to disable this feature at the user level or organization level.

To disable Quick Views at the user level, from the **My View** tab click **My Settings**. Deselect the check box “Quick Views appear when hovering on links to other entities.”

To disable Quick Views system-wide for all users in your organization, from the Administration tab click the **Organization Setup** link. Now, click the **System & Email Settings** link. In the User Interface Settings section, deselect the check box ‘Quick Views appear when hovering on links to other entities’. This action will remove the option to turn on / off Quick Views at the user level.

Activating the Outlook Plug-in for Scheduling

Additional feature available for Taleo Recruit Premium Service customers. Please contact your Sales Representative for more information.

The Taleo Recruit system has made it easier for users to schedule time with Interviewers. With the Outlook Plug-in for Scheduling, Recruiters and other users responsible for scheduling interviews can view Interviewers' Microsoft Outlook Free/Busy time from within the Taleo Recruit system, minimizing the back and forth typically encountered when scheduling interviews by allowing users to quickly see who is available and when.

Administrators can activate this feature for users by clicking the Customize Taleo Business Edition Recruit link from the main Administration page. In the Customize Pages section, click **Page Layouts**. In the Interview Page Layouts section, click the **Edit** link for the Add/Edit Interview Page Layout option. Now, click **Unhide** on the "Exchange Schedule Reader" field, then click **Save**.

Activating the PayScale Widget for Checking Market Compensation Ranges

PayScale provides online and real-time salary and compensation data from within your Taleo Recruit system. Administrators can activate the PayScale Widget for Checking Market Compensation Ranges by clicking the **Administration** tab and the **Customize Taleo Business Edition** link. From the "Customize Pages" section, click **Page Layouts.**

In the Requisition Page Layouts section, click **Edit** for the View Requisition option. Click the **Unhide** link on the "PayScale – Research Competitive Wage" field, and then click **Save**. Follow the same steps for the View Requisition Template option.

Customize: List Views

The **List Views** section allows you to customize how each list of items appears within your Taleo Business Edition system. You can add, remove, and reorder columns based on standard and custom fields as well as set up filters to display only a subset of items in the list. Different list views can be assigned on a role and user basis in the **Roles** section of the **Users** tab.

You can modify list view Names to be relevant for users. Usage defines the purpose or location of the list view and can not be modified. Filters used within list views are exposed on the list view table. Also, you can click on the tablet icon to view the roles and/or users assigned to each list view. The "All Users" section is a combination of users explicitly assigned and those individuals who are assigned based on role.

Candidate List Views

The Candidate List Views section provides access to the following list views:

Candidate Search Results: List of candidates shown for results of a candidate search

Candidates by Requisition: List of candidates shown when viewing candidates by requisition

Candidates Selector: List of candidates shown in the Select Candidate box

Candidates Tab: List of candidates shown when clicking on the Candidates Tab

My View "Active Candidates": List of candidates shown in the My View screen

Pipeline "Active Candidates": List of candidates shown in the Pipeline screen

Requisition List Views

The Requisition List Views section provides access to the following list views:

Job Library: List of requisition templates shown in the Job Library screen

My View "My Requisitions": List of requisitions shown in the My View screen

Pipeline "My Requisitions": List of requisitions shown in the Pipeline screen

Requisitions Search Results: List of requisitions shown for results of a requisition search

Requisitions Selector - OPEN ONLY - Referral Portal: List of requisitions shown in the My View Submit Referral screen when clicking on the Requisitions Add button and the 'Show only Open requisitions' checkbox is selected

Requisitions Selector - All Users: List of requisitions shown in the Select Requisition box

Requisitions Tab: List of requisitions shown when clicking on the Requisitions Tab

View Candidate 'Requisition Table': Filters the requisition table within a candidate record to show only those requisitions and candidates for whom the current user is associated

Work History List Views

The Work History List Views section provides access to the following list views:

Work History Summary: Work history summary section when viewing a candidate record

Interview List Views

The Interview List Views section provides access to the following list views:

Interviews List: List of interviews shown in the My Interviews screen

Interviews Selector: List of interviews shown in the Select Interview box

Feedback List Views

The Feedback List Views section provides access to the following list views:

Feedbacks List: Summary list of feedback for candidates interviewed

Account List Views

The Account List Views section provides access to the following list views:

Accounts Search Results: List of accounts shown for results of an account search

Accounts Selector: List of accounts shown in the Select Account box

Accounts Tab: List of accounts shown when clicking on the Accounts Tab

Contact List Views

The Contact List Views section provides access to the following list views:

Contacts Scheduling Selector: List of contacts with valid email addresses used for Insight report distribution.

Contacts Search Results: List of contacts shown for results of an contact search

Contacts Selector: List of contacts shown in the Select Contact button

Contacts Tab: List of contacts shown when clicking on the Contacts Tab

User List Views

The Users List Views section provides access to the following list views:

Users Search Results: List of users shown for results of a user search

Users Selector: List of users shown in the Select User box

Users Tab: List of users shown when clicking on the Users Tab

Task List Views

The Task List Views section provides access to the following list views:

Tasks: List of users shown when clicking on the Tasks icon from the My View page

Customizing List Views

When editing list views you can choose which fields are shown as columns in the list by moving fields from the “Available” list to the “Added” list. The Up and Down arrows allow you to change the order in which the columns appear. Any custom and standard fields associated with that object type can be used as columns in a list view.

List views can also be filtered by up to three different fields to hide certain data based on specific criteria. For example, filtering the Candidates Tab list view by the “Current User Owner” filter will show users only those candidates that are attached to requisitions they own when they click on the Candidates Tab.

Once a filter field is selected, the List View allows you to customize the values for that field that should be shown in the view. For example, by filtering the Candidates Tab list view on “Rank (%)”, you can then specify a range such as From: 75%, To: 100% -- this will filter out all candidates who do not have a Rank (%) value between 75 and 100%.

Assigning an Ad Hoc search to List Views

Taleo Business Edition Administrators can add Ad Hoc filters to any List View. This allows users to quickly refine a List View by field or category. From the main Administration page, click **Customize**. Click the **List Views** link in the Customize Pages section.

In this example, we will add an Ad Hoc filter to the Job Library page. In the Requisition List Views section, click **Edit** for the Job Library view. This will open the Customize List View Job Library page. In the “Select your List View Search Page Layout” section, you can apply any Search page layout to the top of your list view. Next to Search, select **Search Requisition Template** and **Next**. You are asked to select your default sorting behavior, then click **Save**.

Now, click on the main Requisitions tab and select **Job Library**. You will see that an Ad Hoc filter has been added to the top of the Job Library list view. In this case, users can now sort the Job Library list by Department.

Ad Hoc filters do NOT override the current filters of a list, but rather refine the search by including whatever additional search criteria is identified in the List View Search. The list view results will satisfy all filters applied to that list view.

Assigning Smart Views to List Views

Smart Views give Taleo Business Edition Business Edition users the power to view and sort lists in various ways to increase productivity.

Historically, the Taleo Business Edition system allowed one default view for Candidates, Requisitions, Accounts, Contacts, and Users based on a user's assigned role (Administrator, Recruiter, Hiring Manager, Employee, etc.). With Smart Views, users can have access to multiple views and can toggle between views to quickly access information at a glance.

To set up Smart Views for users, the Taleo Business Edition Administrator must modify two settings:

First, from the main Administration page, click the **Customize Taleo Business Edition** link. In the Customize Pages section, click the **List Views** link. In each of the List Views sections, the Taleo Business Edition Administrator can add alternate list views. For example, to create an alternate Candidate View, click the drop-down arrow and select **Add Version** to the right of the Candidates Tab option. Give the new List View a name, then select the fields that you would like to include in the view by moving fields from the "Available" list on the left to the "Associated" list on the right. Select the preferred filters, and select whether you want the Search Candidate section to appear as part of the new List View and click **Next**. Now, you will need to select the filter values for the list view, and the default sorting behavior. Click **Save**.

With the new view(s) added, next you must add the view(s) to the User List View. From the main Users tab, click a user **Name** link. This will bring you to the user's profile page. At the top of the user page, click the **List Views** button. You can now assign one or multiple List Views for each section. Where you have added additional List Views, you will now have a multi-select box rather than a single-select box. To select more than one view for this user, hold down the CTRL key as you make your selections, and then click **Save**.

When this user goes to any main page view, they will now be able to toggle between views where new List Views have been added by clicking on the drop-down box at the right-top corner of the List View.

Job Library Administration Controls Overview

The Job Library allows Administrators to assign Requisition Templates in a repository that Hiring Managers and Recruiters can use to initiate new requisitions. (See Job Library Overview). To enable Job Library controls and permissions, you will need to modify Menu Items, Role Level Access, Access Control Flags, Permissions, and Page Layouts.

Job Library Menu Items

On the **Requisitions** tab there is a new menu item for **Job Library**. The ability to add or remove this menu item resides within the Role. It can also be added to the Users Page Layout to allow user by user permissions.

Job Library Role Level Access

From the **Users** tab, click **Roles**. For each Role, you have an **Assign Access Control** link. Select the check boxes "Can Create New Requisitions" and "Can Create Requisitions through Job Library" to activate these options. This action allows or restricts the creation of requisitions from the New Requisition or Job Library tabs based on a user's assigned role. For example, if you want Hiring Managers to create new requisitions from the Job Template only, de-select the “Can Create New Requisitions” option, thus enforcing the creation from the Job Library.

Job Library Access Control Flags

To control New Requisition Access, Job Library Access, and Create New Templates Access by user, Administrators must add these fields to the User Page Layout. Click **Administration**, and then click **Customize**. Click the **Page Layouts** link. In the Users Page Layout section, click **Edit** for the Add/Edit User option. Determine where you want these fields to reside within the User Page Layout and click **Insert**. Select the **Input Field** option and **Next**. You will see that the New Requisition Access, Job Library Access, and Create New Templates Access options are available. Add each in turn to your User Page Layout and click **Save**. You will want to follow the same steps to add these fields to the User Page Layouts - View User screen.

Job Library Permissions

Now that the New Requisition Access, Job Library Access, and Create New Templates Access fields have been added, click the **Users** tab. Now, click the **Name** of anyone in your Users list view. You will see that the New Requisition Access, Job Library Access, and Create New Templates fields are now visible within the User profile. Click **Edit** to make the desired selections for each user. Alternatively, you can click on the **Users** tab and the **Role** link to standardize this feature for each Role, with the exception of “Create New Template Access” which is a user based permission.

NOTE: Administrators cannot over-ride the access that is given via the Role assignment of the user.

Job Library Page Layouts

When assigning page layouts to either a Role or a User, there are three page layouts to be assigned: Add/Edit Requisition, View Requisition Template, and Search Requisition Template. These page layouts conduct themselves in the same fashion as any other page layout allowing for alternate versions to be created and assigned to Roles & Users.

The Requisition Template Add/Edit layout exhibits the same behavior as Add/Edit Requisition, except that Owners can not be a required field and the Page Title is Requisition Template.

The View Requisition Template Page Layout differs from the Requisition Page in the items offered in the Menu Bar at the top of the page. All other elements are unchanged.

The Search Requisitions Template can be included in the Job Library list view allowing for Ad Hoc filtering of the List View contents. The Search Requisition Template Page Layout differs from the Search Requisition Page in that there are no required fields in Ad Hoc search. Administrators are able to identify which Ad Hoc search page they would like to include in a list view by selecting it in the Customize List View page. The List View Search Page drop-down will have 'None' as the default option.

There is also a List View to be assigned called Job Library. The assignment of a Job Library page layout at the user level will over-ride any role based setting.

Customize: Careers Website Pages

The **Customize Website Pages** section provides access to the following careers website pages which you can customize:

- **Add to My Jobs**: Page displaying list of jobs candidate has applied for
- **Application Form**: Online application form for candidates and employees, including resume upload and LinkedIn Profile, and data collection settings for certificates and licenses, education, references, residence history, and work history.
- **Certificate and Licenses Pages:** Certificate and License section of the online application form.
- **Education Pages:** Education section of the online application form.
- **General application - Thank You**: Thank you page shown to new candidates after they apply for general consideration
- **Instant Schedule Thank You**: Thank you page shown to new candidates when they schedule an instant appointment (For Premium customers using the Taleo Scheduling Center.)
- **Job Search**: Main careers website job search entry page, including LinkedIn settings
- **Job Search Results**: Page displaying list of job search results. In the **"**Job Search Result**"** screen, Result Table Begin [Placeholder] you can configure "Default sorting column" order by clicking the Edit Link.
- **Not Qualified Thank You**: Thank you page shown to new candidates who do not meet the defined position criteria
- **References Pages**: References section of the online application form.
- **Requisition View**: Requisition details page. In the **"**Requisition View**"** screen, Apply for this Position [Placeholder] you can Hide "Send to Friend" button by clicking the Edit Link.
- **Residence History Pages**: Residence History section of the online application form.
- **Returning Applicant**: Main page for returning applicants. In the **"**Returning Applicant**"** screen, Applicant status table [Placeholder] you can Hide candidate's status and Hide actions column by clicking the Edit Link.
- **Thank You**: Thank you page shown to new candidates after they apply for a specific Requisition

- **Update Candidate Information:** When a candidate chooses the Update My Information option, an application form containing limited editable fields is invoked. This enables you to control the information you allow candidates to edit. Specify the Update Candidate Information page layout here to use an application form with limited fields; for example, you might only want the candidate to be able to change their contact information. See Returning Applicants.
- **Work History**: Work history section of the online application form

To include the certificates and licenses, education, references, residence history, and/or work history Rolling Entities in your Application Form(s), click the **Edit** from the **Action** column for the Application Form in which you want to display a Rolling Entity. Scroll to the 'Placeholder' for each Rolling Entity and click **Unhide**. Click **Edit** from the **Action** column for each Placeholder to define the number of fields displayed and required for each Rolling Entity type.

The Minimum number of entries defines the number of data sets required for a Rolling Entity. The Default number of entries defines the number of data sets and corresponding fields that are displayed for a Rolling Entity. The Maximum number of entries defines the limit for the number of data sets for a Rolling Entity.

When setting a Minimum number of entries for a Rolling Entity, the required field denotation will only appear on the minimum required data sets. However, if a candidate should provide any data into a non-required Rolling Entity data set, the system will validate the provided data when the user attempts to save, and will denote and require all fields that are flagged as required. The intent is that a certain number of the data sets are required; however, any optional data that is provided must be complete.

Enabling Upload of Resume and LinkedIn Profile

From the Careers Website Pages section, you can give candidates the ability to upload their resume, or point to their LinkedIn profile, and the system will automatically parse their resume or profile and auto-populate the application record.

In the External Application Pages section, click **Edit** for the career website(s) where you would like to enable this feature. Click the **Edit** link to the right of the Upload Resume and LinkedIn profile images.

Select the checkbox ‘Allow Resume Parsing’ to enable parsing of the resume. This selection allows candidates to upload their resumes, which then automatically parses information from the resume to populate the application form. In the Parsing Details section, select the appropriate checkboxes to parse the desired data.

NOTE: To capture the resume attachment in addition to parsing the resume, the Resume Attachment Field must be visible and set to required on the Application form.

Select the checkbox ‘Allow LinkedIn Profile Parsing’ to enable parsing from a LinkedIn Profile. This selection allows candidates to use their LinkedIn Profile to populate the application form. Additionally, select the checkbox ‘Copy profile into text resume section of application' to copy the profile into the resume text section. In the Parsing Details section, select the appropriate checkboxes to parse the desired data. Click **Save**. Click **Save** again to save the changes to your careers website page.

Enabling Employee Profile Parsing

Employees can automatically populate application forms with information from their Employee records when they apply for internal opportunities posted on any of your Careers Websites. Data from the Employee record is parsed into the application fields, providing ease-of-use and a positive user experience for employees.

To enable this functionality:

1. From the Administration tab, click Customize Recruit.
2. In the Customize Pages area, click Careers Website Pages.
3. In the Application Form [Placeholder] section, click the **Edit** link to the right of the Employee Record profile image.
4. In the "Allow Employee Profile Parsing" section, select the Parsing Details checkboxes to. It is recommended that you select all options; however, only the Rolling Entities that are present on your Application Form are updated when the employee uses this feature.
5. Click Save and the Employee record option becomes visible.

Customizing Pages

Before starting the web page customization process, the following planning activities are recommended:

1. Decide what data you would like to capture or present in the form. If you need to capture or present more data beyond standard candidate or requisition fields, you will need to add Candidate Custom Fields or Requisition Custom Fields.
2. Decide how you want to organize your form. The form builder allows you to add section Titles. List out the different sections you would like in this form.
3. Do you need to add any text, images, links or other HTML code? Now that you are prepared, click the **Edit** link next to the form you would like to customize to go to the form builder.

Title fields

You can create and edit title headers to create distinct sections in any page layout. To create a new title field, click **Insert** above where you would like the section title to appear. In the Insert Form Field page, enter the section title text in the Title field and click the **Save** button.

When editing a title field you can specify whether the fields below it (i.e. the fields in this section) should be arranged in a single or double column layout. You can also specify whether this section is the default section where newly created fields should be placed when they are added to this page layout.

HTML fields

You can create and edit HTML elements to contain each paragraph of text or HTML you would like to add into a page layout. To add a new HTML field, click **Insert** above where you would like that content to appear. In the Insert Form Field page, enter the content in the HTML field and click the **Save** button. Any HTML content is valid as long as you do not use relative URLs. Note that each page layout also contains a **Show actual HTML code** checkbox in case you enter HTML which distorts the design-time view of the page layout editor itself.

Input fields

Before a new field can be added to a page layout, it must first be created if it does not already exist in the appropriate Fields section. For example, to add a new field to the Candidate Edit and Candidate View pages, you must first create that field in the Candidate Custom Fields section.

To add a field to the layout, click **Insert** above where you would like that field to appear. In the Insert Form Field page, select the field *you* would like to add in the Input field picklist and click the **Save** button.

NOTE: All input fields must be located between any “XX begin” and “XX end” placeholders if they exist.

Returning Applicants

You can control which fields a returning applicant is allowed to update when they come back to your Careers Website to modify their Candidate information. Returning applicants receive the option to “Update My Information.” When clicked, a new application form is invoked, which contains limited editable fields. This enables you to control the information you allow candidates to edit.

With the Update Candidate Information page layout, you can remove fields that you do not want a returning candidate to have access to modify. For example, you might only want the candidate to be able to change their contact information.

NOTE: The Update Candidate Information page layout by default is configured to mimic your existing General Application form.

Proceed as follows to modify the Update Candidate Information page layout:

1. Go to **Administration** > **Customize Recruit.**
2. In the Customize Careers Website Pages section, click **Careers Website Pages.**
3. Scroll to the **Update Candidate Information Pages** section.
4. For the Update Candidate Information page layout, click **Edit** from the Action menu on the right.

5 Click **Remove** to delete fields on this page layout, according to your business objectives, leaving only the fields you want to allow a returning candidate to modify after a hiring decision is made. For example, remove any fields that would materially affect your decision to hire a candidate.

NOTE: A best practices recommendation is to only include Contact fields on this page layout.

6 Click **Save**.

Supporting Requisition Merge Fields on Thank you Pages

To support partner integration, the General Application Thank You page, Instant Schedule Thank You page, Not Qualified Thank You page, and Thank You page supports requisition merge fields.

Repositioning and Drag & Drop

When editing pages you can reposition each element using simple drag & drop operations. Move your mouse over a field's label text, left click and drag the item until you see a black line where you would like to move the element, then release the mouse.

Creating Multiple Versions of Forms

Additional features available in **Plus** and **Premium** Services

Taleo Recruit Plus Service and Premium Service allow you to create multiple versions of each careers site form. This can be useful if you would like to associate different forms with different careers sites (see Customize: Manage Careers Websites), or different application forms with different requisitions (see Posting to a Website).

To create a new version of a careers site form:

1 Go to the Administration tab

2 Click “Customize Taleo Business Edition”

3 In the Customize Careers Website Pages section click the **Careers Website Pages** link.

4 Click the **Add Version** link in the **Action** column next to the form you would like to create a copy of.

5 Choose a name for the new form.

6 Edit the new form by clicking the **Edit** link next to its name in the main Web Forms screen.

Now when you edit the settings for your Customize: Manage Careers Websites you are able to select which form is used on each specific site.

Customize: Manage Careers Websites

The **Careers Website** page allows you to setup and configure your Taleo Recruit careers website settings for proper behavior and to ensure consistent look and feel with your company's website.

Settings

Click the **Edit Settings** link next to a careers website to edit that site's settings. There are three sections in the careers site settings page, each field is summarized in the following tables:

Careers Website Information

Name Unique name identifying this careers website. This is used to show where each requisition is posted to.

Source Default candidate Source applicants should be associated with when they apply through this site if no Source value is selected.

Autoreply Template The System Email Template sent to candidates when they apply through this careers site.

Application Updated Template The System Email Template sent to requisition owners informing them that a candidate has updated their application.

Rows per page in search results Determines how many job search results should be shown to candidates when the search for jobs on this careers site (options are All, 10 per page, or 20 per page).

Locale You can select a different locale to display dates and times on the careers site in a format most relevant to the location the careers site serves.

Radius Search Select a country to enable Radius Search on your Careers Website, allowing candidates to search job openings within a specified distance of a Location. (If you enable Radius Search, be sure the ZIP/Postal code field is accurate in your Locations, as the Location the requisition is associated with will drive the Radius distance. Locations are configured in the Organization Set up page accessible from the Administration tab. You also need to add the ZIP/Postal code to your Search Jobs page.)

NOTE: The Radius Search supports only one Country per Careers Website.

Use Taleo Business Edition style buttons Specifies whether or not Taleo Business Edition-style buttons should be used on the career site; if not checked, regular HTML form buttons are used.

Show RSS button on search results page Specifies whether or not you want to make an RSS (Rich Site Summary) feed available.

Show Facebook button on search results page allows users to select jobs from your careers site and advertise them on Facebook.

Use HTTPS protocol Specifies whether your careers site is delivered over an encrypted Secure Socket Layer (SSL).

General Application

Enable general application form This specifies whether or not you want to allow candidates to add their information to your Taleo Recruit system without specifying a particular job opening. Check this box to allow general applications through this site.

Send notification email to If general applications are enabled, any email addresses specified here are notified whenever a general application is submitted.

Use Email Template to specify the template that is used to notify recipient(s) that a General Application has been submitted.

Web Pages

Add to My Jobs Page displaying list of jobs candidate has applied for

Application Form Specifies which application form to use by default on this careers site.

Instant Schedule Thank You Thank you page shown to new candidates when they schedule an instant appointment (For Premium customers using the Taleo Scheduling Center.)

Job Search Specifies which job search form to use on this careers site.

Job Search Results Specifies which job search results form to use on this careers site. In the **"**Job Search Result" screen, Result Table Begin [Placeholder] you can configure "Default sorting column" order by clicking the Edit Link.

Not Qualified Thank You Specifies which not qualified thank you message form is displayed to new candidates when they apply on this site and do not meet the defined job criteria.

Requisition View Specifies which requisition view form to use on this careers site. In the "Requisition View" screen, Apply for this Position [Placeholder] you can Hide "Send to Friend" button by clicking the Edit Link.

Returning Applicant Specifies which application form to use when candidate edits his/her information on this careers site. In the "Returning Applicant" screen, Applicant status table [Placeholder] you can Hide candidate's status and Hide actions column by clicking the Edit Link.

Thank You Specifies which thank you form is displayed to new candidates after they apply via this careers site.

Locations

You can limit the locations candidates can search by on this careers site by moving desired locations from the "Available" column to the "Assigned" column. If no locations are assigned, requisitions for all locations are available on this careers site.

Access Control

You are able to take security one step further on this career website by controlling access from external Internet Protocols (IP) sources. You can enter the allowed IPs into the box below to limit the external sites that can come into this career website. If the box is left blank, all IPs will able to enter the career website.

Header and Footer

The Header & Footer page is used to ensure that your Taleo Recruit careers site fits in with your company's overall website look and feel.

Click the **Header & Footer** link next to a careers website to edit that site's settings. Each page of your careers website is surrounded by the header and footer HTML defined in the text areas on this page labeled “Header” and “Footer”. Instructions for adding and formatting header and footer content are included on this page.

Important: Make sure to use fully qualified URLs (rather than relative paths) and include the default style element in the header.

Creating Multiple Careers Websites

Additional features available in **Plus** and **Premium** Services

With Taleo Recruit Plus Service or Premium Service, your organization can have multiple Taleo Recruit-powered careers websites. For example, you may need separate careers websites for salaried positions, internal openings, international opportunities, university recruiting, internships, etc.

Plus Service customers can have up to 3 separate careers sites. Premium Service customers can have an unlimited number of distinct careers sites.

To create a new careers website

1. Go to the Administration tab.
2. Click **Customize Taleo Business Edition**.
3. In the Manage Careers Websites section click the **Add Careers Website** link.
4. Provide a unique name for the site and select all of the desired careers site settings.
5. Click **Save** when finished.

Now when you add or edit a requisition you are able to choose whether or not it is posted on this new careers website.

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Customize: System Templates

In the Customize System Templates section you will see options for **System Email Templates, Feedback, Reference** and **Offer Templates**, and **Email Reminders .**

System Email Templates

System Email Templates define the content of automated email messages sent by your Taleo Business Edition system. Brief descriptions of each template and the context in which it is used are included below. Review these descriptions, then review the content of each email template by clicking the **Edit** link next to the template name. Make any necessary changes and click the **Save** button when finished.

NOTE: Merge fields are used to merge data from your Taleo system into outbound emails. For example, **<<COMPANY_NAME>>** will be replaced by your company name when the email is sent. A full list of available merge fields is shown in each template edit screen.

Merge Fields Language Options

Email template merge fields can be localized into English, French, German, and Spanish languages.

Proceed as follows to specify the language for merge fields used in System Templates:

1. From the main Administration page, click Customize Taleo Business Edition Recruit.
2. In the Customize System Templates section, click System Email Templates.
3. Click Edit to modify the email template.
4. On the Edit System Template page, open the Merge Fields Language drop-down menu and select the language in which you want the merge fields to display.
5. Click Save.

Email Template Descriptions

Assign Agency to an Open Requisition Notification Sent when a new requisition is created and an agency is specified; sent to the email address contained in the User record associated with the agency.

Candidate Auto-reply Sent to each new candidate received via email.

Candidate Interview Email Sent to a candidate when he/she is scheduled for an interview.

Candidate Rejection Email Sent to a candidate when he/she is rejected by a requisition owner.

Candidate Submitted for Requisition Sent to requisition owners when a new candidate applies.

Candidate Submitted for General Application Sent to specified recipients when a new candidate applies using the General Application form.

Candidate Updated Application Sent to requisition owners when a candidate updates his/her information on the careers site.

Feedback Reminder Sent to interviewers who have not yet submitted feedback on a completed interview.

Feedback Submitted Sent to interviewers and requisition owners to notify participants when an interviewer has submitted feedback.

Interview Accepted Sent to interviewers to notify participants when an interviewer has accepted a schedule.

Interview Cancelled Sent to interviewers to notify participants when an interview is cancelled.

Interview Created Sent to interviewers and requisition owners to notify participants when an interview has been scheduled.

Interview Declined Sent to interviewers to notify participants when an interviewer has declined a schedule.

Interview Reminder Sent to interviewers as notification of an upcoming interview.

Interview Updated Sent to interviewers and requisition owners to notify participants when an interview schedule has been modified.

IP Restriction Lockout Notification Sent to an emergency contact user as part of the IP Blocking feature. This email provides a link enabling emergency contacts to login to the Taleo system and reset IP restrictions to safeguard against unintentional blocking.

New Employee Reminder Sent to HR, IT, hiring managers, and others to serve as notification of a pending new employee start date.

Offer Approved Sent to requisition owners and offer approvers to notify each user when an offer has been approved.

Offer Rejected Sent to requisition owners and offer approvers to notify each user when an offer has been rejected.

Offer Request For Approval Sent to offer approvers requesting approval or rejection of a proposed offer letter.

Offer Request For Approval Over Email Sent to offer approvers requesting approval or rejection of a proposed offer letter via Email or a PDA.

Referral Notification Sent to requisition owners when a candidate has been referred by an employee.

Requisition Approval Notification Sent to requisition owners and approvers to notify each user when a requisition has been approved.

Requisition Created Sent to requisition owners and approvers to notify each user when a requisition has been created.

Requisition Deleted Sent to requisition owners and approvers to notify each user when a requisition has been removed from the system.

Requisition Rejection Notification Sent to requisition owners and approvers to notify each user when a requisition has been rejected.

Requisition Request For Approval Sent to requisition approvers requesting approval or rejection of a proposed requisition.

Requisition Request For Approval Over Email Sent to requisition approvers requesting approval or rejection of a proposed requisition via email or a PDA.

Requisition Updated Sent to requisition owners and approvers to notify each user that a requisition has been modified.

Scheduled Report E-mail (Insight only) Sent to report recipients when a scheduled report is run.

Scheduled Report Expiry (Insight only) Sent to a report schedule owner to notify them a scheduled report is about to expire.

Scheduled Report Emailing Failed (Insight only) Sent to a report schedule owner to notify them that a report they scheduled for email delivery cannot be delivered because it exceeds the 10MB size restriction. This is an automated email that can not be disabled or assigned.

Sending Report File Failed Notification (Insight only) Sent to an administrator to notify them that, due to an FTP server failure, a scheduled report can not be delivered via FTP. This is an automated email that can not be disabled or assigned.

Send Candidate Data Used in Email wizard when sending a candidate's resume to another user or external recipient.

Send Candidate Link Used in Email wizard when sending a link to a candidate's View page to another user.

Send Requisition Data Used in Email wizard when sending requisition information to another user or external recipient.

Send Requisition Link Used in Email wizard when sending a link to a requisition's View page to another user.

Task Assigned to User Sent to notify a user that a task has been assigned to them.

Feedback Template

The feedback template defines the structure of the interview feedback form used by interviewers to report interview results. Click the **Edit** link to modify this template. (Note that no template tokens should be used in this template.)

Reference Check Template

The reference check template defines the structure of the reference check form used by hiring managers, recruiters and HR professionals to report reference check results. Click the **Edit** link to modify this template. (Note that no template tokens should be used in this template.)

Offer Templates

Offer templates are MS Word (RTF) or plain text documents used to define the content of an offer letter. Any number of offer letter templates can be defined to cover, for example, full time employment, contractors, consultants, etc. A generic MS Word offer template for full time employment is included by default. Edit or replace this template by clicking the **Edit** link. Add new offer letter templates by clicking the **Add Offer Template** link.

When an offer is created for a candidate, the creator can choose the appropriate offer template defined here. As with email templates, each offer template can make use of merge fields to merge Taleo Recruit data into the generated offer letter. A full list of available offer merge fields is shown in each offer template edit screen.

Assign System Templates

By default your Taleo Business Edition system uses each email template described above to automatically send messages to users and candidates when appropriate. To change which templates are used for each situation, or disable certain automated emails, click the **Assign System Templates** link at the top of the Templates list.

The System Templates screen shows the default action-template mappings. To change the template used for a given situation, select the desired template from the appropriate drop-down box. To preview a selected template, click the **View** link to the right of the drop-down box.

To turn a specific automated email off, select **Do not send email** from the drop-down box.

To add a new email template, click the **Add Template** link. A Display Name, Subject, and Body are required by default. To use merge fields, click Select Field Type, Select Field, and then Copy Merge Field Value into the appropriate location in the subject or body of your email. You can also flag any system email template as important by checking the “Mark as High Importance” box. Click **Save**.

Image Management

Your company logo and other images are now supported by Taleo Business Edition. Administrators can upload image files into a repository and reference them as images on Page Layouts, on Configurable Forms, and in Email Templates.

NOTE: Images are not supported in List Views.

NOTE: The re-branding feature is only available to Taleo Business Edition Premium subscribers. For details and instructions see Re-branding Taleo Business Edition.

Uploading Images

Proceed as follows to upload images into your Taleo Business Edition system:

1 Prepare the image file to ensure that it:

- Is the correct dimension to fit properly on the web pages on which it will be viewed
- Does not exceed 4MB
- Is one of the following supported file types: GIF, PNG, JPG and BMP
- Uses a transparent background to avoid the image being surrounded by a white box

2 Login to Taleo Business Edition as an Administrator.

3 Upload the image file:

   a Go to **Administration > Customize Recruit.**

   b In the Image Management section, click **Manage Images**.

   c Click **Add Image**. The following page displays; read and follow the instructions provided:

   d In the Select File area, click **Browse** and then navigate to the custom logo file on your hard drive.

   e Enter a **Title** and **Description** for the image file.

   f Enter **Alternate Text**, such as your company name, to be used in the event that the image file becomes unavailable.

   g Click **Upload**.

Adding Images to Page Layouts

Images can be accessed via the Template HTML option on Page Layouts. Click the **Page Layouts** link and click **Edit** from the **Action** column for the Page Layout to which you would like to add your image file. Decide the placement of your image and click **Insert**. Select the **Template HTML** option, and click **Next**. Select the Images option from the field type drop-down box and select the image you would like to display in the Page Layout. Copy the merge field value into the Editor window, and click **Save**. Click **Save** again to save the changes to the Page Layout. Your image(s) now appears on the Page Layout to which it has been added.

Adding Images to Forms

Images can be accessed via the Template HTML option in Taleo Recruit on Configurable Forms. Click the **Configurable Forms** link from the Customize Forms section, and click **Edit** from the **Action** column for the Form to which you would like to add your image file. Decide the placement of your image and click **Insert**. Select the **Template HTML** option, and click **Next**. Select the Images option from the field type drop-down box and select the image you would like to display in the Form. Copy the merge field value into the Editor window, and click **Save**. Click **Save** again to save the changes to the Form. Your image(s) now appears on the Form to which it has been added.

Adding Images to Emails

Images can be accessed via the Template HTML option in Email Templates. Click the **System Email Template**s link from the 'Customize System Templates section', and click **Edit** from the **Action** column for the email template to which you would like to add your image file. Decide the placement of your image and click **Insert**. Select the **Template HTML** option, and click **Next**. Select the **Images** option from the field type drop-down box and select the image you would like to display in the email. Copy the merge field value into the Editor window, and click **Save**. Click **Save** again to save the changes to the Email Template. Your image(s) now appears in the Email Template to which it has been added.

NOTE: Please be aware that email recipients may block images from being displayed when viewing email.

Re-branding Taleo Business Edition

If you are a subscriber of Taleo Business Edition's Premium service, you can re-brand your Taleo Business Edition system with your own custom logo appearing in the upper left corner instead of the Taleo logo. To become a subscriber, contact your Customer Sales Manager at tbecsmsales@taleo.com.

Proceed as follows to re-brand your Taleo Business Edition system:

1. If you have not already uploaded your custom logo file, do so now using the procedure in Uploading Images.
2. Go to **Organization** > **System & Email Settings.**
3. In the System Settings section, open the **Use Custom Logo** menu and select the logo you uploaded in step 1.
4. If you want to resize the image automatically to the correct dimensions, click Resize to Taleo recommended size.
5. Click Save.
6. Your custom logo now displays in the upper left corner of your Taleo Business Edition system for all users.

Customize: Configurable Forms

Taleo Business Edition allows you to create and customize forms, including Candidate, Requisition, Employee, Government Tax Forms based on Page Layout design.

From the main Administration page of your Taleo Business Edition system, click the **Customize Taleo Business Edition** link. You will see the section “Customize Forms”. Click the **Configurable Forms** link, which displays a list of default forms.

Candidate Data Forms

The Printable Application Form requires the selection of a single requisition. The Candidate Data Sheet is not specific to a requisition, but rather a summary of the candidate record.

The Printable Application Form can include both requisition and candidate fields, including responses related to a particular requisition’s questions. The Page Layout of the Printable Application Form is configurable and is specific to a candidate’s application for a specific Requisition.

The Candidate Data Sheet can include only candidate fields. The Page Layout of the Candidate Sheet is configurable, and allows for the inclusion of the Requisition by Candidate table, which presents a summary of all the requisitions to which a candidate has applied or has been considered.

Additionally, in the Candidate Forms section you will see one or more sample forms that can be used as templates to build new forms. Existing forms can be modified and new versions may be added by clicking the **Edit** and **Add Version** links from the Action column.

Requisition Forms

The Requisition Data Sheet is a printable requisition form. The Page Layout of the Requisition Data Sheet is configurable.

The Requisition Data Sheet can be modified or new versions may be added by clicking the **Edit** and **Add Version** links from the Action column.

Government and Tax Forms

Taleo Business Edition also stores government I9 and W-4 tax forms.

Assigning Access for Configurable Forms

Forms have their own Access Control. This prohibits users from accessing confidential information within Forms if they do not have permission to see it. When a user clicks the Forms button, the list of available Forms are determined by a user's assigned access. By default, only Taleo Business Edition Administrators have access to Forms. To allow additional users to access Forms, an additional step is required. Users who do not have appropriate permissions to access Forms will simply not see the Forms button.

To grant access to Forms, from the main Administration tab, click **Customize Taleo Business Edition**. From the Custom Forms section, click the **Assign Access Control** link. Select the check box for each Role you want to grant access to each Form. To grant an individual user access to a form, regardless of their Role, click the **Select** link in the Selected Users column. Move the users from the "Available" list on the left to the "Associated" list on the right, and then click **Save**.

To enable or disable Headers and Footers on Configurable Forms, see System & Email Settings.

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NOTE:

Customize Processes: Approval Processes

Taleo Recruit allows you to define Requisition and Offer Letter approval processes on a requisition-specific basis. This screen allows you to set the default approval process settings.

Require Approvers

When creating a new requisition, at least one Requisition Owner must be assigned. You may also want to require that at least one Requisition Approver and at least one Offer Letter Approver be assigned. This will ensure that at least one user signs off on each requisition or offer letter before activation. To enable either or both of these requirements, check the appropriate checkboxes in this section.

Default Approvers

When creating or editing a requisition, you can select Requisition and Offer Letter approvers for that specific requisition. By re-ordering each list of approvers, you can define the order in which the approval will sequentially be routed. To assign a default list of requisition and offer letter approvers, select and order them in the tables in this section (click the **Add/Remove** button). When a new requisition is created, these approvers are assigned by default.

Customize Processes: Candidate Workflow

In the “Candidate Workflow” screen you can configure and customize candidate Statuses and their associated “Next Step” actions. The Candidate Main Status is intended to reflect the Candidate’s relationship to your company overall. Use the Candidate Requisition Specific Workflow to denote statuses that pertain to a specific requisition.

For example, to add a new candidate status, click the **Add Status** link in the Candidate Statuses table. Select a name for the status as well as a candidate-facing name (you may want to present a different status name to candidates when they return to your careers site to check on their status). Then select which Next Step actions are available for candidates in that status.

To add a custom Next Step action, click the **Add Action** link in the Candidate “Next Step” Actions table. Custom actions are designed to move a candidate from his/her current status to another status in the hiring process. Select which status this action should move a candidate to when clicked.

The “Description” field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you are restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

The **Considered Hired** flag has been added to identify which of the Candidate Main Statuses identify a Candidate as ‘Hired’. To identify a status as ‘Hired’, use **Status Mappings**.

Customize Processes: Req-Specific Candidate Workflow

In the “Req-Specific Candidate Workflow” screen you can configure one or more workflows and customize candidate Statuses and their associated “Next Step” actions for each workflow. The Req-Specific Candidate Status is intended to reflect the candidate's relationship to a specific position. For example, Application Received, Phone Screen, Interview, Reference Check, etc.—basically the steps you take candidates through when you are considering them for a specific requisition.

To add a new candidate status, click the **Add Status** link in the Req-Specific Candidate Statuses table. Select a name for the status as well as a candidate-facing name (you may want to present a different status name to candidates when they return to your careers site to check on their status).

Then select which Next Step actions (Associated Actions) are available for candidates in that status. You can **Assign** or **Edit Actions** from the **Action** column of the Status. To add a custom Next Step action, click the **Add Action** link in the Candidate "Next Step" Actions table. Custom actions are designed to move a candidate from his/her current status to another status in the hiring process. Select which status this action should move a candidate to when clicked.

The "Description" field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you are restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

The Main Status column allows you to implement Dynamic Status Mapping between your Requisition-Specific Candidate Status and the Main Status, minimizing confusion for Hiring Managers and Recruiters.

In the 'Main Status Mapping' section, you can identify any changes that should be made to the Main Status when a Requisition-Specific Candidate Status is changed. If you select one associated Main Status, the system automatically updates the Main Status when the Requisition-Specific Candidate Status is updated for a candidate.

If you select more than one associated Main Status, users are presented with the option to select the appropriate Main Status at the time the Requisition-Specific Candidate Status is changed for a candidate.

In the 'Rejection and Comment Controls' section, you can specify whether a Rejection Reason is presented and/or required when a candidate is moved into this specific status. You may also specify whether a Comments box is presented and/or required when a candidate's status is changed.

If using Dynamic Status Mapping, the exceptions that are mapped to each Requisition-Specific Candidate Status provide you with the ability to create a rule that specifies when the automatic update of the Main Status should not take place. This prevents a user from making a change to a Main Status while another user is potentially still working with that candidate.

If a Requisition-Specific Candidate Status is included in the Exceptions box, the system will not make a change to the Main Status if the candidate is currently associated with another requisition that is in any of the Requisition-Specific Candidate Statuses identified as an Exception.

General applications will not count in the calculation of whether or not a Main Status should be updated.

When using Dynamic Status Mapping, there is a new Access Control 'Candidate Main Status Control' that enables or disables the ability to change the Main Status directly. If unchecked for a Role, the Main Status drop-down does not appear on the List View headers for the Candidate List Views.

To enable or disable Access Control for a role, click the **Users** tab and the **Roles** sub-tab. Select the Role you wish to enable or disable, and select or deselect the checkbox for Candidate Main Status Controls.

The **Considered Hired** flag identifies which of the Requisition-Specific Candidate Statuses identify a Candidate as 'Hired'. To identify a status as 'Hired', use **Status Mappings**.

Adding Assignable Workflows

You can add more than one Req-Specific Candidate Workflow to support your different hiring needs. As an example, the hiring workflow steps for an hourly position may be more abbreviated than a workflow for an executive position. Or, for multi-location companies, the hiring process may vary by location, region, or country. Once you create your workflows, you can assign the appropriate workflow at the requisition-level. This allows you to progress candidates through the appropriate hiring steps based on the position type.

Click the **New Workflow** link to add a workflow. Enter a workflow title and description. To edit your new workflow, click **Edit** from the **Action** column. Notice when you click into your newly created workflow that workflow steps have been automatically added, but most are inactive. The list of Req-Specific Candidate Statuses is shared by all workflows; therefore you do not have to recreate the status list. Simply activate the statuses that are relevant to the workflow you are building. If you add a status to any of the Req-Specific Candidate Workflows, it is available for all of the Req-Specific Candidate Workflows. You simply activate or deactivate the status based on whether the status is relevant in a particular workflow.

NOTE: If you are adding Statuses to work with Assignable Workflows and use Smart Views, be sure to check your list view filters to ensure your new statuses display in relevant views.

From the **Action** column, you can also **Assign** and **Edit Actions** as they pertain to each workflow you create. The **Set Order** link allows you to change the sequence of the statuses in each workflow you create. Changes you make to the status order or Associated Actions are specific to each workflow. To hide inactive statuses within a workflow, select the **Hide Inactive** checkbox.

When you have completed the changes to your new workflow, you need to activate the workflow so it is available for selection by users creating requisitions. From the Available Workflows list, click **Activate** from the **Action** column.

WARNING: It is strongly recommended that you not delete Statuses and Associated Actions. If you delete a Status or Action from one workflow, it deletes the Status or Action from all workflows resulting in data loss. Rather, use the Deactivate option.

Your Standard Workflow is automatically defined as your Default Workflow. The Default Workflow is assigned when a workflow is not specified at the time a requisition is created. To change the default workflow, click the drop-down button from the **Action** column and select **Set as Default.**

NOTE: If you create more than one Req-Specific Candidate Workflow, you need to add the Candidate Workflow field to your Requisitions Page Layouts. This allows users to select the appropriate workflow when a requisition is created.

Customize Processes: Requisition Workflow

In the “Requisition Workflow” screen you can configure and customize requisition Statuses and their associated “Next Step” actions.

For example, to add a new requisition status, click the **Add Status** link in the Requisition Statuses table. Select a name for the status, then select which Next Step actions are available for requisitions in that status.

To add a custom Next Step action, click the **Add Action** link in the Requisition “Next Step” Actions table. Custom actions are designed to move a requisition from its current status to another status in the requisition workflow. Select which status this action should move a requisition to when clicked.

The “Description” field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you are restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

Customize Processes: Active Hire Controls

Configuring Active Hire Controls is a two-step process, involving:

- Configuring Page Layouts: Add/Edit Requisition and View Requisition (refer to Automated Hiring Processes: Active Hire Controls
- Customizing the Active Hire Controls (described in this section).

NOTE: These features default to disabled until an Administrator configures them in your system.

After configuring the page layouts to enable Active Hire Controls, you can further customize the controls as follows:

- Define the statuses that will identify which candidates will be notified via email that the position has been filled, based on their statuses
- Specify which email template you want to use to notify non-hired candidates that the position has been filled
- Specify which status to change the non-hired candidates to upon filling the position
- Define the status you want the requisition to be automatically changed to upon filling the position

Proceed as follows to customize the Active Hire Controls:

1 Go to **Administration > Customize Recruit.**

2 In the Customize Processes section, click **Active Hire Controls.**

3 Read the instructions provided on-screen and select the options that meet your business objectives:

  - When a candidate is hired and the requisition is reduced to 0 openings, specify which candidates should be notified based on their current requisition-specific status, and indicate which email template should be used.
  - When a candidate is hired and the requisition is reduced to 0 openings, specify to which requisition-specification status, and corresponding Main Status, a candidate should be moved.
  - When a candidate is hired and the requisition is reduced to 0 openings, specify to which status the requisition should be changed.

NOTE: Requisition-specific statuses need to be active in all workflows in order to be selectable for this option.

4 Click **Save**.

Customize Processes: Interview Workflow

In the “Interview Workflow” screen you can configure and customize interview Statuses and their associated actions.

For example, to edit an interview status, click the **Edit** link in the Interview Statuses table. You may modify the name of the status and select the associated Actions.

The “Description” field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you are restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

Customize Processes: Feedback Workflow

In the “Feedback Workflow” screen you can configure and customize feedback Statuses and their associated actions.

For example, to edit a feedback status, click the **Edit** link in the Feedback Statuses table. You may modify the name of the status and select the associated Actions.

The “Description” field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you are restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

Customize Processes: Offer Workflow

In the “Offer Workflow” screen you can configure and customize offer Statuses and their associated actions.

For example, to edit an offer status, click the **Edit** link in the Offer Statuses table. You may modify the name of the status and select the associated Actions.

The “Description” field in the workflow statuses table is intended to explain the purpose of the status. Where the status is a System Status with associated actions or business logic, you will be restricted from modifying the description. The description is intended to inform Administrators and to minimize confusion when a field label has been modified and is out of synch with the system function.

Customize Processes: Menu Items

In the “Menu Items” screen you can modify tab names.

For example, if you refer to Requisitions as Jobs in your organization, you may modify the tab name by clicking the **Edit** link in the Requisitions table. Change the menu name from Requisitions to Jobs and click **Save**.

Customize Processes: Status Mappings

The “Status Mappings” page allows you to customize and configure core Taleo Recruit candidate and requisition status meanings. For example, in order for Taleo Recruit to run reports such as Hiring Summary and Time To Hire, the system must know which candidate statuses represent candidates that have been “hired” in your system. You may have one or more candidate statuses that should be considered as “hired”.

“Hired” Candidate Statuses

Candidates in these statuses are considered as Hired when running reports such as EEO, AAP, Cost per Hire, Time to Hire, etc.

“Open” Requisition Statuses

Requisitions in these statuses are considered available when submitting candidates to requisitions, and when candidates search for jobs on your careers websites.

Candidate-Req Disqualification Statuses

Candidates in these statuses will be marked as disqualified for a specific requisition.

Candidate Disqualification Statuses

Candidates in these statuses will be mark as disqualified as a Main Status.

Customize Processes: Referral Notification

In the “Referral Notification” screen you can set which email address and notification template will be used when a referral is received.

Customize Taleo Insight

This section applies to Taleo Insight only.

This section allows you to manage Insight Access Control, Customize Insight Reports, and manage Scheduled Reports. For more information, refer to the *Taleo Insight User Guide*, available from the **Resources** menu of your Taleo Business Edition system.

Customize Tabs: Custom Tabs

Taleo Recruit allows you to extend your recruiting system to manage data and processes beyond hiring to other areas of HR and talent management. You can create your own tabs and define new applications within your Taleo Recruit system.

When creating a new custom tab you define both a singular and plural name for the new object type (e.g. “Employee” and “Employees”) as well as a tab name and a tab description. You also select an icon to represent this new object type. Once the tab and object criteria are selected you can then define which Application Views this tab should appear in (see Customize Tabs: Application Views).

Once a custom tab has been created, all of the customization features you are already familiar with for standard objects are also available for custom objects. You can create custom fields, custom page layouts & list views, customized selectors, customizable workflow, and custom reports. In addition you can create relationships between custom objects and standard objects (see Customize Tabs: Relationships).

By default each custom tab comes with:

- Page Layouts: View, Add/Edit, and Search
- List Views: Main, Search Results, and Selector
- CSV import wizard allowing you to easily import custom object data
- Quick Search functionality in Main and Search Results List Views
- Workflow (Statuses and Next Step Actions)
- Related Lists: Tasks, Events, Comments, Attachments, and History Log
- A system-required relationship between the new tab and the User entity. Additional relationships can be configured, as required.

We encourage you to experiment with custom tabs to extend your Taleo Business Edition implementation to new areas of talent management within your organization. Examples of new tabs you may want to create to track and manage other data include:

- Employee Data
- Benefits Information
- Performance Reviews
- Time Off & Vacation
- Skills Library
- Training Classes
- Tests & Results
- Special Projects

The maximum number of custom tabs you can create depends on your service level as follows:

- **Standard:** 2 tabs

- **Plus:** 4 tabs
- **Premium:** 10 tabs

To create a custom tab, follow these steps:

1. Navigate to **Administration** > **Customize Taleo Business Edition**.
2. Under the Customize Tabs section click **Custom Tabs**.
3. Click **New Custom Tab**.
4. Specify all required information.
5. You will be able to specify access settings based on Application Views in the next procedure. You can add the new tab to one or more of the existing application views or skip the process if you wish to do it manually at a later time.
6. Once created you can then proceed to configure your custom tab's object properties like any other object in the system by adding custom fields, customizing page layouts and list views, etc.

Customize Tabs: Application Views

In Taleo Business Edition you can redefine the order in which tabs appear, and you can hide or expose different tabs. Similar to page layouts and list views, multiple tab layouts can be created and assigned by role and by user. These tab layouts are called **Application Views**.

By default your Taleo Business Edition system has different Application Views defined for each role:

Administrator, Hiring Manager, Recruiter, Passive User, and Agency . You can customize these default Application Views and create new views to change tab order, hide existing tabs, and add newly created custom tabs based on what you want your users to have access to. Just like page layouts and list views, you can assign Application Views by user and/or role.

A drop-down menu called **Application View** in the upper right corner of the screen allows each user to select which Application View to use at any given time. By creating different Application Views for different groups of tabs based on functionality, you can organize your company’s Taleo Recruit system into discrete on-demand applications for Recruiting, Employee Management, Time & Attendance, Performance Reviews, Special Projects, etc.

To create an Application View, follow these steps:

1. Navigate to Administration > Customize Taleo Business Edition Recruit .

   Under the Customize Tabs section click on **Application Views**. You will see a list of default application views.

2 Click **New Application View**.

You will then need to specify a name for the new application view as well as the tabs that will be included in the new view.

3 Once all desired settings are specified click the **Create** button.

4 Next you can use **Set Order** to specify the order in which Application Views will be listed in the “Application View” drop down selector.

Once the application view is created, you can proceed by assigning the view to the desired users and/or roles.

For a specific user, this can be done as follows:

1 Click on the Users Tab.

2 Locate the user record you wish to enable the application view for and view that user's profile.

3 Click on that user's **Application Views** button on the far right.

4 Assign the desired Application Views for that user. Administrators cannot remove any application views from a specific user if they are also assigned to a role.

5 To modify Application View assignments by role, click on the **Roles** submenu in the Users tab and proceed by clicking on the **Assign Application Views** link for each of the roles you want to modify.

NOTE: If you add additional services to your Taleo Business Edition system e.g. Taleo Business Edition Perform or OnBoard, we recommend that you review your Application View settings to ensure you are exposing the appropriate tabs for each Role in your organization. We also recommend that you review the Role and User level List Views and Page Layouts to ensure the appropriate pages are set to display.

Customize Tabs: Relationships

Many standard objects have built-in relationships to other standard objects in Taleo Recruit, such as Requisitions and Candidates, Accounts and Contacts, Requisitions and Accounts, etc. With custom objects you can define relationships between any objects in the system (standard-to-standard, custom-to-standard, or custom-to-custom).

When a new relationship is established between object X and object Y, Taleo Recruit automatically creates the following:

- An object X selection field in object Y's Add/Edit and Search page layouts
- An object X display field in object Y's View page layout
- An object X related list in object Y's View page layout

- An object Y selection field in object X's Add/Edit and Search page layouts
- An object Y display field in object X's View page layout
- An object Y related list in object X's View page layout

In this way relationships between standard and custom objects can be many-to-many, covering any relationship scenario. Once relationships are established the custom reporting tool allows you to generate X by Y and Y by X reports as with the standard built-in object relationships.

To create a custom relationship, follow these steps:

1. Navigate to Administration, then Customize Taleo Business Edition Recruit.
2. Under the Customize Tabs section click on **Relationships**.
3. There you will see a list of standard relationships, which are not modifiable.
4. Click on the **New Relationship** link.
5. On the next page you will be allowed to specify which objects will be associated in the new relationship. Relationships may not be duplicated.
6. Once the relationship is created, related lists will automatically be added. You will have the option of adding a selector field to the page layouts of associated objects. The selector field will be used to select objects for cross-referencing based on the established relationship. You may skip this step if you wish to add the selector manually at a later time.

Customize: Taleo Business Edition Web API

This is an additional feature available to **Premium Service Subscribers**.

Following the lead of industry pioneers such as Amazon, Google and Salesforce.com, we have created an open, SOAP-based web services interface to Taleo Business Edition allowing developers to build integration and custom applications that leverage candidate and requisition employee employee data. Using this Web API, Taleo Business Edition Premium Service can be easily extended and integrated with any other enterprise applications.

For more information including API documentation and sample code, visit [http://www.taleo.com/products/business-edition-ondemand-integration.php.](http://www.taleo.com/products/business-edition-ondemand-integration.php)

Creating Custom Roles

You can create custom role versions that apply to users in a certain role, whose page layout and list view settings differ significantly from other users in the same role. With this feature you can easily make mass changes that globally affect all users in that role.

For example, you may have a disparate group of Recruiters who reside in both the US and Canada. The Canadian Recruiters require Social Insurance Number fields rather than Social Security Number fields, and require different page layouts. With this feature you can quickly affect the records created by and for Canadian Recruiters by creating a role version that applies specifically to them.

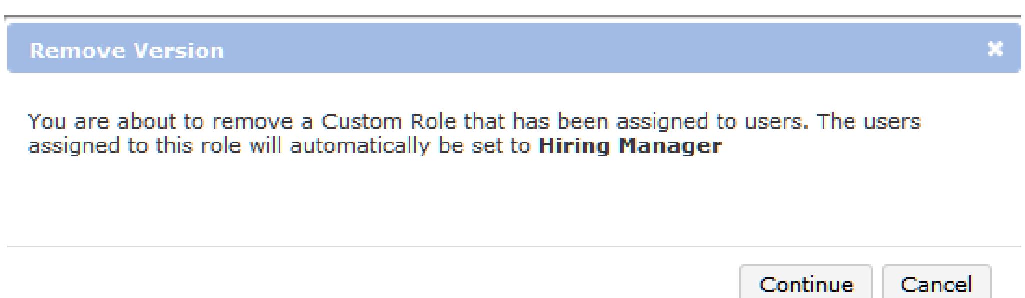
Another common use case example is the Hiring Manager role. You may wish to create a role version of Hiring Manager called simply “Manager” or “Performance Manager” for managers whose responsibilities focus more in the Performance Review area and not in the hiring capacity.

Proceed as follows to create a custom role:

1. From the Users menu, select **Roles**.
2. Decide which role you want to create a custom version of, then scroll to the right and click **Add Version.**
3. Enter a Custom Role Title, and then click **Save**.

   The Role Version displays as a child of the parent role. It inherits the primary attributes of the parent, including page layout, list view, application view, and access control settings. If you subsequently remove the role version, all the users in that role are automatically re-assigned to the parent role.

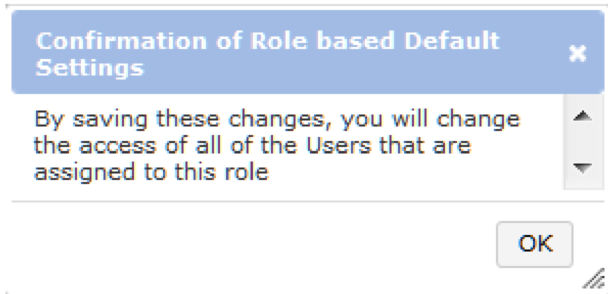
4 You can rename or remove the role version, by clicking the appropriate links indicated above. If you attempt to remove a role version that users are assigned to, you receive the following:



5 Click each of the following and set the defaults that you want to use for the custom role version you're creating:

- Assign Default Page Layouts
- Assign Default List Views
- Assign Application Views
- Assign Access Control

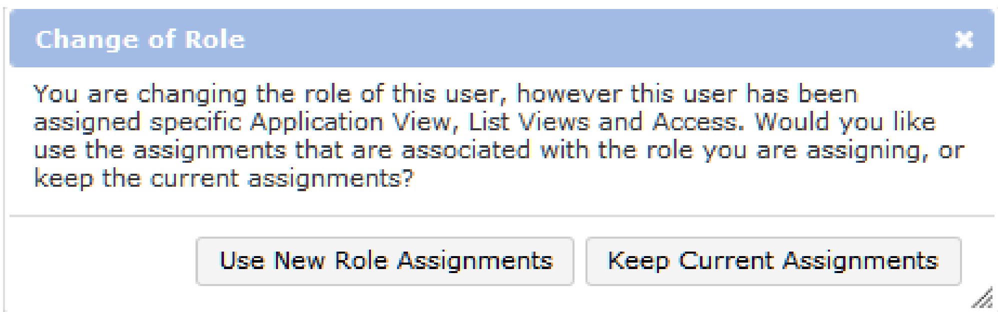
6 Click **Save** and you receive the following confirmation:



7 Click **OK**.

Assigning a Role to a User

When you change a User's role the system checks for specific page layouts, list views, application views and Access Controls. If the user has explicit assignments, the system prompts you to either retain or delete the explicit assignment, as follows:



Resetting a User's Role-based Defaults

This User Management tool gives Administrators the ability to identify any users who do not adhere to default list view and page layout settings, and reset them to their role-based defaults. You can manage users who previously had to be managed on an exception basis as a group; for example, users whose list view and page layout settings differ from other users in the same role.

Proceed as follows to reset a user's role-based defaults:

1 From the Users menu, select **Roles**.

2 Modify the List Views or Page Layouts for a particular role.

3 Click **Save** and the a dialog box displays, informing you of the impact your changes will have, and on which users.

4 Choose from the following options:

- Change Role Defaults Only: Save the changes that have been made to the role, but make no changes to the listed users List View assignments.
- Change Role Defaults and Reset Users: Save the changes that have been made to the role, and reset the listed users to refer to the role defaults.

5 Click **Save**.

Enhanced Employee Record Access

When implemented, this feature enables Managers to share access to Employee records, leveraging List View filters. Currently, shared access to employee records is provided by selecting individuals in the “Indirectly Reports To” field. When this feature is enabled Users will have access to edit and view all information contained within the Employee Page Layout, regardless of who they report to.

Implementing this feature overrides the implicit filter in Taleo Business Edition that prevents Managers from viewing Employee records of non-subordinates.

> **WARNING:** To mitigate the risk of exposing employee data to unauthorized users, it is strongly advised that you test this feature with a small group of Managers and Employee records. It is strongly recommended that you perform and deploy these changes during off hours. To purchase Taleo Business Edition Consulting services for implementation assistance, contact your Customer Sales Manager (CSM) at tbecsmsales@taleo.com.

To restrict unauthorized access to Employee records from previously active links within the product, the following fields have been changed from active links to display-only for all Users: Manager Name, Review Manager, and Indirectly Reports To. The following Employee name clickable links have been deactivated for non-Administrators to reduce unwanted exposure of Employee data.

Best Practice Recommendations

- Consulting implementation assistance is available to help minimize any security concerns you may have with regard to this feature. Contact your Customer Sales Manager (CSM) at tbecsmsales@taleo.com to purchase consulting services.
- Prior to implementing this feature it is imperative that you review the Employee List Views that are assigned to each User. Create Employee List View filters that appropriately restrict or allow access to Employee records, according to your business objectives. An easy way to determine which Employee List Views are assigned to the Users in your system is via the User Management tool (see User Management).
- To restrict access to Employee records for groups of Users consider using Regions, Locations, and Departments (in Administration > Organization) as there are List View filters associated with each for “Current User Region,” “Current User Department,” etc.
- You can also implement this feature based on Custom User Roles, allowing you to retain restrictions for certain roles, while allowing access for other roles.

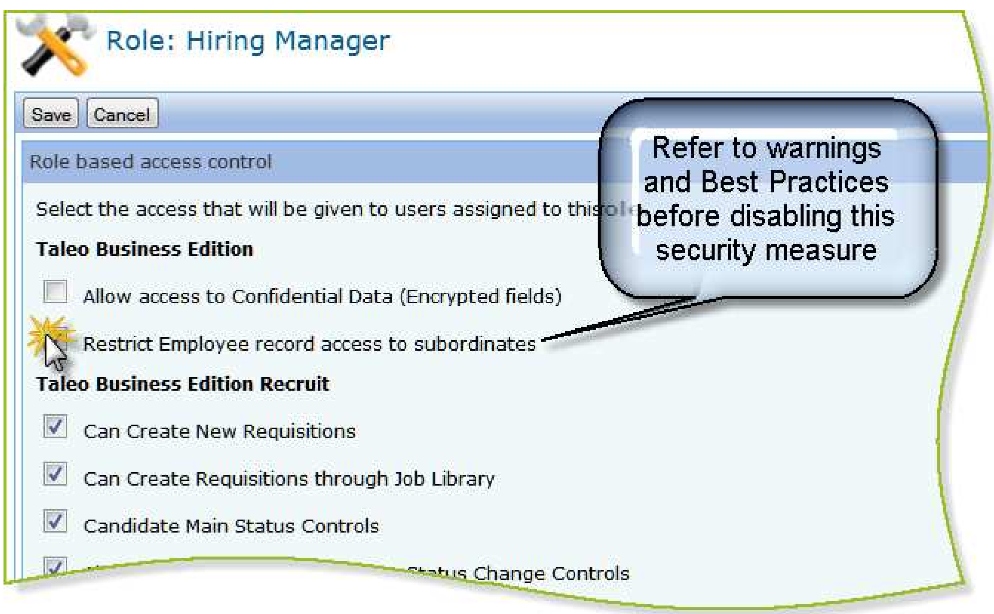
Implementing this Feature

Proceed as follows to implement this feature:

NOTE: You do not need to enable this feature if the current access restrictions to Employee records support your organization's business needs. Refer to the above warnings and Best Practices prior to implementing this feature.

1. Determine how your organization wants to limit access to Employee records (List View filters).
2. Create the List Views with the desired filters.
3. Create a set of test User/Employee records to validate that your Employee record access is designed to appropriately restrict/allow access to Employee records.
4. Create a custom Hiring Manager role, assign that role to the set of Users created in step 3, and then assign the newly created List View filters to the role.
5. During off hours test the access to Employee records and make any adjustments as necessary.
6. During off hours deploy to all users.
7. Deactivate the security measure that prevents Managers from viewing Employee records of non-subordinates, as follows:
   a. From the **Users** menu, select **Roles**.
   b. Click **Assign Access Control** for the role in which you are implementing Enhanced Employee Record Access. Hiring Manager, for example.

      The following page displays:



   c. Deselect the checkbox **Restrict Employee Record Access to Subordinates**.
   d. Click **Save** and the following message displays:

WARNING: Deselecting this option allows any User that has access to Employee information to view and edit data for Employees that are not subordinates. You should ensure that you have appropriate list views and filters assigned to your Users in order to limit access to Employee records.

e Click OK if you are confident that your List View filters are set up to appropriately allow and/or limit access to Employee records.

Reports

This chapter describes how to view and modify reports to get instant, on-demand views into key staffing metrics using your Taleo Recruit system.

NOTE: If you are looking for instructions on working with Insight – Taleo's reporting and analysis tool – refer to the *Taleo Insight User Guide,* available from the **Resources** menu.

- Reports Overview on page 235
- Report Parameters on page 238
- Standard Reports on page 235
- Custom Reports on page 238
- Tracking Employee Referrals on page 239
- Employee Referrals Reporting on page 239

Reports Overview

The Taleo Recruit reporting module provides instant, on-demand views into key staffing metrics. Many reports include presentation-ready bar and pie chart graphs, in addition to tabular data. Each report provides drill-down capabilities and can be filtered based on criteria such as dates, location, department, role, user, and source.

To view a report, click on the **Reports** tab and select the desired report. Most reports will immediately be run with default parameters. Some reports, such as History Logs and User Activity, require the input of specific parameters before they can be run. See Report Parameters.

Reports are grouped into categories based on their function. The table below summarizes each category and its reports.

Important Changes Affecting Existing Taleo Business Edition Customers

For existing Taleo Business Edition customers, Taleo Insight will run in parallel with the existing reports module through January 2012. Both report modules are accessible from the Reports menu. Access to our legacy reporting module and to custom reports created in our legacy module will be removed with our first release in 2012, which is tentatively planned for early February. Custom reports that have been created in our legacy reporting module will need to be recreated in Taleo Insight by your Administrator. If you are interested in custom report writing services, please contact your Customer Sales Manager (CSM) for pricing.

Standard Reports

Summary Reports

Summary reports present a detailed breakdown of the most commonly accessed information:

Candidate Main Status Summary: Shows a breakdown of how many candidates there are in your Taleo Recruit system based on status (pie chart).

Requisition Status Summary: Shows a breakdown of how many requisitions there are in your Taleo Recruit system based on status (pie chart).

History Logs: Allows you to view all historical activity logs for requisitions, candidates and users. By selecting a specific user, you can monitor the key actions that user has performed in your Taleo Recruit system over a specified date range.

User Activity: Summarizes number of logins and average time logged for each user over a specified date range. Note that average time logged in may not be entirely accurate due to inactive sessions or uses who do not properly logout of the system when finished.

Hiring Summary: Shows candidates in the Hired states. Note that Candidates with a Main Status of Hired and/or any Candidates with a Requisition-Specific Status of Hired appear in this report. Also shows a breakdown of how many hires each requisition owner has made over a specified time period (bar chart).

Analysis

Analysis reports provide insight into critical staffing performance and effectiveness metrics:

Time to Fill: Shows how long it took to fill each requisition. Also shows a breakdown of how long each requisition owner takes on average to fill a position (bar chart).

Hires per Source: Shows the bottom-line effectiveness of Sources based on number of hired candidates from each source (pie chart).

Candidates per Source: Shows the volume effectiveness of Sources based on number of candidates that applied for a requisition from each source (pie chart).

Cost Per Hire: Shows how much is spent on each hire. The calculations include the sum of a candidate's expenses, a sum of all requisition expenses divided by the number of candidates hired for that requisition, and a sum of all source expenses divided by number of candidates hired from that source (bar chart). The Cost per Hire report in Insight is calculated as follows:

TOTAL EXPENSES attributed to the REQUISITION / TOTAL HIRED for the REQUISITION

NOTE: This includes 'Source Expenses' or 'Expenses' attached to the requisition as well as all 'Candidates Expenses' from the Hired candidate (that are attributed to the Req) as well as 'Candidates Expenses' for NON-hired if attributed to the requisition. This total number divided by the number of hires gives the cost per hire.

Costs

Cost reports allow you and your team to closely monitor staffing expenditures:

Requisition Expenses: Shows a breakdown of all Requisition expenses, which user logged each expense, total requisition expenses by user (bar chart), and a graph comparing occurrences of expense types (pie chart). This report can be run to include candidate expenses by selecting the check box Include Candidate Expenses.

Candidate Expenses: Shows a breakdown of all Candidate expenses, which user logged each expense, total candidate expenses by user (bar chart), and a graph comparing occurrences of expense types (pie chart).

Source Costs: Shows a breakdown of all Source expenses, which user logged each expense, total source expenses by user (bar chart), and a graph comparing occurrences of expense types (pie chart).

Compliance

Compliance reports dramatically reduce time spent gathering regulatory information for government and other reporting requirements:

EEO-1: Standard Equal Employment Opportunity report based on hired candidates (candidates in the Offer Accepted and Hired states).

AAP Applicants: Affirmative Action Planning report of applicants who applied over a specified date range.

AAP Hires: Affirmative Action Planning report of hired candidates who applied over a specified date range (candidates in the Offer Accepted and Hired states).

OFCCP Compliance: Standard Office of Federal Contract Compliance Programs Report based on applicants searches within a given time period.

Adverse Impact Report: The Adverse Impact report tracks all applicants by ethnicity and gender categories sorted by the requisition and job category to which they applied.

Applicant Flow by Name Report: The Applicant Flow by Name report tracks all applicants who applied or who were submitted to a requisition during a specified date range, sorted by date of application to that requisition.

NOTE: By default the Taleo Recruit Administrator is the only role with permission to access compliance reports. To extend this privilege to another role(s), a written request by your company's assigned Taleo Recruit Administrator must be submitted through Taleo Business Edition Customer Support. See Getting Help.

Referrals

Reports in this section enable quick views into the effectiveness of your employee referral program:

Employee Referrals: Shows a breakdown of all referred candidates, who referred them, when they were referred, and whether they have been hired, rejected, or are in the hiring process (includes pie chart summary).

Candidates

Interviews and Feedback reports provide a high-level view of candidate interviewing activity and interview feedback patterns:

Interviews: Shows all Scheduled (pending) interviews, and interviews awaiting feedback. Also shows a total breakdown of all interviews created over the specified date range and which status they are in.

Interview Feedback: Shows all interview feedback submitted within specified date range. Also shows a summary of total number of feedbacks by recommendation type (with pie chart percentage breakdown).

Report Parameters

Each report has a set of parameters that can be used to filter and narrow in on specific data of interest. The following parameters are available (note that available parameters vary from report to report):

Candidate Source: Only candidates that applied from the selected Source will be shown.

Location, Department and Group: Selecting any combination of these picklists will narrow report results to only those records that match users and/or requisitions with corresponding location, department and group values.

Role and User: Selecting any combination of these picklists will narrow report results to only those records that involve the selected user, and/or users with the selected role.

Candidate Gender: Allows reporting based on specified candidate gender.

Report Format: By default **"**HTML**"** is selected indicating that the report will be displayed as a standard page within the browser. Selecting "Excel" will generate a Microsoft Excel version of the report and open it in a new window automatically.

Custom Reports

The custom reporting tool allows you to create custom reports on any Candidate or Requisition data in your Taleo Recruit system.

To create a custom report:

1. Go to the **Reports** tab.
2. Click **Create New Custom Report**.
3. Select the type of data you would like to report on and click **Next**.
4. In the **"**Available**"** list, select all of the fields you would like to include in this report, and move them to the "Assigned" list using the right arrow button. You can re-order fields by using the up and down arrow buttons. Click **Next** when finished.
5. In the **"**Filtering Options**"** section, select all of the fields you would like to be able to filter the report by. Custom reports contain a maximum of 10,000 rows of data when run. To ensure that your report returns the most relevant results, you will want to narrow in on desired criteria as much as possible.

6 In the **“**Charting Options**”** section, you can (optionally) elect to include a bar or pie chart graph of any picklist fields in your report.

7 In the **“**Sorting Options**”** section, you can select a primary and secondary field to sort results by. Click **Next** when finished with your selections.

8 Your custom report has now been created. You can save this report for future use by clicking the **Save Report** button.

9 To run the report, select one or more filter criteria and click the **Go!** button.

All custom reports can be exported to Excel by selecting “Excel” in the Report format field and clicking **Go!**

Tracking Employee Referrals

Taleo Recruit allows you to set up an employee referral page on your intranet so that referred candidates are automatically imported into your candidates database and tagged appropriately. To set up to the employee referrals form on your intranet, see the Employee Referrals Setup tutorial.

When a candidate is added via the employee referral form, requisition owners are notified via email and the candidate is tagged with the “Referral” source. In each page showing a list of candidates, referred candidates are easily distinguishable from regular applicants because the name of the referrer is included in boldface below the candidate's name.

Employee Referrals Reporting

You can easily get a high-level view of how effective your employee referral plan is working by running an “Employee Referrals” report from the **Reports** tab. This report shows a breakdown of all referred candidates, who referred them, when they were referred, and whether they have been hired, rejected, or are in an intermediary stage in the hiring process.

Insight Reports

Welcome to **Taleo Insight** – a reporting and analysis tool for business users that offers standard reports, query and analysis capabilities, re-usable report topics, and self-service report creation. Taleo Insight provides executives, line managers, and HR teams with information they need to optimize their workforce and understand the business impact of their sourcing and recruitment processes.

With Taleo Insight:

- You have access to a comprehensive list of Standard Reports
- Administrators have access to build and publish Custom Reports to meet your company's unique reporting requirements
- Access controls can be applied to standard and custom reports by Role or by User
- You can monitor key metrics such as Time to Fill, Cost per Hire, Goal Progress, and Performance Review status from your My View page with embedded dashboards
- With scheduling and notifications, you can run reports in the background and receive alerts when your report is ready
- You can access Reports History for up to 30 or 90 days, depending on the Insight version you are using.
- You can export reports in Word, Excel, PowerPoint or PDF

NOTE: Taleo Insight does not currently support the Chrome browser.

Important Changes Affecting Existing Taleo Business Edition Customers

For existing Taleo Business Edition customers, Taleo Insight will run in parallel with the existing reports module through January 2012. Both report modules are accessible from the Reports menu. Access to our legacy reporting module and to custom reports created in our legacy module will be removed with our first release in 2012, which is tentatively planned for early February. Custom reports that have been created in our legacy reporting module will need to be recreated in Taleo Insight by your Administrator. If you are interested in custom report writing services, please contact your Customer Sales Manager (CSM) for pricing.

Terminology

Ter`mi*nol"o*gy\, n. [L. terminus term + -logy: cf. F. terminologie.]
1. The doctrine of terms; a theory of terms or appellations; a treatise on terms.
2. The terms actually used in any business, art, science, or the like; nomenclature; technical terms; as, the terminology of chemistry.

Term	Definition
Access Control	Ability for Administrators and HR Administrators to control which reports can be accessed by role and by user.
Advanced Interactive Viewer	Gives business users access to view a report and manipulate data within a report. With this advanced feature, business users can modify the format of a report, hide, add and group data, and apply calculations and totals to reports.
Custom Reports	Reports created by customer Administrators or HR Administrators, which can be made accessible to business users.
Dashboards	A visual representation of key metrics.
Display Fields	System fields that can be added to custom reports and can be used as column or group headers in reports.
Interactive Viewer	Gives business users access to view a report and manipulate formatting within a report.
Notifications	Alerts business users when a report is available to view.
Notifications History	Displays report notifications that have been triggered for the last 8 days.
Report Filters	System fields that allow Administrators to restrict custom report results (data set) based on the user. This filter goes beyond role or user access control to apply List View controls based on ownership and/or relationship to records (e.g. Current User Owner, Current User Approver, Current User Subordinates, etc.)
Reports History	Previously run reports accessible to business users for up to 30 or 90 days, depending on the Insight version you are using.
Report Studio	Gives Administrators and HR Administrators access to design and format custom reports.
Report Parameters	System fields that can be used to refine report results, e.g. location, region, department, start date, end date, etc.

Term	Definition
Report Scheduler	Gives users the ability to run reports at scheduled times and frequencies, and have the reports emailed to them upon completion (FTP options are available to Insight Advanced users).
Standard Reports	Reports created by Taleo accessible to business users.
Topics	A starting point from which customer Administrators and HR Administrators can create custom reports. Each topic has pre-defined table joins, default fields, and default parameters.

Accessing Insight Reports

End-users have access to Taleo Insight from the Reports menu in Taleo Business Edition.

Standard and custom reports are organized by type for ease of use. Users simply need to run a report to view real-time data. All reports can be filtered by different dimensions such as by location, region, and department for further analysis. Any report can be exported in Excel, Word, PowerPoint, or PDF.

To access Taleo Insight reports:

1 From the Reports menu, choose **Insight**:

2 Depending on the Taleo product(s) used by your company, you can toggle between services to view the available reports, as shown in the screen below.

NOTE: By default, only Administrators and HR Administrators have access to Insight Reports. Users will have access to standard and custom reports from this page based on their assigned role and user level access. See Assigning Access to Insight Reports for instructions on granting role-based access.

Taleo Insight Standard Reports

The following table shows all standard reports available from the Insight menu in your Taleo Business Edition system, categorized by product:

Taleo Recruit		
Candidate Reports:	**Compliance Reports:**	**Requisition Reports:**
Candidate Expenses	AAP - Applicants	Cost Per Hire
Candidate Interviews and Feedback by Requisition	AAP - Hires	Requisition Expenses
Candidate Main Status Summary	EEO-1	Requisition Hiring Summary
Candidates By Requisition	OFCCP Adverse Impact	Requisition Status Summary
Candidates Per Source	OFCCP Applicant Flow by Name	Requisitions By Agency
Cost Per Source	OFCCP Search Compliance	Requisitions by Owner
Employee Referrals		Time to Hire
Hires Per Source		
Taleo Perform and Comp*		
Employee Reports:	**Review Reports:**	**Goal Reports:**
Critical Position and Employee Assessment	Competency Assessment Detail Report – By Competency	Goals Summary
Employee Goals	Multi-rater Average Score Summary	Goals Detail
Employee Mobility - By Department	Multi-rater Performance Review - Rating Detail	Goal Rating Detail by Department
Employee Performance Reviews	Multi-rater Status Summary by Reviewer	Company Goal Rollup
Employees	Performance Review Detail	Individual Goal Detail
High Performer Modeling	Performance Review Status	Company Goal Rating Rollup Summary
Comp* Reports:	Performance Review Rating Detail – By Department	
Compensation Analysis	Performance Review Rating Summary – By Review Manager	
Compensation Base Salary		
Compensation Detail		
Compensation Plans Status		**Taleo Comp is an additional cost module*
Total Compensation Distribution		
Taleo OnBoard		
OnBoard/OffBoard Reports:	**Employee Reports:**	**User Reports:**
OnBoarding Activities	Employees	Users by Status
OnBoarding Activity Packets	Employee Packets	
OffBoarding Activities		
OffBoarding Activity Packets		

Running a Report

To run a report:

1 From the Insight page, hover over a report title until the action buttons display.

2 Click **Run**.

3 The Parameters page displays, where you select the parameters to define your report criteria. Required fields are notated with an asterisk *.

4 When you are finished selecting the parameters for your report, click **Run Report**.

5 Your report will display immediately, or you will be prompted to run the report in the background by clicking the **Notify Me When Finished** button. For more information, see Report Notifications.

6 To save your report to your hard-drive, click **Save As** from the File menu.

7 Select the location and the file format in which to save your report and click **Save**.

Marking Report as Favorite

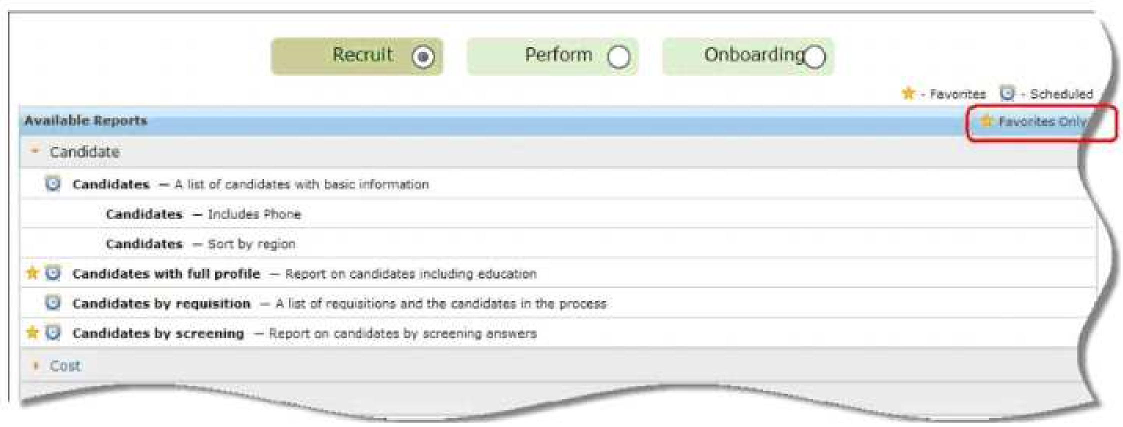
To mark a report as a favorite:

1 From the Insight page, hover over a report title until the action buttons display.

2 Click **Favorite**. (Only root-level reports are available to be added as Favorites.)

3 Reports you have identified as Favorites display the icon to the left of the report.

4 To show only those reports you have identified as Favorites, click the **Favorites Only** toggle in the top right corner of the reports menu.

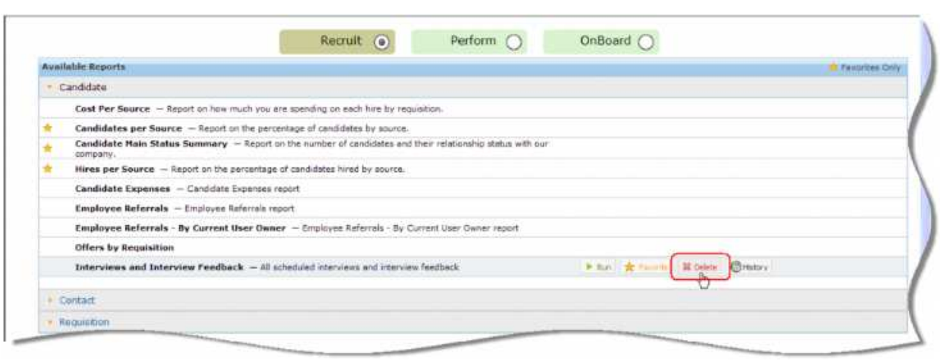


5 To see all Reports, click **Show All**.

Deleting a Report

1 From the Insight page, hover over a report title until the action buttons display.

2 Click **Delete**.



3 Click **OK** to delete the report.

NOTE: Standard reports can not be deleted and therefore the Delete button is not present. Users can only delete private versions of reports. Administrators and HR Administrators can delete custom reports.

Scheduling a Report

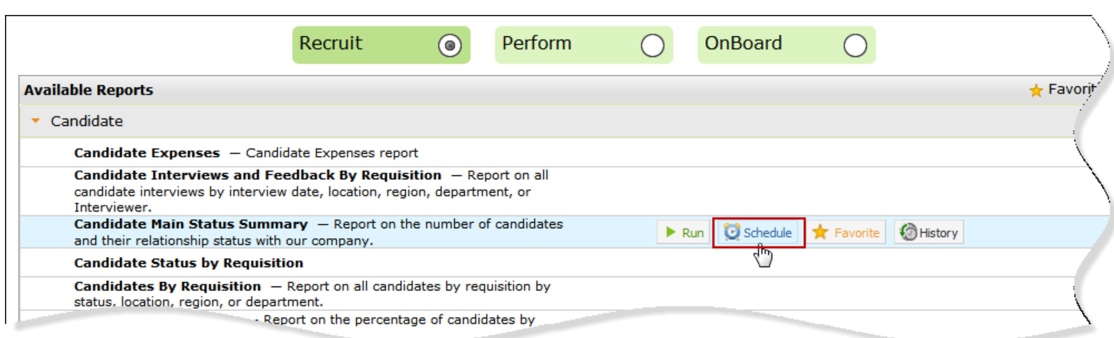
You can schedule reports to run in the background on predetermined days and frequencies. Scheduling reports that you access regularly enables you to automate the process, saving you time and eliminating manual task work – it's one less thing you have to remember to do.

When scheduling a report, it is important to keep in mind the following:

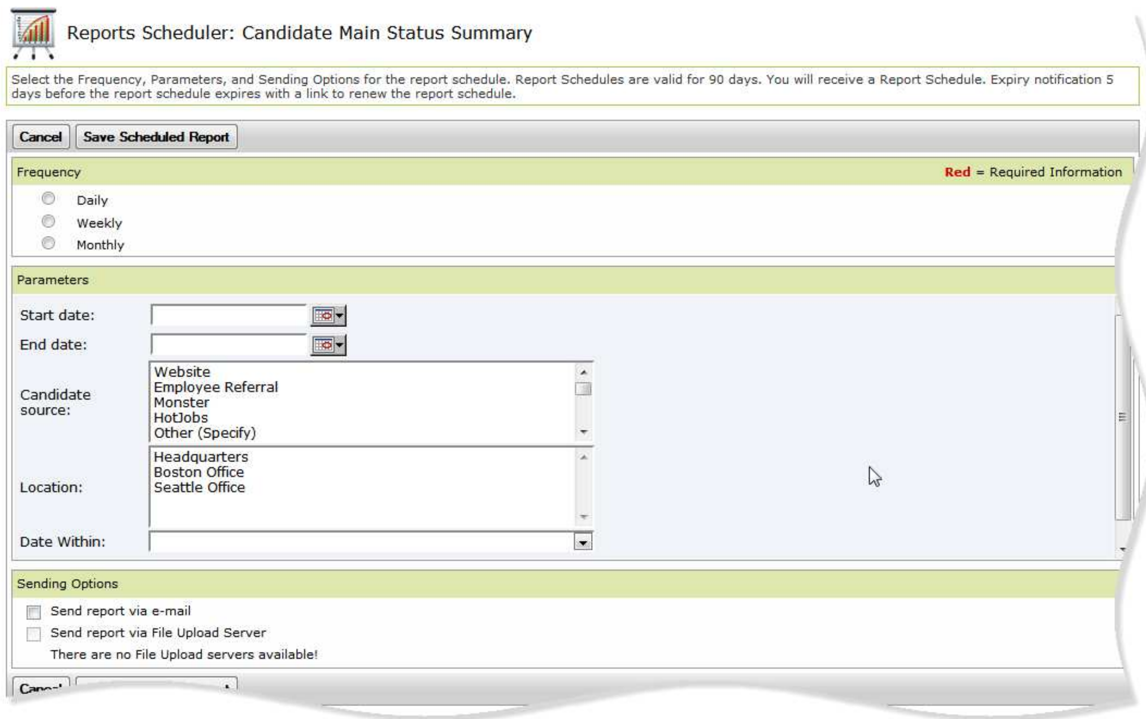
- You must have the appropriate access control level for a particular report to schedule that report.
- You can only set one schedule per report. For example, you may set a report to run weekly or monthly, but not both weekly and monthly.
- Your report schedules are visible only to you; they are not visible or accessible to other users, except administrators, who can see all scheduled reports.
- Scheduled reports expire after 90 days, at which time you have the option to continue receiving the scheduled report by clicking Renew.

To schedule a report:

1 Hover over a report and click **Schedule**.



2 The Report Scheduler displays, where you define scheduling frequency, parameters, and sending options.



3 Select a frequency to specify when your report will run.

The frequency you select specifies how often and on what day your report will run. It does not control the data range that is included on your report – that is done when you define the report's parameters in step 4

- **Daily**: Your report will run each day.
- **Weekly**: A drop-down menu displays where you choose which day of the week to run the report.
- **Monthly**: A recurrence field displays where you enter the day of the month to run the report. If you want the report to run on the last day of each month regardless of the number of days in the month, enter 28.

NOTE: Daily, weekly, and monthly reports will run after midnight, based on your user time zone, on the day you select in the frequency field.

4 Define the reporting parameters for your scheduled report.

- Reporting parameters vary depending on the type of report you are running. These parameters are set up by the administrator in Report Studio.
- **Date parameters**, like From/To and Start/End, allow you to specify the data range that will be included in your report, and should not be used in conjunction with Date Within parameters.
- **Date Within** parameters also allow you to specify the data range that will be included in your report. They differ from standard Date parameters in that they are expressed as calendar time frames, such as: Last Week (Saturday through Sunday of the previous week), Last Month (all of the previous month; none of the current month), Last Quarter, etc. See also:Date vs. Date Within.

	Best practice recommendation: Use either a Date Within parameter or a From and To parameter for defining your data range, but do not use both parameters simultaneously.

5 Choose the sending options for your report:

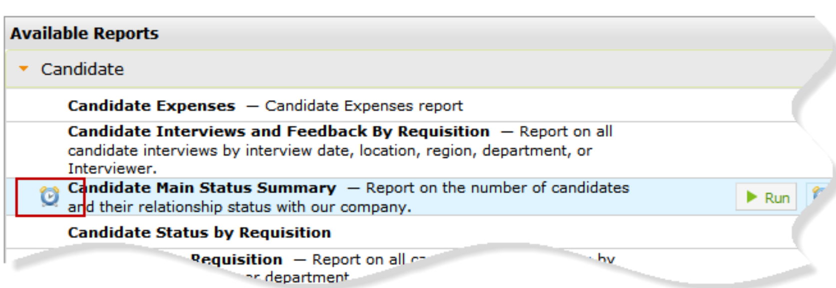
- **Send report via email** – Choose email recipients from the links provided, or enter email addresses manually, then choose the format (PDF, CSV, Word, or Excel) in which you want the recipient to receive the report. It will be sent as an email attachment.

NOTE: There is a 10MB size limit for email attachments. If the report exceeds 10MB, a delivery failure notice is emailed to the user who scheduled the report. In the event that a report delivery fails, the report is still available via "Viewing Report History."

- **Send report via File Upload Server** – This feature is available to customers who have purchased Taleo Insight Advanced. If FTP sending options have been configured by your administrator, you can click Send report via File Upload Server and then choose the FTP site to which you want to upload the report. See Configuring FTP Sending Options for use with Scheduled Reports for more information.

6 Click Save Scheduled Report.

A clock icon indicates that a schedule has been set for the report.



Modifying a Report Schedule

To modify a Report Schedule:

1. Hover over the report and click the **Schedule** button.
2. Make the desired changes to your report schedule and click **Save Scheduled Report.**

Deleting a Report Schedule

To delete a report schedule:

1. Hover over the report and click the **Schedule** button.
2. Click **Delete Scheduled Report.** This deletes only the schedule, not the report itself.
3. A warning displays informing you that once you delete a report schedule it is not recoverable.
4. Click **OK.**

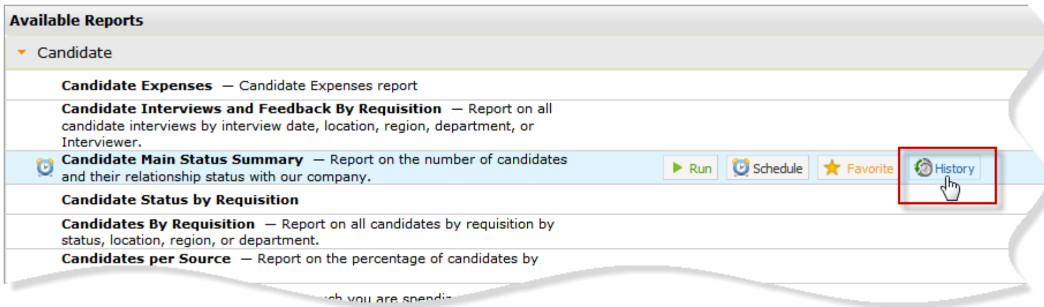
Renewing a Report Schedule

Report Schedules are valid for 90 days only. As the owner of the Report Schedule, you will receive a Report Expiry Notification on day 85. Click **Renew** to maintain your existing Report Schedule. If you do not renew your report, the Report Schedule will be automatically deleted on day 90.

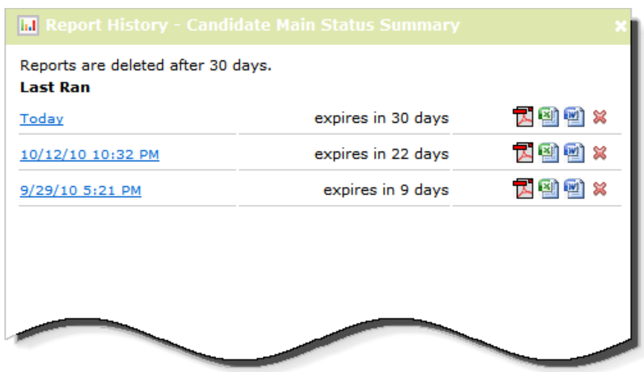
Viewing Report History

To view report history:

1. From the Insight page, hover over a report title until the action buttons display.
2. Click **History.**



3 A modal window opens. Any previously ran instances of the selected report display, most recent first. (History is maintained and accessible for 30 days only; 90 days if you are using Insight Advanced.)



4 Click the report link to view the report instance.

5 When a report is close to expiration, the expiry information appears in orange and then in red. If you want to maintain the report, download it to your hard-drive before expiration.

6 To download the report, click one of the available format icons (PDF, Excel or Word) and save the report to your hard-drive.

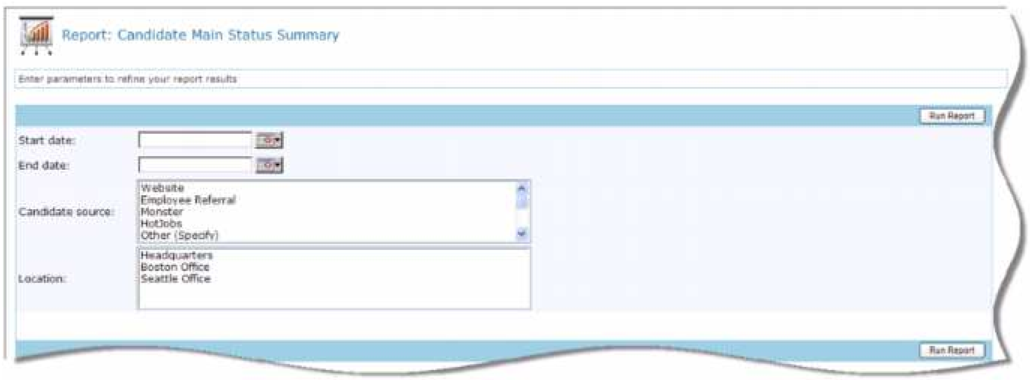
7 You may also click the **X** icon to delete the report instance. (If report history is deleted, any related report notification is also deleted.)

Report Notifications

Users can run reports in the background without compromising system performance. Taleo Insight alerts you when your reports are available.

To run a report in the background and set up a report notification:

1. From the Insight page, hover over a report title until the action buttons display.
2. Click **Run**.
3. Select the parameters to define your report criteria.
4. Click **Run Report**.



5. When prompted, click **Notify Me When Finished**.

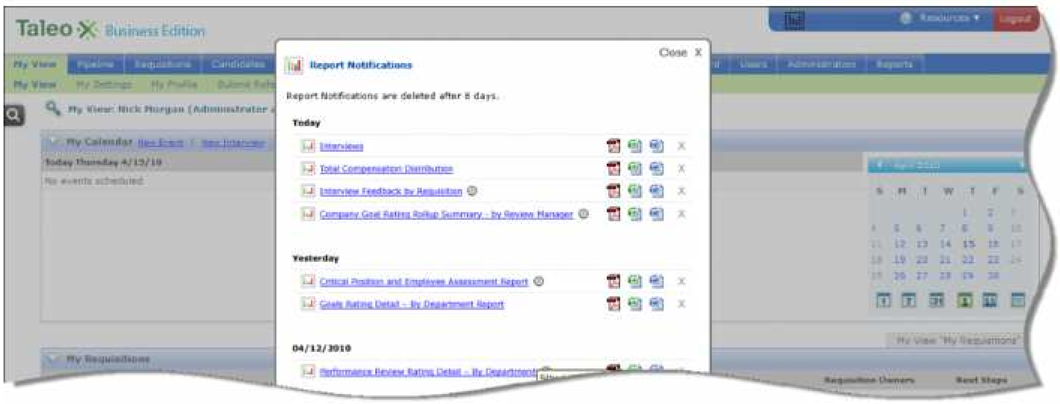
   When the report is completed, you will receive a report notification. The report notification is visible above the main navigation button. The number displayed in the report notification indicates the number of reports completed. (Scheduled reports send an automatic notification to the Report Schedule owner.)

6. Click the report notification icon to view the report(s) completed. This action decrements the notification number.

   A drop-down list displays with a link to the report(s).

7 Alternatively, click the More Report Notifications option to view all notifications for the last eight (8) days.

8 A Report Notification window displays, listing all reports you have scheduled or ran in the background in the last 8 days. Scheduled reports are identified by the schedule icon.



9 To download a report, click one of the available format icons (PDF, Excel or Word) and save the report to your hard-drive.

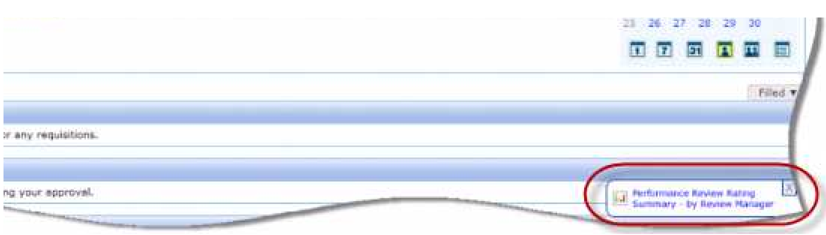
10 You can also click the **X** icon to delete the report notification. Deleting the report notification removes the notification only. To view the report instance, click the History button from the Insight menu.

Viewing Notification Bubbles

In addition to the report notification above the menu navigation, a notification bubble message displays if a user is active on the Taleo system when the report is completed.

To view notification bubbles:

1 A bubble notification message appears for 3 seconds in the bottom right corner of the screen if you are active on the Taleo system when the report is completed.



2 Click the report title in the bubble notification message to view the report.

3 Or, click the **X** icon to delete the notification. (Deleting the notification only removes the notification bubble from your screen. The notification and report are still accessible from the report notification drop-down menu).

4 To turn off notification bubbles, click the **My Settings** option from the My View tab.

5 Deselect the 'Display Bubble Notifications' checkbox, and click **Save**.

Interactive Viewers

Insight's Basic Interactive Viewer allows business users to change the look of a report to meet their individual preferences and needs. They can define headers and labels; change data alignment; and change font or case. Versions of reports templates can be renamed and saved by users for reuse.

The Advanced Interactive Viewer is available to Taleo Business Edition customers for an additional fee. Advanced Interactive Viewer extends access to the report designer to give business users even more flexibility to manipulate data. You can hide, add, and group data, and most importantly apply compute and aggregation functions. See Advanced Interactive Viewer on page 254 for more information.

Basic Interactive Viewer

Gives users access to view a report and manipulate formatting within a report. Features include:

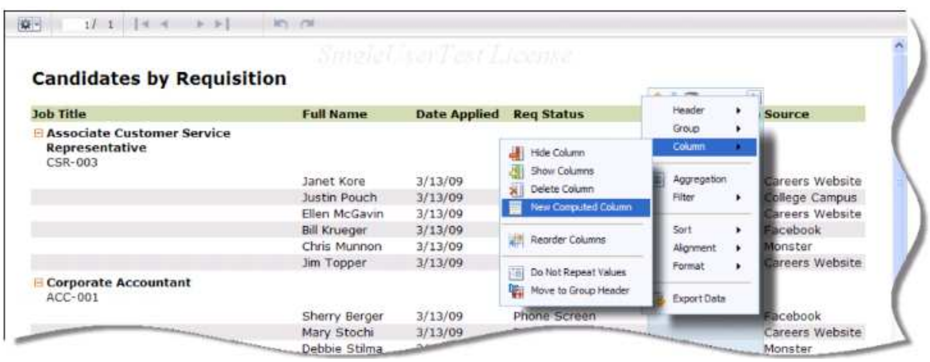
- Change Report Header, Alignment, Font
- Page Break
- Hide Column, Show Columns, Delete Column
- Filter
- Sort
- Alignment
- Format Font
- Conditional Formatting
- Format Data (date fields)

Advanced Interactive Viewer

Gives users access to view a report and manipulate data within a report. With this advanced feature, business users can modify the format of a report, group data, and apply calculations and totals to reports. Features include:

- Change Report Header, Alignment, Font

- Add Group, Delete Inner Group, Page Break
- Hide Column, Show Columns, Delete Column, New Computed Column, Reorder Columns
- Do Not Repeat Values
- Move to Group Header
- Aggregation - Apply Calculations (Count, Sum, Average, Median, Standard Deviation)
- Filter
- Sort / Advanced Sort
- Alignment
- Format Font
- Conditional Formatting
- Format Data (date fields)



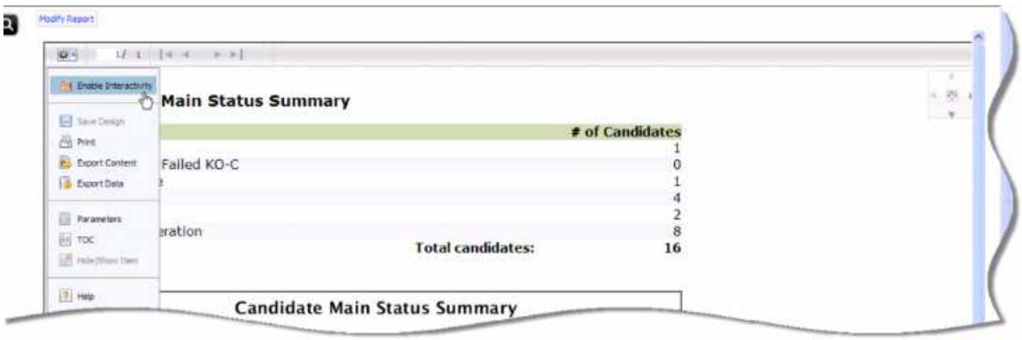
Using the Interactive Viewer Toolbar

The Interactive Viewer Toolbar is accessible when viewing a report. Using the Toolbar, you can Enable Interactivity and save the design of a report you have modified. You can print, export the content of a report, view the Table of Contents (TOC), and access Interactive Viewer Help.

To Enable Interactivity:

1. From the Insight menu hover over a report and click **Run**.
2. Select the parameters and click **Run Report.**
3. Click the Toolbar  icon in the top left corner of the report window.

4 Select **Enable Interactivity**.



5 You can now modify the report as needed. The menu options available to you are based on whether your company is using Basic or Advanced Interactive Viewer.

NOTE: Interactivity is not accessible with report documents that exceed 200 pages. For reports larger than 200 pages, it is recommended that you export the data to Excel to manipulate the report.

Saving a Report Design

To save the design of your modified report:

1 From the Insight tab, hover over a report and click **Run**.

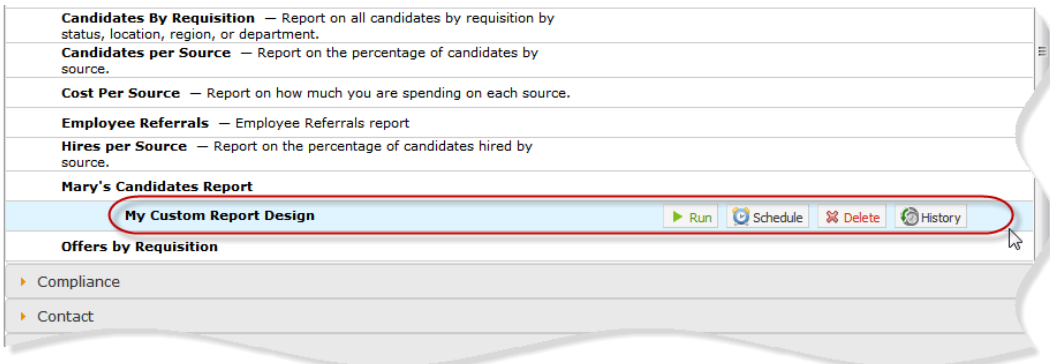
2 Click the Toolbar  icon in the top left corner of the report window.

3 Click **Enable Interactivity** to modify the report design.

4 From the Toolbar, click **Save Design**.

5 Enter the name of your new report and click **Save**.

6 Your new report is now accessible from the Insight report menu, indented underneath the root version of the report. As with other Insight Reports, you can now run and view the history of your report version. You can also delete your report, since you are the author of the report.



Printing a Report

To print a report:

1 From the Insight tab hover over a report and click **Run**.

2 Click the Toolbar icon in the top left corner of the report window.

3 Select **Print**.

Exporting Report Contents

To export the contents of a report:

1 From the Insight tab, hover over a report and click Run.

2 Click the Toolbar icon in the top left corner of the report window.

3 Select **Export Content**.

4 The Export Content box displays. Select the **Export Format**, **Page Range,** and **Page Style** and then click **OK**.

5 You can now choose to Open or Save the file.

Viewing the Report Table of Contents (TOC)

To view the TOC:

1 From the Insight tab, hover over a report and click **Run**.

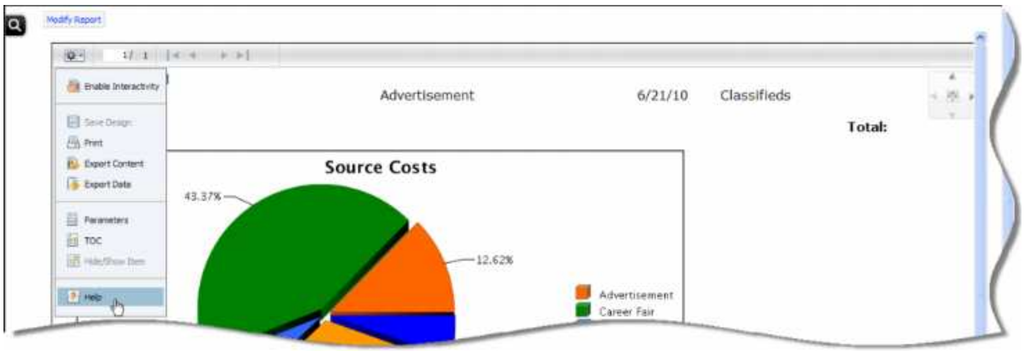
2 Click the Toolbar  icon in the top left corner of the report window.

3 Select **TOC**. This option is most relevant if you have a multi-page report.

Accessing Online Help

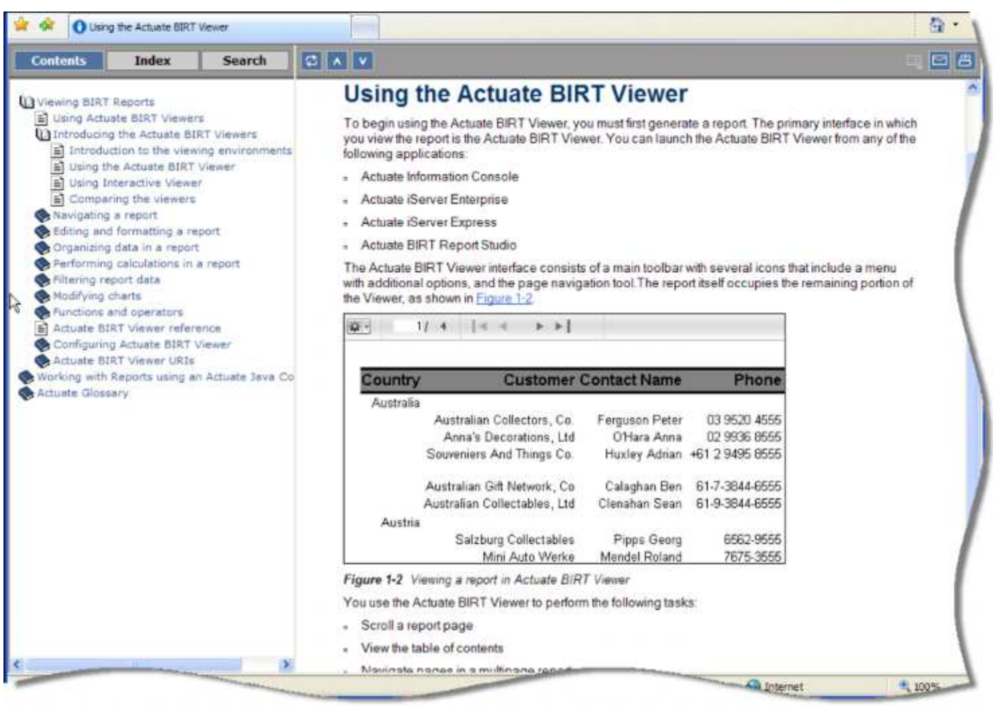
For assistance with Interactive Viewer and Report Studio:

1. From the Insight tab, hover over a report and click **Run**.
2. Click the Toolbar  icon in the top left corner of the report window.
3. Select **Help**.



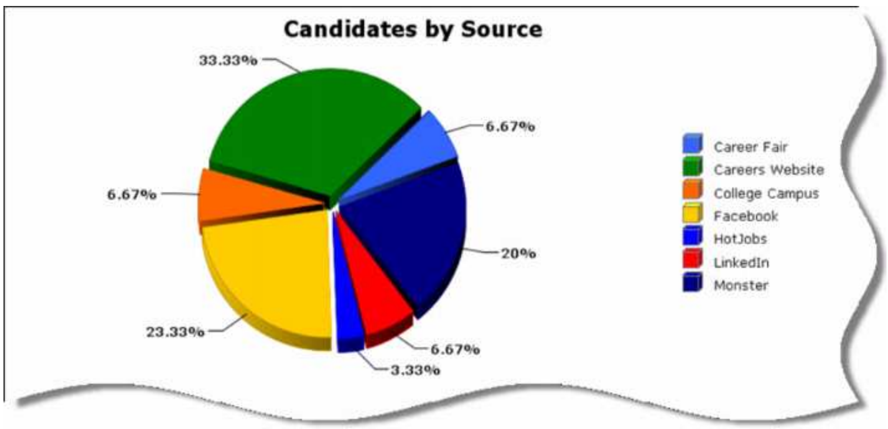
4. Online Help displays in a separate browser window. The Help module is context-sensitive, meaning the topic that displays is relevant to the screen from which you invoked the Help.

   You can also use the Contents, Index, and Search buttons in the left panel to navigate to the relevant topic.



Dashboards

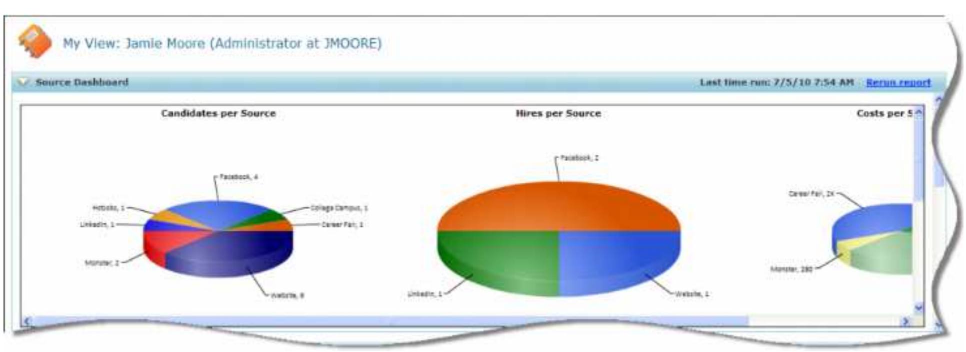
Embedded dashboards deliver an organized view of key metrics. Pre-defined dashboards are embedded into the My View of Taleo Business Edition and can be set to display or be hidden based on relevance to your organization and user role.



Viewing Dashboards

Once Dashboards have been enabled, users can view the Dashboards from their My View page. Scroll bars enable users to reposition the Dashboard up and down, and from left to right, where needed. Dashboards are refreshed every 24 hours by default.

You can refresh the Dashboard manually by clicking the **Rerun report** link at the top right of the Dashboard. Once it has been refreshed, the Rerun report link is not accessible again for 30 minutes.



Administration

This section describes tasks to be performed by the Administrator and HR Administrator.

Assigning Access to Insight Reports

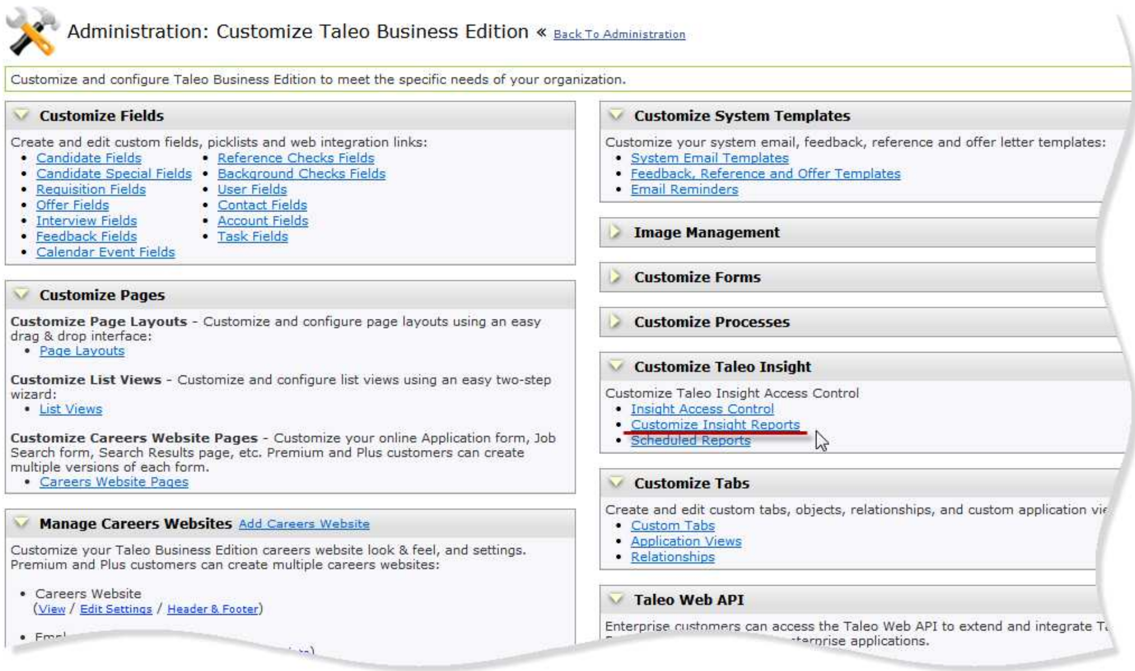
Insight Reports have their own Access Control. This prohibits users from accessing confidential information within reports if they do not have permission to see it. When a user selects the **Insight** menu option, the list of available reports is determined by a user's assigned access. By default, reports are only accessible to Administrators and HR Administrators. To assign access to a role or user, an additional step is required. Users who do not have appropriate permissions to access Insight Reports will see a blank Insight menu.

To grant access to Insight Reports:

1. Select **Customize Recruit/Perform/OnBoard** from the **Administration** tab.
2. Click the **Insight Access Control** link from the Customize Taleo Insight section.
3. Select the check box for each Role you want to grant access to each Report.
4. To grant an individual user access to a Report regardless of their Role, click the **Select** link in the Selected Users column.
5. Move the users from the "Available" list on the left to the "Selected" list on the right.
6. Click **Save**.

NOTE: Many Insight Standard Reports have more than one version with embedded report filters restricting data by Current User Owner, Current User Subordinates. This ensure users see only data relevant to them and confidential information remains secure.

Best practice recommendation: assign filtered reports to Recruiters and Hiring Managers so the data is restricted to records they own.



NOTE: Setting access to a role or user for a specific report does not provide access to an entire section of reports e.g. requisition reports, candidate reports, etc. Administrators must select the reporting group section header as well as the specific report(s) by role and user to make it accessible.

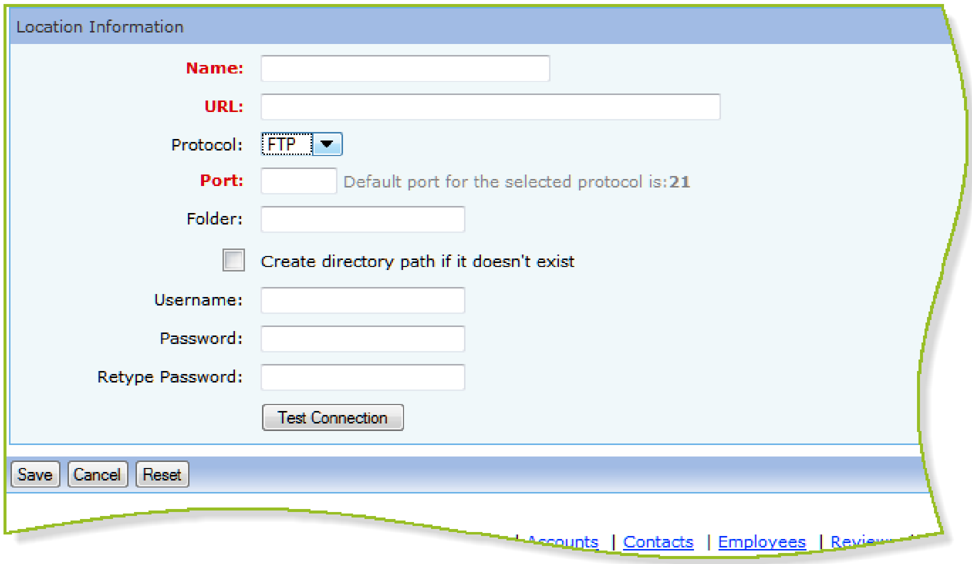
Configuring FTP Sending Options for use with Scheduled Reports

This feature is available to Insight Advanced customers; please contact your Customer Sales Manager (CSM) for information and pricing.

After an Administrator sets up your File Upload Server as described below, the option to deliver reports via FTP becomes available to users when they schedule reports.

To Configure FTP Delivery Options:

1. From the Administration tab, click Customize Recruit/Perform/OnBoard.
2. In the File Upload Servers area, click File Upload Servers. If you do not see this option Advanced Reporting is not enabled in your system; contact your CSM.
3. Click New File Upload Server and the following displays:



4 Enter the following FTP site details and user login information:

- Name: This is a required text field that is intended to help users identify the location to which their report is going to be uploaded. Enter a descriptive name
- URL: This field is required for identifying the exact web address of the FTP site where reports will be uploaded.
- Enter the URL for the FTP site, exactly as it appears in the address bar of your browser.
- Protocol: Specify the protocol your FTP site uses: FTP, SFTP, or SCP.
- Port: This is a required field. Enter the port for your FTP connection. This is typically 21 or 22, depending on the protocol you are using. FTP uses port 21, SFTP and SCP use port 22.
- Folder: Enter the folder on your FTP site where you want the report to be uploaded.

NOTE: If you specified the SCP protocol option above, which does not support folder creation, you must type the folder name exactly as it appears in your FTP site's directory.

- Username: This must be entered correctly and must be a case sensitive match with the username of your FTP site login credentials.
- Password: This must be entered correctly and must be a case sensitive match with the password of your FTP site login credentials.

5 Click TEST CONNECTION and make any necessary corrections until you establish a successful connection.

NOTE: If you receive an error, “Connection could NOT be established! File transfer failed: wrong server's hostname,” this is most likely due to an incorrect URL. This error does not refer to the Name field shown in the sample screen above, which can be anything you want to use as a description to help users identify where their reports are being uploaded.

6 Click Save, and the option to deliver a report via FTP becomes available to users in the Report Scheduler.

Displaying and Editing Dashboards

A number of summary-level Dashboards have been embedded in the My View Page Layout and can be hidden or displayed depending on your company’s preference.

To display an Insight Dashboard:

1 From Administration click **Customize Recruit**.

2 From the Customize Pages section, click the **Page Layouts** link.

3 In the General Page Layouts section, click **Edit** for the My View page layout.

4 By default, Insight Dashboards are embedded as placeholders at the bottom of the My View page layout. Scroll to the bottom of the page layout. Each Dashboard is labeled as “Reporting Dashboard: Dashboard name.”

1 Click the **Unhide** link to display a Dashboard.

2 To edit the parameters or display type of the Dashboard, click **Edit**.

3 The parameters available in each Dashboard allow you to determine the results that display to the user. For example, the Candidates per Source Dashboard allows you to

select which candidates are included in the source report based on the date they were added to the system by using the Start and End Date fields.

4 You may also control the type of Dashboard that is displayed – standard format or Flash. To display the Dashboard in Flash, select the check box "Flash Enabled."

> **Best practice recommendation:** to view the Dashboards in Flash format, your users must have Adobe Flash Player 9 or above installed on their browser. If your company does not support Adobe Flash for users, it is recommended you deselect the "Flash Enabled" checkbox.

5 As with other placeholders in Taleo Business Edition, you can drag and drop the placeholder to any location of the page.

6 Click **Save** to save your changes.

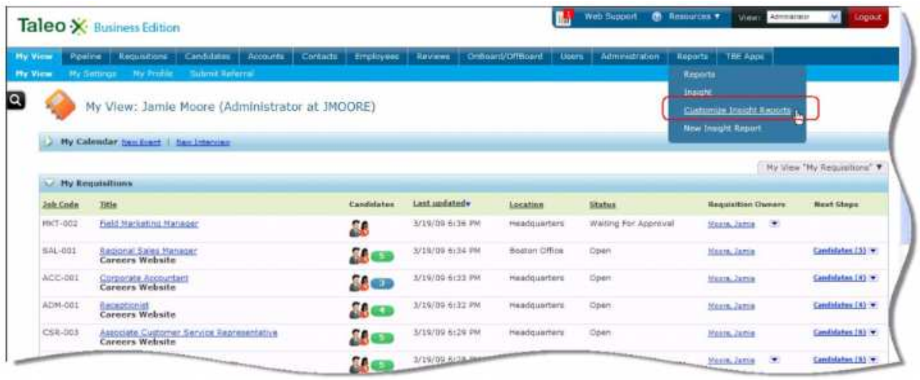
You can Add Versions of the My View page and assign them to specific Roles or Users to control who can view Dashboards.

Customizing Insight Reports

Administrators and HR Administrators have the ability to Edit, Clone, Delete, or Assign access to Custom Insight Reports at any time. Only custom Insight Reports can be modified. Refer to Creating and Enhancing Reports for instructions on creating new reports.

To access a Custom Insight Report:

1 Select **Customize Insight Reports** from the **Reports** tab.



2 Depending on the Taleo product(s) used by your company, you can toggle between services to view the available Topics.

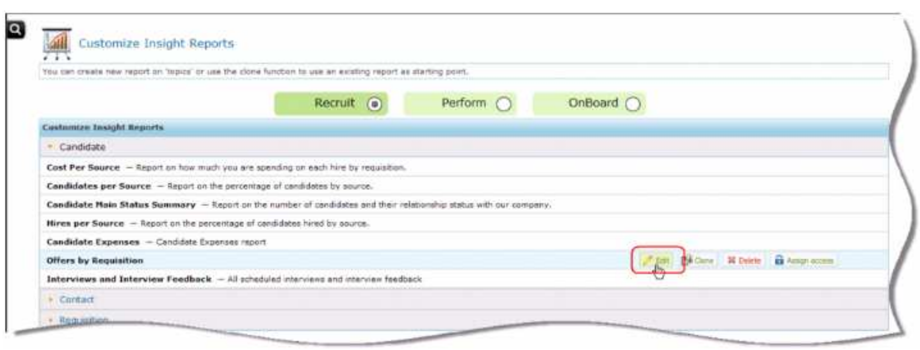
NOTE: Standard reports can not be modified. Users can run a standard report from the Insight page and save a version of a standard report with desired format or design changes. See Interactive Viewers for more information.

Editing a Custom Insight Report

To edit a Custom Insight Report:

1 Select **Customize Insight Reports** from the **Reports** tab.

2 Hover over a report and click the **Edit** button.



3 This action will open the Edit Insight Report in Report Studio and allow you to modify the report design as needed.

4 Click **Save**.

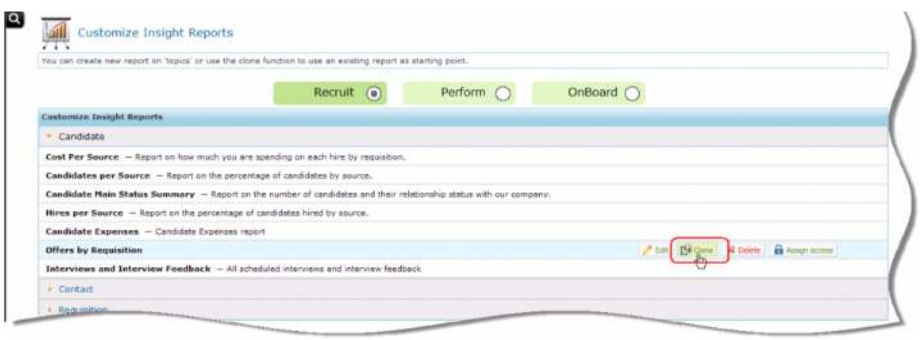
	Best practice recommendation: Use the Clone option to add a display field or parameter to a custom report you have already created. It is also recommended that you save and clone reports often during the design phase so you can see your results as you progress and to protect from losing your work due to internet connectivity failure. Be sure to add version numbers to your report title (v1, v2, etc.) When you have the final report result, you can delete the previous version(s).

Cloning a Custom Insight Report

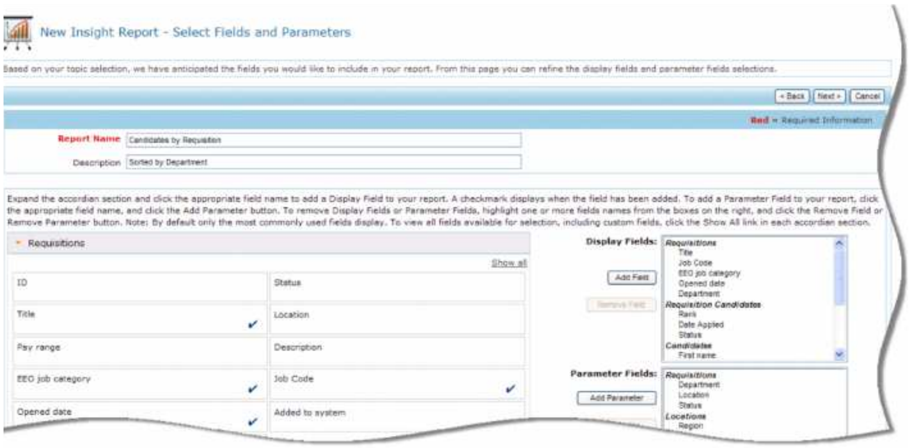
To clone a Custom Insight Report:

1 Select **Customize Insight Reports** from the **Reports** tab.

2 Hover over a report and click the **Clone** button.



3 This action will open the Clone Insight Report page and allow you to modify the report Name, Description, Display Fields, Parameter Fields, Filters (if appropriate), and change the report design.



Tip: Cloning a custom Insight Report is similar to creating a New Insight Report, but allows you to select an existing custom report from which to create your new report, saving you time and effort.

4 Follow each step of the process and click **Save**.

Deleting a Custom Insight Report

To delete a Custom Insight Report:

1 Select **Customize Insight Reports** from the **Reports** tab.

2 Hover over a report and click the **Delete** button.

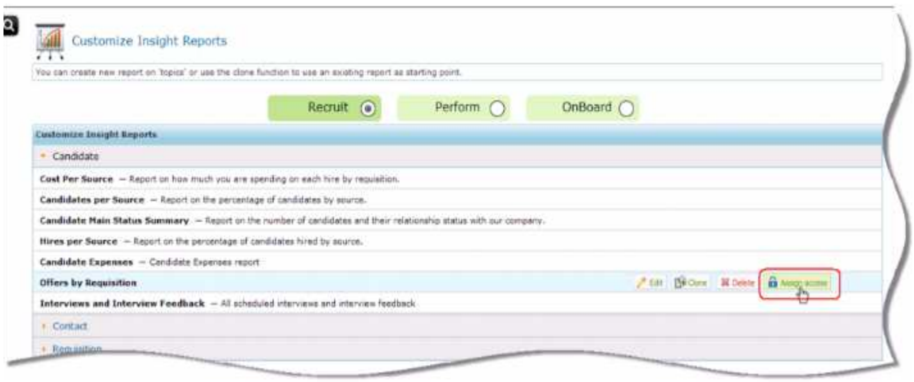
3 A confirmation message will appear, click **OK**.

Assigning Access to a Custom Insight Report

To modify report access to Insight Reports:

1 Select **Customize Insight Reports** from the **Reports** tab.

2 Hover over a report and click the **Assign access** button.



3 Select the check box for each Role you want to grant access to each Report.

4 To grant an individual user access to a Report regardless of their Role, click the **Select** link in the Selected Users column.

5 Move the users from the “Available” list on the left to the “Selected” list on the right.

6 Click **Save**.

NOTE: To assign access in bulk, see Assigning Access to Insight Reports on page 261.

Insight System Email Templates

System Email Templates define the content of automated email messages sent by your Taleo Business Edition system. Brief descriptions of each Insight template and the context in which it is used are included below. Review these descriptions, then review the content of each email template by clicking the Edit link next to the template name. Make any necessary changes and click Save when you are finished.

NOTE: Merge fields are used to merge data from your Taleo Business Edition system into outbound emails. For example, <<COMPANY_NAME>> will be replaced by your company name when the email is sent. A full list of available merge fields is shown in each template edit screen.

Email Template Descriptions

- **Scheduled Report E-mail**
  Sent to report recipients when a scheduled report is run.
- **Scheduled Report Expiry**
  Sent to a report schedule owner to notify them the schedule report is about to expire.
- **Sending Report File Failed Notification**
  Sent to an administrator to notify them their file server has failed; and therefore a scheduled report can not be delivered via FTP.

NOTE: Insight Report System Email Templates are automated; they can not be disabled.

Creating and Enhancing Reports

Taleo Insight is a web-based report development tool for companies to create business intelligence reports using reusable report components. Administrators and HR Administrators have access to a library of Topics (pre-defined table joins) to build custom reports.

This section provides instructions for creating reports in Taleo Insight and enhancing their layout and design using Report Studio.

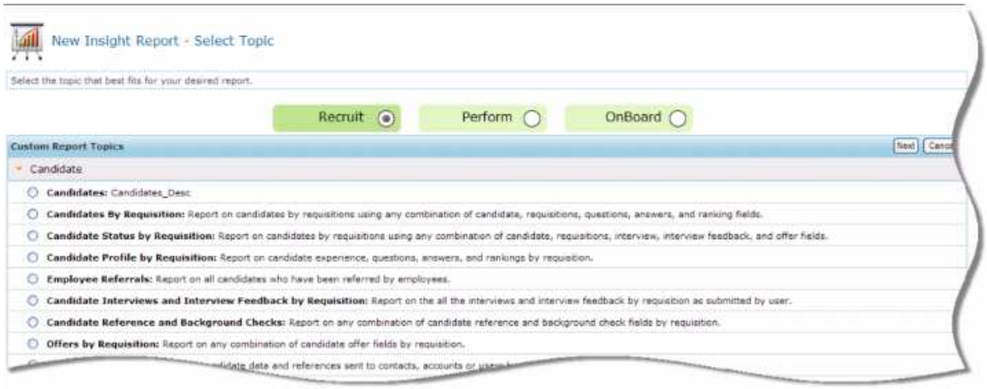
NOTE: Only Administrators and HR Administrators have access to create and enhance reports.

Creating a New Insight Report

To create a new Insight Report:

1 From the **Reports** menu, select **New Insight Report.**

The following displays:

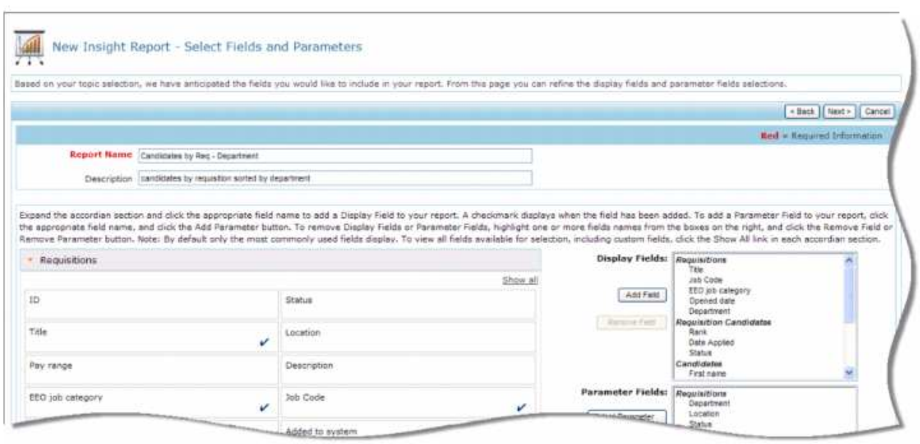


2 Specify the Taleo product.

Depending on the Taleo products used by your company, you can toggle between the Recruit, Perform, and OnBoard services at the top of the page. Each application has a unique set of topics you can choose from.

3 Select a Topic that best fits your reporting requirements. A topic is a report query that includes relevant tables and fields corresponding to the type of report you are building. Read the topic description and choose the most relevant topic. The query results that are returned will be restricted based on the topic you select. For example, the Offers by Requisition topic will only display offers that are associated to a requisition.

4 Click **Next**. The Refine Fields and Parameters page displays:



5 Enter a **Report Name** (required) and **Description** (optional).

- **Report Name:** Appears at the top of the report.
- **Description:** Appears under the report name on the main Insight Reports page, not on the report itself.

6 Expand each section to view the fields and parameters available. By default only the most commonly used fields display in each section; to view all fields available, including any custom fields, click **Show All**. The fields available to you on this page are based on the Topic you selected above.

7 Select the display fields and parameters users will be prompted to choose from when they run the report.

To add a display field and/or a parameter field, select the field and click the **Add Field** or **Add Parameter** button.

> **Tip:** You can **Double-click** on a field name to quickly add it as a display field (or use the **Add Field** button). The double-click tip only works for display fields; to add parameter fields, you must use the **Add Parameter** button.

Use Aggregated fields to minimize redundancies in your report.

Aggregated fields are represented by this icon: , and Custom fields are represented by this icon: 

Refer to Using Aggregated Fields on page 273 for more information.

NOTE: **Date vs. Date Within**

Each “Date” display field has a corresponding “Date Within” parameter field. For example, the “Date Added” display field has a corresponding “Date Added Within” parameter field. “Date Added” can be used as a display field, but “Date Added Within” cannot – it can only be used as a parameter field.

“Date Within” parameters enable time frame options such as Last Day, Last Week (Sunday through Saturday of the previous week), Last Month (all of the previous month, none of the current month), and Last Quarter, when users schedule and run reports.

To remove a Display or Parameter field, highlight one or more fields and click **Remove Field** or **Remove Parameter**.

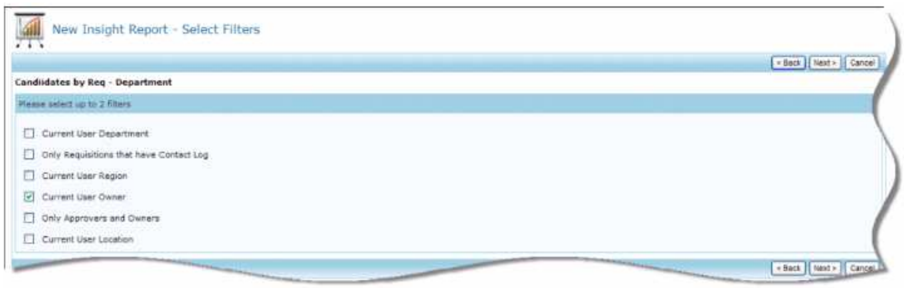
8 Click **Next**.

9 Select the **Filters** that will be applied to your new report when it is run.

These filters are used to ensure that the person running the report does not gain access to records they would not normally have access to within Taleo Business Edition. It is important to have the report filters match the list view filters for your users. You may select up to a maximum of two filters.

The filters available will vary depending on the report topic and fields and parameters you selected in previous steps.

	Best practice recommendation: Selecting Filters controls the data results returned when a user runs a New Insight Report. While you can control which Roles and Users access a report from the Assign access option, Filters allows you to further refine the data results returned based on ownership of a requisition, candidate, etc., similar to the Filter options in List Views. (For example, you can now limit report data to a business user's department only.)



CAUTION: This is the last step in the report definition phase. After you click **Next** in the following step you will not be able to return to the previous screen to modify your selections.

10 Click **Next** and Report Studio launches.

This completes the report definition phase. Now you can begin designing the report's layout using Report Studio. Refer to Designing Reports with Report Studio on page 274, for detailed instructions.

Using Aggregated Fields

You can use Aggregated fields when creating custom reports to minimize redundancies and create more visually appealing reports.

Without aggregated fields, if there are three requisition owners associated to an individual requisition, Insight repeats the same row of data three times. Each row displays the common requisition data, with the one deviation being the requisition owner. Where additional deviations are introduced with multiple fields and table joins, the number of data rows increases exponentially. While the data output is valid, the inclusion of repeated rows may impact the usefulness of your report.

Aggregated fields Available in Taleo Insight

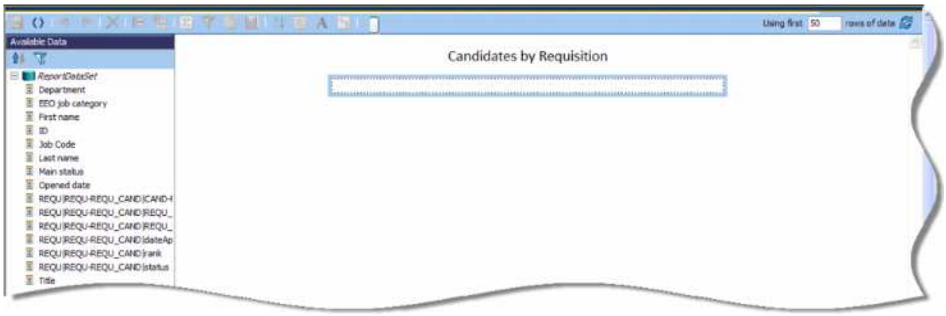
Requisition Table	• Aggregated Requisition Owners • Aggregated Requisition Approvers • Aggregated Offer Approvers • Aggregated Agencies • "Number of Candidates Applied" Calculates the number of candidates associated to a requisition
Candidate Table	• Aggregated Interviewers • Aggregated Feedback by Interviewers
Compensation Cycle Table	• Aggregated Cycle Owners • Aggregated Cycle Approvers
Performance Reviews Table	• Aggregated Performance Review Approvers • "Numeric-Calculated Manager Rating" *Calculated Manager Score * Max Rating Score = Numeric-Calculated Manager Rating (e.g. 80*5 = 4.00). Display xx.xx for 10 point scales.* • "Numeric-Calculated Employee Rating" *Calculated Employee Score * Max Rating Score = Numeric-Calculated Employee Rating (e.g. 80*5=4.00). Display xx.xx for 10 point scales.*

NOTE: Aggregated fields can be used instead of or in conjunction with user table joins. For example, you can use the Aggregated Requisition Owners field to display all Requisition Owners in a single display field within a report and exclude the Requisitions Owners table. Where table joins are added in addition to or in lieu of Aggregated fields, the repeating rows will be present.

Designing Reports with Report Studio

After creating the report and specifying the content that will be contained in it, you can design the layout of your report and make cosmetic improvements to enhance its appearance and usability.

Picking up where we left off in the previous section, Report Studio launches as a blank canvas:



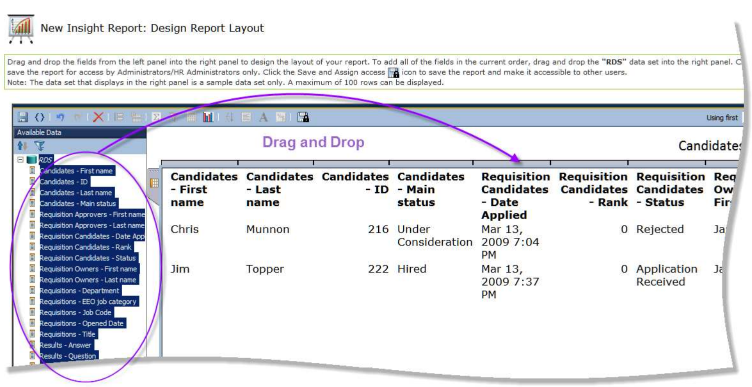
To design the layout of your report:

1 Drag and drop columns from the Available Data section on the left to the blank report section on the right. The fields shown in the Available Data section are the display fields you selected in the report creation phase.

NOTE: The data set that displays in the right panel is a sample data set only. A maximum of 100 rows can be displayed on the screen.

To drag and drop all fields at once, click on the ***ReportDataSet*** in the left navigation panel and drag and drop to the right. You can also selectively drag and drop columns.

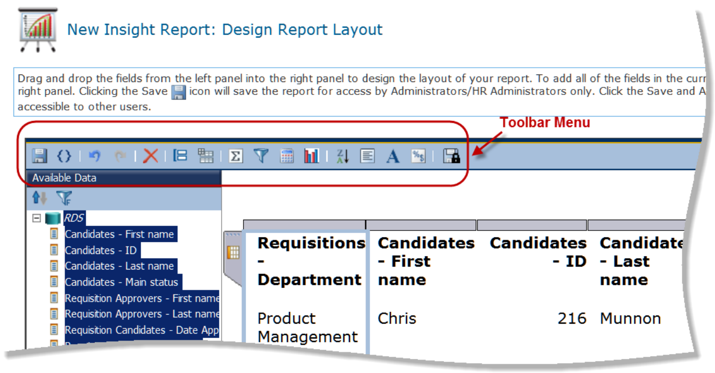
2 Follow the instructions for using Report Studio Design Options on page 276 and Making Cosmetic Improvements on page 278.



Report Studio Design Options

This section outlines the design options available from the Toolbar menu and Pop-up menus in Report Studio.

Toolbar Menu:



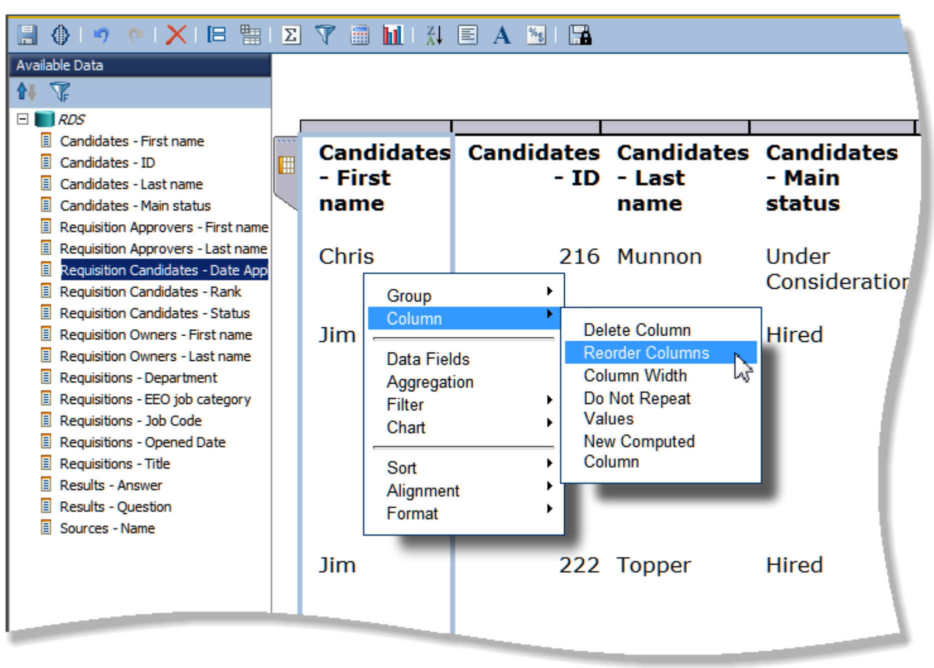
Design Options and Corresponding Icons:

Icon	Design Feature
	Select Parameters
	Undo
	Redo
	Delete
	Add Group
	Add Section
	Add Aggregation
	Add Filter
	Add New Computed Column
	Add Chart

Icon	Design Feature
	Sort Ascending or Descending
	Align
	Modify Font
	Format Data
	Save Report
	Save and Assign Access

Report Studio Pop-up Menus

The design options available from the Toolbar menu are also accessible by right-clicking an area of the report to invoke a pop-up menu. Pop-up menus, also known as context menus, contain the options relevant to the area of the report from which you invoked the menu. For example, if you right-click in the body of a column, the pop-up menu that displays contains design options relevant to columns, as illustrated below:



Making Cosmetic Improvements

When you build a report in Taleo Insight, the content of the report is pulled from a database that uses naming conventions designed to facilitate the storage and retrieval of data. Those naming conventions work very well in databases, but not so well on a report that has size constraints and needs to be presented as concisely as possible for maximum reader comprehension. Therefore, some modifications to the raw data pulled from the database may be necessary. This section contains instructions for making cosmetic improvements to the raw data of your report, including:

- Applying Themes to Custom Reports
- Reordering Columns and Sorting Rows
- Creating User Friendly Column Headings
- Applying a Short Date Format to Date Fields
- Combining Columns of Data
- Deleting Redundant Columns
- Changing Column Widths

Best practice recommendation: If you have a large or complex report, it is wise to save versions of the report by cloning it as you make progress. Cloning can be compared to the “Save As” feature available in many software programs. It provides a way to save draft versions of the report for editing purposes. When the report is complete and you are satisfied with the final format, you can delete the cloned versions. Cloning provides:

- An opportunity to add any display fields and parameters you may have forgotten during the report creation process.
- Protection from human error (or internet connection failure), by giving you a baseline you can revert back to if you introduce changes that cause undesired results and are too difficult or complex to easily remove.

Refer to Cloning a Custom Insight Report for instructions.

Applying Themes to Custom Reports

Report Studio has customized themes to instantly add style formats to new Insight custom reports.

To apply a theme to a new custom report:

1. From the Reports menu, select **New Insight Report.**
2. Select a Topic and click **Next**.
3. Refine the fields and parameters and then click **Next**.
4. Add filters, if appropriate, and then click **Next**.

5 Drag and drop the data you want to include in the report.

6 In the panel on the left, scroll down and click **Themes**.

7 Select a theme and then click **Apply**.

8 Click Save.

NOTE: Themes are not available for existing custom reports.

Changing Page Layouts, Fonts, and Colors

You can specify page layout and aesthetic options for your report, as follows:

To change Page Layout options:

1 Click **Page Setup i**n the left panel and then choose from the following options:

- Layout preference: Auto-expand or Fixed Width for columns
- Orientation: Portrait or Landscape
- Paper Size: A4, US Letter, US Legal, or Custom
- Margins: Top, Bottom, Left, and Right.

2 Click **Apply**.

To change font styles and colors:

1 Right-click on a column in your report and then select **Format > Font.**

2 Make cosmetic changes to suit your preference and then click **Apply.**

Reordering Columns and Sorting Rows

To increase the usefulness and readability of your report, you may want to move columns around and sort rows in a way that best represents the data you are displaying.

To reorder columns:

1 Right-click a column and then choose **Column > Reorder Columns**.

2 Use the up and down arrows to change the display order of your columns, and then click **Apply**.

To sort rows:

1 Right-click the gray bar directly above a date column, then choose **Sort > Sort Ascending, Descending, or Advanced Sort.**

2 If you choose to sort in ascending or descending order, the rows are sorted immediately.

3 If you choose Advanced Sort, scroll to the Advanced Sort dialog box, select up to 3 sorting levels, and then click **Apply**.

Creating User Friendly Column Headings

The names of the column headings are pulled directly from the database, and as such, could use some minor edits to make them more readable and user friendly. You may also wish to shorten the column headings to maximize space on your report.

To create user friendly column headings:

1. Click the text of a column heading to select it, then click it again to make it editable.

   When in edit mode, the font size of the column heading temporarily becomes smaller to indicate that it is editable.
2. Type the new column heading, using the backspace key to delete existing text, and the arrow keys on your keyboard to reposition the cursor within the column heading.
3. Right-click the column heading to access a menu with formatting options that enable you to:
   - Change the font size, type, and color
   - Change the font style to bold, italic, or underlined
   - Change the alignment of the text: left, right, or center
   - Insert rows
   - Merge cells
   - Add a border with color and line width options

Applying a Short Date Format to Date Fields

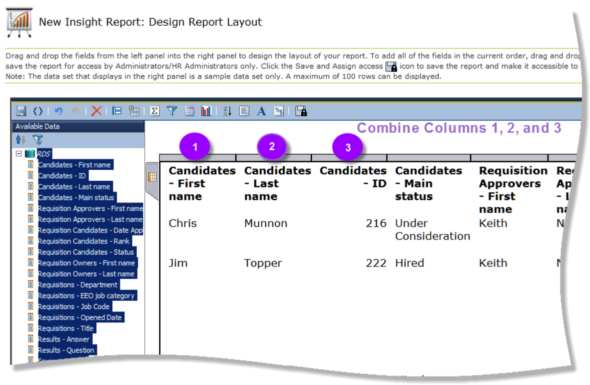
To apply a Short Date format to date fields in your report:

1. Right-click the gray bar directly above a date column, then choose **Format > Format Data.**
2. Scroll to the **Date/Time Column Format** dialog box, select a date format, and then click **Apply**.

Combining Columns of Data

Combining columns is a good way to maximize space and create a more visually appealing report. This is done using the Computed Columns feature, which is often referred to as concatenation.

The example below describes how to combine the First Name, Last Name, and Candidate ID columns, effectively displaying 3 columns of data in 1 concise column:



To combine columns:

1 Select the Last Name column by clicking the gray bar above the column heading. A border displays around the length of the column to indicate it is selected.

2 Right-click the gray bar above the column heading, then choose **Column > New Computed Column**. You can also click the icon and then select **New Computed Column**.

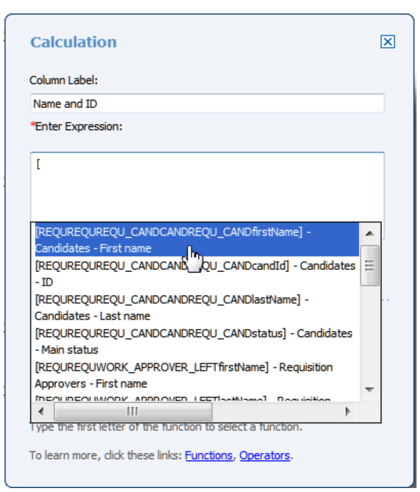
3 The Calculation window displays.

4 Enter a column label, for example, "**Name and ID**".

5 Enter an Expression, as described below, to define the content of the new column.

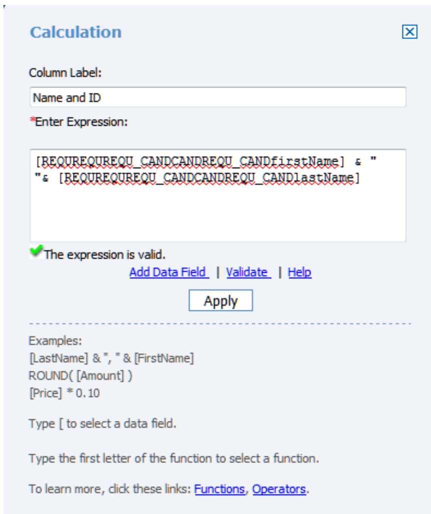
a) To begin building the expression, type a left bracket character: [

b) A drop-down menu displays where you select the first column you want to combine. In this example, select the First Name column, as shown in the sample screen below:



6 To insert a space between the first and last names, enter the following text. You can copy/paste or type these characters directly into the expression field. There is a space between each character: `& " " &`

7 Type a left bracket character: `[` and then select the Last Name column from the list, as shown below:



8 Click **Validate** to test the expression. If you've entered it correctly, you will see a message, "The Expression is valid," illustrated in the sample screen. If validation fails, check the expression to make sure you've entered it correctly and then re-validate it.

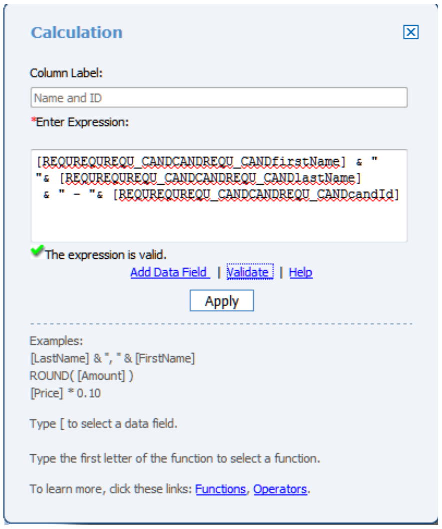
9 Click **Apply**. You now have one column with the First and Last Names separated by a space.

10 Right-click the new computed column and select **Column > Edit Computed Column.**

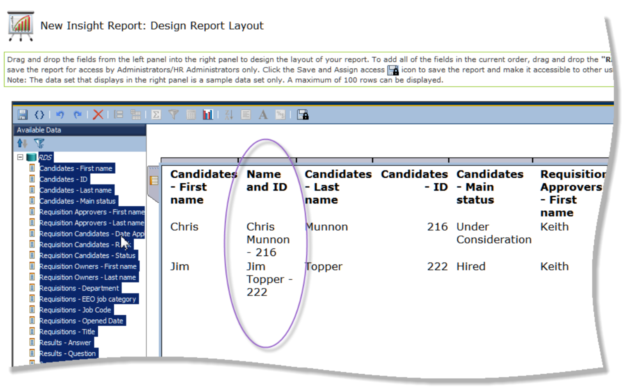
11 Enter the following text to insert a hyphen between the name fields and the ID field. You can copy/paste or type these characters directly into the expression field. There is a space between each character: `& "-" &`

This is illustrated in the sample screen below.

12 Type a left bracket character: [and then select the Candidate ID column from the list.



13 Click **Validate**, then click **Apply**. Your new Computed Column displays as shown below.



14 Use the procedures in the following sections to delete redundant columns and change the column width.

Tip: Save your expressions in a text file, such as Note Pad or Word, so you can re-use the content later by copy/pasting the expression instead of building it from scratch.

Deleting Redundant Columns

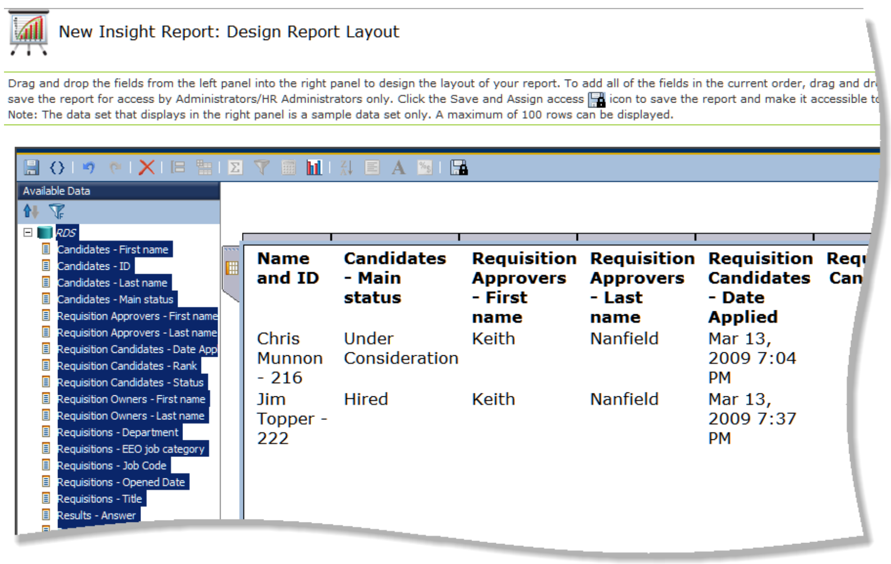
After combining the First Name, Last Name, and ID columns, you can delete the columns you no longer need. In this example, we will delete the First Name, Last Name, and Candidate ID columns, as they are now redundant.

To delete a column:

1 Select the column you want to delete, by clicking the gray bar above the column heading. A border displays along the length of the column to indicate it is selected.

2 Right-click the column and select **Column > Delete Column.**

3 Repeat this step for all redundant columns. The sample report now appears as follows:



Changing Column Widths

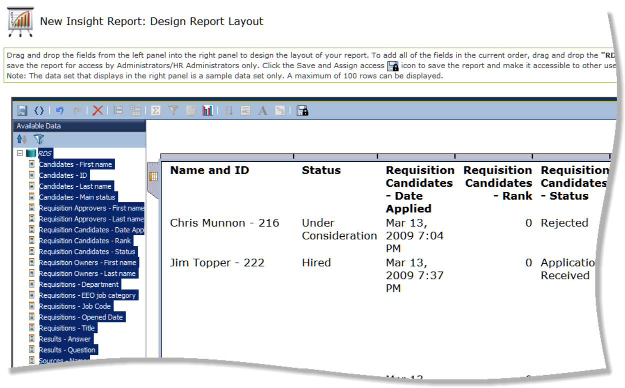
After combining columns, you may need to widen the column width to display all the data on one line.

To widen a column:

1 Select the column you want to widen, by clicking the gray bar above the column heading. A border displays along the length of the column to indicate it is selected.

2 Right-click the column and select **Column > Column Width.**

3 Repeat this procedure for any columns you want to widen. The sample report now appears as follows:



Functions

Report Studio contains a robust set of functions to assist in the creation of analytical reports. Each of these functions and how they are used is described in detail in the Report Studio online Help. To access the online Help, click the Help link in any of the Report Studio dialog boxes.

Functions are used in Computed Columns to define the values displayed. Functions enable you to perform a wide range of operations, such as data manipulation, rounding, counting, and mathematical equations.

This section provides a complete reference of all of the functions available in Report Studio, organized into two tables:

- Functions used in computed column expressions
- Functions used to perform aggregate calculations.

Functions used in computed column expressions

Computed Column Function	Description	Syntax
BETWEEN( )	Tests if a value is between two specified values.	BETWEEN(value, upper-Bound, lowerBound)
IF( )	Returns one value if a specified condition evaluates to TRUE, or another value if the condition eval-uates to FALSE.	IF(condition, doIfTrue, doIfFalse)

Computed Column Function	Description	Syntax
LEFT( )	Extracts a substring from a string, starting from the left-most, or first, character.	LEFT(str) LEFT(str, n)
NOW( )	Returns the current date and time.	NOW( )
ABS( )	Returns the absolute value of a number without regard to its sign. For example, 6 is the absolute value of 6 and -6.	ABS(num)
ADD_DAY( )	Adds a specified number of days to a date value.	ADD_DAY(date, daysToAdd)
ADD_HOUR( )	Adds a specified number of hours to a date value.	ADD_HOUR(date, hoursToAdd)
ADD_MINUTE( )	Adds a specified number of minutes to a date value.	ADD_MINUTE(date, minutesToAdd)
ADD_MONTH( )	Adds a specified number of months to a date value.	ADD_MONTH(date, monthsToAdd)
ADD_QUARTER( )	Adds a specified number of quarters to a date value.	ADD_QUARTER(date, quartersToAdd)
ADD_SECOND( )	Adds a specified number of seconds to a date value.	ADD_SECOND(date, secondsToAdd)
ADD_WEEK( )	Adds a specified number of weeks to a date value.	ADD_WEEK(date, weeksToAdd)
ADD_YEAR( )	Adds a specified number of years to a date value.	ADD_YEAR(date, yearsToAdd)
CEILING( )	Rounds a number up to the nearest specified multiple.	CEILING(num, significance)
DAY( )	Returns a number from 1 to 31 that represents the day of the month.	DAY(date)
DIFF_DAY( )	Calculates the number of days between two date values.	DIFF_DAY(date1, date2)
DIFF_HOUR( )	Calculates the number of hours between two date values.	DIFF_HOUR(date1, date2)
DIFF_MINUTE( )	Calculates the number of minutes between two date values.	DIFF_MINUTE(date1, date2)

Computed Column Function	Description	Syntax
DIFF_MONTH( )	Calculates the number of months between two date values.	DIFF_MONTH(date1,date2)
DIFF_QUARTER( )	Calculates the number of quarters between two date values.	DIFF_QUARTER(date1, date2)
DIFF_SECOND( )	Calculates the number of seconds between two date values.	DIFF_SECOND(date1, date2)
DIFF_WEEK( )	Calculates the number of weeks between two date values.	DIFF_WEEK(date1, date2)
DIFF_YEAR( )	Calculates the number of years between two date values.	DIFF_YEAR(date1, date2)
FIND( )	Finds the location of a substring in a string.	FIND(strToFind, str) FIND(strToFind, str, startPosition)
IN( )	Tests if a value is equal to a value in a list.	IN(value, check1,..., checkN)
ISNULL( )	Tests if a value in a specified data field is a null value. A null value means that no value exists.	ISNULL(value)
LEN( )	Counts the number of characters in a string.	LEN(str)
LIKE( )	Tests if a string matches a pattern.	LIKE(str, pattern)
LOWER( )	Converts all letters in a string to lowercase.	LOWER(str)
MONTH( )	Returns the month for a specified date value.	MONTH(date) MONTH(date, option)
NOTNULL( )	Tests if a value in a specified data field is a non-null value.	NOTNULL(value)
QUARTER( )	Returns the quarter number for a specified date value.	QUARTER(date)
RIGHT( )	Extracts a substring from a string, starting from the right-most, or last, character.	RIGHT(str) RIGHT(str, n)
ROUND( )	Rounds a number to a specified number of digits.	ROUND(num) ROUND(num, dec)

Computed Column Function	Description	Syntax
ROUNDDOWN( )	Rounds a number down to a specified number of digits.	ROUNDDOWN(num) ROUNDDOWN(num, dec)
ROUNDUP( )	Rounds a number up to a specified number of digits.	ROUNDUP(num) ROUNDUP(num, dec)
SEARCH( )	Finds the location of a substring in a string. The substring can contain wildcard characters.	SEARCH(pattern, str) SEARCH(pattern, str, startPosition)
SQRT( )	Calculates the square root of a number.	SQRT(num)
TODAY( )	Returns the current date that includes a time value of midnight, 12:00 AM.	TODAY( )
TRIM( )	Removes the leading and trailing blanks from a specified string. TRIM( ) does not remove blank characters between words.	TRIM(str)
TRIMLEFT( )	Removes the leading blanks from a specified string.	TRIMLEFT(str)
TRIMRIGHT( )	Removes the trailing blanks from a specified string.	TRIMRIGHT(str)
UPPER( )	Converts all letters in a string to uppercase.	UPPER(str)
WEEK( )	Returns a number from 1 to 52 that represents the week of the year.	WEEK(date)
WEEKDAY( )	Returns the day of the week for a specified date value.	WEEKDAY(date, option)
YEAR( )	Returns the four-digit year value for a specified date value.	YEAR(date)

Functions used in aggregate calculations

Aggregate Calculation Function	Description
AVERAGE	Returns the average, or mean for a set of data rows. For example, if a report column contains values 5, 2, 7, and 10, AVERAGE returns 6.
COUNT	Counts the number of data rows. If a column contains values 5, 2, 7, and 10, COUNT returns 4.
COUNTDISTINCT	Counts the number of unique values in a set of data rows. If a report column contains values 5, 2, 5, 7, and 10, COUNTDISTINCT returns 4.
FIRST	Returns the first value in set of data rows. If a report column contains data rows 5, 2, 7, and 10, FIRST returns 5.
IS-BOTTOM-N	Returns a Boolean value that indicates if a data row is one of the bottom n values. If a report column contains data rows 5, 2, 7, and 10, and you specify 2 as the n value, IS-BOTTOM-N returns true for values 5 and 2, and false for values 7 and 10.
IS-BOTTOM-N-PERCENT	Returns a Boolean value that indicates if a data row is one of the bottom n values. If a report column contains data rows 5, 2, 7, and 10 and you specify an n value of 25 (percent), IS-BOTTOM-N-PERCENT returns true for 2, and false for 5, 7, and 10.
IS-TOP-N	Returns a Boolean value that indicates if a data row is one of the top n values. If a report column contains data rows 5, 2, 7, and 10, and you specify an n value of 2, IS-TOP-N returns false for 2 and 5, and true for 7 and 10.
IS-TOP-N-PERCENT	Returns a Boolean value that indicates if a data row is one of the top n values. If a report column contains data rows 5, 2, 7, and 10, and you specify an n value of 25 (percent), IS-TOP-N-PERCENT returns false for 5, 2 and 7, and true for 10.
LAST	Returns the last value in a set of data rows. If a report column contains data row values 2, 5, 7, and 10, LAST returns 10.

Aggregate Calculation Function	Description
MAX	Returns the largest value in a set of data rows. If a report column contains data row values 5, 2, 7, and 10, MAX returns 10. For string values, MAX returns the last alphabetical value. For date values, MAX returns the latest date.
MEDIAN	Returns the median, or middle value in a set of data rows. If a report column contains values, 5, 2, 7, and 10, MEDIAN returns 6.
MIN	Returns the smallest value in a set of data rows. If a report column contains data row values 5, 2, 7, and 10, MIN returns 2. For string data, MIN returns the first alphabetical value. For date values, MIN returns the earliest date.
MODE	Returns the mode, or the value that occurs most frequently in a set of data rows. If a report column contains values, 5, 2, 5, 7, and 10, MODE returns 5.
MOVINGAVERAGE	Returns the moving average for a set of data rows across an interval or number of data rows. Typically, you use moving averages to analyze stock price trends. You can, for example, display the moving average of stock prices over three days. If a set of data rows contains values 5, 2, 7, and 10, and you select 3 as the interval, MOVINGAVE returns null, null, 4, 4.66, and 7.33 for each row respectively.
PERCENTILE	Returns the percentile value in a set of data rows, given a specific percent rank. For example, you can calculate the score that represents the 50th percentile of all scores on a test. If a set of data rows contains 50, 75, 80, 90, and 95, and you specify a percent rank of 0.9 (to get the 90th percentile value) PERCENTILE returns 93.
PERCENT-RANK	Returns the rank of a value in a set of data rows, as a percentage of the set. The return value ranges from 0 to 1. If a set of data rows contains 50, 75, 80, 90, and 95, PERCENT-RANK returns 0, 0.25, 0.5, 0.75, and 1 for each row respectively.
PERCENT-SUM	Returns the percentage of a total. If a set of data rows contains 50, 75, 80, 90, and 95, the sum of values is 390. PERCENT-SUM returns 0.128 (50/390), 0.192 (75/390), 0.205 (80/390), 0.231 (90/390), and 0.244 (95/390) for each row, respectively.

Aggregate Calculation Function	Description
QUARTILE	Returns the quartile value in a set of data rows, given a specified quart (0-4). A quartile can be defined as any three values that divide a set of values into four equal parts, such that each part represents 1/4 of the set of values. MIN, MEDIAN, and MAX return the same value as QUARTILE when quart is equal to 0, 2, and 4 respectively. If a set of data rows contains 50, 75, 80, 90, and 95, and you specify a quart of 2, QUARTILE returns 80.
RANK	Returns the rank of a value in a set of data rows. The rank of a value ranges from 1 to the number of values in the report column. If two values are identical, they have the same rank. If a set of data rows contains 50, 75, 80, 90, and 95, RANK returns 5, 4, 3, 2, and 1 for each row, respectively.
RUNNINGSUM	Returns the total, up to a specific point, in the report. If a set of data rows contains 50, 75, 80, 90, and 95, RUNNINGSUM returns 50, 125, 205, 295, and 390 for each row, respectively.
STDDEV	Returns the standard deviation of a set of data rows. Standard deviation is a statistic that shows how widely values disperse from the mean value. If a set of data rows contains 50, 75, 80, 90 and 95, STDDEV returns 17.536.
SUM	Adds all the values in a set of data rows. If a report column contains 50, 75, 80, 90, and 95, SUM returns 390.
VARIANCE	Returns the variance of a set of data rows. Variance is a statistical measure expressing large the size of the differences between the values. The variance increases as the differences between the numbers increase. If a set of data rows contains 50, 75, 80, 90, and 95, VARIANCE returns 307.5. If a set of data rows contains 5, 2, 5, 7, and 10, VARIANCE returns 8.7.

Aggregate Calculation Function	Description
WEIGHTEDAVE	Returns the weighted average value in a set of data rows, given weights specified in another set of values. In a weighted average, each number is assigned a weight or degree of importance. These weights determine the relative importance of each number on the average. Grades are often computed using a weighted average. For example, for a set of scores 50, 75, 80, 90, and 95, with respective weights, 10, 25, 15, 30, and 20, WEIGHTEDAVE returns 81.75.

Operators

This section provides a complete reference of all of the operators you can use for creating expressions in Report Studio. This section is organized into two tables:

- Operators used in computed column expressions
- Operators used in conditional formatting and filter condition expressions

Operators used in computed column expressions

Operator	Use to	Example
+	Add two or more numeric values together.	[OrderAmount] + [SalesTax]
-	Subtract one numeric value from another numeric value.	[OrderAmount] - [Discount]
*****	Multiply numeric values.	[Price] * [Quantity]
/	Divide numeric values.	[Profit]/12
^	Raise a numeric value to a power.	Length]^2
%	Specify a percent.	[Price] * 80%
=	Test if two values are equal.	IF([ProductName] = “1919 Ford Falcon”, “Discontinued Item”, [ProductName])

Operator	Use to	Example
>	Test if one value is greater than another.	IF([Total] > 5000, [Total]*15% , [Total]*10%)
<	Test if one value is less than another.	IF([SalePrice] < [MSRP] , “Below MSRP” , “Above MSRP”)
>=	Test if one value is greater than or equal to another.	IF([Total] >= 5000, [Total]*15% , [Total]*10%)
<=	Test if one value is less than or equal to another value.	IF([SalePrice] <= [MSRP] , “Below or equal to MSRP” , “Above MSRP”)
<>	Test if two values are not equal.	IF([Country] <> “USA”, “Imported product”, “Domestic product”)
AND	Test if two or more conditions are true.	IF(([Gender] = “Male” AND [Salary] >= 150000 AND [Age] < 50), “Match found”, “No match”)
OR	Test if any one of multiple conditions is true.	IF(([City] = “Boston”) OR ([City] = “San Francisco”), “U.S.” , “Europe and Asia”)
&	Concatenate string values.	[FirstName] & “ “ & [LastName]

Operators used in conditional formatting and filter expressions

Operator	Use to	Example
Any Of	Test if a column value is equal to any one of the specified values.	Country Any Of USA, Canada, Mexico
Between	Test if a column value is between two specified values.	Profit Between 1000 and 2000
Bottom N	Test if a column value is among the lowest n values.	SalesAmount Bottom N 10
Bottom Percent	Test if a column value is in the bottom n percent of all values.	SalesAmount Bottom Percent 5
Equal to	Test if a column value is equal to a specified value.	Country Equal to France

Operator	Use to	Example
Greater Than	Test if a column value is greater than a specified value.	Total Greater Than 5000
Greater Than or Equal to	Test if a column value is greater than or equal to a specified value.	Total Greater Than or Equal to 5000
Is Blank	Test if a column value is blank (“ “). This operator applies only to string values.	E-mail Is Blank
Is False	Test if a column value is False.	LoanApproved Is False
Is Not Blank	Test if a column value is not blank. This operator applies only to string values.	Email Is Not Blank
Is Not Null	Test if a column value is not a null value. A null value means that no value is supplied.	CreditLimit Is Not Null
Is Null	Test if a column value is a null value.	CreditLimit Is Null
Is True	Test if a column value is True.	LoanApproved Is True
Less Than	Test if a column value is less than a specified value.	Total Less Than 5000
Less Than or Equal to	Test if a column value is less than or equal to a specified value.	Total Less Than or Equal to 5000
Like	Test if a column value matches a string pattern.	ProductName Like %Ford%
Not Between	Test if a column value is not between two specified values.	Profit Not Between 1000 and 2000
Not Equal to	Test if a column value is not equal to a specified value.	Country Not Equal to France
Not Like	Test if a column value does not match a string pattern.	ProductName Not Like %Ford%

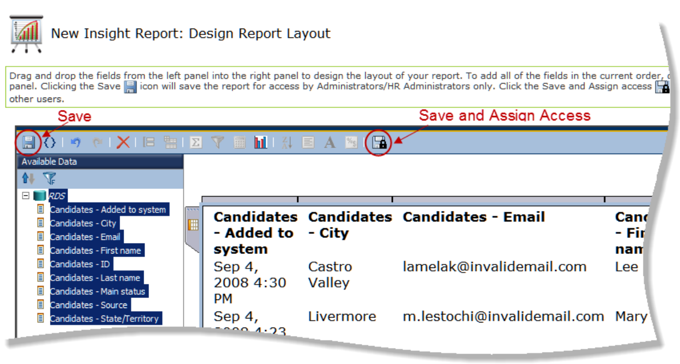
Operator	Use to	Example
Top N	Test if a column value is among the top n values.	SalesAmount Top N 10
Top Percent	Test if a column value is in the top n percent of all values.	SalesAmount Top Percent 5

Saving and Assigning Access

To save your report, click the icon. This action will grant access to this report to Administrators and HR Administrators only. If you are ready to grant access to other Roles or Users, click the icon (Save and Assign Access). This action will take you to the Assign access page.

To Save and Assign Access to the New Report:

1 Click the **Save and Assign Access** icon.



2 Select the check box for each Role you want to grant access to the new report.

3 To grant an individual user access to the report regardless of their role, click the **Select** link in the Selected Users column.

4 Move the users from the “Available” list on the left to the “Selected” list on the right.

5 Click **Save**.

Your New Insight Report will now be accessible from the main Insight Reports page (Reports menu > Insight option.)

Importing, Exporting, and Backing Up Files

This chapter describes how to import and export information and how to use the on-demand back up service in the Taleo Recruit system.

- Importing on page 298
- Exporting on page 298
- On-Demand Backup Service on page 299

Importing

- Importing Resumes from Disk
- Importing from CSV or Excel

Importing Resumes from Disk

To import multiple resumes into your Taleo Recruit system, you will need to bundle them into a ZIP archive. For complete instructions, go to the Candidates tab and click the **Import** menu item. See the Importing Resumes from a ZIP file tutorial for a step-by-step guide.

Importing from CSV or Excel

Most applications (including Microsoft Excel, Microsoft Access, Goldmine, Palm Desktop and FileMaker) allow you to export contact data into a comma delimited text file (.CSV). You can then import this data into your Taleo Recruit candidates database using the Import tool in the Candidates tab. See the Importing Candidates from a CSV file tutorial for a step-by-step guide.

Exporting

- Microsoft Excel Reporting
- On-Demand Backup Service
- On-Demand Backup Tables

Microsoft Excel Reporting

All Reports can be exported to Microsoft Excel for further analysis or quick exporting of specific data. When running a report, select **Excel** in the Report Format picklist.

Images such as bar charts and pie charts are not automatically included in Excel reports. However, you can easily include them in any excel spreadsheet, word document, or PowerPoint presentation by generating an HTML report and dragging the image into your document.

On-Demand Backup Service

The Taleo Recruit On-Demand Backup Service allows your administrator to create and download complete Taleo Recruit backups literally on-demand.

How it works

Your Taleo Recruit system administrator logs in, navigates to the Administration tab, selects the **Backup** menu item and clicks **Create Backup**. Within minutes a ZIP archive is created and available for secure download containing:

- All resumes in their original formats (DOC, RTF, PDF, HTML, TXT).
- All Taleo Recruit data in CSV files suitable for viewing in MS Excel or import into another database (see On Demand Backup Tables for a description of these files).
- All ancillary documents such as attachments, offer letters, etc.

Key Benefits

- Complete backups as often as you need them - your data is entirely in your hands
- The ability to store backups at your company site
- Write custom applications that leverage your Taleo Recruit data
- Import candidate, requisition and new hire data into other internal systems

If you are already a Taleo Recruit subscriber and would like to add the On-Demand Backup Service to your subscription, contact us at 1-888-836-3669 or tbesales@taleo.com.

On-Demand Backup Tables

Within your backup ZIP file you will find several .CSV files (in the "export" directory). These files contain all the data in your Taleo Recruit system. What follows is a summary description of each of these files.

- CANDIDATES.csv
- REQUISITIONS.csv
- WORKFORCE.csv
- COMMENTS.csv
- ATTACHMENTS.csv
- FEEDBACK.csv
- INTERVIEWS.csv
- FLEX_FIELD.csv
- HISTORY.csv
- LOCATIONS.csv

- LOOKUP.csv
- STATUS.csv
- VIEWED.csv
- REQ CAND.csv
- REQ POSTER.csv
- REQ WFORCE.csv

CANDIDATES.csv

Each row of data in this file represents a Candidate in your Taleo Recruit system.

Column	ID	Description
1	CANDIDATE ID	Unique number identifying this candidate.
2	STATUS ID	Number corresponding to candidate's status (see STATUS.csv table to map this number to status name).
3	FIRST NAME	Candidate's first name.
4	MIDDLE NAME	Candidate's middle name.
5	LAST NAME	Candidate's last name.
6	LOWER LAST NAME	Candidate's last name in all lowercase (used internally for quicker sorting).
7	EMAIL	Candidate's email address.
8	PHONE	Candidate's phone #.
9	MOBILE	Candidate's mobile/cell phone #.
10	ADDRESS	Candidate's street address.
11	CITY	Candidate's city.
12	LOWER CITY	Candidate's city in all lowercase (used internally for quicker sorting).
13	ZIP	Candidate's zip/postal code.
14	STATE	Candidate's state/region.
15	COUNTRY ID	Number corresponding to candidate's country (see LOOKUP.csv table to map this number to country name).

Column	ID	Description
16	SOURCE ID	Number corresponding to candidate's source (see LOOKUP.csv table to map this number to source name).
17	REFERRED BY ID	Number corresponding to user that referred/submitted this candidate (see LOOKUP.csv table to map this number to user name).
18	REFERRED BY	Text description of person who referred this candidate via referral form.
19	LEGAL STATUS ID	Number corresponding to candidate's legal status (see LOOKUP.csv table to map this number to legal status name).
20	RESUME MIME TYPE	Mime type of attached resume file.
21	RESUME FILE	Name of attached resume file.
22		This column is currently unused.
23	RESUME TEXT	Text resume/cover letter.
24	GENDER ID	Number corresponding to candidate's gender type (see LOOKUP.csv table to map this number to gender name).
25	RACE ID	Number corresponding to candidate's race type (see LOOKUP.csv table to map this number to race name).
26	VETERAN ID	Number corresponding to candidate's veteran status type (see LOOKUP.csv table to map this number to veteran status name).
27	CREATION DATE	Date this candidate record was created.
28	LAST UPDATED DATE	Date/time of last update to this candidate record.
29	LAST UPDATED [LONG]	Time of last update in milliseconds.

REQUISITIONS.csv

Each row of data in this file represents a Requisition in your Taleo Recruit system.

WORKFORCE.csv

Each row of data in this file represents a User in your Taleo Recruit system.

Column	ID	Description
1	USER ID	Unique number identifying this user.
2	STATUS ID	Number corresponding to user's status (see STATUS.csv table to map this number to status name).
3	FIRST NAME	User's first name.
4	MIDDLE NAME	User's middle name.
5	LAST NAME	User's last name.
6	LOWER LAST NAME	User's last name in all lowercase (used internally for quicker sorting).
7	TITLE	User's title within the organization.
8	LOWER TITLE	User's title in all lowercase (used internally for quicker sorting).
9	LOCATION ID	Number corresponding to user's location (see LOCATIONS.csv table to map this number to location name).
10	DEPARTMENT ID	Number corresponding to user's department (see LOOKUP.csv table to map this number to department name).
11	GROUP ID	Number corresponding to user's group (see LOOKUP.csv table to map this number to group name).
12		This column is currently unused.
13		This column is currently unused.
14		This column is currently unused.
15		This column is currently unused.
16	MANAGER ID	ID number of user that is this user's manager.
17	PHONE	User's phone number.

Column	ID	Description
18	MOBILE	User's mobile phone number.
19	FAX	User's fax number.
20	EMAIL	User's email address.
21	PROFILE	User's profile: a text description/background/bio of this user.
22	SIGNATURE	User's email signature.
23	SHOW RESUME	Flag specifying whether or not this user has made their resume available for other user's to view (“N” = no; “Y” = yes).
24	RESUME MIME TYPE	Mime type of attached resume file.
25	RESUME FILE	Name of attached resume file.
26	ROLE	User's assigned role (“A” = Administrator; “R” = Recruiter; “H” = Hiring Manager; “E” = Employee; “N” = No Access).
27	USER NAME	User's login name.
28	PASSWORD	User's password (encrypted using Taleo Business Edition proprietary techniques).
29	PASSWORD STATUS	“E” = expired; password is no longer valid, user will be asked to create a new password at next login.
30		This column is currently unused.
31		This column is currently unused.
32	GENDER ID	Number corresponding to candidate's gender type (see LOOKUP.csv table to map this number to gender name).
33	RACE ID	Number corresponding to candidate's race type (see LOOKUP.csv table to map this number to race name).
34	VETERAN ID	Number corresponding to candidate's veteran status type (see LOOKUP.csv table to map this number to veteran status name).
35	LAST LOGIN	Date this candidate last logged in.
36	LAST LOGIN [LONG]	Time of last login in milliseconds

Column	ID	Description
37	CREATION DATE	Date this user record was created.
38	LAST UPDATED DATE	Date/time of last update to this user record.

COMMENTS.csv

Each row of data in this file represents a Comment in your Taleo Recruit system.

Column	ID	Description
1	COMMENT ID	Unique number identifying this comment.
2	ENTITY TYPE	Identifier indicating whether this comment is for a Candidate or Requisition ("CAND" = candidate; "REQU" = requisition).
3	ENTITY ID	Unique number identifying the candidate or requisition this comment is attached to (see the REQUISITIONS.csv and CANDIDATES.csv tables to map this number to the appropriate record).
4	COMMENT TEXT	All comment text.
5	USER ID	Unique number identifying the user who last updated this attachment (see the WORKFORCE.csv table to map this number to the appropriate user).
6	CREATION DATE	Date this comment was created.
7	LAST UPDATED DATE	Date/time of last update to this comment.

ATTACHMENTS.csv

Each row of data in this file represents an Attachment in your Taleo Recruit system.

Column	ID	Description
1	ATTACHMENT ID	Unique number identifying this attachment.

Column	ID	Description
2	ENTITY TYPE	Identifier indicating whether this attachment is for a Candidate or Requisition (“CAND” = candidate; “REQU” = requisition).
3	ENTITY ID	Unique number identifying the candidate or requisition this attachment is attached to (see the REQUISI-TIONS.csv and CANDIDATES.csv tables to map this number to the appropriate record).
4	DESCRIPTION	Text description of this attachment.
5	ATTACHMENT MIME TYPE	Mime type of attached file.
6	ATTACHMENT FILE	Name of attached file.
7	USER ID	Unique number identifying the user who last updated this attachment (see the WORKFORCE.csv table to map this number to the appropriate user).
8	CREATION DATE	Date this attachment was created.
9	LAST UPDATED DATE	Date/time of last update to this attachment.

FEEDBACK.csv

Each row of data in this file represents an Interview Feedback item in your Taleo Recruit system.

Column	ID	Description
1	FEEDBACK ID	Unique number identifying this feedback item.
2	FEEDBACK STA-TUS NUMBER	Number corresponding to feedback's status (see STA-TUS.csv table to map this number to feedback status name).
3	USER ID	Unique number identifying the user who submitted this feedback (see the WORKFORCE.csv table to map this number to the appropriate user).
4	CANDIDATE ID	Unique ID number corresponding to a candidate (see CANDIDATES.csv table to map this number to candi-date).

Column	ID	Description
5	INTERVIEW ID	Unique ID number corresponding to an interview schedule (see INTERVIEWS.csv table to map this number to interview).
6	SCHEDULE DATE/TIME	Date/Time interview was scheduled
7	FEEDBACK SUMMARY	Number corresponding to feedback summary/recommendation (see LOOKUP.csv table to map this number to feedback summary name).
8	FEEDBACK DETAILS	Text content of feedback.
9	CREATION DATE	Date this feedback was submitted.
10	LAST UPDATED DATE	Date/time of last update to this feedback.

INTERVIEWS.csv

Each row of data in this file represents an Interview Schedule in your Taleo Recruit system.

Column	ID	Description
1	INTERVIEW ID	Unique number identifying this interview.
2	CANDIDATE ID	Unique ID number corresponding to a candidate (see CANDIDATES.csv table to map this number to candidate).
3	REQUISITION ID	Unique ID number corresponding to a requisition (see REQUISITIONS.csv table to map this number to requisition).
4	INTERVIEW STATUS NUMBER	Number corresponding to interview's status (see STATUS.csv table to map this number to interview status name).
5	INTERVIEW TYPE	Unique number corresponding to interview type (see LOOKUP.csv table to map this number to interview type).
6	DATE/TIME	Date/time of this interview.

Column	ID	Description
7	INTERVIEW ROOM ID	Unique ID number corresponding to interview room (see LOOKUP.csv table to map this number to interview room).
8	COMMENTS	All text comments included with this interview schedule.
9	SCHEDULER ID	Unique ID number corresponding to user who scheduled this interview (see WORKFORCE.csv table to map this number to user).
10	CREATION DATE	Date this feedback was submitted.
11	LAST UPDATED DATE	Date/time of last update to this feedback.

FLEX_FIELD.csv

Each row of data in this file represents custom field data from a Candidate or Requisition Custom Field in your Taleo Recruit system.

Column	ID	Description
1	ENTITY TYPE	Identifier indicating whether this record is for a Candidate, Requisition or other record type (“CAND” = candidate, “REQU” = requisition, “ORG” = organization information).
2	ENTITY ID	Unique number identifying the candidate or requisition this attachment is attached to (see the REQUISITIONS.csv and CANDIDATES.csv tables to map this number to the appropriate record).
3	CUSTOM FIELD NAME	Name identifying the custom field this value is associated with (see the DISPLAY_FIELD.csv table to map this number to the appropriate custom field).
4	TEXT VALUE	This column contains a text value if the associated custom field's datatype is Text, URL, Email, or Checkbox.
5	LONG VALUE	This column contains a long number value if the associated custom field's datatype is Picklist.
6	DOUBLE VALUE	This column contains a double number value if the associated custom field's datatype is Currency, Integer, or Decimal.

Column	ID	Description
7	DATE VALUE	This column contains a date value if the associated custom field's datatype is Date.
8	LONG TEXT VALUE	This column contains a text value if the associated custom field's datatype is Text Area.

HISTORY.csv

Each row of data in this file represents a History Log item in your Taleo Recruitsystem.

Column	ID	Description
1	HISTORY ID	Unique number identifying this history log entry.
2	ENTITY TYPE	Identifier indicating whether this record is for a Candidate, Requisition or other record type ("CAND" = candidate, "REQU" = requisition, "LETR" letter, "OFFER"=Offer, "INTV"=Interview, "WORK"=user
3	ENTITY ID	Unique number identifying the candidate or requisition this attachment is attached to (see the REQUISITIONS.csv and CANDIDATES.csv tables to map this number to the appropriate record).
4	LOG TEXT	Text describing this logged event.
5	EMAIL	Full text of email associated with this event (only if an email was sent).
6	USER ID	Unique ID number corresponding to a user (see WORKFORCE.csv table to map this number to user).
7	CREATION DATE	Date this activity was logged.

LOCATIONS.csv

Each row of data in this file represents a Location defined in your Taleo Recruit system.

Column	ID	Description
1	LOCATION ID	Unique number identifying this location.
2	LOCATION NAME	Display name assigned to this location.

Column	ID	Description
3	LOWER LOCA-TION NAME	Display name assigned to this location in all lowercase (used internally for quicker sorting).
4	PHONE	Main phone number for this location.
5	ADDRESS	Street address of this location.
6	CITY	City of this location.
7	ZIP	ZIP/Postal code of this location.
8	STATE	State of this location.
9	COUNTRY ID	Number corresponding to country name (see LOOKUP.csv table to map this number to country name).
10	TIME ZONE	Time zone of this location.
11	DIRECTIONS	Directions to this location from major destinations.

LOOKUP.csv

Each row of data in this file represents a lookup value in your Taleo Recruit system (examples include countries, states, genders, races, veteran statuses, legal statuses, departments, groups, etc).

Column	ID	Description
1	LOOKUP ID	Unique number identifying this lookup value.
2	LOOKUP TYPE	Identifier indicating what type of value this lookup represents (“duration” = requisition duration; “legalStatus” = candidate legal status; “Interview” = interview type; “gender” = candidate gender; “race” = candidate race; “veteran” = candidate veteran status; “ReasonRej” = reason for candidate rejection; etc.
3	LOOKUP VALUE	Value of this lookup item.
4	PARENT ID	Unique ID number of parent object. For example, department lookups have parent ID that points to a Location (see LOCATIONS.csv). Group lookups have a parent ID that points to a department lookup; etc.
5	SORT NUMBER	Sort numbers are used to define the order lookups will appear in when multiple lookups of the same TYPE (as defined in Column 2) are placed in a list.

STATUS.csv

Each row of data in this file represents a candidate, requisition, or other object type's Status in your Taleo Recruit system.

Column	ID	Description
1	ENTITY TYPE	Identifier indicating whether this record is for a Candidate, Requisition or other record type (“CAND” = candidate, “REQU” = requisition, “WORK” = user, “INTV” = Interview, “OFFER” = Offer letter,).
2	SEQUENCE NUMBER	Sequence numbers are used to define the order statuses will appear in when multiple statuses with the same ENTITY TYPE (as defined in Column 1) are placed in a list.
3	STATUS NAME	Display name of this status.
4	SYSTEM FLAG	Flag specifying whether or not this Status is a default Taleo Business Edition status that cannot be modified or deleted.

VIEWED.csv

Each row of data in this file represents a Candidate-User mapping indicating that the given user has viewed the given candidate's details page.

Column	ID	Description
1	ENTITY TYPE	Identifier indicating whether this record is for a Candidate or other record type (“CAND” = candidate).
2	ENTITY ID	Unique ID number corresponding to a candidate (see CANDIDATES.csv table to map this number to candidate).
3	USER ID	Unique ID number corresponding to a user (see WORKFORCE.csv table to map this number to user).
4	IS FLAGGED	Indicates whether or not the given user has flagged this candidate (“Y” = flagged; “A” = not flagged).

REQ CAND.csv

Each row of data in this file represents a Requisition-Candidate mapping; a candidate submitted for a requisition in your Taleo Recruit system. This data can be used to determine which requisition(s) a given candidate has been submitted for; and which candidates have been submitted for a given requisition.

Column	ID	Description
1	REQUISITION ID	Unique ID number corresponding to a requisition (see REQUISITIONS.csv table to map this number to requisition).
2	CANDIDATE ID	Unique ID number corresponding to a candidate (see CANDIDATES.csv table to map this number to candidate).

REQ POSTER.csv

Each row of data in this file represents Requisition-Careers site mapping; a requisition posted to one of your careers websites.

Column	ID	Description
1	REQUISITION ID	Unique ID number corresponding to a requisition (see REQUISITIONS.csv table to map this number to requisition).
2	CAREERS SITE ID	Number corresponding to careers site where this requisition is posted (“1” = Standard Taleo Business Edition careers site).

REQ WFORCE.csv

Each row of data in this file represents Requisition-User mapping; a user assigned as an Owner, Approver, Offer Approver or Agency to a given requisition.

Column	ID	Description
1	REQUISITION ID	Unique ID number corresponding to a requisition (see REQUISITIONS.csv table to map this number to requisition).
2	USER ID	Unique ID number corresponding to a user (see WORKFORCE.csv table to map this number to user).

Column	ID	Description
3	ASSOCIATION TYPE	Defines the relationship this user has to this requisition ("O" = Owner; "A" = Approver; "P" = Offer Approver; "G" = Agency).
4	SEQUENCE NUMBER	Number corresponding to user's sequence in relationship (this is typically used to define order of approval process; sequence starts with "1").

Taleo Scheduling Center

This chapter describes how to use the Taleo Scheduling Center to schedule and track appointments for your organization.

- Taleo Scheduling Center (TSC) on page 315
- Setting up your Taleo Scheduling Center (TSC) on page 315
- Scheduling Appointments in Taleo Recruit on page 318
- Assigning Calendars to a Requisition on page 318
- Inviting Candidates to an Appointment on page 318
- Instant Scheduling on page 319

Taleo Scheduling Center (TSC)

Additional features available for Premium Service customers. Please contact your Sales Representative for more information.

The Taleo Scheduling Center is a stand-alone module designed to help automate the process of setting up appointments with candidates. Taleo Scheduling Center users will find that using the TSC features will help to reduce the number of calls to and from candidates when making appointments and preparing for upcoming interviews.

Setting up your Taleo Scheduling Center (TSC)

Setting up your Taleo Scheduling Center consists of the following tasks:

- Assigning your TSC Super Administrator
- Adding a TSC Calendar(s)
- Assigning TSC Calendar Time Slots
- Adding Users to TSC
- Viewing Candidate Appointments in the TSC Calendar(s)

Assigning your TSC Super Administrator

Once TSC is activated from the main Administration tab, click **Customize Taleo Business Edition**. You will see a section called Manage Taleo Schedule Center. Your first action will be to assign a TSC System Administrator. Click the **Assign TSC Super Admin** button. The TSC Super Admin is much like a Taleo Business tools. Assign the TSC Super Admin by moving a user from the “Available” list on the left to the “Associated” list on the right.

Adding a TSC Calendar(s)

Click the **Taleo Schedule Center Calendar Management** link. When you enter the Taleo Schedule Center the first time, you will not have any Calendars. To add a calendar, click the **Add New Calendar** button which will bring you to the Create Calendar page. You will have a number of fields to populate to set up your new calendar. When you have populated the fields of your TSC Calendar, click the **Update** button.

The following section describes all of the TSC core data fields:

Calendar Name The Calendar Name can be anything you would like it to be and it can be used in a number of ways. For example, you may have an office with multiple Recruiters who may be interviewing the same pool of candidates, and it doesn't matter which Recruiter interviews which candidate. In this case, you might have one Calendar that is shared by all the Recruiters in this central office. A second example is where a Recruiter has his/her own scheduled appointments to interview specific candidates. In this case, a Recruiter may have his/her own Calendar by name.

Active Calendar Specifies whether this calendar is active and visible by candidates.

Allow Same Day Scheduling Allows candidates same day scheduling access if a Requisition's defined score or ranking threshold has been met. (See Requisition Ranking Template and Requisition Ranking Criteria).

Scheduling Cushion (in minutes) Controls how far in advance a candidate can schedule an appointment if you 'Allow Same Day Scheduling'. For example, if a candidate applies and meets the ranking threshold of a requisition, the candidate has the ability to schedule a 'same day' appointment. You can control whether the candidate can schedule an appointment 5 minutes from now or 90 minutes from now.

Scheduling Horizon (in days) Controls how far out a candidate can schedule an appointment. The maximum number of days is 30.

Calendar Owner The assigned Calendar Owner

Time Zone The time zone of the interview location

Calendar Location Name The physical location name of the interview.

Address The address of the interview location.

Additional Address The additional address of the interview location, if needed.

City The City of the interview location

State/Province The State/Province of the interview location

Zip/Postal Code The Zip/Postal Code of the interview location

Country The Country of the interview location

Locales Allows you to select the language of the calendar.

Select Primary Locale Allows you to select the primary locale. This means this will be the first choice of language description presented to the candidate.

Calendar Display Name Displays the name of the calendar displayed to the candidate.

Pre-Schedule Information Allows you to specify any preparation information relevant to the candidate. For example, bring your resume and references.

Interview Directions Allows you to specify directions to the interview location.

Interview Instructions Allows you to define expectations for the interview. For example, business casual dress or arrive 15 minutes before your scheduled appointment.

Assigning TSC Calendar Time Slots

From the Scheduling Center page, click on the **Calendar Name** link, which displays the Scheduling Calendar page. You can now assign time slots. A time slot is an available opportunity for an interview. You can add as many or as few time slots as you would like.

A candidate can not book into a time slot that does not exist. The requirements for a candidate to schedule an appointment would (1) be an invitation from you to book an appointment; and (2) and available time slot.

To add a time slot, click on the **Add Time Slot** link which appears to the right of the calendar date. The Add Time Slot page will appear. Specify the time slot Start Date and End Date, the Day Start Time and Day End Time, the Interval (in minutes), the maximum number of candidates to be scheduled within a particular time slot, and days you want the set time slots to be available. For example, you could set up a time slot to interview a maximum of 4 candidates every Monday and Thursday for 30 minutes each from 8 am - 10 am. When you have completed the Time Slot fields, click the **Add Time slot** button. You can add as many time slots as you require.

Adding Users to TSC

From the main Users page, click the **Name** of a user. In the Taleo Scheduling Assignment section, click **View or Modify Calendar Assignments** to automatically add this user to TSC. You will now be presented with the TSC Calendars page. To assign this user to a Calendar, click the **Modify** link to the right of the Calendar Name. Click the **Add/Modify Calendar Permissions** link in the Update Calendar screen, and you will be taken to the Assign Users and Permissions to a Calendar screen. In the Zone User field, select your user, and then select the appropriate calendar role for this user. Four options are available: Read only allows this user to view only; Marked Arrive / No Show allows this user to select the checkbox on the calendar to indicate a candidate has arrived for an interview or never arrived for an interview. This role is often assigned to the company receptionist; Manage Time slots allows this user to manage the Time slots. (See Assigning TSC Calendar Time Slots.); and Administer Calendars gives this user access to all administration functions. When you are done, click **Create Permission**. Click **Close** to go back to the main Calendars page.

Viewing Candidate Appointments in the TSC Calendar(s)

Click a **Calendar Name**, and then click a calendar date. You will see the candidate appointments scheduled for the date you have selected. For appointments that have not yet taken place, you will see a small check box next to a candidate's name. This allows users to update a candidate status by clicking **Marked Arrived** or **Mark No Show**. You will also notice the Candidate Name is actually a link back to this candidate's record in your Taleo Recruit system.

The locks on the date page indicate the time slots that are not available for appointments. Clicking on the **Lock** icon will unlock the time slot. You can also lock or unlock an entire day by clicking on the **Lock** or **Unlock** link at the top of the calendar date. The Lock and Unlock day is often used for blocking out holidays.

The Calendar key at the top of the Calendar page presents a summary of Time slots available, Appointments scheduled, and whether the current day is locked.

Scheduling Appointments in Taleo Recruit

From the main **My View** tab, you will see a section called the Taleo Scheduling Center - Appointment Scheduling section. Click the **expand collapse** icon to expand this section. Within this section, you will see a list of Calendars set up through the Taleo Scheduling Center to which you have access. If you click on a Calendar Name you will be taken back into the Taleo Scheduling Center.

Assigning Calendars to a Requisition

For a candidate to be able to schedule an appointment, you must first update the Requisition to identify which calendar should be used to schedule candidates for appointments associated with the requisition. The association of candidates to calendars is achieved through assigning a calendar to a Requisition. From the **Requisitions** main tab, click the **Title** of the requisition for which you want to associate a calendar. Click **Edit** and scroll to the Taleo Scheduling Center section. Click **Add** to select the appropriate Calendar. To allow automatic scheduling for ACE candidates or candidates who meet the minimum ranking percentage of the requisition, select the associated check boxes and click **Save**.

Inviting Candidates to an Appointment

From within the Requisition where you have associated a calendar, click on the **Candidates** link at the top of the Requisition page. You will be taken to a list of candidates assigned to this Requisition. Click on the **Candidate Name** you wish to invite to an appointment. Scroll down and expand the Taleo Scheduling Center - Appointment Scheduling section of the candidate record. Click **New Invitation**, and the Select Requisition box will appear. Select the appropriate Requisition. Your Taleo Recruit system will validate that the requisition has an assigned calendar, will validate there are time slots available to be scheduled, and will send an invitation to your Candidate. The candidate will receive the email invitation and be able to click the calendar link to see your available time slots to book an appointment.

To retract an invitation, click the **Retract Invitation** link in the **Action** column. Retracting an invitation is often used to recall an invitation that a candidate has not responded to in a reasonable period of time, or since the original invitation you have hired another candidate. The Retract Invitation action will disable the ability for this candidate to schedule an appointment and will update the invitation status to Invitation revoked. If a candidate has already booked an appointment and you want to cancel the appointment, you will need to call the candidate directly. Click **View** in the **Action** column to view the details of the invitation.

Instant Scheduling

Instant Scheduling allows applicants applying through your Careers website to automatically schedule an appointment if they meet the requisition's defined criteria and if you have enabled the “allow automatic scheduling for ACE candidates” or “allows automatic scheduling for candidates who meet the minimum ranking by X percent” check boxes within the Requisition.

Taleo Voice Response

This chapter describes how to setup and manage the Taleo Voice Response feature.

- Taleo Voice Response (TVR) Overview on page 323
- TVR Administration of Phone Lines on page 323
- TVR Administration of Candidate Fields on page 323
- TVR - Managing Sources in Taleo Recruit on page 324
- TVR - Managing Questions in Taleo Recruit on page 324
- TVR - View & Add/Edit Candidates in Taleo Business Edition on page 325

Taleo Voice Response (TVR) Overview

Additional features available for Premium Service customers. Contact your Sales Representative for more information.

Taleo Voice Response (TVR) is a stand alone module that allows candidates to apply for a job posting by calling a specific phone number and providing verbal responses to an application. TVR interfaces with your Taleo Recruit system by allowing Jobs to be posted to a Voice Career Site. The Taleo Recruit user can control which requisitions get posted and what elements of the requisition are exposed to the TVR career application.

Candidates can call into the TVR system and apply for positions. The candidate's application flows into your Taleo Recruit system and displays similar to a regular submission from your careers website. Additionally, online questions assigned to a Requisition Template carry all of the appropriate values for the TVR questions into the Requisition when converted or cloned. Conversely, converting a Requisition into a Template copies all of the values associated with the questions.

TVR Administration of Phone Lines

TVR Career Sites work the same as normal web career sites. The TVR Administrator starts by creating the TVR Career Site and then users assign specific requisitions to that site. Clicking the **TVR Administration Login** takes the TVR Administrator into the TVR product. Click **Edit Settings** to access the TVR Career Site Configuration page. In the Edit TVR Career Site screen, the TVR Administrator can assign the phone numbers, which are drawn from a list of DID numbers that are assigned to the customer in CRM. In the Candidate Field Collection section, the TVR Administrator can assign the standard fields and custom fields that will be available for customers to select and present as questions in TVR.

TVR Administration of Candidate Fields

The TVR Administrator is able to assign the Text to Speech (TTS) text for standard and user defined fields (UDFs) used in their Phone Application.

A small speaker icon will appear beside the fields that have spoken values in them. The legend in the header bar appears in both standard fields and custom fields as there are a few standard fields that have the ability to have spoken values. When a user “assigns any value to any 'TVR language' text section,” the list displays the speaker icon, and the field is visible in the Edit TVR Career Site page.

To assign the TVR text, click the **Edit** link. If TVR is active for a customer and the field allows for TVR text (either custom fields or pre-defined standard fields), a modified **Edit** button will display, which has a section for the Spoken text. Multiple Choice questions require a translation section to appear. The TVR Administrator can assign spoken values for the options they have in the Valid Values section.

TVR - Managing Sources in Taleo Recruit

From the main Candidates tab in your Taleo Recruit system, click **Sources**. Click **Edit** for any existing Source to take you to the Edit Source Page. If TVR is enabled, you can provide the Spoken name to accompany the Source name. Likewise, to add a new Source, click the **Add Source** button, and complete the Source name and Spoken name fields.

TVR - Managing Questions in Taleo Recruit

If TVR is enabled, the edit Question page includes an entry field for the Spoken Question. If this field is not populated, the question is not available for TVR.

From the main **Requisitions** tab, click **Questions**. Click the **Add Question** button to add a new question. The Category, Type, and Question fields are required by default. To use this question with TVR, you want to complete the Spoken Question field. When creating questions with Picklist options, you need to provide the response values. Click the new question you have added and click the **Answers** button. Two columns appear: the first column allows for the Displayed response; and the second column allows for the Spoken response. Click **Save** when you have completed the responses. (To add scores, ranking, or knockout questions see Requisition Ranking Template and Requisition Ranking Criteria).

To add questions to a requisition, click on the main **Requisitions** tab. Click the **Title** of the Requisition to which you want to add questions. In the Questions & Ranking table, there is a small speaker icon present. This speaker represents whether TTS has been provided for the question. There is a dimmed speaker for Questions that do not have TTS text provided. Additionally, at the top of the Questions & Ranking table, you will see a blue TVR Ready icon and a grey No Spoken Text Available icon. The blue icon indicates whether this requisition is TVR ready. If a question does not have a Spoken Question recorded, it is not going to be asked in the call and displays as a grey speaker icon.

TVR - View & Add/Edit Candidates in Taleo Business Edition

When viewing a candidate that has applied by phone, a small speaker icon appears beside any field that has a spoken response by the candidate. Click the **speaker icon** to listen to the .wav file. To transcribe the contents of the .wav file, click **Edit** at the top of the candidate view. If you have appropriate permissions, you will be able to fill in the field with the .wav file contents. Your Taleo Recruit Administrator can control who can transcribe .wav files by exposing these fields as 'read only' in Page Layouts.

Once transcribed, a user is able to play the .wav file by clicking on it.

NOTE: A candidate record is created for each application through Taleo Voice Response. If a candidate applies for two positions, two candidate records are created.

Talent Exchange

The Taleo Talent Exchange is an online job board and sourcing tool available to Taleo customers. It enables candidates to create one robust application profile-a Universal Profile-that provides quick application to prospective employers. As a repository for Universal Profiles, Taleo Talent Exchange also enables you to collect candidate data easily. The candidates can search for jobs while employers can search for candidates. Employers can also submit unsuccessful applicants into the Taleo Talent Exchange to earn credits, which allows them to source and extract other candidates who better match their open positions.

Talent Exchange presents high-quality candidates along with access to 25 million business contacts through our partnership with Jigsaw, a Salesforce.com company. The unique combination of Universal Profiles, Web Candidates, and Jigsaw contacts provides recruiters with flexible, robust sourcing options. Talent Exchange seamlessly integrates these sourcing options with Taleo Recruit via the integrated search option.

- Accessing Talent Exchange on page 327
- Working with Requisitions on page 327
- Submitting Candidates to Talent Exchange on page 329
- Easy Application for Universal Profile on page 330
- Configuring Talent Exchange on page 331

. Accessing Talent Exchange

To log into Talent Exchange:

1 From the top menu bar, select **TBE Apps > TBE Apps.**
2 The system displays the active TBE applications. If the Talent Exchange application is not activated, it requires activation, and an Activate link is displayed.
3 Click Activate.
4 When the Talent Exchange application is activated, the system displays a Login link.
5 Click Login.
6 The Taleo Talent Exchange Dashboard displays. From this screen you can begin to source candidates by entering a search string.

Working with Requisitions

When activated, Talent Exchange embeds a 'Talent Exchange' placeholder on the View Requisition page. This placeholder displays as a collapsed section within the requisition. It enables the user to see the Talent Exchange status and other available actions. You can use the **Action** drop-down box to source candidates for the requisition or post the requisition to the Talent Exchange job board.

Posting a Requisition to the Talent Exchange Job Board

To post a requisition:

1 Open a requisition.
2 At the Talent Exchange placeholder, click the Actions drop-down box and select Post Requisition. The system links to the Talent Exchange site. A form is displayed, which you will need to complete to validate requisition-related information.
3 Click Save.

The Talent Exchange system displays a confirmation message and the Talent Exchange placeholder displays the status *Posted on TX*.

Unposting a Requisition

To unpost a requisition:

1 Open a posted requisition.

2 At the Talent Exchange placeholder, click the **Actions** drop-down box and select **UnPost Requisition**.

The Talent Exchange site displays a confirmation page. Follow the onscreen instructions to complete the task. When the requisition is unposted, the Talent Exchange placeholder displays the status *Not posted on TX*.

Sourcing Candidates

To source candidates:

1 From an open requisition, click the **Actions** drop-down box at the Talent Exchange placeholder and select **Source Candidates**.

2 The system launches an integrated search on the Talent Exchange site. The job title is used as the keyword and you are automatically presented with a list of candidates who fit that job title search. If you have OFCCP enabled for your company, the requisition ID is passed into the OFCCP text box and all search criteria is tracked for OFCCP compliance.

3 You can now refine your search results by utilizing the filters or enter a new keyword.

Country	Select the country from the drop-down list.
Location	Type the City, State, postal code for a specific region.
Radius	Specify the distance radius by sliding the radius meter left or right.
Willing to Relocate	Specify if the candidate is willing to relocate for a job.
Search Status	Specify the job interest level by selecting the **Active**, **Passive**, or **Graduate** check boxes.
Create Date	Specify the candidate data freshness based on the candidate create date.
Previous Employer	Specify past employers that you would like to view candidates from.

4 You can download the following types of Candidates:

- **Universal Profiles:** Candidates that have been referred by other Taleo community members, have come from other Talent Exchange partners, or have created their profile directly from the Talent Exchange home page.
- **Web Based Candidates:** The highest quality candidates from the web, aggregated in one location.
- **Jigsaw Contacts:** Contact information of business professionals.

5 Download candidates from Talent Exchange directly into your Taleo Business Edition system by clicking the Download icon. When the Download icon is selected the candidate's data is sent to your Taleo Business Edition system and associated to the Requisition ID that is present in the OFCCP text box. If no Requisition ID is present, the candidate is sent to your Taleo Business Edition system and is not associated to a Requisition.

6 On Download, the candidate contact information is displayed on the search results screen and the candidate displays on your Dashboard, as purchased.

Pricing and Procurement Methods

You can download a candidate via three methods:

- **Earned Credits:** When you invite candidates to participate in Talent Exchange you earn 10 credits for each Universal Profile created. These earned credits go into your Talent Exchange “earned credits” bank for you to use when downloading a Universal Profile candidate.
- **Credit Card:** You can associate a credit card to your individual or company account.You can download any type of candidate content (Universal Profile, Web Candidate, or Contact) with a credit card.
- **Subscription Plan:** You can purchase an annual subscription plan which entitles you to credits in the amounts described below to download any type of candidate content (Universal Profile, Web Candidate, or Contact). Under the annual subscription plan, you will be billed automatically each year at the same rate and can pay by credit card or purchase order.
  - Tier 1 Subscription: Annual fee of $500 for 525 credits per year.
  - Tier 2 Subscription: Annual fee of $1,000 for 1,100 credits per year.
  - Tier 3 Subscription: Annual fee of $5,000 for 5,750 credits per year.
  - Tier 4 Subscription: Annual fee of $10,000 for 12,000 credits per year.
  - Tier 5 Subscription: Annual fee of $20,000 for 25,000 credits per year.

Submitting Candidates to Talent Exchange

If candidates have not been submitted to Talent Exchange, you can submit them. When you submit candidates, they will receive an email invitation to participate in Talent Exchange. The *Candidates: Home* page provides bulk or single submissions for selected candidates.

If candidates do not have a Universal Profile and they elect to join Talent Exchange, you will be awarded credits that you can use to source candidates from Talent Exchange.

The Candidates Tab list view provides bulk or single submissions for selected candidates.

To submit candidates:

1 From the top menu, select **Candidates > Candidates**.
2 The *Candidates: Home* page appears.
3 Select the candidate(s) from the list.
4 Select **Submit** from the Talent Exchange drop-down list.
5 The system displays a confirmation page. Follow the onscreen instructions to complete the submission.

Locking and Unlocking Candidates

You can lock or unlock candidates to specify whether they can be submitted to Talent Exchange. When candidates are locked, they cannot be submitted to Talent Exchange. When candidates are unlocked, they can be submitted.

To lock a candidate:

1 Open a candidate page.
2 At the Talent Exchange placeholder, ensure that the status is *Unsubmitted*.
3 Select **Lock** from the drop-down list.
4 The status in the placeholder changes to *Locked*.

To unlock a candidate:

1 Open a candidate page.
2 At the Talent Exchange placeholder, ensure that the status is *Locked*.
3 Select **Unlock** from the drop-down list.

The status in the placeholder changes to *Unsubmitted*.

Easy Application for Universal Profile

Candidates can populate the application form with information from their Universal Profile. The application form displays the corresponding Universal Profile icon.

To populate the Universal Profile:

1 Select the Universal Profile link or icon.
2 The Talent Exchange login page appears.
3 In the Login section, enter the **Username** and **Password** in the corresponding fields.

4 Click **Login**.

The system populates the candidate's application form with information from the Universal Profile.

Configuring Talent Exchange

NOTE: This section is for the Administrator.

Configuring Talent Exchange involves the following tasks:

- Step 1: Activating Talent Exchange
- Step 2: Enabling Talent Exchange Automatic Submission Controls
- Step 3: Activating Easy Application for Universal Profile
- Step 4: Setting Up User Permissions
- Step 5: Setting Up an Email Template for Downloaded Candidates
- Step 6: Configuring Other Talent Exchange Options

Procedures for all of these tasks are provided in the following sections.

Activating Talent Exchange

To activate Talent Exchange:

1 From the top menu bar, select **TBE Apps > TBE Apps.**

The system displays your active applications. If the Talent Exchange application is not activated, it requires activation, and an Activate link displays.

2 Click **Activate**.

3 Accept the **Terms and Conditions** and **Data Privacy Statements**.

4 Click **Activate**.

5 Register your company on the Talent Exchange.

Enabling Talent Exchange Automatic Submission Controls

Talent Exchange Automatic Submission Controls allow Taleo Business Edition Recruit Administrators to automatically invite candidates based on a set of controls that they define. These rules define when and if a candidate should be automatically submitted to Talent Exchange.

To enable Automatic Submission Controls:

1 From **TBE Apps,** click **Automatic Actions and Controls**.

2 Select **Activate Automatic Candidate Submission.** This action allows the following rules to be applied:

Exclusion Option	Choices
Exclude candidates who have been updated or modified in the last:	10 Days 30 Days 60 Days 90 Days 120 Days
Exclude candidates who have any submission with the Requisition-Specific Status of:	List all requisition specific statuses, even if not active in workflow.
Exclude candidates identified as ACE candidates	Select
Exclude candidates with a MAX score over:	Select 0 – 100%, in 5% increments
Exclude candidates who have applied to a specific requisition:	Select Requisition Title(s)

3 Make your selections and click **Submit**.

Candidates who are not excluded based on the defined criteria are automatically submitted to the Talent Exchange within a 24 hour period. The candidate history log records all automatic submissions. The candidate email correspondence can be set in the Talent Exchange by the Administrator within the Profile tab > Manage Correspondence > Automatic Invite.

Activating Easy Application for Universal Profile

To activate Easy Application for Universal Profile:

1 In Taleo Recruit, go to **Administration** >**Customize Recruit.**

2 In the Customize Pages section, click **Careers Website Pages**.

3 Scroll to the External Application Pages section, choose an application form and then click **Edit**.

4 Locate the Application Form placeholders, which include icons labeled **Upload Resume, LinkedIn Profile, Universal Profile, and Employee Record.**

a) Click Unhide to display the placeholders.

b) Click Edit, check Allow Universal Profile Parsing, then choose the Parsing Details.

5. Click **Submit** to save changes to the placeholder.
6. Click **Save** to save changes to the Application Form.
7. Repeat this process for the other Application Form placeholders, as desired.

Setting Up User Permissions

Use the administration page to specify user access to Talent Exchange

To access the Administration page:

1. At the top menu bar, select TBE Apps > Administration.
2. The *TBE Apps: Administration* page appears.
3. At the Taleo Talent Exchange section, click **User Access Controls**.
4. The Administration page appears. It provides access options for the following users:

Users	Access Options
Administrator HR Administrator Hiring Manager Recruiter	Allow Talent Exchange Login through TBE Apps tab Post Requisitions to Talent Exchange Source Candidates from Talent Exchange Access Talent Exchange control on Candidate List Views View Talent Exchange section in 'View Requisition' pages View Talent Exchange section in 'View Candidate' pages

Based on these options, you can specify the users who can use Talent Exchange.

To do this:

1. For each user role, select the corresponding checkbox for the access option.
2. Click **Save**.

Setting Up an Email Template for Downloaded Candidates

Use the following procedure to set up an email template to send to downloaded Talent Exchange candidates:

1. From Taleo Recruit, go to Administration > Customize Recruit.
2. In the Customize System Templates section, click System Email Templates

3 Click **Add Template** and create a system email template.

4 Add the following merge fields from the Candidate and Requisition field types, so the Candidate can come back to the career site and finish the application:

<<REQUISITION_TITLE >>, << REQ_POSTING_LINK>>, <<CANDIDATE_EMAIL>>, <<CANDIDATE_CWS_PSWD>>

5 Edit the Template Information section, using the following sample text for your email template:

Display Name: Talent Exchange Candidate Download Correspondence

Format Type: HTML

Subject: We found you on Talent Exchange

Body: Dear, <<CANDIDATE_NAME>>

We found your Universal Profile on Talent Exchange. We have a number of opportunities that may interest you, specifically we found the following position that we thought you would be a great fit for:

<<REQUISITION_TITLE>>-<<REQ_POSTING_LINK>>

If you are interested please complete your application form by clicking the Return Applicant's Link and entering the following details:

USERNAME: <<CANDIDATE_EMAIL>>

PASSWORD: <<CANDIDATE_CWS_PSWD>>

Thank you,
HR Team

Configuring Other Talent Exchange Options

The other options that need to be configured are opt-in candidate email correspondence and OFCCP settings.

To configure these options:

1 From the top menu bar, select **TBE Apps > TBE Apps.**

The system displays the active TBE applications.

2 Login to Talent Exchange and go to the Profile tab.

3 Configure the opt-in candidate email correspondence.

4 Configure the OFCCP settings.

5 Click Save.

Talent Exchange Integration with Jigsaw

Talent Exchange presents high-quality candidates along with access to 25 million business contacts through a new partnership with Jigsaw, a Salesforce.com company. The unique combination of Universal Profiles, Web Candidates and Jigsaw contacts provides recruiters with flexible, robust sourcing options. This feature seamlessly integrates these sourcing options with Taleo Recruit via our new integrated search option.

Quick Start

This chapter provides a Quick Start Guide designed to help you get up and running with Taleo Recruit quickly and easily.

- Quick Start Guide on page 337
- Adding Users on page 343
- Creating Requisitions on page 345
- Careers Website Setup on page 349
- Employee Referrals Setup on page 351
- Pre-Screening Questions on page 352
- Application Form Customization on page 353
- Importing Resumes from a ZIP file on page 355
- Importing Candidates from a CSV file on page 357

Quick Start Guide

This Quick Start Guide is designed to help you get up and running with Taleo Recruit quickly and easily.

Steps:

1. Set up your Organization

2. Add Users

3. Create and Import Requisitions

4. Set up your Careers Website

5. Set up your Employee Referrals page

6. What's Next?

1. Set up your Organization

After you sign up for Taleo Recruit, the first step in setting up your system is to add all of your organization's locations.

Step 1. Login and go to the **Administration** tab.

Step 2. Go to the **Organization** section.

Step 3. In the **"**Locations**"** table, choose **Add Location** to create a new location corresponding to each office or client office where you will be managing job openings.

2. Add Users

The next step is to create user accounts for your other team members who will be using Taleo Recruit. If you are setting up a trial account, you can enable up to 5 active users. If you have already purchased a Taleo Recruit subscription you will be limited to the number of user licenses purchased. To see how many licenses your organization has, click the **About** link in the upper right of the page.

Step 1. Go to the **Users** tab.

Step 2. Choose **New User**, and fill in the user's information. Make sure to input the correct company email address and select an appropriate role (see table below for descriptions). It is important to select the correct role for each user because when you create requisitions, you'll need to assign each requisition one or more Requisition Owners. In order to be a Requisition Owner, a user must be assigned one of the following roles: *Administrator, Hiring Manager,* or *Recruiter*.

Step 3. If you would like a user to be able to approve requisitions and/or offer letters, make sure the appropriate check boxes are checked.

Step 4. Click the **Save** button when finished.

Step 5. An email will automatically be sent to the new user with login information.

User Roles

Title	Description
Administrator	Administrators have access to everything, including all candidates and other confidential information. Only Administrators can create new users and reset user passwords. Administrators are the only users with access to the “Administration” tab.
HR Administrator	HR Administrators have access to all records in Recruit (Candidates, Requisitions, Accounts, Users, etc.), but no access to Administration. Essentially, the HR Administration role is similar to the Hiring Manager role with visibility to all records - a global view of Recruit.
Hiring Manager	Hiring Managers can search through the candidates database, but only have full access to candidates who are unassigned or who have applied to requisitions they own.
Recruiter	Recruiters can search through the candidates database, but only have full access to candidates who are unassigned or who have applied to requisitions they own.
Passive User	Passive Users can view open requisitions, accept or decline participation in interviews, submit interview feedback, and submit employee referrals. Passive Users cannot view any candidate information other than candidates they are scheduled to interview.
Agency	Agency users can submit candidates to requisitions they have been assigned to, and check the status of previously submitted candidates.
No Access	This role is used when you want to temporarily prevent a user from accessing the system. Users assigned to the No Access role can not be Requisition and Offer Approvers.

3. Create and Import Requisitions

The next step is to create all of your requisitions. To add requisitions individually, follow the steps below. To do a mass import of requisitions and/or requisition templates, refer to “Importing Requisitions from a CSV file.”

Step 1. Go to the **Requisitions** tab.

Step 2. Choose **New Requisition**, and fill in the requisition's information. (The Location picklist values were created by you in step 1 above.)

Step 3. If you would like this requisition to appear on your careers website, select the check box called “Post this requisition on Careers Website”.

Step 4. You must assign at least one Requisition Owner. These are the users that can view and contact candidates that apply for this requisition. Select **Add/Remove** and choose the appropriate users.

Step 5. Requisition Approvers are the users that must approve this requisition before it will appear on your careers web site. (Only users with the Requisition Approval privilege can be assigned as Requisition Approvers.)

Step 6. Offer Letter Approvers are the users that must approve offer letters for candidates you may hire for this requisition. (Only users with the Offer Approval privilege can be assigned as Offer Approvers.)

Step 7. Click the **Save** button when finished.

Additional features available in **Plus** and **Premium** Services

With Taleo Recruit Plus Service or Premium Service, requisitions can be posted to multiple careers websites using multiple different application forms. For more information about these features, refer to the Administration chapter of this guide: Creating Multiple Versions of Forms and Creating Multiple Careers Websites.

Importing Requisitions from a CSV file

Use the Requisition Import Wizard to import requisitions and requisition templates from a CSV file into your Taleo Recruit system.

Preparing to Import

Prior to using the Requisition Import Wizard review and perform the following prerequisites:

- Create a .CSV (comma separated value) file that contains the requisition data you want to import into your Taleo Business Edition system. To import requisition data stored in Excel, you'll need to export or save that data to a .CSV file. Once you have created your .CSV file, compare your data to the Requisition fields available for import. Check with your Administrator if you need custom fields or custom pick-list values.
- The CSV file must be delimited as follows: Fields and columns must be separated by commas and multiple pick-list values must be separated by pipe characters: |
- Taleo Business Edition will not accept CSV files larger than 4 megabytes. If you have a larger file to import, you may need to create multiple CSV files and import them separately.
- Highly recommended: Consider testing the import process by importing a small test file of 5 records before importing all of your data to ensure that your file is properly formatted.
- If you are importing Job Descriptions or other blocks of text containing commas, it is important to properly format the commas by enclosing them in quotes so they can be differentiated from comma delimiters.

- Ensure that any values you want to store as pick-list selections match the pick-list value exactly as non matching values will be discarded
- All Requisitions can be imported with a default status as defined in the wizard. You can also identify an alternative status in the CSV contents, however if it does not match an existing 'Active' Status it will be discarded.
- All Requisitions or Requisitions Templates in a single upload will be assigned to a specific workflow. This might mean that you should break your upload into separate files if your upload includes requisitions of various workflows.
- If you include a column for Job Code in your upload, and there is a matching Job Code assigned to one requisition within Taleo Business Edition, the corresponding Requisition will be updated to the information contained in the CSV file. If more than one existing record has the same Job Code, then no action will take place. If no Requisition with a matching Job Code is found, a new Requisition or Requisition Template will be created.
- When mapping a column to a pick-list such as “State/Region”, “Country”, or a custom pick-list field, the import wizard will look for a text match (case insensitive). If no text match is found, the pick-list value will not be set.
- When mapping a column to a checkbox field, the import wizard will look for “True” values. If a “True” is found the checkbox will be checked; otherwise it will be unchecked.
- The only fields you cannot map are “Requisition Workflow” and “Associated Careers Website(s)” These are separate selections in the import wizard. Therefore, you may need to perform separate imports for each variation of these fields.

Importing Requisitions and Requisition Templates:

1. From the Requisitions menu in Taleo Recruit, select **Import**. The Requisition Import Wizard displays.
2. Select the type of import: Requisitions or Requisition Templates.
3. Click Next.
4. Click Browse and navigate to the CSV file containing the requisition data. Page two of the Import Wizard displays.
5. Select a Requisition Workflow and Associated Careers Website.

- Select default values for the following fields that the system will use if certain conditions (listed below) are present:
  - Requisition Status
  - Location

The system will use the default values you select for these fields in the following scenarios:

- For items that cannot be differentiated in the CSV file
- In the event that critical information is not mapped correctly in the final step
- If there is an error contained within the CSV file and matching is not possible

6 Click Next.

7 Map the columns contained in your CSV file to Standard or Custom Requisition Fields. This includes pick-lists, checkboxes, and all supported data types.

8 Click Import when you are finished mapping fields and columns.

4. Set up your Careers Website

The next step is to work with your webmaster to set up the Careers section of your company's website. Taleo Recruit hosts this part of your website so open requisitions will automatically appear there whenever you create and update them in your Taleo Recruit system. Candidates can search, apply online, and come back to check their status and update their information. When a candidate applies, all candidate information and the resume is immediately captured and stored in your Taleo Recruit system. The requisition owners are notified by email whenever someone applies to their requisitions.

In order for all this to work, the only thing your webmaster needs to do is use the following URL for the “Careers” or “Job Openings” link on your web site:

https://tbe.taleo.net/<<NAX>>/ats/careers/jobSearch.jsp?cws=1&org=<<COMPANY_CODE>>

...where **<<NAX>>** should be substituted with your Taleo Business Edition server name using all upper case letters and **<<COMPANY_CODE>>** should be substituted with your Taleo Business Edition company code. Try testing this URL in your browser (make sure to use upper case letters for your server name; the entire URL is case-sensitive).

The web pages at this URL should already look like your company's web site. If not, contact Taleo Business Edition support at tbesupport@taleo.com, and we'll take care of this for you as soon as possible.

Additional features available in **Plus** and **Premium** Services

With Taleo Recruit Plus Service or Premium Service, your organization can have multiple Taleo Recruit-powered careers websites. For example, you may need separate careers websites for salaried positions, internal openings, international opportunities, university recruiting, internships, etc. For more information, see Customize: Manage Careers Websites or contact your Taleo Business Edition representative.

5. Set up your Employee Referrals page

The next step is to work with your webmaster to set up your internal employee referral submission page.

Research has shown that a high percentage of top talent actually comes from referrals by existing employees. Using Taleo Recruit you can enable all of your employees to quickly and easily submit referrals. There is no login required to submit a referral. Referral submissions are handled by a one-page form which captures all required information. Once submitted, referred candidates are tagged with the referrer's name and highlighted for high visibility in your Taleo Recruit system.

Employee Referrals Page URL

The URL to your organization's Submit Referral page shown below.

NOTE: IMPORTANT! In the following example, information that is specific to your environment is surrounded by angle brackets, like this <<example>>. You must change the bracketed information to match your server information.

https://sj.tbe.taleo.net/<<SJ#>>/ats/external/SubmitReferral.jsp?org=<<COMPANY_CODE>>&lang=<<Locale>>

In the above example:

<<SJ#>> must be substituted with your Taleo Business Edition server name using all upper case letters (for example, SJ99)

<<COMPANY_CODE>> must be substituted with your Taleo Business Edition company code, for example TECKO_CORP

<<Locale>> must be substituted with your Taleo Business Edition Locale setting, for example: English or one of the following abbreviations, as appropriate: de, en, es, fr.

NOTE: **IMPORTANT:** Test this URL in your browser (make sure to use upper case letters for your server name; the entire URL is case-sensitive).

6. What's Next?

Congratulations! You have now completed the core Taleo Recruit setup process.

There is much more you can do to configure and customize Taleo Recruit. You can choose to work through any of the following tutorials now, or come back to them at a later time:

- Pre-Screening Questions
- Importing Resumes from a ZIP file
- Importing Candidates from a CSV file

Adding Users

Before you start adding requisitions into your Taleo Recruit system, you first need to add the hiring manager and recruiter users who will be responsible for each requisition.

Steps:

1. New User Planning

2. New User Creation

3. What's Next?

1. New User Planning

When creating a new user, you must assign that user a role. A user's role determines which Taleo Recruit resources and features that user has access to. There are six possible roles:

User Roles

Title	Description
Administrator	Administrators have access to everything, including all candidates and other confidential information. Only Administrators can create new users and reset user passwords. Administrators are the only users with access to the “Administration” tab.
HR Administrator	HR Administrators have access to all records in Recruit (Candidates, Requisitions, Accounts, Users, etc.), but no access to Administration. Essentially, the HR Administration role is similar to the Hiring Manager role with visibility to all records - a global view of Recruit.
Hiring Manager	Hiring Managers can search through the candidates database, but only have full access to candidates who are unassigned or who have applied to requisitions they own.
Recruiter	Recruiters can search through the candidates database, but only have full access to candidates who are unassigned or who have applied to requisitions they own.
Passive User	Passive Users can view open requisitions, accept or decline participation in interviews, submit interview feedback, and submit employee referrals. Passive Users cannot view any candidate information other than candidates they are scheduled to interview.

Title	Description
Agency	Agency users can submit candidates to requisitions they have been assigned to, and check the status of previously submitted candidates.
No Access	This role is used when you want to temporarily prevent a user from accessing the system. Users assigned to the No Access role can not be Requisition and Offer Approvers.

You can assign roles based on the number of Active User and Passive User licenses your organization has purchased. To find out how many licenses your organization has, click the About link in the upper right corner of your Taleo Recruit screen.

User Licences

Title	Description
Active Users	Active Users are users with the following roles: Administrator, Hiring Manager or Recruiter.
Passive Users	Passive Users are users with the following roles: Passive User and Agency.

2. New User Creation

In order to create new user accounts, you must be logged in as a user with Administrator privileges.

Step 1. Go to the **Users** tab.

Step 2. Click the **New User** link.

Step 3. Enter the new user's name, title, and all other requested information. Make sure to enter a unique company email address for each user.

Step 4. Select the appropriate role and assign a username.

Step 5. Assign **"**Requisition Approval**"** and **"**Offer Approval**"** privileges. These privileges should be reserved only for users who need to sign off on new requisitions or offer letters before they can be executed.

Step 6. Select the appropriate Time Zone and Locale for this user based on their geographic location.

Step 7. Click the **Save** button. An email with login information will automatically be sent to the new user.

Repeat this process for each new user you would like to add.

3. What's Next?

You have now completed the new user creation process!

What's Next?

- Creating Requisitions
- Careers Website Setup
- Employee Referrals Setup

Creating Requisitions

Now that you have configured your Taleo Recruit system and added your organization's requisitions, the next step is to activate your careers website. This is the job openings section of your web site where candidates can search and apply to your requisitions online.

Steps:

1. Information Gathering

2. The New Requisition Form

3. Requisition Data

4. Owners, Approvers & Agencies

5. Requisition Posters

6. Description

7. Save and Approve

8. What's Next?

1. Information Gathering

The first thing you'll need to do before adding requisitions is gather the following information for each requisition you want to add:

Requisition Information

Field	Description
Job Code	A 10-character or less abbreviation for this requisition.
Title	A short two or three word title for this requisition.

Field	Description
Location	The location of this requisition as defined in your Taleo Business Edition Organization structure.
EEO job category	EEO job classification for this requisition. This can be one of the following: • Officials and Management • Professionals • Technicians • Sales Workers • Office And Clerical • Craft Workers (Skilled) • Operators (Semi-Skilled) • Laborers (Unskilled) • Service Workers
# of openings	Number of open positions corresponding to this requisition.
Employment Duration	Job duration, i.e. Full time, Contract, etc.
Pay Range	Range of possible salaries or hourly wages. (optional)
Requisition Owners	Recruiters and Hiring Managers who need access to candidates that apply to this requisition. Each owner must have a user account in your Taleo Business Edition system.
Requisition Approvers	The people responsible for approving this requisition. These can only be Taleo Business Edition users who have the “Requisition Approval” privilege. (NOTE: If a requisition has already been approved, assign yourself as the only owner so that you can approve it once created.)
Offer Approvers	The people responsible for approving any proposed offer letters to candidates for this position. These can only be Taleo Business Edition users who have the “Offer Approval” privilege.
Agencies	External recruiters and staffing agencies you would like to allow candidate submission and review privileges to. These can only be Taleo Business Edition users with the “Agency” role.
Description	A complete description for this requisition (i.e. job overview, required skills, duties, preferred experience, education, etc).

2. The New Requisition Form

Now that you have all the information you need to add your organization's requisitions, login to Taleo Recruit and navigate to the **Requisitions** tab.

Once you are in the Requisitions section, click the **New Requisition** link to display the "Requisitions: New Requisition" form.

3. Requisition Data

In the section titled Requisition Data, enter and select appropriate values for each field. The following fields are marked in red indicating that they are required:

- Title
- Location
- EEO job category

Requisitions must each have a Job Code. If you do not explicitly assign one, the Job Code will automatically default to the Job ID#.

Picklist values can be customized, and custom requisition fields can be added to the requisition form by your Taleo Recruit Administrator. See Customize: Requisition Fields.

4. Owners, Approvers & Agencies

The section titled Owners, Approvers & Agencies is used to assign requisition privileges and responsibilities.

Requisition Owners

Each requisition must have at least one Requisition Owner. Requisition Owners are the only users (other than Administrators) who will have complete access to candidates that apply to this requisition.

To add owners, click the **Add/Remove** link next to the "Requisition Owners" label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons.

Only users with the following roles are allowed to be requisition owners: Administrator, Hiring Manager, and Recruiter.

Requisition Approvers

If one or more users have the "Requisition Approval" privilege, you will be required to assign at least one Requisition Approver. Requisition Approvers are the users who are responsible for approving this requisition before it is opened.

To add approvers, click the **Add/Remove** link next to the "Requisition Approvers" label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons.

Only users with the "Requisition Approval" privilege can be assigned (to give this privilege to a user, an Administrator must edit the user's account).

Offer Letter Approvers

If one or more users have the “Offer Approval” privilege, you will be required to assign at least one Offer Letter Approver. Offer Letter Approvers are the users who are responsible for approving any offer letters made to candidates for this requisition.

To add offer letter approvers, click the **Add/Remove** link next to the “Offer Letter Approvers” label. In the popup dialog, select the users you would like to assign as owners from the left list and move them to the right list with the arrow buttons. Only users with the “Offer Approval” privilege can be assigned (to give this privilege to a user, an Administrator must edit that user's account).

Agencies

Assigning Agencies is always optional. Any user with the Agency role can be assigned to a requisition so they can submit candidates and track the status of their previously submitted candidates in your Taleo Recruit system.

To add Agencies, click the **Add/Remove** link next to the “Agencies” label. In the popup dialog, select the users you would like to assign as agencies from the left list and move them to the right list with the arrow buttons. Only users with the Agency role can be assigned.

5. Requisition Posters

In the section titled Requisition Posters there is a check box displaying “Post this requisition on Careers Website”. If you would like this requisition to be displayed on your careers web site, check this check box.

Requisitions will only appear on your careers web site after they have been approved, and only when they are in the “Open” state.

Additional features available in **Plus** and **Premium** Services

If your Taleo Recruit system has multiple careers websites, you will see a separate checkbox for each careers site. Only check the boxes where you want this job to be posted.

In addition, if your Taleo Recruit system has more than one type of Application Form, you will be able to select which application form to use for this job posting for each careers website. Check with your Administrator to make sure you select the appropriate application forms for each careers site this requisition will be posted to.

For more information about these features see Careers Website Setup and Application Form Customization.

6. Description

In the section titled Description, enter a complete description for this requisition i.e. job overview, required skills, duties, preferred experience, education, etc. See Writing a Description.

7. Save and Approve

When you are finished filling out the form, scroll to the bottom and click the Save button. You will be taken to the main Requisitions view and the new requisition will be highlighted.

If no Requisition Approvers were assigned, the requisition will automatically be approved and moved to the Open state. If one or more Requisition Approvers is assigned, the requisition will remain in the Waiting For Approval state until the assigned approvers approve or reject the requisition.

8. What's Next?

You have now completed the requisition creation process!

What's Next?

- Careers Website Setup
- Employee Referrals Setup

Careers Website Setup

Now that you have configured your Taleo Recruit system and added your organization's requisitions, the next step is to activate your careers website. This is the job openings section of your web site where candidates can search and apply to your requisitions online.

Whenever a requisition is approved in your Taleo Recruit system, it can be immediately activated on your careers website. Similarly, whenever a requisition is updated, filled, or placed on hold, your careers web site is immediately updated. Candidates that apply to any of your requisitions through your careers website are immediately stored in your Taleo Recruit candidates database, and the appropriate requisition owners are automatically notified via email.

When candidates apply through your careers website they can select a password. Using this password in combination with their email address, candidates can come back to your careers site and login to check their application status and update application information

All of these features and more are already set up for your organization. To activate your careers website, consult with your webmaster on the following steps.

Steps:

1. Test your Careers Website URL

2. Ensure proper Look and Feel

3. Replace your current Job Openings link

4. What's Next?

1. Test your Careers Website URL

YourTaleo Recruit careers website URL is:

**https://tbe.taleo.net/<<NAX>>/ats/careers/
jobSearch.jsp?cws=1&org=<<COMPANY_CODE>>**

...where **<<NAX>>** should be substituted with your Taleo Business Edition server name using all upper case letters and **<<COMPANY_CODE>>** should be substituted with your Taleo Business Edition company code. Try testing this URL in your browser (make sure to use upper case letters for your server name; the entire URL is case sensitive).

2. Ensure proper Look and Feel

The Taleo Recruit implementation team has most likely already configured your careers website pages to match the look and feel of your organization's web site. If your Taleo Recruitn careers site does not seamlessly fit in with the look and feel of your company's web site, contact Taleo Business Edition support at tbesupport@taleo.com or submit a case online by clicking the “Support” link in the upper right of your TTaleo Recruit screen.

If you would like to modify the header & footer HTML yourself, you can do so as follows:

1. Login to Taleo Recruit as an Administrator user.
2. Go to the **Administration** tab.
3. Click **Customize Taleo Business Edition** and scroll down to the section called Manage Careers Websites.
4. Locate the Careers Website item and click the **Header & Footer** link.
5. You or your webmaster can modify the header and footer HTML as needed. (Make sure to include a BASE URL tag if using relative URLs.)

3. Replace your current Job Openings link

Working with your webmaster, the only thing you need to do to integrate your Taleo Recruit careers web site into your organization's web site is replace the current link to your “job openings” page (or whatever your current careers page is called) with your Taleo Recruit careers site URL from step 1.

4. What's Next?

You have now completed the careers website setup process!

What's Next?

- Employee Referrals Setup
- Application Form Customization

Employee Referrals Setup

With Taleo Recruit you can provide employees throughout your organization with a centralized way to submit employee referrals. Referrals are then highlighted and tracked in your Taleo Recruit system.

Steps:

1. Test your Submit Referral URL

2. Add the Submit Referral page to your Intranet

3. What's Next?

1. Test your Submit Referral URL

There is no login required for employees to submit a referral. Referral submissions are handled by a one-page form which captures all required information. The URL to your organizations Submit Referral page is of the form:

https://tbe.taleo.net/<<NAX>>/ats/external/SubmitRefer ral.jsp?org=<<COMPANY_CODE>>&lang=<<Locale>>

...where **<<NAX>>** should be substituted with your Taleo Business Edition server name using all upper case letters, **<<COMPANY_CODE>>** should be substituted with your Taleo Business Edition company code and **<<Locale>>** should be substituted with your Taleo Business Edition company Locale (de, en, es, fr,...). Try testing this URL in your browser (make sure to use upper case letters for your server name; the entire URL is case-sensitive).

2. Add the Submit Referral page to your Intranet

Working with your webmaster, the only thing you need to do to integrate your TTaleo Recruit careers web site into your organization's web site is replace the current link to your “job openings” page (or whatever your current careers page is called) with your Taleo Recruit careers site URL from step 1.

3. What's Next?

You have now completed the employee referrals setup!

What's Next?

At this point your Taleo Recruit system is fully configured and operational. Congratulations! You can continue on with some of the below tutorials or come back to them later as needed:

- Pre-Screening Questions
- Importing Resumes from a ZIP file

Pre-Screening Questions

With Taleo Recruit you can attach questions to each requisition which are then presented to candidates when they apply online. Questions are categorized and stored in a shared Online Questions Library in your TTaleo Recruit system for reuse by any number of requisitions. Answers to online questions are stored with each candidate's profile.

This tutorial provides an overview of how to import account information from a CSV (comma delimited text) file into your Taleo Recruit system.

Steps:

1. The Online Questions Library

2. Adding a new Question

3. Attaching Questions to Requisitions

4. What's Next?

1. The Online Questions Library

The Taleo Recruit Online Questions Library is a shared repository of categorized questions that can be attached to requisitions to form online questionnaires. These questions are used for the purpose of pre-screening candidates.

To view and add questions to the library, log in and go to the Requisitions section. Click the Questions link to go to the Online Questions Library page.

2. Adding a new Question

To add a new question, click the Add Question button. In the Add Question form, select the appropriate Category for your question. If you would like to create a new category for this question, type the new category name in the text field to the right of the list.

Type the question in the text area and click the Submit button when finished.

3. Attaching Questions to Requisitions

Now that you have created your online questions, the next step is to attach them to the appropriate requisitions.

1 Click on the **Requisitions** tab and select the appropriate requisition.

2 In the Questions & Ranking section, click **Attach Question**. In the popup window you will see a listing of all available questions sorted by category.

3 Click the **Append** link next to any question you would like to add. Click the **Close** button when finished to close the popup window.

4 To set the rankings for each of the questions, click the **Edit Ranking Template** link. To view your ranking criteria, click the **View Ranking Criteria** link.

Now you should see all the questions you added in the Questions & Rankings section of the Requisition page. The questions are listed in the order in which they will appear to candidates applying online. Use the **Move Up** and **Move Down** links to reorder the questions.

4. What's Next?

You are now familiar with creating and configuring prescreening questions!

What's Next?

You can continue on with some of the below tutorials or come back to them later as needed:

- Importing Resumes from a ZIP file
- Importing Candidates from a CSV file

Application Form Customization

Once you've set up your careers website you may want to customize your online application form. Using the application form builder in Taleo Recruit you can add custom fields, section titles, text and any HTML to create the application form that best suits your organization's needs.

Steps:

1. Application Form Planning

2. Customize Application Form

3. Creating Multiple Application Forms

4. What's Next?

1. Application Form Planning

Before starting the application form customization process, the following planning activities are recommended:

Step 1. Decide what data you would like to capture in the online application form. If you need to capture more data beyond standard candidate fields, you will need to add Candidate Custom Fields

Step 2. Decide how you want to organize your form. The form builder allows you to add section Titles. List out the different sections you would like in this form. The application form builder allows you to add section Titles. List out the different sections you would like in the application form.

Step 3. Do you need to add any text, images, links or other HTML to explain or display certain information in the application form? If so plan out where you would like this content to appear.

2. Customize Application Form

To get to the application form builder:

Step 1. Go to the **Administration** tab.

Step 2. Click **“**Customize Taleo Business Edition**”**.

Step 3. In the Customize Careers Pages section click the **Careers Website Page** link.

Step 4. Click the **Edit** link next to **“**Application Form**”**.

Adding section titles:

For each unique section of the application form you would like to add, click **Insert** above where you would like the section title to appear. In the **Insert Web Page** page, enter the section title in the **Title** field and click the **Save** button.

Adding text and HTML:

For each paragraph of text or HTML you would like to add, click **Insert** above where you would like that content to appear. In the Insert Web Page page, enter the content in the HTML field and click the **Save** button.

Adding fields:

Before a new field can be added to the application form, you must first create it as a custom candidate field.

To add a custom candidate field to the application form, click **Insert** above where you would like that content to appear. In the **Insert Web Page** page, select the field you would like to add in the **Input field** picklist and click the **Save** button.

All input fields must be located between any “XX begin” and “XX end” placeholders if they exist. and “Application form end” placeholders.

All fields can be re-ordered using the arrow buttons in the left column called “Order”.

NOTE: By default a resume attachment and/or cover letter is required in the application form. If you would like to remove this requirement, “Edit” the **Attach Resume** placeholder and uncheck the checkbox.

3. Creating Multiple Application Forms

Additional features available in **Plus** and **Premium** Services

Taleo Recruit Plus Service and Premium Service allow you to create multiple application forms.

This can be useful if you would like to associate different application forms with different requisitions. If you have multiple careers websites, you can also associate different application forms with the same requisition based on which careers website the requisition is posted to.

To create a new application form:

Step 1. Go to the **Administration** tab.

Step 2. Click **"**Customize Taleo Business Edition**"**.

Step 3. In the Customize Careers Website Pages section click the **Careers Website Pages** link.

Step 4. Click the **Add Version** link next to **"**Application Form**"**.

Step 5. Choose a name for the new application form.

Step 6. Edit this application form by clicking the **Edit** link next to its name in the main Web Forms page.

Now when you create or edit a requisition you will be able to select which application form is for that req on each of your Taleo Recruit careers websites.

4. What's Next?

You are now an expert in application form customization!

What's Next?

- Creating Requisitions
- Careers Website Setup
- Employee Referrals Setup

Importing Resumes from a ZIP file

If you have resumes stored on your computer that you would like to import into your Taleo Recruit system, you can use the Candidate Import feature to do so quickly and easily.

This tutorial provides an overview of how to import resumes from a ZIP file into your Taleo Recruit system.

Steps:

1. Preparing a ZIP file

2. Creating a new Candidate Source

3. Importing

4. What's Next?

1. Preparing a ZIP file

In order to import multiple resumes saved on your computer, you'll need to bundle them in a ZIP file. If you are not familiar with ZIP files ask your IT department for help. You will need a freeware tool such as WinZip to create a ZIP file containing all your resumes.

Best practice guideline: If you have separated your resumes into folders based on requisition, when you upload them Taleo Recruit can automatically submit them for the appropriate requisition. To do this, create a separate ZIP file of resumes corresponding to each requisition and repeat steps 2 and 3 of this tutorial for each ZIP file.

Each ZIP file can contain any number of resumes and subfolders containing resumes. All resume documents must be in either DOC, DOCX, RTF, PDF, HTML or TXT format.

2. Creating a new Candidate Source

Each candidate in your Taleo Recruit candidates database has a field called “Source” which identifies where that candidate came from. Candidates that apply through your Careers Web Site will automatically be tagged with the **Careers Web Site** source. Similarly, candidates submitted as referrals will have a source of **Referral**.

When you import candidate resumes into your Taleo Recruit system you will want to associate them with an appropriate source. To create a new source, login and go to the **Candidates** section. Click the **Sources** link and click the **Add Source** button. Name the source appropriately: for example, if the resumes you are importing were all found on Monster.com, you may want to call the new source Monster.com. Click the **Submit** button when finished.

3. Importing

One you have prepared a ZIP file, you need to upload this file with the Candidate Import tool:

Step 1. Login and go to the **Candidates** section. Click the **Import** link and in the first screen of the Candidate Import Wizard, select the **Import multiple resumes** option. Click the **Next** button to move to the next screen.

Step 2. Click the **Browse** button to locate the ZIP file you created in Step 1.

Step 3. Select the appropriate Candidate Source these resumes should be associated with (you may have just created this Source above).

Step 4. (Optional) If you would like to associate these candidates with a particular requisition, select the appropriate requisition from the **Requisition** pick list.

Click the Import button when finished.

QUESTION: How does Taleo Recruit process each imported resume file?

ANSWER: A new candidate is created corresponding to each resume. Since candidates are uniquely identified by email address, Taleo Recruit first attempts to locate an email address in the resume.

A first name and last name are also automatically located based on intelligent search criteria. The resume file itself is attached to that candidate in the same, original format.

NOTE: A high degree of accuracy is difficult to achieve because there is no standard method of locating data within a resume. For this reason, candidates that are created from imported resumes may have incorrect names and email addresses. Taleo Business Edition is continually researching new technology to increase this accuracy.

Taleo Business Edition does not support PPMD compression available in Winzip version 10 and higher.

4. What's Next?

You are now familiar with the resume importing process!

What's Next?

You can continue on with some of the below tutorials or come back to them later as needed:

- Pre-Screening Questions
- Importing Candidates from a CSV file

Importing Candidates from a CSV file

If you have candidate data stored in an Excel spreadsheet, ACT!, GoldMine, or other application, and you would like to import this data into your Taleo Recruit system, you can use the Candidate Import Wizard to do so quickly and easily.

This tutorial provides an overview of how to import candidate information from a CSV (comma delimited text) file into your Taleo Recruit system.

Steps:

1. Preparing a CSV file

2. Creating a new Candidate Source

3. Importing

4. What's Next?

1. Preparing a CSV file

NOTE: By default MS Excel files are stored in XLS format. If you are importing directly from Excel, you will need to convert from XLS to CSV before performing an import. Please read this section before continuing

Converting to CSV from XLS and other formats:

If you have a Microsoft Excel file in XLS or other format, open this file in Excel and:

1. Select the **File** menu.
2. Select **Save As...**.
3. In the popup dialog, choose **CSV (Comma delimited)(*.csv)** from the **Save as type**: field.
4. You may see another popup dialog asking "**yourfile.csv may contain features that are incompatible with CSV (Comma delimited). Do you want to keep the workbook in this format?"**. Click the **Yes** button.

2. Creating a new Candidate Source

Each candidate in your Taleo Recruit candidates database has a field called "Source" which identifies where that candidate came from. Candidates that apply through your Careers Web Site will automatically be tagged with the **Careers Web Site** source. Similarly, candidates submitted as referrals will have a source of **Referral**.

When you import candidate resumes into your Taleo Recruit system you will want to associate them with an appropriate source. To create a new source, login and go to the Candidates section. Click the **Sources** link and click the **Add Source** button. Name the source appropriately: for example, if the resumes you are importing were all found on Monster.com, you may want to call the new source Monster.com. Click the **Submit** button when finished.

3. Importing

One you have prepared a CSV file, you need to upload this file with the Account Import tool:

NOTE: Before importing a large number of records, we highly recommend running a test import with 2 or 3 rows of data only to make sure your data is formatted properly.

Step 1. Login and go to the **Candidates** section. Click the **Import** link and in the first screen of the Candidate Import Wizard, select the **Import from CSV file** option. Click the **Next** button to move to the next screen.

Step 2. Click the **Browse** button to locate the CSV file you created in Step 1.

Step 3. Select the appropriate Candidate Source these resumes should be associated with (you may have just created this Source above).

Step 4. (Optional) If you would like to associate these candidates with a particular requisition, select the appropriate requisition from the **Requisition** pick list.

Step 5. Click the **Next >>** button to go to the **Map Columns to Candidate Fields** screen.

The Taleo Business Edition Import Wizard allows you to map any column of data in your CSV file to a Standard or Custom Candidate Field. This includes picklists, checkboxes, and all supported data types. Once you have your CSV file prepared, look at all the fields in your Taleo Recruit Candidate form and determine which column in your CSV file should map to each candidate field.

When mapping a column to a picklist such as “State/Region”, “Country”, or a custom picklist field, the import wizard will look for a text match (case insensitive). If no text match is found, the picklist value will not be set.

NOTE: CSV is a delimited data format that has fields/columns separated by the comma “,”and multiple picklist values separated by pipe “|”.

When mapping a column to a checkbox field, the import wizard will look for “True” values. If “True” is found the checkbox will be checked; otherwise it will be unchecked.

NOTE: The only fields you cannot map are “Source” and “Requisition”. These are separate selections in the import wizard (see Steps 3 and 4 above). Therefore, you may need to perform separate imports for each Source and/or Requisition.

Click the **Import** button when finished.

4. What's Next?

You are now familiar with the candidate importing process!

What's Next?

You can continue on with some of the next tutorials or come back to them later as needed:

- Pre-Screening Questions
- Importing Resumes from a ZIP file

Smart Sourcing

This chapter describes how to use Taleo Smart Sourcing™ to connect to tools and resources you may already have such as Outlook, eQuest, Facebook, and LinkedIn.

Taleo Smart Sourcing provides small and midsize companies with the same talent sourcing advantages that large organizations enjoy. Now you can build stronger relationships with active and passive jobseekers and hire the most qualified candidates faster. Taleo Smart Sourcing broadens your talent reach by connecting automatically with a wide range of candidate networks. You earn a higher return on your sourcing investments by streamlining and accelerating the hiring process.

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Taleo Outlook Plug-in Overview

As a Taleo Business Edition Premium Service client, your organization can take advantage of the Taleo Outlook Plug-in for tighter Microsoft Outlook and Taleo Business Edition integration and seamless workflow.

Using the Taleo Outlook Plug-in with Taleo Business Edition Recruit allows you to:

- Easily access the TBE Resource Center, giving you access to video clips, guides, white papers, and more.
- Access your 'My View' page from your Outlook inbox to view and monitor tasks, activities, records, and upcoming due dates.
- Easily move candidates' resumes, correspondence, and profiles from Outlook to Taleo.
- Easily address emails to candidates and contacts from Outlook by using the Taleo Address Book lookup. Emails sent from Outlook can also be automatically saved to Taleo.

Compatibility

The Outlook Plug-in is compatible with Windows 7, Windows XP Home or Professional, and Windows Vista operating systems, running Office 2007, Office 2010 (32-bit only), Outlook 2003, or Outlook 2007.

Outlook Express is not supported.

Installing Taleo Outlook Plug-in

To install the most current Taleo Outlook Plug-in, click the link provided below. This link will always contain the most current version of the Taleo Outlook Plug-in.

- Click Here: http://tbe.taleo.net/outlook/TaleoOutlookToolbarInstaller.exe and click **Run**

Follow the instructions in the Taleo Outlook Toolbar Setup wizard and then click **Finish**. If you had your Microsoft Outlook client open during installation, you will want to close and re-launch Outlook.

Managing Taleo Outlook Plug-in

Once you have installed the Taleo Outlook Plug-in, you can access the Plug-in buttons from your Outlook Toolbar and from the Taleo menu option. The Taleo menu option allows you to view and modify preferences, to access Taleo's Privacy Statement, and to View 'About' information.

The **Preferences** menu option allows you to modify the user name, password, and account name to which the Outlook Plug-in will refer when viewing or saving data to your Taleo Business Edition system. Should you change your user name, password, or account name in Taleo Business Edition, you will need to update the Preferences section for your Taleo Outlook Plug-in as well.

From the menu bar select **Taleo > Preferences** and update your information, then click **Reset** and **Yes**.

NOTE: When you first receive access to your Taleo Business Edition system, you will be given a temporary password. You must update your Taleo Business Edition password before you reset your Taleo Outlook Plug-in. Attempting to use your temporary password with the Outlook Plug-in will result in an error.

The **Preferences Feedback** option allows you to submit feedback. While feedback is appreciated and will be monitored, the feedback tool is not intended to be used as a reporting system for issues you may be experiencing with the Taleo Outlook Plug-in. Please contact the Support Desk directly if you are experiencing issues with the Taleo Outlook Plug-in.

The **Preferences Advanced** checkbox enables animation of the Taleo button to alert you that updates have been made to the TBE Resource Center. The icon on the Taleo button animates 6 cycles, and then the animation stops for 3 seconds. It then animates for another 6 cycles, and then it stops for a minute. After a minute the animation resumes again. If you click the Taleo button, the animation stops and will not resume again for that particular date.

The **Help** option displays the **Taleo Privacy Statement**, which is also accessible by going to www.taleo.com. The **Help Contact Customer Support** option initiates an email to the Taleo Support Desk.

The **Check for Updates** button will perform a real-time check to see if you are using the latest version of the Taleo Outlook Plug-in and offer for you to update to the latest version.

The **About** option displays the version of the Taleo Outlook Plug-in you currently have installed on your system. This information is important when you call the Taleo Support Desk if you are having difficulties with the Taleo Outlook Plug-in.

Using Taleo Outlook Plug-in

Now you are ready to begin using the Taleo Outlook Plug-in, which includes easy access to the TBE Resource Center, the Taleo Dashboard, the Add to Taleo and Address Book buttons.

Taleo

The **Taleo** button is a quick link to TBE's Resource Center. Click the **Taleo** button to view the TBE Resource Center where you can access video clips, user guides, white papers, and more. When updates are posted to the TBE Resource Center, the **Taleo** button will animate to alert you that new information is available. Click the **Taleo** button to view the Resource Center and to stop the animation.

Dashboard

The **Dashboard** button provides a view-only display of your Taleo Business Edition 'My View' page, essentially allowing you to view and to monitor scheduled events, tasks, active candidates, and assigned requisitions from within your Outlook client.

Click the **Dashboard** button to view your **My View** page. This is a view-only representation of your My View page. You need to login to Taleo Business Edition to initiate or update activities.

NOTE: The information displayed in your 'My View' page is configurable by your Administrator using the Outlook My View Page Layout feature.

Add to Taleo

The **Add to Taleo** button allows you to easily move candidates' resumes, correspondence, and profile information from your Outlook inbox to Taleo Business Edition.

First, from your Outlook Inbox highlight the email you wish to save to Taleo, and click the **Add to Taleo** button. (You may also initiate this process from within the email window.) The Add to Taleo window will appear. Select the appropriate email type from the drop-down list, and click **Next** to continue.

If you are adding a new candidate and resume to Taleo, select whether the resume is an attachment or within the body of the email, and click **Parse**. The extraction process will begin and will extract basic candidate information that will be added to the candidate profile. If you want to attach this candidate to a specific Requisition, click the **Requisitions: [Add]** button and select the Requisition. You may also add to or modify the fielded data that has been auto-populated to the candidate record, then click **Add**. The Candidate Create Confirmation screen will appear indicating your candidate has been saved to Taleo. Click **Finish**.

If you adding a new candidate referral, you will be asked to provide the Referral name, then click **Next**. Now, select whether the resume is an attachment or within the body of the email, and click **Parse**. The extraction process will begin and will extract basic candidate information that will be added to the candidate profile. If you want to attach this candidate to a specific Requisition, click the **Requisitions: [Add]** button and select the Requisition. You may also add to or modify the fielded data that has been auto-populated to the candidate record, then click **Add**. The Candidate Create Confirmation screen will appear indicating your candidate has been saved to Taleo. Click **Finish**.

NOTE: The candidate profile page that appears when you are saving a new candidate or new candidate referral to Taleo is configurable by your Administrator using the Outlook Add/Edit Candidate Page Layout feature.

If you are adding correspondence from an existing candidate, highlight the email or the text within the body of the email, and click **Next**. You will be able to view the text that will be logged to the Candidate record, and click **Next**. You will then be asked to select the Candidate record to which you wish to save the communication. The Contact Log Confirmation screen will appear indicating your communication has been saved to Taleo. Click **Finish**.

You can now go into your Taleo Business Edition system and click the **Candidate** record to view this candidate and/or any communication, profile information, and resume that has been saved. Additionally, the Contact Log section will log correspondence by date.

Taleo Address Book

The **Taleo Address** button allows you to perform a 'look up' to your Candidate or Contact selector in Taleo to address outgoing emails from your Outlook Inbox.

If you want to send an email to a Candidate or Contact from your Outlook Inbox, click the **New Mail Message** and click the **Taleo Address Book**. The Taleo - Select Names dialog box will appear. Select the recipient to whom you wish to send the email and the recipient's email address will auto-populate into the "**To**:" field. If you wish to add a recipient to the "**cc**:" or "**bcc**:" fields, select the radio button for either field before you select your recipient(s). Click **OK**.

Type your message and click **Send**. To log this outgoing communication to the recipients' record in Taleo, click the **Log Email** button before you click **Send**, which tags this email to be forwarded to Taleo.

You can now go into your Taleo Business Edition system and click the Candidate record to view this candidate. In the Candidate Contact Log section you will see that this outgoing correspondence has been added to the contact log.

Log Email

The Log Email button allows you to reply to a message you've received in your Outlook Inbox and log your response to Taleo. From your Email Inbox, highlight any email message from a Candidate or Contact and click the Reply button. Now, click the Log Email button, which essentially tags this email response to be forwarded to Taleo. Type your response and click Send. A dialogue box displays confirming that your email is being logged to Taleo.

NOTE: If you are using Microsoft Word as your email editor, the 'Taleo Address Book' and 'Log Email' buttons do not show up in the tool bar. You need to use Outlook as your email editor to take advantage of the Outlook Plug-in features. Go to Options in the Outlook Menu under Tools. Click the 'Mail Format' tab and uncheck the first two boxes that are options for using Word as your email editor.

eQuest Overview

Additional features available for Premium Service customers. eQuest License required. Contact your Sales Representative for more information.

Unlock the potential of job boards by using eQuest. The eQuest suite of products includes a set of predictive analytics that help you optimize your job board investments. It also includes a set of tools to automate the posting process to the top free and paid job boards.

eQuest Prophesy

With eQuest Prophesy you are able to use predictive analytics in your sourcing strategies. eQuest Prophesy conducts a complete job board cost-per-click analysis prior to posting each job. Based on the actual candidate response metrics, Prophesy confirms the best job board as well as which job board brought in the highest number of candidates based on similar jobs in similar locations. Prophesy is easy to use and is completely automated.

eQuest FreeBug

eQuest FreeBug is an acronym that stands for free board user group. eQuest established a free job board certification program to continue to offer industry leading recruitment products and services to its worldwide customer base. The program is the first job description company to harvest traffic trending data on free job boards and reports these back to you. Only job boards that meet eQuest's strict standards are awarded certification and admission into the eQuest FreeBug network.

eQuest Advantage

eQuest Advantage allows you to post jobs through Taleo without the need for a direct contract with any job board. The system is designed for quick posting without having to contact eQuest. eQuest Advantage offers you easy access to paid boards and the ability to pay via credit card and free delivery for postings purchased via eQuest Advantage. Clients with existing contracts must use the current eQuest enterprise product.

Posting Jobs with eQuest

In order to post to eQuest, you need to have Smart Sourcing set up in your zone. To post a requisition using eQuest job board, simply click the **Requisitions** tab and choose the requisition **Title** that you would like to post to eQuest. Within the Requisition there is an eQuest Credentials section. If you need to update the information within this section, click the **Edit** button and choose the appropriate values for this requisition. Once you have made your changes, click the **Save** button.

When you are ready to post, scroll down to the eQuest Credentials section and click **Post**. Once you click the Post button using the Taleo / eQuest integration, it will pass the appropriate requisition information in order to post to each of the automated and paid boards you select. Based on the job information, eQuest Prophesy will conduct its analytics to determine the recommended board(s) based on cost-per-click analysis to help you define and understand which job boards present the best ROI.

Once you are ready to choose the job boards you wish to post to, click on each job board Name in turn. The Postings Total will have a running total based on the job boards you select. When you are ready to post, click on the **Post Job** button, and eQuest will ask you for the appropriate billing information.

If you have a job that is already posted through eQuest, you can use the **Update** and **Delete** buttons to update, modify or simply delete a job from a job board.

Taleo IE SourceBar

Taleo IE SourceBar works with Internet Explorer so you don't have to switch back and forth between Taleo Business Edition Recruit and your favorite job boards and resume sites when looking for qualified talent. You can quickly import candidates into Taleo Business Edition with a simple add-on for your browser. You'll never be forced to toggle between windows or cut and paste from one application to another when sourcing online again.

You can access the link for the Taleo IE Source Bar from the Resource Center. From the **Resources** drop-down menu in your Taleo Business Edition system, click the **Resource Center** option. The Resource Center will open in a separate browser window. From the Explore section of the Resource Center (on the right hand side of the screen), click the **Download IE Sourcebar** link and follow the installation instructions below:

1. Download and run SBinstall.exe.
2. Click “yes” to agree to the licensing terms.
3. Leave both checkboxes selected and click UNZIP. This unzips installation files to your local programs directory (by default C:\Program Files\Taleo\sourcebar) and automatically starts the installation process.

Using Taleo IE SourceBar

Once the installation is complete, you can use IE SourceBar immediately. In Internet Explorer, click the Taleo icon in the tool bar or navigate to the **View** menu and select **Taleo IE SourceBar**. The SourceBar appears on the left side of your Internet Explorer browser window.

Provide your login credentials to get started. You will be taken to a new candidate form allowing you to add candidates to your Taleo Business Edition system without leaving the browser window. (See IE Sourcebar Candidate Form to modify the candidate form used within the SourceBar.)

NOTE: 64 bit Operating Systems are not supported by the Taleo IE SourceBar.

Sharing Job Postings on Facebook

Additional features available in Premium Service.

Facebook support enables candidates to be informed of new jobs as they become available and to share those job postings with friends who might be interested in applying.

Key Benefits

- The (Taleo) Job Openings application in Facebook ensures that the jobs Taleo clients post reach a wider audience via this particular social network.
- Candidates can share job postings with friends who might be interested in applying.

The first step in using the Job Openings application is to edit the settings of your Careers website.

To edit your Careers website settings:

1. From the **Administration** menu, click **Customize Recruit**.
2. In the Manage Careers Websites section, click **Edit Settings**.
3. To enable the Facebook button, select "Show Facebook button on search results page" and then click Save.

Now that the Facebook button has been enabled on your careers website; when a job seeker executes a search, the button will be visible on the search results page. Clicking the button will open a new browser and launch Facebook. When Facebook launches, any person who wishes to list the open jobs on their Facebook main page is prompted with a Request for Permission dialogue box. Click **Allow**.

Visitors to your Facebook main page can now see the Job Openings link, and by clicking the link will be able to view the position openings. When a visitor clicks on a specific job title, they are sent back to the originating Careers Website where they can view the detailed job description and apply online.

LinkedIn Plug-in - Company Insider

Additional features available in Premium Service.

Taleo Recruit has created a relationship with the online networking service Linked In. This tool “Company Insider” allows you to add a link to your career web pages. To activate this tool, from the Administration tab, click **Customize**. Click the **Careers Website Pages** link and click **Edit** in the Job Search and/or Job Search Results Pages section. In the middle of the screen, you will see a field called “Do you know anyone at your Company Name”. Click **Unhide** and **Save**. To change the Company Name and question that appears, click **Edit** and update the Question and Organization Name fields. Click **Submit** to save your changes.

Once you unhide this field, the Company Insider logo will be visible to candidates in your Job Search and/or Job Search Results careers site page. When candidates click on this button, it will let them know if there is anyone in their Linked In network who may be working at your company. This feature benefits the candidate and you as the hiring company as it will increase the amount of referral and qualified candidates who will be applying.

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