Taleo Enterprise Edition

Manager WebTop User Manual

Version 7.5

November 2009

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Revision History

The table below provides information on the modifications that were made to the manual.

Date	Modification	Chapter and Page Number
October 2007	Added enhancements done in SP2: • Added information on the most advanced progression status.	"Most Advanced Progression Status" on page 6-11
November 2007	Added information regarding the DPI setting.	"DPI Setting" on page 1-4
	Modified information regarding the use of a Lotus Notes plug-in for the Scheduling Interview feature.	"Viewing an Interview Email and Adding it to Your Calendar" on page 8-20
January 2008	Modified information regarding the use of a Lotus Notes plug-in for the Scheduling Interview feature.	"Viewing an Interview Email and Adding it to Your Calendar" on page 8-20
	Added information regarding the candidate file merge.	"Merging Candidate Files" on page 8-31
April 2008	Added enhancements done in SP5: • Added information regarding frequent offer approvers.	"Defining Frequent Approvers for Offers" on page 4-7
	• Added information on the Weight Column in the requisition Prescreening tab.	"Entering Prescreening Information" on page 5-12
	• Added information regarding the paper clip icon in the candidates list.	"My Candidates Column Headers" on page 6-9
	• Added information regarding frequent requisition approvers.	"Defining Frequent Approvers for Requisitions" on page 4-6
July 2008	Updated the My Setup and Preferences section (the fields in this section are no longer organized by tabs).	"How Do I Create a Requisition" on page 3-4
	Added steps to viewing a file attached to job-specific application.	"Opening a File Attached to a Job-specific Application" on page 6-16

Date	Modification	Chapter and Page Number
October 2008	Two sentences added to "My Requisitions Tab". These are not critical changes.	"My Requisitions Tab" on page 6-4 and "Show Requisitions List" on page 6-4
	Information added regarding separate skills for internal, external or all candidates.	"Entering Prescreening Information" on page 5-12
	Information added regarding separate questions for internal, external or all candidates.	"Entering Prescreening Information" on page 5-12
	Information added to Opening a File Attached to a Job-specific Application.	"Opening a File Attached to a Job-specific Application" on page 6-16
January 2009	Show all Requisitions section added.	"Show all Requisitions" on page 6-4
	Added explanation of Session Time-out to the "Introduction" chapter.	"Session Time-out" on page 1-6
February 2009	New feature added: editing correspondence sent to multiple candidates. This change has required minor changes to other sections.	"Editing Correspondence Sent to Multiple Candidates" on page 10-6 and minor changes to "Creating Correspondence for Multiple Candidates When Changing Their Step or Status" on page 10-5 "Creating Correspondence While Changing a Candidate's Step or Status" on page 10-3 "Editing Correspondence Sent to a Single Candidate" on page 10-4
November 2009	The following passage was added to Last Update: by a Manager WebTop user or the candidate.	"Last Update" on page 9-4
	The "Show all Requisitions" section includes some additional information and the text was reworded in places to improve clarity.	"Show all Requisitions" on page 6-4
	Explanation of how to create an Internet browser "Favorite" for the Taleo product page was added.	"Creating an Internet browser "Favorite" to the Taleo Product Page" on page 1-5

Date	Modification	Chapter and Page Number
	The following sentence was added: A contribution request is “cancelled” if no contribution has been received by the time the requisition is posted.	“Requesting a Contribution” on page 7-3

Table of Contents

1 Introduction

About the Manager WebTop

The Manager WebTop is a simple yet powerful tool that allows hiring managers to complete some of the essential recruiting tasks in a simplified and streamlined manner.

The *Manager WebTop User Manual* and the *Manager WebTop Online Help* describe features delivered with the application and used by most organizations. Because Taleo products allow custom configurations and custom fields, you may not see components in the Manager WebTop that are mentioned in this manual or in the online help. For example, if the Search for candidates or Staffing Metrics Reporter features are not available at your organization, they will not appear in the main page. If you have any questions on your organization’s particular configuration, please contact your Taleo representative.

Symbols Used in the Manual

Information that merits particular attention.

A useful tip when performing a particular operation.

A best practice to adopt.

Pop-Up Blockers

It is recommended to not use pop-up blockers as they may interfere with the application.

DPI Setting

To make sure that the Taleo application displays page content properly, it is recommended to set the DPI setting of your computer to 96 DPI.

Using the Online Help

You have ongoing access to online help in the Manager WebTop. The Help icon is displayed on almost every page. Click the icon to access context-sensitive information about the task you are performing or about the feature you are in.

Editing Requisitions Imported from HRMS

Some requisitions that you will be working with have been imported from Human Resource Management Systems (HRMS). If, for some reason, you are unable to edit or modify certain requisitions that appear in your requisition list, you may not have the required user privileges. Please contact your system administrator for more information.

Concurrent Users

When you open a requisition that is currently being edited by another user, a message is displayed to notify you that the requisition is locked by another user. You will only have read-only access until that user is finished editing the requisition.

This feature prevents a user's saved changes from being overwritten seconds later by another user also making changes in the same requisition.

The concurrent management function also applies to templates. If a template that is being edited is selected to be applied to a requisition, the version used is the one currently available in the database.

When an action is performed on a requisition from the e-share response center, it may result in a change for that requisition. To prevent this while a requisition is being edited, an alternative page is displayed, asking the user to return at a later time.

Creating an Internet browser “Favorite” to the Taleo Product Page

If you are creating an Internet browser “Favorite” for the Web page that lists Taleo products, please ensure that nothing follows the URL for your organization's zone.

Correct: https://yourorganization.taleo.net

Incorrect: https://yourorganization.taleo.net/smartorg/smartorg/common/toc.jsf?lang=en

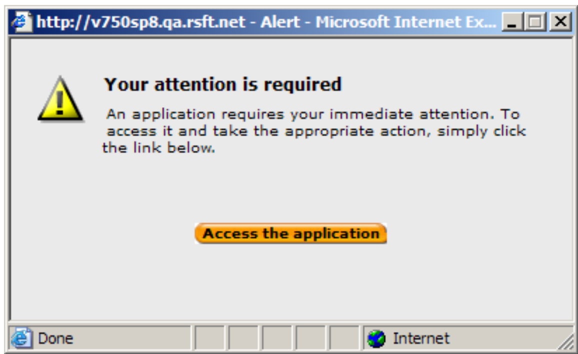
Session Time-out

A pop-up window replaces the blinking window to direct users to a session expiration alert in the application when a time-out is imminent. This modification to the feature ensures a uniform experience to users across browsers, such as Internet Explorer 7 or Firefox.

Extending a Session

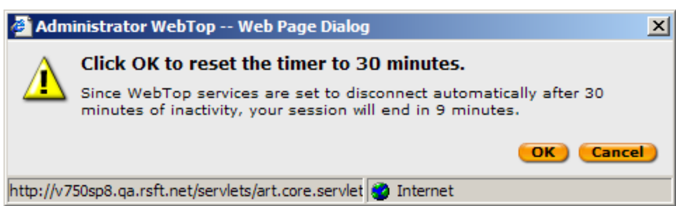
A pop-up window notifies the user that the application requires attention when the session approaches the maximum idle time of 30 minutes.

1. Click Access the application.



   The application displays a pop-up window indicating the time remaining before the session expires.

2. Click OK to extend the session.

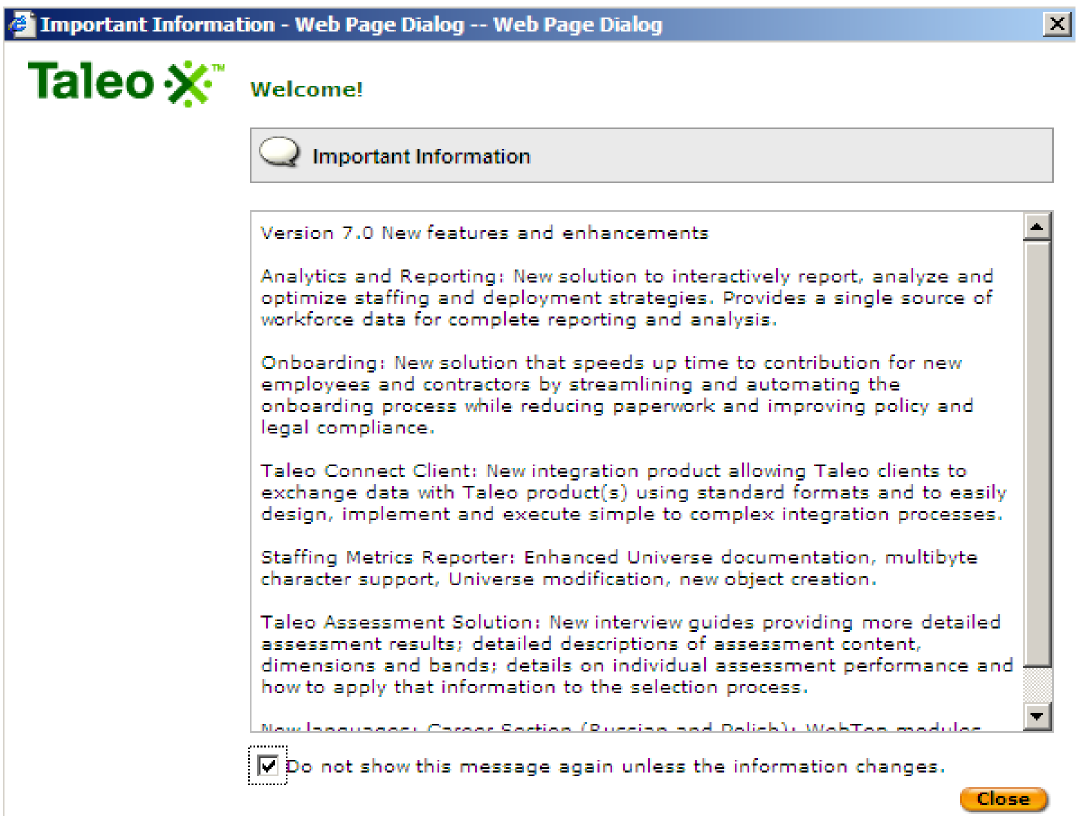


New Release Information

A pop-up message containing new release information or other important information appears when you log in the Manager WebTop. The message will only appear once per day or when a change has been made to the text displayed.

This feature must be activated by your system administrator.

When the pop-up message is activated, the following window appears.



You can deactivate the pop-up message by selecting the option at the bottom of the page. The pop-up message will reappear when new release information or other important information is available. If you do not select the option, the pop-up message will appear once per day. A day is from 12AM to 12AM the next day according to the time zone set in your user preferences.

2 Buttons and Icons

Buttons

Online Help

You have ongoing access to online help in the Manager WebTop. The Help icon is displayed on almost every page. Click the icon to access context-sensitive information about the task you are performing or about the feature you are in.

The *Manager WebTop Online Help* describes features delivered with the application and used by most organizations. Because Taleo products allow custom configurations and custom fields, you may not see components in the Manager WebTop that are mentioned in this manual or in the online help. If you have any questions on your organization's particular configuration, please contact your Taleo representative.

Back to Menu Return to the main menu.	**Back to Req. List** Return to the Requisition List.
Back to Search Return to the **Search** window.	**Back to Top** Return to the top of a list.
Cancel Cancel the requisition you are creating without saving the changes.	**Close** Close the candidate file.
Done Save the requisition you are creating. If you are editing a draft requisition, all the changes will be saved and the requisition will no longer have the draft status.	**Save** Save the information in a requisition or in a candidate file.
Add ► Add a selected element to a list of available elements.	**◄ Remove** Remove elements from a list of selected elements.
< Previous Return to the previous page.	**Next >** Access the following page.
Save as Draft Save the requisition you are creating in a draft format. You can edit requisitions in draft status.	Move from one page to another or move directly to the first page or to the last page of a list.
Preview In the HTML Editor, view a correspondence message or a job description or qualifications text.	**Paste** Paste the information that was entered in the Internal Page to the External Page.
Apply Perform the selected action without closing the window when you want to perform more than one action on a candidate file.	**Apply Model** Apply an existing model for questions and skills.

Print... Print the requisition.	Finish End the requisition creation process and close the requisition.
Select... Open a selection menu.	Search... Open Selector Windows (user, department, job template, skills, questions, etc.)
Add selected candidates to a requisition.	Add comments in a candidate file.
Attach a file (resume, presentation letter, or any type of document) to a candidate file.	Enter Grade... Select an action (enter grade, add comments, or attach a file), enter details (grade%) and enter comments.
Create Requisition... Create a new requisition.	Cancel Requisition Click to cancel a requisition.
Contact Recruiter... Send information or comments to the recruiter.	Duplicate a requisition or a candidate.
Create customized candidate lists.	+ / - Expand and collapse headers in a Requisition or in a Candidate File.
Clear a search result or a selection.	Open the calendar.
Match... Match a candidate to a requisition.	Share... Share a candidate with other users.
Add items to a list.	Remove items from a list.
Print Print a requisition, a requisition list, a candidate file, candidate list or a preview page.	Reorder Reorder questions and skills included in a template.
Save as Default Save as default search parameters in **Candidate Search.**	Send information to other users via email.
Remove or delete an element in a list.	

Icons

The Ace Candidate Alert function is enabled for the requisition. In candidates lists, indicates a candidate who meets all the required criteria.	The Attention Indicator Flag (AIF) flag indicates that changes have been made by another user to a candidate file or to a requisition that you own. It also appears when a candidate has made changes to his or her candidate profile.
The numbers listed under this column header indicates the number of candidates for a requisition.	Internal candidate. The candidate already works for your organization
Indicates that the daily recruiting report function has been activated for that requisition	Activated languages for a requisition. Several languages are activated for a requisition
The requisition requires the recruiter/hiring manager's immediate attention.	The candidate is referred by a agent, or by a colleague.

Attention Indicator Flag (AIF)

The Attention Indicator Flag (AIF) flag is used when changes are made by another user to a candidate file or to a requisition that you or the recruiter associated to the requisition own.

- When a requisition has just been created, or if its status has changed, and the requisition has been saved, an AIF will appear next to the requisition in the requisition list of the recruiter who owns the requisition (owner), and for the hiring manager specified in the requisition.
  When the requisition is opened the AIF disappears from the list for the current user who just opened it (recruiter or hiring manager).
- If the recruiter (owner) or the hiring manager changes (delegate), an AIF will appear next to the requisition in the requisition list of the new recruiter and/or hiring manager.
  AIFs that are associated with a job application and/or offers are also transferred to the new recruiter or hiring manager.
- When a requisition is filled, and an AIF is associated to the requisition, the AIF will remain.
- When a requisition is cancelled, if an AIF is associated to the requisition, the AIF will remain. The AIFs associated to job application and offers related to that requisition are deleted.
- When an AIF is associated to a requisition workflow, the AIF is displayed when a task is created for a user. When the task is performed, the AIF is deleted.
- When a requisition is filled, the AIF associated to the requisition remain. Only AIFs associated to the job applications related to the requisition are deleted.
- When a requisition is cancelled Cancel Requisition, the AIF associated to the requisition remains. Only AIFs associated to job applications and offers related to the requisition are deleted.

Quick Reference 3

How Do I Log Into the Manager WebTop

1	Click Manager WebTop in the TOC window. The User Sign In window opens.
2	Enter your user name and password, and then click Sign In.

I Forgot my Password

1	In the User Sign In window, click Forgot Your Password?
2	• If your organization implemented standard security procedures, you will receive an Access Code by email.
3	• If your organization implemented enhanced security procedures: - Provide answers to security questions, and then enter and confirm the new password. - The new password must contain both letters and numbers, have at least six characters, and cannot be the same as your login name.
4	Click Sign In.

How Do I Modify My Setup and Preferences?

1	Click **Modify My Setup** in the main menu. **My Setup** opens.
2	To modify your SmartOrg information, click the **My Setup** link. • To edit your personal information, click **Edit** next to Personal Information, enter your changes (a small red square indicates a mandatory field), and then click **Save**. • You can edit your account information and general preferences in a similar manner. • To delegate your work items temporarily to another person, click **Delegate** next to Account Information, enter the name of the person you want to delegate and the date range, and then click **Save**.
3	To specify frequent collaborators, click **Frequent Collaborateurs**. Click , click the check box next to each person you want to add, and then click **Done**. Select the check box next to each collaborator you want to add to your collaborator list and then click **Save**.
4	If you want the system to display only candidates who are in a selection process, click **My Candidates**, click the **Candidate List Content** check box, and then click **Save**.
5	If you want the requisition wizard to automatically fill (applicable) fields, click **My requisitions**, click the **Requisition Wizard** check box, and then click **Save**.
6	To create a list of approvers who frequently approve your requisitions, click **Frequent Approvers - Requisitions**. Click , click the check box next to each person you want to add, and then click **Done**. Select the check box next to each approver you want to add to your frequent approver list and then click **Save**.
7	To create a list of approvers who frequently approve your offers, click **Frequent Approvers - Offers**. Click , click the check box next to each person you want to add, and then click **Done**. Select the check box next to each approver you want to add to your frequent approver list and then click **Save**.

How Do I Create a Requisition

1	Click **Create a Requisition** on the main menu.
2	Select a posting option. • **Create a requisition and post it:** The requisition will be posted on internal career sections only, or on internal and external career sections, depending on the requisition workflow. • **Create a requisition without posting it:** The requisition will not be posted on internal or external career sections. • Click **Next**.
3	Select a requisition type. • **Professional recruitment:** Create requisitions for professionals. • **Hourly recruitment:** Create requisitions for hourly personnel. • **Campus recruitment:** Create requisitions for campus students or graduates. • **Executives recruitment:** Create requisitions for executives. **Note:** This option may not be visible if your organization uses only one requisition type. • Click **Next**.
4	Select Requisition Autofill options. • **Specify the Position (ID or Job Title):** - Click **Search** to open the **Position** selector. - Select a position. Certain fields relative to positions will automatically be filled in the requisition form. • **Specify the Job Template:** - Click **Search** to open the **Job Template** selector. - Select a position. Certain fields relative to job template will automatically be filled in the requisition form. **Note:** This option will be available if you have selected **I want to use the "automatic filling" option of the requisition wizard** in **My Setup.** • Click **Next**.

<table>
<tr><td>5</td><td>Enter information in the following pages.
Note: Pages and Information Blocks may vary according to the requisition workflow selected by your system administrator.
Note: Information marked with an asterisk (*) is mandatory.
• Step 1 - Structure and Template
• Step 2 - Identification
• Step 3 - Profile and Compensation
• Step 4 - Internal Description
• Step 5 - External Description
• Step 6 - Administration
• Step 7 - Prescreening
• Step 8 - Screening
• Step 9 - Assignment (with Approval Path or without Approval Path)
• Step 10 - Preview
• Step 11 - Posting Options
• Step 12 - Thank you
At the end of the process, a Thank you message appears indicating that you have successfully completed the requisition creation process. The message will vary according to your posting options. Click OK to return to requisition list in My Requisitions.</td></tr>
<tr><td></td><td>At the end of each page you can:
• Click Save as Draft to save the requisition in Draft form.
• Click Next to move on to the next page.
• Click Previous to return to the previous page.
• Click Cancel to return to the main menu.</td></tr>
<tr><td></td><td>At the end of the requisition creation process, you can:
• Click Print to open the Print window and print the preview page. Print is available on the Preview page only.
• Click Finish to end the requisition creation process.
Once you click Finish, it is no longer possible to make changes on previous pages in the requisition. The requisition will be saved with one of the following statuses as:
• Open (ready for posting)
• Pending (if the requisition must be approved by other users)</td></tr>
</table>

Requisition Pages and Information Blocks in Requisitions

Note: Pages and Information Blocks may vary according to the requisition workflow selected by your system administrator. Note: Information marked with an asterisk (*) is mandatory.	
	Structure and Template • In **Structure and Template**, enter the following information: - User Group, Job, Department, Organization, Primary Location, Other Location, Position (Id and Job Title) and Template Used (Code and Job Title).
	Identification • In **Identification**, enter the following information: - Job Title, Requisition Number, Justification, Number of Openings, Abstract (information on the job), Custom User Fields (UDFs).
	Profile and Compensation • In **Profile and Compensation**, enter the following information: - **Profile:** Employee Status, Job Type, Schedule, Job Level, Shift, Education Level, Education Program Travel, Target Start Date and End Date - **Compensation:** Currency, Minimum and Maximum Salary, Pay Basis, Vacation, Low Quartile, Midpoint and High Quartile Salary, Commission, Relocation, Stock, options, Expense Accounts, Car Allowance, Bonus, and Other Compensation.
	Internal Description • In **Internal Description**, enter the following information: - Contact Name, Email, opening and Closing Date of the requisition, a Description of the position, Qualifications required for the position, and custom fields (UDFs). Use the **HTML Editor** to format text in **Description** and **Qualifications** blocks.
	External Description • In **External Description**, enter the following information: - Contact Name, and Email (click **Search** to open the **User Selector**). - Opening and Closing Date of the requisition - A description of the position. - The qualifications required for the position (use the **HTML Editor** to format text in **Description** and **Qualifications** blocks). - Job Board Summary Description (write a summary of the job that will be used on job boards) - Custom fields (UDFs). Or, click **Paste** to copy information from the **Internal Description** page.
	Administration • In **Administration**, enter the following information: - Citizenship Status, Overtime Status and Additional Information, - Custom fields (UDFs). • **Regulations:** EE (Canada), or EEO US)

Prescreening

- In **Administration**, enter the following information:
  - **Disqualification Questions:** Click + to view available disqualification questions. It is not possible to add or remove disqualification questions.
  - **Questions:** Add or remove questions.
  - Skills: Add or remove questions.

  OR

- Click **Apply Model** to select all the questions, and skills that are related to the position. (**Apply Model** does not apply to disqualification questions).

Screening

- In **Screening,** select the screening tests required for the requisition. Available choices are:
  - Background Check
  - Tax Eligibility
  - Other

Assignment (Without Approval Path)

- In **Assignment** (Without Approval Path):
  - Assign the requisition to a specific recruiter (click **Search** to open the **User Selector**). This recruiter will then become the owner of the requisition.
  - Enter comments if necessary. Comments may be mandatory.

Assignment (With Approval Path)

- In **Assignment** (With Approval Path):
  - Select approvers (click **Add Approvers...** to open the **User Selector**).

Preview Page

Review information entered in your requisition. If you need to make changes in previous pages, click **Previous** to go back to previous pages.
Once you have completed the changes, click **Finish**. Your requisition will automatically be saved. If errors occurred during the requisition creation process, a pop-up message will indicate the errors.

- If you selected **Create a requisition and post it** in the **Select a Posting Option** page at the beginning of the requisition creation process, the **Posting** page will open (see **12, Posting Options**).
- If you did not select a posting option, the **Thank You** page will open.

Posting Options

If you selected **Create a requisition and post it** in the **Select a Posting Option** page at the beginning of the requisition creation process, the **Posting** page will display the list of career sections where you can post your requisitions.

- Select internal and/or external career sections.
- Select **Post as Urgent Need job** if you want the job to be posted quickly.

> **Note:** If the **With automatic internal posting** application flow was selected, the **Posting** page will not appear. The requisition will automatically be posted on internal career sections.

If you need to make changes to the requisition, click **Previous** to go back to previous pages.
Once you have completed all your changes, click **Finish**.

> **Note:** Once you click **Finish**, it is no longer possible to make changes to previous pages in the requisition.

	Thank you A Thank you message appears indicating that you have successfully completed the requisition creation process. The message will vary according to your posting options. Click OK to go to the requisition list in My Requisitions.

How Can I View My Requisitions?

1	Click **Requisitions** on the main menu. The **Requisitions and Candidates** page opens.
	On the **My Requisitions** tab you can: • Click **Create a Requisition...** to create a new requisition. • View candidates linked to a specific requisition. - Click the number under the  column to access the **Candidate List** tab where you can view all candidates linked to the selected requisition. • Open a selected requisition and access requisition information and candidate information. - Click the **Candidate List** tab to view the list of candidate linked to the selected requisition. - Click the **Content** sub-tab to view the requisition content. - Click the **History** sub-tab to view the different actions that were performed on the selected requisition.

How do I Modify an Existing Requisition?

1	Open an existing requisition. Note: If you want to make changes to an existing requisition, the status of the requisition must be Draft.
2	In the requisition, move to the page that needs to be modified (using Previous and Next buttons). See “How Do I Create a Requisition” on page 3-4 to make changes in appropriate Steps.

How Can I View My Candidates?

1	Click **Candidates** on the main page. The **Requisitions and Candidates** page opens.
	On the **My Candidates** tab, you can: • Filter candidates using the **Show** tool. • Select a candidate and open a candidate file. • Click to print the candidate list or a list of selected candidates. • Select candidates, and then click to add selected candidates to a specific requisition. • Select candidates, and then click to send candidate information to other users. • Select candidates and then click to attach a a document (resume, presentation letter, education documents, etc.).

How Can I View Candidates Attached to My Requisitions?

1	Click **Requisitions** on the main page. The **Requisitions and Candidates** page opens.
2	In **My Requisitions** list, select a number under the column. The number represents the number of candidates who have applied on the requisition and who have been matched to the requisition. The **Candidate** list opens displaying the candidates linked to the selected requisition
3	In **My Requisitions** list, select a requisition. The **Requisition** tab displays information on the requisition.
4	Click the **Candidate List** tab. The candidates linked to the selected requisition appear. **Note:** If no candidates are linked to the requisition, the candidate list will be empty.

How Can I Change a Candidate’s Status or Step?

1	Click Requisitions on the main page. The Requisitions and Candidates page opens.
2	In My Requisitions list, click on a number under the  column. • The number represents the number of candidates who have applied on the requisition and who have been matched to the requisition. • The Candidate list opens displaying the candidates linked to the selected requisition. • The Candidate Selection Steps tab are also displayed. Note: Candidate Selection Steps tabs will only be available if the workflow is a sequential workflow.
3	Select a candidate, and then select Change Status in the More Actions list. The Action Dialog window opens. The step indicated in the Step box, should be the same as the step on the Step tab in the Candidate List.
4	In the to list, select a new status for the step. - Statuses marked with an asterisk (*) are Completion statuses. If you select a Completion status, the candidate will move to the next step in the selection process. • For example: - If a candidate is in the New step, and the status is Waiting for info, if you select the Qualified status, the candidate will remain in the New selection step. - If you select Under Consideration*, you will be able to select Move in the Action list, and then move the candidate to the next selection step.
5	When you have selected a Completion (*) step, select Move in the Action list. The Action Dialog window opens. Move is selected in the Action list.
6	In the to list, select a Step, and then select a Status in the with status list. Note: The steps and statuses that are available depend on the candidate selection workflow.
7	Check Send Correspondence if you want to send information to other users.
8	Enter comments. If you have selected Rejected or Declined statuses, comments are mandatory.
9	You can apply Change Status... and Move... to multiple candidates. You can change the status of multiple candidates if all the candidates are at the same step, and at the same status in the selected step.

How Can I Match Candidates to Requisitions

1	Click **Candidates** on the main menu. **My Candidates** list opens.
2	Select the candidates that you want to match to the requisition, or select the checkbox to the right of the **AIF** flag on the column header bar, if you want to select all the candidates at once.
3	Click Match... - , or select **Match** in the **More Actions** list. The **Requisition Selector** opens.
4	Select a requisition, or click the checkbox on the column header bar if you want to select all the candidates at once.
5	Click **Add,** and then click **Done.** A pop-up message will ask you if you want to send an email to each candidate to request more information. • Click **Yes** to send an email message to all matched candidates • Click **No** if you don't want to send messages to the matched candidates. The system will automatically match the selected candidates to the selected requisitions.
6	Click **My Requisitions** tab to view the **My Requisitions** list. The number of candidates matched to the requisition(s) you selected previously will be indicated under the column.

How Can I Share Candidates with Other Users

1	In the candidate list, select one or more candidates.
2	Click or select **Share** in the **More Actions** list. The **Candidate Sharing** window opens.
3	On the **Recipients** tab, click to select users and to remove users.
4	On the **Contents** tab, select the type of information you want to share with the recruiter.
5	In the **Comments** tab, enter information and comments that you want to share with the recruiter.
6	Click **Preview** to view all the information in the message.
7	Click **Share** to send the information to the selected users.

How Can I Search for Candidates?

1	Click Search for Candidate on the main menu. The Candidate Search window opens.
2	If activated by your system administrator, you might have the ability to select the requisition for which you want to archive search criteria and results. To do so, open the selector window to select a requisition. Note: This feature is only available to U.S. clients in order to comply with a new regulation of the *Office of Federal Contract Compliance Programs* (OFCCP) regarding the collection of gender, race and ethnicity data for each candidate. When performing a search, search criteria and/or results are archived in the database. The information is kept in the database for two years.
3	Enter a keyword. Note: It is not necessary to enter a keyword to perform a search.
4	In the Last Update list, select a period of time.
5	In the Internal/External list, select if you want to include internal and/or external candidates.
6	In Disqualified Candidates, select if you want to include or exclude disqualified candidates.
7	Select a specific country, state/province or city. The Location Selector opens.
8	Click + More Criteria to select additional search criteria.
9	Click Search to start the candidate search process.

What Can I Do in the Candidate Search Results Page?

1	In the **Candidate Search Results** list you can:
2	Filter candidates using the **Show** tool. See "Selection Tools" on page 14-1.
3	Click **Print** to print the candidate list or a list of selected candidates.
4	Select candidates and click **Match** to match selected candidates to a specific requisition.
5	Select candidates and click **Share** to send information on selected candidates to other users.
6	Select **Recipients, Content,** and add **Comments** for the users you will share the information with.
7	Click **List Format** to select a new list format in the **Candidate Search Results** page. The **List Format** selector window opens. **Note:** You cannot add or remove list formats in the Manager WebTop.
8	Select a candidate to open a candidate file and view candidate information.
9	Click **Back to Search** to return to the search page and enter new criteria.
10	Click **Back to Menu** to return to the main menu.

4 Modifying My Setup

Overview

My Setup allows you to manage your user account and delegate your requisitions and work items to another user without having to contact your system administrator.

To access My Setup, click Modify My Setup on the main menu.

My Setup window is separated in two sections:

- SmartOrg which allows you to view and edit personal information regarding your account, to create and edit your password, to delegate your requisitions and work items to another user and to set general preferences such as languages and time zone.
- Preferences which is used to manage frequent collaborators, view your candidates and requisitions, and manage candidate search preferences.

Buttons and Icons

Back to Menu Return to the main menu.	Save Save the information in My Setup.
Cancel Cancel without saving changes.	Order information in a list.
Add ► Add a selected element to a list of available elements.	◄ Remove Remove elements from a list.
Search... Open selector windows.	Open the calendar.

The Save and Cancel buttons affect all tabs in My Setup. If you leave My Setup without clicking Save, all changes you made since the last save will be lost.

Changing Your Personal Information

1. In My Setup window, click My Setup.
2. Click Edit next to Personal Information.
3. In the Language list, select the language in which you want to edit the user account.
4. Modify the fields that must be changed.
5. Click Save.

Changing Account Information

1. In **My Setup** window, click **My Setup**.
2. Click **Edit** next to **Account Information**.
3. Enter new password if necessary.

A valid password must:

- Contain letters (at least one) and numbers (at least one).
- Have at least 6 characters and no more than 32 (numbers and letters).
- Have no special characters (for example: ', ^, ü, é, etc.).
- Be different from the user name.
- Not contain more than 2 identical consecutive characters (for example, AAA).

4. Click **Generate Password** if you want the system to generate a password. You will be forced to change your password at the next login.
5. If your system configuration allows for identification questions to be set for users, the **Forgot Password Information** section is displayed. You will have to answer the question before the password can be changed while signing in.

   5a) In the **Security Question** field, enter your question.

   5b) In the **Answer** field, enter your answer. The answer must contain at least one character.

   5c) Confirm your answer and click **Save**.

6. Click **Save**.

Delegating Requisitions and Work Items

The **Delegation** page allows you to delegate requisitions and work items to another user. Work items are delegated for a short period of time (for example, while the owner of a work item is on vacation or on sick leave).

1. In **My Setup** window, click **My Setup**.
2. Click **Delegate** next to **Account Information**. The **Delegation** page opens.
3. Click **Search**. The **User Selector** opens.
4. In the list of **Users**, select the user to whom you wish to delegate your work items, then click **Select**.
5. Click to open the calendar and select a starting date and an end date. Click to erase the date selected.

6. Click **Save**.

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

- The new owner must be different from the current owner.
- The new owner must have the same role (user type) as the current owner.
- The new owner must be at least in all the same groups of the current owner.
- It is always possible for a Staffing WebTop user to be the new owner.
- If the current owner is not a Staffing WebTop user, the new owner must be a Manager WebTop user.
- If the current owner is a Share user (neither Staffing WebTop nor Manager WebTop user), the new owner must also be a share user (neither Staffing WebTop nor Manager WebTop user).
- An Administrator WebTop user is both a Staffing and a Manager WebTop user.
- A Staffing WebTop user can be assigned to an Administrator WebTop user.

Changing General Preferences

1. In **My Setup** window, click **My Setup**.
2. Click **Edit** next to **General Preferences**. The **User Account Editor** page opens.
3. In the **Correspondence Language** list, select the language used for correspondence. When the user receives correspondence, the correspondence will be in the language selected.
4. Select a content language.

   4a) To add a language to the **Selected Languages** list, select a language in the **Available Languages** list then click **Add**.

   4b) To remove a language from the **Selected Languages** list, select a language in the **Selected Languages** list then click **Remove**.

   4c) To reorder languages in the **Selected Languages** list, select a language in the list then click the up or down arrows until the language is in the desired position.

When you determine the content language, the first language in the list is the one in which new requisitions and templates will be created, regardless of the Staffing WebTop language.

5. In the Time Zone section, click Search, select a time zone in the Time Zone Selector, then click Select. If desired, you can search for a specific location, time zone description or Coordinated Universal Time (UTC) using the Refine by list. Enter a search term in the field then click Refresh.

A default time zone is set for the entire organization. Users who are in the same time zone as the organization do not need to modify their time zone. However, users may need to modify their time zone to view information in their own time zone (for interview scheduling, for example).

Once configured, the new time zone information will replace the default company time zone in all meeting interview notifications that you sent. The information will be displayed (for example, Date: Monday, May 3, 2007 02:30 PM to 03:00 PM Eastern Time (UTC -5:00)) and will be used by the recipient's Outlook or Lotus Notes Calendar to make appropriate time adjustments according to the recipient's own time zone.

6. In the Distance section, select the distance measurements, that is Kilometers or Miles.
7. In the Notification section, select Send faxable messages to this user by fax, not by email to fax screening and external services messages only, instead of sending them by email.
8. In the Notification section, select Keep this user informed of workflow events by email if you want the user to be informed of step and status changes related to candidates that he or she owns.
9. Click Save.

Setting a List of Frequent Collaborators

Recruiters have the ability to built a list of frequent collaborators. Any user (not deleted) can be a collaborator, even non-WebTop users (these users can be involved in the approval process with the use of the Taleo e-share Center).

To be available, the Collaborators field must be activated by your system administrator.

1. In My Setup window, click Frequent Collaborators.
2. To add collaborators, click , select the desired collaborators in the list, then click Done. You can also use the Show list to find the desired collaborators.
3. To remove one or several collaborators from the list, select the collaborators then click .
4. Click Save.

Setting Candidates Display Preferences

1. In **My Setup** window, click **My Candidates**.
2. If the option **By default, only show candidates that are in selection process (if relevant)** is selected, candidates that are in selection process are automatically filtered in a candidate list. By default, the permission is not enabled.
3. Click **Save**.

Enabling the Requisition Wizard Automatic Filling Option

The automatic filling option allows you to select automatically-filled requisition fields when creating a requisition. Disabling the automatic filling option bypasses the Requisition Wizard dialog and the first page of the requisition form is displayed when creating a requisition.

1. In **My Setup** window, click **My Requisitions**.
2. Select the option.
3. Click **Save**.

Defining Frequent Approvers for Requisitions

If you have access to My Setup, you have the ability to overwrite the default approvers set by your system administrator. These approvers will be automatically selected when creating requisitions. When selecting approvers, the selector only displays users who can be potential approvers. An approver must be an active user and have the permission to approve requisitions.

The system administrator cannot modify the approver list that you have set under My Setup.

When a requisition is ready to be approved (by selecting the Request Approval action), the approval path is selected as follows:

- If you have selected requisition approvers in My Setup, these approvers will be automatically selected.
- If you have not selected approvers in My Setup, the approvers set at the department level by the system administrator will be selected automatically.

Only the approvers who have the right to approve the requisition will be displayed. It is possible that no approvers are displayed if none of them are allowed to do the approval.

1. Click **My Setup**.
2. Click **Frequent Approvers - Requisitions**.
3. To add approvers, click , select the desired approvers in the list, then click **Done**. You can also use the **Show** list to find the desired approvers.
4. To change the order of the approvers, select a number from the list next to the approver, then click **Reorder**.
5. To remove one or several approvers from the list, select the approvers then click .
6. Click **Save**.

Defining Frequent Approvers for Offers

If you have access to My Setup, you have the ability to overwrite the default approvers set by your system administrator. These approvers will be automatically selected when creating offers. When selecting approvers, the selector only displays users who can be potential approvers. An approver must be an active user and have the permission to approve offers.

When an offer is ready to be approved (by selecting the Request Approval action), the approval path is selected as follows:

- If you have selected offer approvers in My Setup, these approvers will be automatically selected.
- If you have not selected approvers in My Setup, the approvers set at the department level by the system administrator will be selected automatically.

Only the approvers who have the right to approve the offer will be displayed. It is possible that no approvers are displayed if none of them are allowed to do the approval.

1. Click **My Setup**.
2. Click **Frequent Approvers - Offers**.
3. To add approvers, click , select the desired approvers in the list, then click **Done**. You can also use the **Show** list to find the desired approvers.
4. To change the order of the approvers, select a number from the list next to the approver, then click **Reorder**.
5. To remove one or several approvers from the list, select the approvers then click .
6. Click **Save**.

5 Creating a Requisition

Overview

The **Create a Requisition** link lets you quickly create and post requisitions.

Buttons and Icons

Save as Draft Save the requisition you are creating in a draft format. You can edit requisitions in draft status.	**Cancel** Cancel the requisition you are creating without saving changes.
< Previous Return to the previous page.	**Next >** Access the following page.
Preview View the Job Description field as it will appear in a career section.	**Paste** Paste the information that was entered in the Internal Page to the External Page, or vice-versa.
Apply Model Apply an existing model for questions and skills.	**Print...** Print the requisition.
Finish End the requisition creation process and close the requisition when it is complete.	Search... Open selector windows (user, department, job template, skills, questions, etc.).
Select... Open a selection menu.	Reorder Reorder questions and skills included in a requisition.
Remove items from a list.	Add items to a list.
Remove or delete an element in a list.	

Requisition Management - Multi-User Collaboration

Several features support multi-user collaboration around requisition management. A true double ownership is possible between hiring managers and recruiters.

To help out hiring managers and recruiters in their daily work, two assistant roles are available:

- Recruiter Assistant
- Hiring Manager Assistant

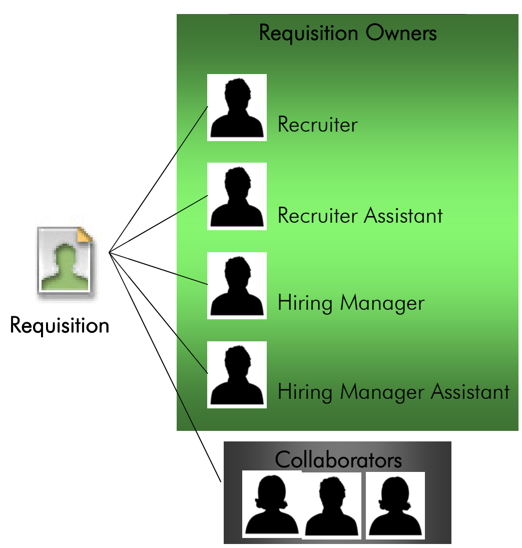
As co-owners of the requisition, the recruiter assistant and hiring manager assistant can carry out requisition related activities to help out the recruiter or hiring manager while, from a reports perspective, the requisition is attributed to the recruiter and hiring manager.

The recruiter, the hiring manager, the recruiter assistant and the hiring manager assistant are considered “owners” of a requisition. When notifications (such as attention indicator flags, workflow event notifications) are sent, the recruiter, the hiring manager as well as the assistants will receive them. Tasks (such as To be completed, Ready for sourcing) are now assigned to the assistants instead of the recruiter or hiring manager.

Also, to provide special access to a number of users throughout the requisition’s life cycle, a Collaborator role is available. Requisition owners (namely the recruiter, hiring manager, recruiter assistant and hiring manager assistant) can grant privileges and access to one or multiple users they identify as collaborators on their requisitions. The recruiter, the hiring manager and the assistants, if any, are the principal actors throughout the requisition’s life cycle. Collaborators will help out or take responsibility for certain parts of the process.

Any user (not deleted) can be a collaborator, even non-WebTop users (these users can be involved in the approval process with the use of the Taleo e-share Center).

To be available, the Collaborator field as well as the Recruiter Assistant and Hiring Manager Assistant fields have to be activated by your system administrator.



Creating a Requisition

In the Manager WebTop, the user who creates the requisition is able to specify another user as the hiring manager. By default, the user who creates the requisition is considered the Hiring Manager.

Selecting a Posting Option

Select one of the following posting options then click Next.

Create a requisition and post it	Creates a requisition and posts it on internal and external career sections.
Create a requisition without posting it	Creates a requisition without having to select a job posting site.

Selecting a Requisition Type

Select one of the following requisition types then click Next.

Professional recruitment	Creates requisitions for most professional employees.
Hourly recruitment	Creates requisitions for hourly employees.
Campus recruitment	Creates requisitions for students or campus job fairs.
Executive recruitment	Creates requisitions for executives.

If only one requisition type is selected for your organization, the Requisition Type Selection page will not be displayed.

If a Requisition Type has been disabled by the system administrator, it is not possible to duplicate requisitions that were created with the disabled hire type. The Duplicate command will be unavailable.

Enabling the Requisition Autofill

You can select a job template, a position, or a department on which your requisition will be based. This enables the system to automatically fill a certain number of fields in the requisition form.

To select a job template, a position, or a department, click Search... . Then click **Next**.

The **Template Selector** will only show you general templates, or templates that are related to your user group, job field, organization, and location.

Some requisitions that you will be working with may have been imported from **Human Resource Management Systems (HRMS)**. If for some reason you are unable to edit or modify certain requisitions that appear in your requisition list, you may not have the required user permissions. Please contact your system administrator for more information.

Defining a Structure and Selecting Templates

The **Structure and Template** section is where you enter requisition information regarding corporate structure, department, location, job, organization, etc. The following sections are configured for most organizations.

1. Select a **User Group**. Groups to which you belong are available.

   A group is a collection of users who need to have access to the same information. An example of a group would be a crew of people who all work on requisitions from a certain location. See "Organization-Location-Job (OLF) Group Sections" on page 14-10

2. In the **Job** field, click **Select...** The **Selection Menu** opens. Select the category, function, and speciality. Click **Done**.

   If you have selected a template in the **Requisition Autofill** section, these fields are already filled.

   - To clear your selection, click .

3. In the **Department (Number and Name)** field, click Search... . The **Department Selector** opens. Select the department name and number. Click **Done**.

4. In the **Organization** field, click **Select...** The **Selection Menu** opens. Select the company, sector, department, and division. Click **Done**.

   If you have selected a template in the **Requisition Autofill** section, these fields are already filled.

   - Click the **Organization Structure** window when available to view the company hierarchy.
   - To clear your selection, click .

5. In the **Primary Location** field, click **Select...** The **Selection Menu** opens. Select the country, state/province, region, and city. Click **Done**.

   If you have selected a template in the **Requisition Autofill** section, these fields are already filled.

   - To clear your selection, click .

6. In **Other Locations** field, click if the position is offered in more than one location. The **Location Selector**. Select the other locations. Click **Done**.

- To remove a location, click .

7. In the **Position (ID and Job Title)** field, click Search... to select the ID and job title. The **Position Selector** opens. Select the position. Click **Done**.

8. In the **Template Used (Code and Job Title)** field, click Search... to select the code and job title. The **Job Template** window opens. Select the job template. Click **Done**.

   If you have selected a template in the **Requisition Autofill** section, this field is already filled.

9. The **Work Locations** section allows you to associate the requisition to one or multiple work locations. If you do so, candidates will have the ability to search for jobs based on the zip/postal code. Click the + button to select a work location in the **Work Location Selector**.

10. Click **Next**.

If you have selected **Requisition Autofill**, you can still make modifications on the **Structure and Template** page. If your new template selection requires the system to update certain fields, a warning message will appear. The message lists the possible missing fields and allows you to indicate which ones you would like to update.

Entering Identification Information and Attaching Files

The **Identification** section is where you enter information that will help you identify the requisition. The **Attachments** section allows you to attach files to the requisition and share these files with approvers and users having access to the corresponding requisition.

1. In the **Title (by Manager)** field, enter a temporary title for the requisition. This title will be used as an identifier while the requisition is in the first stages of creation, until the recruiter assigns the official requisition title.

2. In the **Requisition Number** field, enter a requisition number. A validation is performed to ensure that the requisition number is unique in the system. If the system is configured to generate the requisition number automatically, this field might not be visible.

3. In the **Recruiter (ID and Name)** field, click Search... to select a recruiter.

4. In the **Hiring Manager (ID and Name)** field, click Search... to select a hiring manager.

5. In the **Recruiter Assistant (ID and Name)** field, click Search... to select a recruiter assistant.

6. In the **Hiring Manager Assistant (ID and Name)** field, click Search... to select a hiring manager assistant.

To be displayed, the Recruiter Assistant and Hiring Manager Assistant fields have to be activated and also integrated into requisition flows.

To modify the recruiter, the hiring manager, the recruiter assistant and the hiring manager assistant, you must be an owner of the requisition or have a special permission enabled by your system administrator.

7. In the Collaborators section, specify the collaborators who will help you out during the requisition life cycle.
   - Click to add collaborators to the list using the User Selector.
   - Click to remove collaborators from the list.
   - Click Add Frequent Collaborators... to add the list of collaborators defined in My Setup. See "Setting a List of Frequent Collaborators" on page 4-5
8. In the Justification field, specify why the position is available. Available choices are:
   - New Position
   - Replacement
   - Modification
   - Extension
9. In the Number of Openings field, enter the number of positions available. A specific or unlimited number of positions can be specified. The Unlimited setting is often used for positions that have a high turnover.
10. In the Abstract field, enter additional information about the requisition. This information will only be available to recruiters and will not be displayed with the requisition when it is posted.

You can include additional information specific to your organization by adding custom fields. If your organization does not use custom fields, this section might not be visible.

11. To attach a file to the requisition, click Browse… to select a file. Click Attach to attach the file to the requisition.
    - To consult a file attached to the requisition, click the file you wish to consult.
    - To delete a file attached to the requisition, click Delete.
12. Click Next.

Entering Profile and Compensation Information

The Profile section is where you enter general characteristics of the job that will be available to candidates who apply for the job. The Compensation section is used to enter compensation information (salary, car allowance, etc.) regarding the specified job. Alphanumeric characters can be entered in these fields, with the exception of the Minimum Salary and Maximum Salary fields.

1. Select the status the employee will have. Available choices are:
   - Regular
   - Contractual
   - Temporary
   - Limited Term
   - Not Specified
2. Select the type of job. Available choices are:
   - Standard
   - Internship
   - Cooperative
   - Summer Job
   - Graduate Job
   - Temporary Work
   - Experienced
   - Not Specified
3. Select a job schedule to specify the amount of time the employee will work per pay period. Available choices are:
   - Full-time
   - Part-time
   - Worksharing
   - Per Diem
   - Not Specified
4. Select a job level to specify whether the person will be an individual contributor or a manager with direct reports. Available choices are:
   - Entry Level
   - Individual Contributor
   - Team Leader
   - Manager
   - Director
   - Executive
   - Manager with Direct Reports
   - Manager without Direct Reports
   - Senior Executive
   - Not Specified
5. Select a shift to specify the period of time that the employee will typically work over a 24-hour period. Available choices are:
   - Day Job

- Evening Job
- Night Job
- On Call
- Variable
- Flex Time
- Weekend
- Rotating
- Not Specified

6. Select the level of education required for the position.
7. Select the area of study required for the position.
8. Select the amount of time the employee will typically spend travelling for the employer. Available choices are:
    - No
    - Yes, 5% of the Time
    - Yes, 10% of the Time
    - Yes, 15% of the Time
    - Yes, 20% of the Time
    - Yes, 25% of the Time
    - Yes, 50% of the Time
    - Yes, 75% of the Time
    - Yes, 100% of the Time
    - Not Specified
9. Enter the approximate preferred start date for the position.
10. In the Currency field, select the currency for the salary.
11. In the Job Grade field, enter the job grade.
12. In the Minimum and Maximum salary fields, enter the salaries.
13. From the Pay Basis list, select the pay basis that the minimum and maximum salaries are based on.
14. In the Vacation field, enter a numerical value and then make a selection from the list.

15. In the Low Quartile Salary, Midpoint Salary, and High Quartile Salary fields, enter values if applicable.

Low Quartile Salary	Indicates the salary level that is paid and below which the lowest quartile (25%) of people holding comparable positions in the market are paid.
Midpoint Salary	Indicates the median salary that people holding comparable positions in the market are paid.
High Quartile Salary	Indicates the salary level that is paid and above which the highest quartile (25%) of people holding comparable positions in the market are paid.

16. In the Commission / Description field, enter commission information. Then in the Package list, select the package.
17. In the Relocation / Amount field, enter relocation expense information. Then in the Package list, select the package.
18. In the Stock / Description field, enter the quantity of stocks available. Then in the Package list, select the package.
19. In the Options / Description field, describe the options available. Then in the Package list, select the package.
20. In the Expense Account field, enter the amount allocated for the expense account.
21. In the Car Allowance field, enter the amount allocated for car expenses.
22. In the Annual, Sign-on, and Other fields, enter amounts for these bonuses.
23. In the Other Compensation field, enter a description and/or amount for other compensation.
24. Click Next.

Providing an Internal Description

The fields in the Internal Description section let you control what information will be posted internally in the job offer. The contents of the fields in this section appear with the job offer on the Intranet only. You can therefore use the internal description fields to provide sensitive details such as specific project or product names, knowing that only employees will see this information.

1. In the Contact Name field, click Search... to select a contact person. You may enter your own name or the name of someone who is informed of the requirements regarding the requisition.
2. In the Contact Email field, if the email address does not appear automatically, click Search... to select the contact.
3. In the Opening Date field, click to select the date when the position will open.

4. In the **Closing Date** field, click to select the date when the position will close.

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

5. In the **Description** field, enter a description or copy and paste text from another source.

   5a) To format the text, select formatting options from the Description toolbar. Rich text format is supported. See "HTML Editor" on page 13-1

6. In the **Qualifications** field, enter qualifications or copy and paste text from another source. The Qualifications toolbar contains the same formatting features as the Description toolbar. See "HTML Editor" on page 13-1
7. In the organization-specific fields (UDFs), provide information that is specific to your company. If your organization does not use custom fields, this section might not be visible.
8. Click **Next**.

Providing an External Description

The fields in the **External Description** section let you control what information will be posted externally in the job offer. The contents of the fields in this section will be posted on all external career sections of the Web site and on selected job boards.

1. Click **Paste** if you wish to copy the internal description. Modify the information if necessary.

   OR

   Repeat the steps for entering an internal description. See "Providing an Internal Description" on page 5-10

In the **Job Board Summary Description** field, enter a summary of the job description for external job boards. The **Job Board Summary Description** field supports 1000 ASCII characters. However, this field is used only on Yahoo! HotJobs which cannot accept more than 100 ASCII characters. On Yahoo! HotJobs, the **Job Board Summary Description** appears under the job title.

2. Click **Next**.

Entering Administration Information

In the Administration section, you can enter additional administrative information that will not be visible to the candidate.

1. In the Citizenship Status list, select the type of citizenship status required for the position.
2. In the Overtime Status list, specify if the future employee will be exempt from overtime.
3. In the Additional Information field, enter additional information.
4. In the organization-specific fields (UDFs), provide information that is specific to your company. If your organization does not use custom fields, this section might not be visible.
5. In the Regulations section, complete the EEO (United States) or EE (Canada) section as required. The Regulations section is where you can enter information related to regulations that are applicable in the countries where the position is offered. Because some statistics required by law might be subject to such regulations, it is very important to provide the correct information in the Regulations section.

If such regulations do not exist in your country, or if your organization is not submitted to them, this section might not be visible.

6. Click Next.

Entering Prescreening Information

The Prescreening section lets you view disqualification questions associated with the requisition as well as skills and questions associated with your requisition. Skills and questions, are automatically suggested for inclusion in the requisition from the competency model created for the job field. Skills and questions from a template override those from a competency model.

1. Click + to view the requisition's disqualification questions.

You cannot add, remove, or edit disqualification questions.

2. To apply the skills and questions model associated to this type of position, click Apply Model if available. Add or remove skills from the model as necessary. If Apply Model is unavailable, no skill model applies to this type of position.
3. To modify the default values in the Min. Proficiency and Min. Experience lists, select Modify the minimum requirements of proficiency and experience (Intermediate, 1-3 years).
4. To add skills to the requisition:
   a) In the Skills section, click .

b) When the Selector window opens, you can search for a skill in the entire list but you can also limit the items displayed in the list to those that satisfy a certain criterion by making a selection in the **Show** field. See "Skill Selector" on page 14-6.

c) In the Skill Selector window, click the check box next to each skill you want to add to the requisition and then click **Done**. The skills are displayed on the Prescreening page.

d) *Optional*: If your organization allows separate skills for internal and external candidates, you can change the default value displayed in the skill's **Visible by** field.

e) *Optional*: Specify if a particular skill is a requirement or an asset for the position.

f) If **Modify the minimum requirements of proficiency and experience (Intermediate, 1-3 years)** was selected, select **Required** or **Asset** for the skill, and make the necessary changes from the **Min. Proficiency** and **Min. Experience** lists.

g) In the **Weight** field, select a value for the answer of the skill. For every answer, you can choose a value without any limits. The Weight list always displays the same values. Also, a percentage is displayed in parenthesis beside the Weight list. It is the percentage that each single answer represents in comparison to the total for skills and questions. When changing the weight, the percentage is recalculated and displayed with the new values.

Depending on your organization's settings, you may not see the **Weight** column and the **Total for Skills and Questions** box.

5. To remove skills from the requisition, in the **Skills** section, select the items and click .
6. To change the order of the skills, select a number from the list next to the skill. Then click **Reorder**.
7. To add questions to the requisition:

a) In the Questions section, click .

b) When the Select Questions window opens, you can search for a question in the entire list but you can also limit the items displayed in the list to those that satisfy a certain criterion by making a selection in the **Show** field. See "Question Selector (single or multiple)" on page 14-6.

c) In the Question Selector, window, click the check box next to each question you want to add to the requisition and then click **Done**. The questions you selected are displayed on the Prescreening page.

d) *Optional*: If your organization allows separate questions for internal and external candidates, you can change the default value displayed in the question's **Visible by** field.

e) *Optional*: Specify if a particular skill is a requirement or an asset for the position.

8. To remove questions from the requisition, in the **Questions** section, select the items and click .
9. To change the order of the questions, select a number from the list next to the question. Then click **Reorder**.

10. Click **Next**.

A Note on Ace Recruiting™

ACE RecruitingTM enables you to quickly find top candidates with the information you need, without having to sort through long lists of applicants.

Each **ACE** step enhances your hiring process. The entire **ACE Recruiting** process improves consistency, quality and objectivity to help recruiters and hiring managers streamline hiring time frames and improve the overall quality of hires.

How does ACE Recruiting work?

- When candidates apply on a job-specific applications, they are asked the prescreening questions and skills that you entered in the **Prescreening** page.
- Candidates will choose answers that you selected for the questions and skills you entered.
- You may also have specified a level of importance to certain answers.
- By selecting answers, candidates are automatically prescreened.

Selecting Screening Services

The Screening section is where you select services and service providers that will be included in your requisition. Screening services, such as candidate assessment, background check, tax credit eligibility, interview guides, provide validated tests to identify and measure a candidate's qualifications, motivations, abilities and eligibility. As soon as a service is activated at your organization, it is displayed in this Screening section.

Available **Screening Services** may vary according to services enabled by your organization. For more information on available screening services, please contact your system administrator.

1. Select a screening service. You can select more than one screening service.
2. Click Search... to select a specific service provider.
3. Click **Next**.

The number of services and the selection mode (Search button, check boxes, lists, etc.) may vary from one service provider to another.
The selected services will be available to returning candidates who apply online on job-specific applications, or who are asked to self-identify, or to provide additional information. For a screening service to be available to candidates, the recruiter must select **Request a Screening service** in the **More Actions** list.

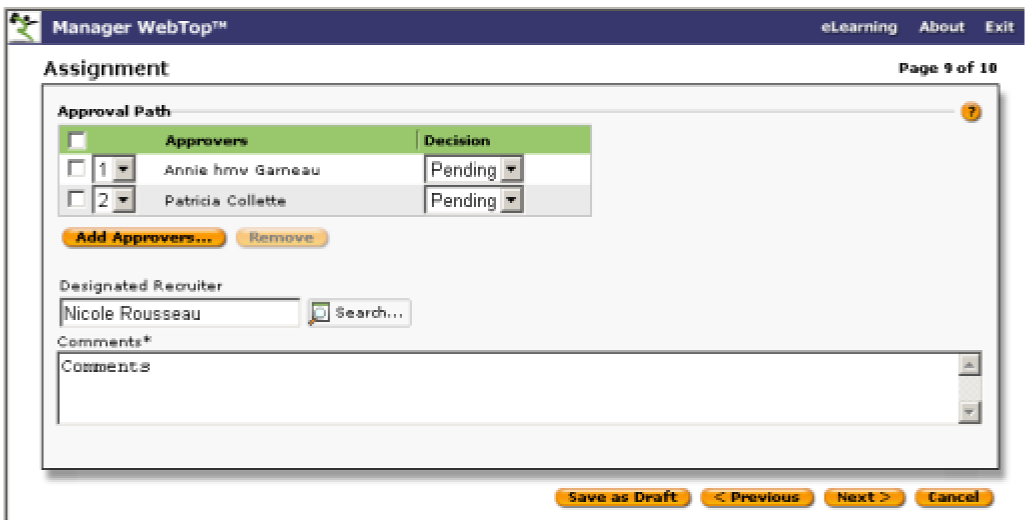
Assigning a Requisition to a Specific Recruiter

In this section, you can assign a requisition to a specific recruiter. This recruiter will then become the owner of the requisition.

1. Enter the name of the recruiter in the text field, or click Search... to select a name in the User Selector.
2. Enter comments or assignment-related information in the Comments field.
3. Click Next.

Assigning an Approver

In this section, you create a sequence of approval, select approvers, and select a Designated Recruiter to whom the requisition will be assigned once it is approved. The selected recruiter will become the owner of the requisition.



Once the requisition is approved, you can forward it to the recruiter (owner). Enter the name of the recruiter in the text field or click Search... to select a name in the User Selector. See "User Selector (Single and Multiple)" on page 14-8

Verifying the Requisition Information

The Verifying the Information you Entered lets you review the content of the requisition you have just created.

Click Previous to make changes in previous pages.

Click Finish when all your changes are made. Your requisition will automatically be saved. If errors occurred during the requisition creation process, a pop-up message will indicate the errors. Make all the necessary corrections, and then click Finish.

Click **Print** if you wish to print the requisition.

If you selected **Create a requisition and post it** in the **Select a Posting Option** page at the beginning of the requisition creation process, the **Posting** page may open (depending on the posting options selected for the requisition flow). If you did not select a posting option, the **Thank You** page will open.

Posting the Requisition

If you selected **Create a requisition and post it** in the **Select a Posting Option** page at the beginning of the requisition creation process, you can select where you want to post it.

1. Select internal and external career sections.
2. Select **Post as "Urgent Need" job** if the job needs to be filled quickly. The **Urgent Need** icon will appear next to the requisition title in the career section.
3. If you have selected internal and external posting, a job posting notification (**Email this job to matching internal candidates**) will be sent to internal candidates only.
4. Click **Finish**. Once your requisition is complete, the **Thank You** page appears.

Delayed Posting

If you do not have the permission to approve a requisition, your posting selections will be saved until all the users have approved your requisition.

The selected posting options and the **Posting After Approval Requested** will be tracked in the **History** tab in the Manager WebTop and in the Staffing WebTop.

Once the requisition is approved, it will automatically be posted on all the career sections you have selected in the **Posting** page.

If you select **Save as Draft** in the **Posting** page, the posting selections will be saved and tracked as in **Delay Posting.**

It is not possible to unpost a requisition in Manager WebTop.

6 Viewing My Requisitions and My Candidates

Overview

The **My Requisitions** and **My Candidates** tabs let you access your personal requisitions and candidates.

To access requisitions and candidates:

1. In the main menu, click **Requisitions** or **Candidates**.

To view requisition-specific candidate lists, a user permission must be enabled by your system administrator. If this permission is not enabled, only **View My Requisitions** will be available on the main menu. For more information, contact your system administrator.

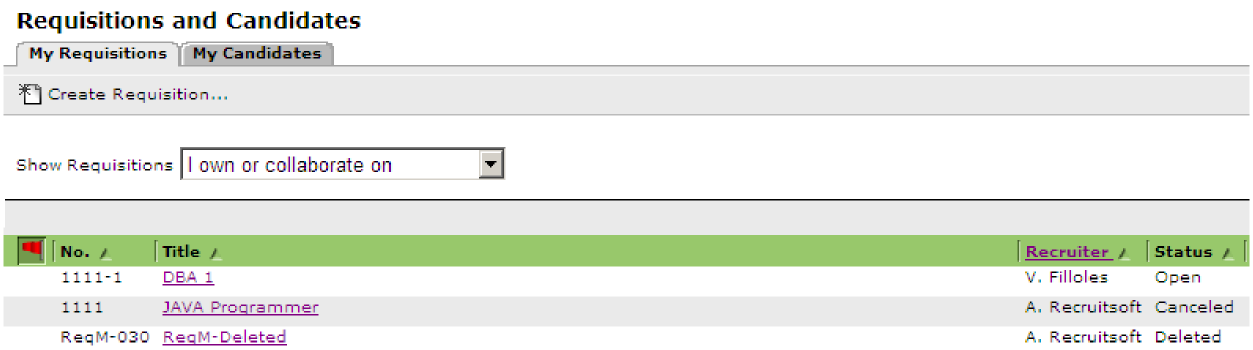
Buttons and Icons

Save as Draft Save the requisition you are creating in a draft format. You can edit requisitions in draft status.	**Cancel** Cancel the requisition you are creating without saving changes.
Preview View the Job Description field as it will appear in a career section.	**Paste** Paste the information that was entered in the Internal Page to the External Page and vice-versa.
Apply Model Apply an existing model for questions and skills.	**Print...** Print the requisition.
Finish End the requisition creation process and close the requisition when it is complete.	**Close** Close the candidate file.
Save Save the information in a requisition or in a candidate file.	**Back to Top** Return to the top of a list.
Back to Menu Return to the main menu.	+ / - Expand and collapse headers in a Requisition or in a Candidate File.
 Move from one page to another or move directly to the first page or to the last page of a list.	Select... Open a selection menu.

Search... Open selector windows (user, department, job template, skills, questions, etc.).	Create Requisition... Create a new requisition.
Cancel Requisition Click to cancel a requisition.	Add comments to a candidate file.
Contact Recruiter... Open the Contact Recruiter window to send information or comments to the recruiter.	Match... Match candidates to requisitions.
Share... Share a candidate with other users.	Print Print a requisition, a requisition list, a candidate file, candidate list or a preview page.
Create a new requisition based on the information contained in the requisition that is currently open.	Enter Grade... Select an action (enter grade, add comments, or attach a file), enter details (grade%) and enter comments.
Send information on a candidate to other users.	Reorder Reorder questions and skills included in a requisition.
Attach files or documents to a candidate file.	Add items to a list.
Remove items from a list.	Remove or delete an element in a list.
Indicates that the recruiter must verify the disqualification answers of a candidate.	Indicates disqualified candidates in a candidate list and in a candidate file.
Changes have been made by another user to a candidate file or to a requisition that you own.	

My Requisitions Tab

The **My Requisitions** tab displays the requisitions that correspond to the **Show Requisitions** filter. The default filter that is applied is set by your organization's administrator.



Show Requisitions List

The **Show Requisitions** list enables you to filter the requisitions displayed on the Requisitions tab.

I own	Displays requisitions you own.
I collaborate on	Displays requisitions to which you collaborate.
I own or collaborate on	Displays requisitions you own or to which you collaborate.
I was requested to contribute to	Displays requisitions for which a Contribution Request was sent and to which you must contribute.

To change filters, click the **Show Requisitions** field and then click a different filter to apply it to the list.

To be considered an owner of a requisition, you must be a recruiter, a recruiter assistant, a hiring manager or a hiring manager assistant. See "Requisition Management - Multi-User Collaboration" on page 5-3.

Show all Requisitions

The following information assumes your system administrator has selected both of the following user type permissions for your user type:

- See deleted requisitions.
- See closed (filled & canceled) requisitions.

The My Requisitions tab contains a Show all Requisitions field that the user can select to view not only "active" requisitions (i.e. whose status is Draft, Pending, Open, or On Hold) but also those whose status is Filled, Canceled or Deleted. The Show all Requisitions field is not selected by default.

Perform one of the following steps.

- To view requisitions that have been filled, canceled or deleted in addition to "active" requisitions, click the check box next to Show all Requisitions (provided it is not already selected). The requisition list is updated automatically to include requisitions whose status is: Draft, Pending, Open, On Hold, Filled, Canceled or Deleted. The Status column in the requisition list displays each requisition's status.
- To view only "active" requisitions, clear the check box next to Show all Requisitions (provided the check box displays a check mark). The requisition list is updated automatically to include only requisitions whose status is: Draft, Pending, Open or On Hold. The Status column in the requisition list displays each requisition's status.

The Show all Requisitions field is not selected by default.

My Requisitions Column Headers

Column	Definition
	Identifies requisitions that have an Attention Indicator Flag (AIF). The AIF flag appears when someone other than yourself has changed the status of a requisition that you own. It also appears if a candidate linked to one of your requisitions has modified his or her candidate profile. See "Attention Indicator Flag (AIF)" on page 2-4.
No.	Identifies the requisition number.
Title	Identifies the requisition title. Click the requisition title to view information on this requisition. If the requisition is still a draft, and you are the owner, the system will automatically display an edit window so you can complete the requisition. Icons beside the title give information relative to the requisition. To find the meaning of an icon, place the pointer over the icon until the tooltip appears.
	Indicates that there is an urgent need to fill this requisition.
	Indicates that the ACE candidate alert has been activated for this requisition.
	Indicates that the daily recruiting report has been activated for this requisition.
	Indicates that the requisition was prevented from being posted.
Recruiter	Identifies the recruiter who owns the requisition. To toggle between the recruiter, the recruiter assistant, the hiring manager, the hiring manager assistant, and the most recent assignee, click the **Recruiter** column title.
Status	Indicates the status of the requisition.

Column	Definition
Status Details	Provides details on the requisition statuses. The following describes the statuses with their status details: **Draft:** <None> **Pending:** To be Approved, Rejected **Open:** Approved, Scheduled, Posted, Expired, Unposted **On Hold:** <None>, Expired, Unposted **Filled:** <None>, Expired, Unposted **Canceled:** <None>, Expired, Unposted **Deleted:** <None> The following describes the posting status detail information. **Posted (until date):** Displays the expiry date for the last posting. It may also be "ongoing". **Scheduled (date):** Displays the date when the posting is scheduled to occur. **Updated (date):** Displays the date when the requisition was unposted from the last site. **Expired (date):** Displays the date when the last posting expired.
	Indicates the number of candidates who have applied for or who have been matched to the requisition.
Actions	Contains a list of actions that can be performed on requisitions.

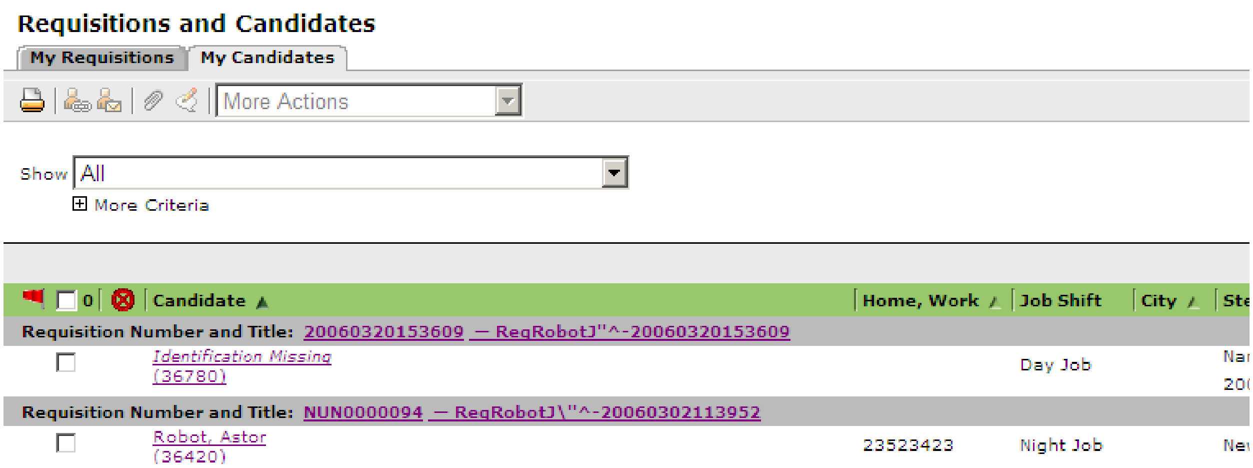
The requisition list can be sorted by AIF, requisition number, title, recruiter name, status, or by status detail. To sort the different columns, click the triangle in the selected column header.

If you click a requisition that is still in **Draft** status, the system will take you directly to that requisition for completion.

If the requisition was created in the Staffing WebTop, click the requisition title to display a page summarizing the main information about the requisition. You will not be able to modify the requisition but you can contact the recruiter (if you have the appropriate user permission).

My Candidates Tab

My Candidates lists candidates that match requisitions listed on the **My Requisitions** tab.



The columns in the candidate list may vary from one organization to another according to the configuration of the candidate list formats. See "List Format Selector" on page 6-10.

My Candidates Toolbar

Icon	Description
	Prints the candidate list. See "Printing Candidate Information" on page 9-9..
	Matches candidates to a specific requisition. See "Matching Candidates to Requisitions" on page 8-5.
	Shares a candidate with other users. See "Sharing Candidates" on page 8-5.
	Attaches files or documents to a candidate file. See "Attaching a File to a Candidate File" on page 8-11.
	Adds comments to a candidate file. See "Adding Comments to a Candidate File" on page 8-12.

Show List

The **Show** list filters the candidate list.

To display candidates according to specific criteria:

1. From the **Show** list, select a criterion.
2. In the **contains/is** field, enter your search or click the Search... button. Click **Refresh**.
3. Optional: Add more criteria to broaden or narrow your search.

   Click ⊞ next to **More Criteria**. Select filter criteria from the lists. Enter additional search terms in the fields that appear or click the selector icons. Click **Any Criteria (Or)** to broaden the search or **All Criteria (And)** to narrow the search. Click **Refresh** to update the candidate list.

My Candidates Column Headers

Columns in the **Candidates** list vary according to the list format selected. See "List Format Selector" on page 6-10..

Column	Definition
	The Attention Indicator Flag (AIF) indicates that changes have been made to the candidate file by another user and that the candidate requires attention.
	Identifies disqualified or need to be verified candidates. A to be verified status does not affect the hiring process of a candidate. The candidate is considered as passed.
Candidates	The candidate's name and system identification number. To open the candidate file, click the name. identifies ACE candidates. identifies candidates currently employed by the company. identifies candidates who applied for or were matched to at least one requisition.
Step	The step the candidate has reached in the selection process.
Sel. Status	The status of the step the candidate has reached in the selection process.
Function	The job function held by the candidate in his/her most relevant job experience.
Residence	Where the candidate currently lives.
Education Level	The education level of the candidate.
Program	The educational program or area of study of the candidate.

Column	Definition
Employer	The candidate’s current employer.
Institution	The institution where the candidate studied.
Next Action	Actions that give access to the next status or step related to a candidate. See “Changing Steps and Statuses with One Click” on page 8-8..
	The paper clip icon indicates that there is at least one attached file for a specific candidate. When clicking on the icon, a pop-up window appears showing the list of attachments. Attachments can be opened directly from the Attachments List window. The attachments column can be sorted; the presence or absence of attached files is the sole sorting criterion. Attachments refer to resumes attached by candidates, not those attached by recruiters in the Tracking tab. The original document is displayed, not the HTML conversion.

List Format Selector

Depending on your company’s configuration and your permissions, you may be able to view various list formats or build your own personalized list format.

To save time in the candidate evaluation, administrators have defined the available candidate information that can be displayed in candidate lists. Different list formats were created for users of this application depending on the different recruiting contexts. For example, if you participate in a recruiting campaign, you might want to view degree and educational institution information first. An executive recruiter, however, may need to see certification and former employer fields.

The ability to choose the way in which you view candidates can help you evaluate a candidate’s skills and attributes much more quickly so you may find it important to find the best candidate list available to you.

Changing the candidate list format

1. Click at the top of the candidate list. The **List Format Selector** appears.
2. Select a list format. The contents of the list format are displayed.
3. Click **Done**.

Creating a custom candidate list format

The proper permissions are required for this feature.

1. Click at the top of the candidate list. The **List Format Selector** appears.
2. Select **Personal Format** from the **List Format** list.
3. Enter a format name. The check boxes become active.
4. Select the desired columns.
5. Select the sequence number for each column. Click **Reorder**.

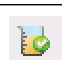
6. Select the sorting criteria in the **Sort by** column.
7. Click **Done.**

Most Advanced Progression Status

This feature provides the most advanced progression status of a candidate on other requisitions to take enlightened decisions. Managers and recruiters are informed of candidates being considered on other requisitions and they can have additional details directly on the candidate list on the job where the candidate is active and has progressed furthest. It also reduces chances of multiple recruiters or managers working on the same candidate simultaneously.

A new column is available when setting a list format: **Most Advanced Progression Status** (see “List Format Selector” on page 6-10.). When this column is selected, an icon appears in the Manager WebTop indicating the furthest active progression status of a candidate across all positions where he/she is being considered.

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

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

In the scenario below, a candidate has applied to four jobs:

Job	Job Status	Candidate Status
1	Active for sourcing	New > To be Reviewed
2	Closed	Interview 2 > To be Scheduled
3	Active for sourcing	Offer > Rejected
4	Active for sourcing	Interview 1 > To be scheduled

The icon that would appear for this candidate across all contexts would be Interview 1 because it is the furthest active progression status on an active job.

Both requisition status and candidate status must be active to be considered for the furthest active progression status.

In the **Candidates** list, a new column is available: **Progression status**. This column consists of an icon that represents the most advanced progression status of a candidate on a current job application. When mousing over an icon, a tooltip appears. The tooltip indicates the active status and a date. For example, "Most advanced progression status: Offer (as of 09/19/2007)". It is possible to obtain more details on the status by clicking on the icon.

In the Candidates list, the staircase icon remains available and shows the parallel job applications of the candidate.

In an application specific list, the new progression status icon may be displayed while the staircase icon may not be displayed if there is only one job application.

In the search result list, if the staircase icon is displayed, the progression status icon is also displayed. If no staircase icon is displayed, the progression status column is empty.

It is recommended to remove the staircase icon) and to replace it with the Most Advanced Progression Status feature.

Requisition File Description

Requisition File Header

By default, the requisition header is collapsed.

To view more information about the selected requisition, click + next to the requisition name. This will expand the header to provide information such as the requisition number, title and status, the recruiter and hiring manager in charge, etc.

Requisition File Toolbar

Icon	Description
	Duplicates the current requisition. See "Duplicating a Requisition" on page 7-2.
	Prints or previews the requisition. See "Printing a Requisition" on page 7-2.
Edit	Edits a requisition. See "Editing a Requisition" on page 7-2.
Cancel Requisition	Cancels the requisition. See "Canceling a Requisition" on page 7-4.
Request Contribution...	Requests the contribution of another user. See "Requesting a Contribution" on page 7-3.

Requisition File Content Tab

This tab displays the content of the requisition.

Requisition File History Tab

This-tab provides information on the requisition workflow.

The following columns are available on the History tab:

Column	Definition
Date and Time	Indicates the date and time an action was performed on a requisition.
Action	The action performed on the requisition.
By	The name of the user who performed the action.
Comments	Comments entered by the user who performed the action.

This information is provided for each contribution during the hiring process.

Candidate File Description

The Candidate File provides information such as candidate status, profile, resume, prescreening, screening, tracking, etc.

Candidate File Header

The Candidate File header provides information about the selected candidate. The selected requisition title and number are always visible on the header.

By default, the candidate file header is collapsed. To view more information regarding the candidate, click + in the header. This will expand the identification header to provide additional information on the candidate (step, status, medium used to apply, recruiter's name, hiring manager's name, source and application date). Click - to collapse the header.

Candidate File Tabs

The Candidate File tabs reflect the information entered in the candidate profiler when the candidate applied online. If you have the appropriate user permissions, you can add and edit candidate information in a candidate file. See "Overview" on page 8-2.

Tab	Definition
Prescreening	Displays the disqualification questions presented to the candidate, the candidate's skills as well as the candidate's answers to the job application questions.
Screening	Displays information on the different screening services that were required for the candidate. Information includes the type of service, the name of the service provider, the requester, as well as the results of the different tests. Test results may be confidential.

Tab	Definition

Resume	Provides information such as:
	• personal information regarding the candidate
	• education, work experience, certifications and references
	• current version of files attached by the candidate and/or recruiter (prior versions of files attached by the candidate can be found under the Tracking tab)
	• paster cover letter and pasted resume
	• eSignature information (if you have the required permissions, you can view each job submission signed by the candidate. The following information is available:
	    • Statement confirming that the eSignature was provided
	    • IP Address where the statement was signed
	    • Date and time when the statement was signed
	    • Reference to the agreement text
	• background check consent information (indicates that the candidate has consented to the background check and that all mandatory fields were completed. The information cannot be edited).

Profile	Displays the candidate's job, location, and organization preferences as well as source tracking information (that is, Source Type, Source, Event as well as the Explanation Text field if the candidate selected "Other" as a source type).
Regulations	Displays EEO (United States) and EE (Canada) data. The Regulations presents all diversity forms that apply to the current application. If the candidate provided answers, then recruiters and managers are only able to see that the candidate responded. They are not able to see the actual responses. Recruiters and managers can provide answers until a candidate has provided them, then recruiter or manager responses will be overwritten.
Tracking	Displays the history of the candidate's application, such as status changes, information updates and comments added by recruiters and hiring managers involved in the process.

Candidate File Toolbar

Icon	Description
	Prints the candidate file. See "Printing a Candidate File" on page 8-13..
	Attaches a file to the candidate file. See "Attaching a File to a Candidate File" on page 8-11..
	Adds comments to a candidate file. See "Adding Comments to a Candidate File" on page 8-12..
	The Routing icons are activated and configured by your system administrator. They require proper user permissions.  could change the candidate's status to the next appropriate status.  could change the candidate's status to Rejected.  could change the candidate's status to Under consideration.  could move the candidate to the next appropriate step.
More Actions	Contains a list of actions that can be performed on candidates.

Opening a File Attached to a Job-specific Application

1. Click **View My Requisitions**.
2. On the My Requisitions tab, click the name of the requisition on which the candidate applied.
3. Click the **Candidate List** tab and then click the name of the candidate.
4. Click the Resume tab. The Attached Files section on the tab consists of two subsections. The Job-specific Attachments subsection lists all files the candidate has attached to the specific job application. The Other Attachments subsection lists all other files the candidate has submitted (including files the candidate has attached to other applications and to his/her general profile).

If the candidate was matched to the requisition, no files are displayed in the Job-specific Attachments subsection unless the candidate has attached files to the job-specific application since the match was performed.

5. To open an attached file, click the corresponding file name in the Name column of the Attached Files section. Alternately, you can open an HTML version of the document by clicking the corresponding link in the Converted File column of the Attached Files section.

To view the list of file attachments currently associated with a candidate's general profile and all of his/her job-specific applications, click the Application field and then click General Profile in the list. The Attached Files section of the Resume tab consists of a single list of all the file attachments that the candidate has submitted (via job-specific applications and his/her general profile).

Candidate List Description

The **Candidate List** tab displays all the candidates matched to the requisition previously selected on the **Requisition** tab. The candidates list provides information such as candidate name, candidate status, job function, present or previous employer, grade, and score. The columns of information presented in the candidate list can vary depending on your user permissions and on company settings.

You can go from the **Candidate List** tab to the **Requisition** tab to view information on the requisition.

The number of candidates displayed on the list should be equal to the number of candidates indicated in the  column of the selected requisition. For example, if the requisition indicates three candidates in the  column in the **Requisition List**, there should be three candidates displayed in the **Candidate List**.

Candidate List Toolbar

Icon	Description
	Prints the candidate list. See "Printing Candidate Information" on page 9-9..
	Matches candidates to a specific requisition. See "Matching Candidates to Requisitions" on page 8-5.
	Shares a candidate with other users. See "Sharing Candidates" on page 8-5.
	Attaches files or documents to a candidate file. See "Attaching a File to a Candidate File" on page 8-11.
	Adds comments to a candidate file. See "Adding Comments to a Candidate File" on page 8-12.

Candidate List Selection Steps

The candidate selection steps tabs (**All, New, Prescreen, Phone Screen, 1st Interview,** etc.), indicate the different candidate selection steps that were selected for the selected requisition. These selection steps will vary according to the candidate selection workflows configured by the system administrator.

If you want to view the candidates who are at a specific selection step, click the tab corresponding to the step. The candidates who have reached the selected step will be displayed. Dimmed tabs indicate that no candidates have reached this specific selection step.

In some organizations, hiring managers are not involved in the initial steps to the candidate selection process. Recruiters are responsible for evaluating new candidates and selecting those who will be forwarded to hiring managers. In this case, selection steps that are performed only by the recruiter are not displayed to hiring managers. For example **New, Background Check,** or **Medical Check** may not be available to hiring managers. Only the names of the steps will be displayed, not the tab. A selection step tab is dimmed when there are no candidates in this step.

Show List

The **Show** list filters the candidate list.

To display candidates according to specific criteria:

1. From the **Show** list, select a criterion.
2. In the **contains/is** field, enter your search or click the Search... button. Click **Refresh**.
3. Optional: Add more criteria to broaden or narrow your search.

   Click ⊞ next to **More Criteria**. Select filter criteria from the lists. Enter additional search terms in the fields that appear or click the selector icons. Click **Any Criteria (Or)** to broaden the search or **All Criteria (And)** to narrow the search. Click **Refresh** to update the candidate list.

Candidate List Column Headers

The candidate list provides information such as candidate identification information, selection step, status, education, employers, test results, etc. Columns may vary according to the list format selected by the system administrator. You may also personalize your list format. See "My Candidates Column Headers" on page 6-9.

List Format Selector

Depending on your company's configuration and your permissions, you may be able to view various list formats or build your own personalized list format. See "List Format Selector" on page 6-10.

7 Managing and Processing Requisitions

Opening a Requisition

1. In the main menu, click **Requisitions**.
2. In the **My Requisitions** page, click the requisition title hyperlink. The **Requisition** page opens.

See "Requisition File Description" on page 6-13.

Editing a Requisition

If you have the proper permission, you can edit a requisition.

1. In the **My Requisitions** page, click the requisition title hyperlink. The **Requisition** page opens.
2. Click the **Edit** button to access to the requisition creation wizard. Or, click the **Edit...** link to edit each information block separately.

The requisition wizard is available as long as the requisition is in Draft status and was created in the Manager WebTop. The **Assignment** block and the **Structure** block cannot be edited for data consistency reasons.

Duplicating a Requisition

1. Open a requisition.
2. Click . The requisition creation wizard opens.
3. Enter required information. See "Creating a Requisition" on page 5-1.

Printing a Requisition

1. Open a requisition.
2. Click . The **Print** window opens.
3. Select the desired options.
4. Click **Print**.

Requesting a Contribution

You can request contributions and select a contributor. For each contribution, a task is created. If the selected contributor is a Staffing WebTop user, a contribution task appears in the My WebTop page, under Tasks. If the selected contributor is a Manager WebTop user, an email message is sent. The Manager WebTop user must login to the Manager WebTop and use the new I was requested to contribute to filter available in the Show Requisitions list, under My Requisitions tab.

To request a contribution, you must have the required permission (enabled by your system administrator).

A contribution request can be done at any time except when the requisition is deleted or is on hold.

When requesting a contribution, you can automatically add the contributor to the list of collaborators defined for the requisition if the Collaborators field was activated in the Administrator WebTop and if permission was granted.

1. Open the requisition.
2. Click Request Contribution...
3. Enter the name of the contributor.
4. Select the option Add this contributor to the list of collaborators defined for this requisition, if desired.
5. Enter comments in the Comments field.
6. Click Done.

A contribution request is “cancelled” if no contribution has been received by the time the requisition is posted.

Canceling a Requisition

To cancel a requisition:

1. Open a requisition.
2. Click Cancel Requisition.
3. Enter comments in the displayed window.
4. Click Done. The status of the requisition is changed to Canceled.

Approving a Requisition Using a Blackberry

This feature was first introduced with service pack 5 and applied to a specific model of Blackberry. You can approve requisitions (and offers) using any model of Blackberry provided your organization uses service pack 9 or later and provided your system administrator has configured your user account accordingly.

You must activate JavaScript and Javascript popups if login authentication has been activated via eShare (JavaScript is still required on the login page).

Configuring Your Blackberry

To configure your Blackberry browser, ensure that the following options are selected.

Path: Browser > Menu > Options > Browser Configuration

- Browser: Blackberry Browser
- Support JavaScript (*only* necessary if login authentication has been activated via eShare (JavaScript is still required on the login page))
- Allow JavaScript Popups (*only* necessary if login authentication has been activated via eShare (JavaScript is required on the login page))
- Terminate slow running scripts
- Browser Identification: Internet Explorer
- Support HTML Tables
- Use Foreground and Background Colors
- Use Background Images
- Support Style Sheets

8 Managing and Processing Candidates

Overview

Candidates send applications for a specific requisition you have posted (job-specific application), or submit their profile for future job opportunities (candidate profiler). You can perform a number of tasks related to the candidate's selection process and to the candidate's profile.

Available actions may vary according to the Steps, Statuses and Actions, selected for the Candidate Selection Workflows configured by your system administrator. For more information, please contact your system administrator.

Buttons and Icon

Back to Top Return to the top of a list.	Back to Menu Return to the main menu.
Save Save the information in a requisition or in a candidate file.	Close Close the candidate file,
	Move from one page to another or move directly to the first page or to the last page of a list.
Search... Open selector windows (user, department, job template, skills, questions, etc.).	Select... Open a selection menu.
Create Requisition... Create a new requisition.	Cancel Requisition Click to cancel a requisition
Share... Share a candidate with other users.	Match... Match candidates to requisitions
Enter Grade... Select an action (enter grade, add comments, or attach a file), enter details (grade%) and enter comments.	Reorder Reorder questions and skills included in a requisition
Send information on a candidate to other users.	Attach files or documents to a candidate file.

Add comments to a candidate file.	Changes have been made by another user to a candidate file or to a requisition that you own.
Print Print a requisition, a requisition list, a candidate file, candidate list or a preview page.	Create a new requisition based on the information contained in the requisition that is currently open.
Remove items from a list.	Add items to a list.
Remove or delete an element in a list.	Indicates disqualified candidates in a candidate list or in a candidate file header.
Indicates that the candidate disqualification question results and answers must be verified.	

Opening Candidate Files

You can access information provided by the candidates who applied on a requisition using one of the following methods.

Opening Candidate Files from My Requisitions

1. On the main menu, click **Requisitions**.
2. In the **My Requisitions** tab, select a requisition, and then click the number under the column. The number represents the number of candidates who have applied on the selected requisition and who have been matched to the requisition. The **Candidate List** opens displaying the candidates linked to the selected requisition.
3. Click the candidate name. The Candidate File opens.

Candidate Selection Workflow tabs (for example, All, New, 1st Interview, 2nd Interview, etc.) are only available when displaying candidates in **My Requisitions/ Candidate List** tab because the selected candidates are linked to specific requisitions (the requisition number and title are displayed at the top of the page). The candidate selection workflow is selected when the requisition is first created and is linked to the requisition, not to the candidate.

Opening Candidate Files from My Candidates

1. On the main menu, click **Requisitions**.
2. Click **My Candidates**. The candidates listed under **My Candidates** are linked to requisitions listed under the **My Requisitions** tab.
3. Click the candidate name. The **Candidate File** opens.

The total number of candidates under the column in **My Requisitions** tab should be equal to the number of candidates under **My Candidates.**

Candidate Selection Workflow tabs are not available in candidate files opened through **My Candidates** because the candidate selected is not linked to a specific requisition. The tabs displayed in this context reflect the candidate profiler (**Prescreening, Screening, Resume, Profile,** etc.) The candidate selection workflow is selected when the requisition or the requisition template is first created by a Staffing WebTop user and is linked to the requisition, not to the candidate.

Matching Candidates to Requisitions

1. Open a candidate file.
2. Select **Match** in the **More Actions** list. The **Requisitions Selector** opens. See "Requisition Selector" on page 14-7.
3. Select one or more requisitions to which you want to match the selected candidate.
4. Click **Done.** A message will ask you if you want to send an email message to the candidate to request more information. Clicking **Yes** sends an email to the candidates inviting them to the career site and to provide answers to job-specific questions.

Candidates can only be matched to requisitions with the **Approved** status detail.

Sharing Candidates

You can share candidates with other users within your organization or with agents and agencies.

1. Open a candidate file.
2. In the **More Actions** list, select **Share...** The **Action Dialog** window opens with the **Share** action selected.
3. On the **Recipients** tab, click . The **User Selector** opens. See "User Selector (Single and Multiple)" on page 14-8.
4. Select users, and then click **Done.**
5. On the **Contents** tab, select the information you want to share with other users.
6. On the **Comments** tab, enter comments in the **Comments** field.
7. If you want to share the information with a user outside your organization, (for example, an agent), enter the user's email address in the **Share with External Recipients** field. You may enter more than one user email address. In this case, use a comma to separate the email addresses.
8. Click **Preview,** if you want to view the information you selected.
9. Click **Share** to send the information to the selected users.

Hiring a Candidate

If your candidate has accepted the job offer, you can hire the candidate.

1. Open the candidate file.
2. In the **More Actions** list, select **Move...** The **Action Dialog** window opens with the **Hire** step selected.
3. If a message template is associated to the **Hire** status, you can select **Send Correspondence** if you want to inform the candidate that he or she has been hired. The **Correspondence Wizard** will open when you click **Apply.** See "Correspondence Manager" on page 10-1.
4. In the **Details** section, enter a **Start Date** using the pop-up calendar.
5. Enter notes and comments to in the **Comments** field.
6. Click **Done.**

Please Note: If you are incapable of completing the **Hiring** process, it may be because you do not have the appropriate user permissions to do so. In some organizations, only recruiters or supervisors are authorized to hire candidates. Please review your user permissions with your system administrator.

Indicating a Candidate Has Declined

You can select **Candidate has declined** when the candidate has indicated that he or she is no longer interested in the position.

1. Open the candidate file.
2. In the **More Actions** list, select **Candidate has declined.** The **Action Dialog** window opens with the **Candidate has declined** action selected.
3. Select **Send correspondence...** to inform the candidate of the change. The Correspondence Wizard will open after clicking **Apply.** See "Overview" on page 10-2.
4. Enter comments in the **Comments** field.
5. Click **Done**.

Rejecting a Candidate

You can **Reject** a candidate when you decide not to hire a candidate. When a candidate declines the job offer, you can enter **Comments** and **Dispositions** (motives) to specify why the candidate has declined the job. Comments and dispositions can be mandatory.

You can reject an application and choose one, or more than one, disposition or motive for this action.

1. In the **More Actions** list, select **Reject Candidates...**The **Action Dialog** opens with **Reject Candidates** selected.
2. In **Details or Disposition**, select the reason(s) why the candidate was rejected.
3. Select **Send Correspondence...** to inform the candidate of the change. The Correspondence Wizard will open after clicking **Apply.** See “Correspondence Manager” on page 10-1.
4. Enter comments in the **Comments** field. A comment is mandatory with the rejected action.
5. Click **Done**.

Hiring a Candidate for the Same Requisition

The **Reset Selection Process** action allows hiring managers to rehire a candidate on the same requisition. This situation can easily occur in temporary jobs, contract jobs, summer jobs for example.

This action re-initializes the workflow of step New (first step of the workflow -- initial step, initial status). The action can be performed on a candidate having one the following status:

- Rejected
- Declined
- Offer
- Hired

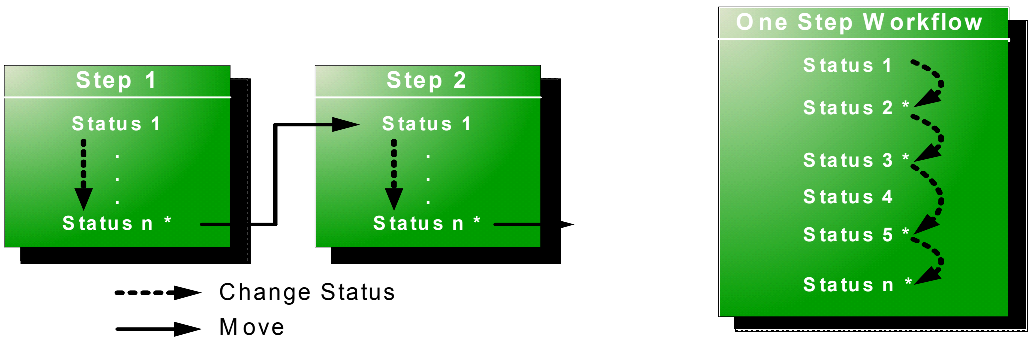
The Reset Selection Process action is also restricted to the following conditions:

- The action can only be performed for one candidate at a time.
- The action can only be performed on hourly recruitment requisitions. This is the only type of requisitions for which the selection process can be restarted.
- The requisition must be active (it cannot be canceled or filled).
- The candidate must not be disqualified for the application or for his/her profile.
- The action cannot be performed if the application is flagged as deleted.
- The action cannot be performed if the Offer management step is part of the workflow (active or not active step).
- The action cannot be performed if the action brings the hiring manager to a restricted step.
- The following production setting must be activated: EnableResetSelectionProcess.

Standard reports and metrics will not take into account the repeatability of the selection process. Also, the following flags are recalculated: NewCandidate, SendNewEntryNotificationFlag, IsNewApplication, IsInHiringProgress.

Changing Steps and Statuses with One Click

You have the ability to access steps and statuses directly in the Candidates list without having to select an action in the **More Actions** list. You are also provided with the next logical step or status. This feature eases the movement of candidates in a Candidate Selection Workflow (CSW).



A column named **Next Action** is available to be added to configurable candidate list formats. See "List Format Selector" on page 6-10.

The **Next Action** column is available only for requisition-specific formats.

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

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

Users with the permission to personalize list formats will be able to add the **Next Action** column as they would for any other column.

Actions available in the **Next Action** column are Candidate Selection Workflow (CSW) movements only, either a "Move to the next step in the CSW" or a "Change to the completion status within the current step". Basically, if the current status is not a completion status, the action displayed will be a move (change status) to the first completion status of the current step. If the current status is a completion status, then the action will be a move to the next step at the initial status. In a one-step CSW (reference workflow), only statuses configured as a "completion status" will show up as next steps.

To change the current status or step, click on the link displayed in the **Next Action** column. If you must provide comments or select motives, the **Action Dialog** window opens automatically.

Candidate Selection Workflow Actions

The list of actions displayed in the More Actions list is context-sensitive and the actions that are available vary depending on the selected workflow, the candidate status, and user permissions. For example, Canceled, Deleted, Offer or Hire may not be available to all users.

The information displayed in each Action Dialog window is also context sensitive and may vary accordingly.

The Action Dialog window may not be available if the number of candidates selected in the candidate list is higher that the number of positions available.

Candidate Selection Workflow

When you match candidates to a job, they enter a candidate selection process known as Candidate Selection Workflow (CSW). The Candidate Selection Workflow (CSW) lets you move candidates from one selection step to another. When you match a candidate to a requisition, the candidate will have to be processed through each selection step related to that requisition.

Selection Steps

The CSW lets you move candidates from one selection step to another. Here are a few examples of selection steps: New, 1st Interview, 2nd Interview, Testing, Reference check, Offer, Hired, etc.

The selection steps and statuses may vary according to the candidate selection workflows enabled at your organization.

Step Statuses

Selection steps include Statuses that indicate the progression of a candidate in a specific selection step. For example, in a 1st Interview step, the status may be To be Scheduled, Scheduled, or Passed.

As several reports are organized around candidate selection steps and statuses, it is important to document your daily activities by updating candidate files and performing candidate steps and status changes accurately and consistently.

Special Rules for the Candidate Selection Workflow

- Candidate selection workflows steps and statuses are included in the requisition.
- Selection steps may vary from one requisition to another.
- You can view selection steps tabs in candidate lists related to specific requisitions (Go to: Welcome Page/View My Requisitions/Candidate List).

- To view candidate selection steps, the requisition must have been created with a sequential candidate selection workflow. For more information, contact your system administrator.
- It is only possible to move candidates from one step to another if the requisition was created using a sequential candidate selection workflow.
- When you create a requisition in the Manager WebTop, the default candidate selection workflow created by the system administrator will apply to the new requisition.
- Available actions may vary according to the steps, statuses and sections selected for the Candidate Selection Workflows configured by your system administrator.

Moving a Candidate to Another Step

1. Open a candidate file.
2. In the **More Actions** list, select **Move.** The **Action Dialog** window opens with the **Move** action selected.

Before moving a candidate to a new step, the present step must be completed. In some cases, it may be possible to bypass steps that can be completed later on. Contact your system administrator for more information.

3. Select a step in the **to** field and a status in the **with status** field. The next available step and status appear automatically. A status marked with an asterisk completes the step. The **Action Dialog** window opens with the **Move...** action selected. The name of the status is indicated and a list of subsequent statuses is available in the **with status** list. The statuses available in the lists are based on the context of the selection step and on your user permissions. Only the steps that are available, given the selection workflow, appear in the **to** list.
4. Select **Send Correspondence...** to inform the candidate of the change. The Correspondence Wizard will open after clicking **Apply.** See "Overview" on page 10-2.
5. Enter comments in the **Comments** field. A comment is mandatory with certain statuses.
6. Click **Done**.

Changing the Status of a Candidate

1. Open a candidate file.
2. In the **More Actions** list, select **Change Status...** The **Action Dialog** window opens with the **Change Status** action selected.

Statuses available in the lists are based on the context of the selection step and on your user permissions.

3. Select a status in the **to** field. The next available status appears automatically. A status marked with an asterisk completes the step.
4. Select **Send Correspondence...** to inform the candidate of the change. The Correspondence Wizard will open after clicking **Apply.** See "Overview" on page 10-2.

5. Enter comments in the **Comments** field, if necessary. A comment is mandatory with certain statuses.
6. Click **Done**.

Bypassing Steps

If you have the appropriate user permissions, you can skip a mandatory steps in a candidate selection workflow and move candidates to any selection step without restriction.

1. Open a **Candidate File.**
2. In the **More Actions** list, select **Bypass.** The **Action Dialog** window opens with the **Bypass** action selected.
3. Select a step in the **to** field and a status in the **with status** field. The next available step and status appear automatically. A status marked with an asterisk completes the step.
4. Select **Send Correspondence...** to inform the candidate of the change. The Correspondence Wizard will open after clicking **Apply.** See "Overview" on page 10-2.
5. Enter comments in the **Comments** field. A comment is mandatory with the Bypass action.
6. Click **Done**.

Attaching a File to a Candidate File

You can attach external documents or files (resume, cover letter, reference letters, etc.) to a candidate file.

Accepted file formats are defined by your system administrator.

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

1. Open a **Candidate File.**
2. Click , or select **Attach File** in the **More Actions** list. The **Action Dialog** window opens with the **Attach File** action selected.
3. Click **Browse...**
4. Locate and select the file. Then click **Open**.
5. Locate and select the file. Then click **Open**.
6. Enter comments in the **Comments** field.
7. Click **Done**. The file is attached to the selected candidate file(s) and is visible as a hyperlink on the **Tracking** tab. If you click the file name link, your browser will attempt to open the attached file

using the appropriate software. Refer to your browser's documentation if you encounter any difficulty in opening the file.

McAfee scans attached files for viruses. If a virus is detected, the Staffing WebTop does not attach the file; it displays file information or suggests attaching a different file.

Adding Comments to a Candidate File

1. Open a **Candidate File.**
2. Click or select **Add Comments...** in the **More Actions** list. The **Action Dialog** window opens with the **Add Comments** action selected.
3. Enter comments in the **Comments** field.
4. Click **Done**.

Entering a Grade in a Candidate File

You can enter or edit the grade of a candidate. See "Weighting and Criteria for Skills and Questions" on page 15-3.

1. Open a **Candidate File.**
2. From the **More Actions** list, select **Enter Grade...** The **Action Dialog** window opens and **Enter Grade** appears in the **Action** list.
3. Enter or edit the grade in the **Grade** field. You can enter **-1** to erase a grade that was entered previously.
4. Enter comments in the **Comments** field.
5. Click **Done**.

Using the Fill Out Form

The Fill Out Form action enables managers to immediately select, print, and deliver human resource forms and documents that are completed on-site by candidates.

The proper permissions are required to access the Fill Out Form action.

To be available, the Fill Out Form action must be enabled in a candidate selection workflow.

1. Open the candidate file.
2. From the More Actions list, select Fill Out Form… The Action Dialog window opens. The list of available forms and documents is displayed.
3. Click the name of the document to open it. Acrobat® Reader opens, displaying the form or document. The form is filled automatically using the corresponding fields of the candidate file or requisition.
4. Validate the information.
5. Click Print. The Print window opens.
6. Click OK.

Your system administrator has the ability to tie forms to the workflows, steps and statuses of the Candidate Selection Workflow (CSW). Therefore, when a candidate reaches a certain step or status of the Candidate Selection Workflow, you are presented with a list of PDF forms according to the current workflow, step or status.

Printing a Candidate File

1. Open the candidate file.
2. Click . The Print Configuration window opens.
3. In the Content and Order section, select the candidate file sections to print and their print order.
4. Click Default to set the content and order to the default settings.
5. Click Preview to view the printout before printing.
6. Click Print.

Printing Several Candidate Files

1. In the Candidates window, select each candidate file to print. Making no selection prints all the candidate files.
2. Click . The Print Configuration window opens.
3. In the Selection section, select all candidate files or the ones selected previously.

4. In the Content and Order section, select List only to print only a list of the candidates. Or select Candidate file details and select the candidate file sections to print and their print order.
5. Click Default to set the content and order to the default settings.
6. Click Preview to view the printout before printing.
7. Click Print.

Sending a Correspondence to a Candidate

1. Select a candidate file.
2. Select Change Status in the More Actions list. The Action Dialog opens.
3. Select Send Correspondence, and then click Apply. The Correspondence Wizard opens. See "Creating Correspondence While Changing a Candidate's Step or Status" on page 10-3.

Unlocking a Candidate Account

The Candidate file becomes locked after a predetermined number of failed login attempts. A recruiter or hiring manager with the proper permissions can unlock a candidate account at the candidate's request (usually verbal).

To unlock a Candidate account:

1. Open the candidate file.
2. Verify the identity of the candidate, by checking the name and phone number for example.
3. Under the Resume tab, click Unlock Account. The Tracking tab is updated.

The Account Status field indicates the date when the account will be unlocked by the system.

Generating a New Password

A recruiter or hiring manager with the proper permissions can generate a new candidate password at the candidate's request (usually verbal).

To generate a new password:

1. Open the candidate file.
2. Verify the identity of the candidate, by checking the name and phone number for example.
3. Under the Resume tab, click Generate New Password. The Tracking tab is updated.

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

Editing Comments in the Tracking tab

It is possible to edit comments for entries appearing in the **Tracking** tab. The icon appears if you have the permission to edit a comment. To edit a comment, click on the icon to open the **Edit a comment** window and enter a comment.

Once a comment is edited, the comment appears in the **Comments** column. Who edited the comment and what information was edited are not indicated.

The **Comments** option must be selected in the **Tracking Event Categories** window in order to see the comment icon.

Requesting a Screening Service

Screening Services lets you attach screening documents, government forms or questionnaires, tests, background check provided by external service providers.

Procedures to fill tests or questionnaires will vary from one service provider to another. Candidates must follow online procedures when submitting their profiles or when filling a job application in a career section.

To request a Screening Service:

1. Open a candidate file.
2. In the **More Actions** list, select **Request a Screening Service...** The **Request a Screening Service** window opens.
3. Select a screening service in the **Available Services** list.
4. If necessary, enter comments in the **Comments** field, and then click **Apply.** The system will connect you to the online screening service that you have selected, or will send an email to the candidate with additional information.

- Screens, options and procedures will vary from one service provider to another. Follow online instructions.
- If necessary, enter your ID number and password provided by your system administrator for the selected screening service.
- Each service provider may offer a selection of screening services. In most cases, you will be invited to select a service from a menu or from a list of available services.
- In some cases, you might have a specific period of time to select your screening service options.
- The service you select will automatically be attached to the candidate file and will appear on the Screening tab.

Your system administrator may have configured a specific Response Timeout Delay for each available screening service. The response timeout delay will vary according to the service provider and to the type of service provided. Timeout delays can be configured in number of seconds, minutes, hours, or days.

5. If you want to view the progress on a specific screening questionnaire that was sent to a candidate (using a Complete Online Screening Questionnaire message), click the link of the specific screening service on the Screening tab.
6. Click Print if you want to print the information.
7. If you think that the candidate did not receive the request, click Resend.
8. Click Close to return to the Tracking tab of the candidate file.

Starting the Onboarding Process

When you change the status of a candidate to hired, you have the possibility to start an onboarding process.

1. Open the candidate file.
2. In the More Actions list, select Start Onboarding Process...
3. In the Action Dialog window, select an onboarding process in the list. Processes available in the list are based on the requisition’s primary location, organization and job type.
4. Enter comments if desired.
5. Click Done.

Scheduling an Interview

Interview Scheduling allows recruiters and hiring managers to schedule interviews directly in the Staffing WebTop as part of the candidate selection process. This feature integrates with Microsoft® Outlook® calendar or any iCalendar system (for example, Lotus Notes®). Each time an interview is scheduled, updated or canceled in the Staffing WebTop, an email message is sent to the attendees so that the interview can be put into their calendars.

Events occurring in MS Outlook calendar or any iCalendar system are not managed by the Staffing WebTop. For example, if an interview meeting is modified in Outlook, the new information will not appear in the Staffing WebTop.

MS Outlook 2000 and higher are supported. The iCalendar plug-in has been tested with Lotus Notes version 5.5 and higher. Other calendar products may be functional but are not officially supported.

There may be some restrictions on the use of the Interview Scheduling feature with systems integrating iCalendar.

Users with the necessary permissions can perform the following actions with the Interview Scheduling feature:

- Schedule an interview
- Update an interview
- Cancel an interview

Candidate interviews can only be scheduled when the candidate is moved to the Interview status or any step that is mapped to this referential status. Also, to schedule, update and cancel an interview, the meeting organizer must have the permission to view sensitive candidate information.

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

To schedule an interview:

1. Open the candidate file.
2. From the More Actions list, select Schedule an Interview. The Schedule an Interview window opens.

The language icon indicates the language in which the application was submitted. When scheduling the candidate for an interview, ensure that the information is in the candidate's language.

3. Clear Invite the candidate if you do not want to invite the candidate to the interview.
4. Click [Search...] next to the Organizer field to select an interview organizer other than user creating the interview. The Organizer field is required.
5. In the Attendees field, enter the name or email address of each attendee. If several attendees are invited, separate the email addresses with a comma. Internal and external email addresses can be used.

Click [Search...] to validate the email addresses of internal attendees before sending the interview request.

If the candidate has no email address, you will still be able to schedule an interview, but you will have to print the interview invitation and send it to the candidate by fax or regular mail.

The hiring manager is invited by default. If the organizer is the hiring manager, the recruiter is invited. If the organizer is the recruiter, the hiring manager is invited. If the organizer is another person, the recruiter is invited.

The system requires at least one attendee at an interview. If the candidate is invited, the **Attendees** field can be empty (since the candidate is considered an attendee). If the candidate is not invited, the **Attendees** field must contain at least one attendee.

Your system administrator may limit attendees to members of the groups to which you belong.

To view attendee information or to delete an attendee, click the attendee's name. The **Attendee Details** window appears. Click **Remove** to delete the attendee.

6. In the **Subject** field, enter the subject of the interview.
7. In the **Location** field, indicate the interview location (for example, name of the location, address or name of the meeting room).
8. In the **Date** field, select an interview date. Select start and end times from the lists.

The start and end times are specified using the list only and cannot be edited manually. All interview time information is in the organizer's time zone.

9. Select **Reminder** to activate the reminder functionality in MS Outlook. The **Reminder** option is not available with Lotus Notes.

10. In the **Message Template** field, a default message template is proposed. Click Search... to select a different template (if available).

The most appropriate message template is pre-selected based on the requisition's OLF and the application language. Taleo provides a generic template in 13 languages.

11. In the **Notes** field, enter other relevant information. The **Notes** field information appears in the email received by all attendees.
12. Select **Send candidate file to attendees (but not to candidate)**, if desired.

    The candidate file attached to the email message only contains information from the **Prescreening**, **Screening**, **Resume** and **Profile** tabs and may be further limited by the organizer's access privileges. The file never contains confidential candidate information from the **Offers**, **Tracking** and **Regulations** tabs. Also, files attached to the candidate record (for example, a resume) are not included.

13. Select **Send requisition to attendees (but not to candidate)**, if desired. The requisition file attached to the email message only contains information from the **Logistics** and **Description** tabs.

You must have the proper permissions to attach the candidate file and requisition to the interview being scheduled.

Since the content of the candidate and requisition files depends on the viewing permissions of the user scheduling the interview, some attendees may not have access to information they normally would have.

The candidate will not receive the candidate or the requisition files.

Meeting organizers have the ability to share (instead of send) the candidate file and the requisition with the attendees (candidates neither receive nor have access to this information). To have access to this feature, a setting in the Administrator WebTop must be activated. When activated, the **Schedule an Interview** window mostly remains unchanged except for necessary label changes. **Send candidate file...** and **Send requisition...** become **Share candidate file with attendees (but not with the candidate)** and **Share requisition with attendees (but not with the candidate)**.

14. If desired, click **Preview** to see how the information will appear in the message sent to the attendees.
15. Click **Send** to send the interview invitation. If the candidate has no email address, click **Print** to print the interview invitation and send it to the candidate by fax or regular mail.

Viewing Information on Scheduled Interviews

Interview information can be viewed in:

- the Candidates list, under the Interview column
- the Candidate File, under the Tracking tab
- the Candidate File, in the header.

You must have the permission to view sensitive candidate information to access the **Interview Information** window.

Candidates list, Interview column

1. In the **Candidates** list, click the link in the **Interview** column. The **Interview Information** window opens.

Your system administrator must activate the **Interview** column and you must add it to the Candidates list using the **List Format Selector** icon ( ).

Candidate File, Tracking tab

1. Open the candidate file.
2. Click the **Tracking** tab.
3. In the **Details** column, view the time and location of the interview.

   3a) Click **Request sent**. The **Interview Information** window opens.

Candidate File, in the Header

1. Open the candidate file.
2. In the **Header**, click the link in the status field. The **Interview Information** window opens.

Viewing an Interview Email and Adding it to Your Calendar

Once the interview is scheduled, an email message is sent to all the invited attendees. The email contains information regarding the interview and an .ics file attachment.

Outlook users:

1. Open the interview email message.
2. If desired, double-click the candidate file or requisition attachment.
3. To add the interview meeting to your calendar, double-click the “Add to my calendar.ics” attachment.
4. Click **Accept** to add the interview to your calendar.

   Outlook will display a message asking if you want to send a response to the meeting organizer.

Lotus Notes users:

1. Open the interview email message.
2. Double-click the "Add to my calendar.ics" attachment.
3. A message containing choices on how to open an attachment appears. Select **Open**.
4. A message entitled **Scheduling Notes in iCalendar file** appears. Select **Import All**.
5. You will then receive a new email in your Lotus Notes Inbox. Accept the invitation to add it to your calendar.

Updating an Interview by Changing the Attendees

To schedule, update and cancel an interview meeting, the interview organizer must have the permission to access sensitive candidate information. Also, only one user at a time can update a specific interview.

To update an interview by changing the attendees:

1. Open the candidate file.
2. From the **More Actions** list, select **Update the Interview**. The **Update the Details of an Interview** window opens.
3. Add or remove interview attendees. See Step 5 of Scheduling an Interview.
4. Click **Send Update**. The **Update the Details of an Interview** window opens.
5. Select to either send an update to all attendees or only to the attendees that were added or deleted. You are also reminded if the invited candidate has no email address. Click **OK**.
6. Once the interview is updated:

- The email message sent to the attendees is identical to the original message except that **(Updated)** appears in the subject of the email.
- Attendees that have been removed receive a cancellation message. See "Canceling an Interview Meeting" on page 8-22.)
- The ics file attachment is now named "Update my calendar.ics".
- In the Candidate File, the **Tracking** tab indicates that the interview has been updated.

Updating an Interview by Changing the Interview Information

To schedule, update and cancel an interview meeting, the interview organizer must have the permission to access sensitive candidate information. Also, only one user at a time can update a specific interview.

To update an interview meeting by changing the interview information:

1. Open the candidate file.
2. From the **More Actions** list, select **Update the Interview**. The **Update the Details of an Interview** window opens.
3. Modify the information, other than the list of attendees. See "Updating an Interview by Changing the Attendees" on page 8-21.
4. Click **Send Update**. All attendees are sent the email message. You are also reminded if the invited candidate has no email address.
5. Once the interview is updated:

- The email message sent to the attendees is identical to the original message except that **(Updated)** appears in the subject of the email.
- The ics file attachment is now named "Update my calendar.ics".

- In the Candidate File, the Tracking tab indicates that the interview has been updated.

The interview update is not automatic in Lotus Notes. Notes users must remove the original appointment and create a new appointment based on the updated information.

Canceling an Interview Meeting

To schedule, update and cancel an interview meeting, the interview organizer must have the permission to access sensitive candidate information. Also, you cannot cancel an interview that is being updated by another user.

To cancel an interview meeting:

1. Open the candidate file.
2. From the More Actions list, select Cancel the Interview. The Cancel an Interview window opens.
3. Select to send or not to send a cancellation message to all attendees. You are also reminded if the invited candidate has no email address. Click OK. The Action Dialog window opens.

   3a) The cancellation message sent to attendees contains interview information and an .ics file attachment. Attendees can click this attachment to cancel the interview meeting in MS Outlook.

The interview meeting cancellation is not automatic in Lotus Notes. Notes users must manually remove the appointment from their calendar.

4. Select a new status for the candidate. Click Done.
5. Once the interview is canceled:

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

Interview Scheduling and Candidate Selection Workflow

Interview scheduling can interact with the candidate selection workflow (CSW) for proper candidate selection tracking.

Your system administrator can configure candidate selection workflows so that when scheduling an interview, a candidate’s status automatically changes to a preset value.

To automatically change the candidate’s status, the system administrator must activate the Interview Scheduling Behavior setting for the statuses in question. The Interview Scheduling Behavior setting is available only on 1st, 2nd and 3rd Interview statuses or any status mapped to these referential statuses.

For example, if the CSW used by the recruiter contains 1st, 2nd and 3rd Interview steps. All three steps have the following statuses: **To be scheduled**, **Scheduled**, and **Passed***. The **Interview Scheduling Behavior** setting is activated for the **Scheduled** status. The candidate is currently at the 1st Interview step and the **To be Scheduled** status.

It is recommended to configure no more than one status per step for the **Interview Scheduling Behavior** setting.

The recruiter organizes an interview for the candidate (see "Scheduling an Interview" on page 8-16.). When the recruiter sends the interview invitation to the attendees, the status of the candidate in the 1st Interview step automatically changes from **To be scheduled** to **Scheduled**. The recruiter can view the step and status information in the Candidate File header.

Next, suppose that the candidate attended the interview as scheduled, and the recruiter wants to invite the candidate to a second interview. The recruiter will have to perform the following steps:

1. Change the status of the 1st Interview step to **Passed***.
2. Move the candidate to the 2nd Interview step and set the status to **To be scheduled**.
3. Schedule a new interview.
4. Send the interview invitation.

Since the **Scheduled** status is also configured for the 2nd Interview step, the candidate's 2nd Interview status automatically changes to **Scheduled** once the interview is sent to the attendees.

Performing an Action on Several Candidates Simultaneously

You can perform an action on several candidates at the same time.

To perform an action on several candidates simultaneously:

1. In the candidate list, select the check box next to the candidates on which you want to perform an action, or select the check box next to the **AIF** flag to select all the candidates in the list.
2. In the **More Actions** list, select the action you want to perform. If you choose an action that cannot be performed on all your selected candidates, a warning message will be displayed.
3. Enter the information related to the action you have selected.
4. Enter comments in the **Comments** field if necessary.
5. Click **Done**.

The changes you have made will appear in all the candidate files that were selected. All the changes will be tracked on the Tracking tab in each selected candidate file.

Attaching Files in the Resume Tab and Tracking Actions Taken on Attached Files

You can attach, delete and modify files in the candidate's file Resume tab and track actions taken on attached files. The application track changes made by both recruiters (via the candidate file Resume tab) and candidates.

Only actions taken on an attached file are tracked, not changes to the file content.

To view actions taken on attached files in the candidate file Tracking tab:

- The Attachments category must be selected in the Tracking Event Categories window (available by clicking the Modify... button).
- General Profile must be selected in the Application list.

To track actions taken on attached files:

1. Open a candidate file.
2. Select the Tracking tab.
3. Make sure the Attachments category is selected in the Tracking Event Categories window (available by clicking the Modify... button).

Tracking Events Related to Candidates

It is possible to track events related to a candidate. The event tracking mechanism displays an "Updated" event every time something is modified on a candidate's general profile or specific application.

The events tracked are:

Updates to Personal Info: First Name, Last Name, Initial, Date of Birth, Social Security Number, City, Zip/Postal Code, Home Phone, Work Phone, Cellular Number and Email. Note: Updates to any of these fields are tracked individually.

Updates to the Basic Profile fields (except OLF): Job Level, Schedule, Education Level, Employee Status, Shift, Advance Notice, Job Type, Min Annual Salary, Travel and Date of Availability. Note: Updates to any of these fields are tracked individually.

Updates to Plain Text fields: Resume, Cover Letter, Career Objectives and Supplementary Comments. Note: Updates done to any of these fields appear in the tracking as an update to the "field". An hyperlink is provided to view the field as it was before the update.

Updates to the Work Experience block: Current Job check box, Employer, Job Function, Start Date, End Date, Supervisor's Name, Supervisor's Phone and Achievements. Note: Updates done to any of these fields appear in the tracking as an update to the "block". An hyperlink is provided to view the block as it was before the update.

Updates to the Education block: Institution, Program, Education Level, GPA, Start Date and Graduation Date. Note: Updates done to any of these fields appear in the tracking as an update to the "block". An hyperlink is provided to view the block as it was before the update.

Propagation: Skills and questions updates were previously tracked but they were tracked only on the application where the update was done (even if many applications were affected by the change). Now, if an update is done on question 1 of application A and this update affects applications A, B and C, the update appears in the tracking history of applications A, B and C.

Key benefits of events tracking

Saving you time - "At a glance" view of the candidate's application tracking history: now that all updates are tracked, the Staffing WebTop user does not have to manually compare information contained in a candidate's application (using snapshots) to determine what has changed over time.

Saving you time - Filtering: the filtering by category improves usability even more by substantially decreasing the size of the application history on the screen and by allowing a selection of categories that are relevant to you. Browsing through the application tracking history will be much faster and easier, especially when reviewing candidates who have many applications.

Increased accountability - Capturing who made the change: the tracking indicates who made the change (candidate or Staffing WebTop user) and when it was made (which was not possible with snapshots).

Improved traceability - Propagation: when multiple applications are affected by an update to the answers of skills or questions, the application tracking history of all affected applications will not only indicate that a change was made but will also keep a trace of the actual application where the update was made. This is extremely useful for someone who need to know the precise history of a candidate's application.

Reports / Reportability: tracking events are reportable.

Tracking by Categories

Filtering by category decreases the size of the application tracking on the screen and allows you to select categories that are relevant to you. Browsing through the application tracking history is faster and easier, especially when reviewing candidates who have many applications.

Filters allow you to display the desired tracking event. Each tracking event is linked to a category and filtering is performed by category.

There are 103 distinct combinations of (tracking event + event details) in the application and each combination belongs to 1 of the 11 categories. The categories are:

- Agent
- Candidate Progression
- Comments
- Screening Services
- Questions and Skills
- Regulations
- Candidate Information
- Resume
- Correspondence
- Attachments
- Candidate File Update

By default, when accessing a candidate file, only "Candidate Progression" (events related to Candidate Selection Workflow moves), "Comments", and "Attachments" are selected. You can select to view other categories. These selections are kept when navigating to the next candidate, but they will not be kept when leaving the candidate file.

Displaying the Tracking of Specific Applications

In addition, options allow you to select the applications that you want to view in the application tracking history. For example, it is possible to view only the applications for which the candidate is "In Hiring Process", thus hiding all applications that are either Rejected, Declined, Deleted or Hired and also all applications that are tied to Requisitions other than Open of On Hold.

Please Note: The option Show candidate history relating to all applications was replaced by the list Show tracking for the following applications.

The list Show tracking for the following applications contains the following options:

- Current application (default view)
- In Selection Process
- All

Tracking Events and Categories grid

Category	Tracking Event	Event Detail
1. Agent	Agent changed	New agent:
1. Agent	Association between candidate and agent removed	Agent:
1. Agent	Recommended by or associated to an agent	Agent:
2. Selection Process	Applied	Via Capture Resume
2. Selection Process	Applied	Via Candidate Search
2. Selection Process	Applied	Via File Import
2. Selection Process	Applied	Via Staffing Station
2. Selection Process	Applied online	
2. Selection Process	Candidate matched	Candidate has been matched to requisition but not notified
2. Selection Process	Candidate matched	Candidate has been matched to requisition and notified
2. Selection Process	Referred	
2. Selection Process	Hired	Start Date:
2. Selection Process	Moved to step	
2. Selection Process	Revert	
2. Selection Process	Selection workflow changed	Selection workflow changed from to
2. Selection Process	Status changed to	
2. Selection Process	Status changed to in step	
2. Selection Process	Steps bypassed. Step reached:	
2. Selection Process	Interview canceled	
2. Selection Process	Interview scheduled	
2. Selection Process	Interview updated	
2. Selection Process	Approval Process Terminated	
2. Selection Process	Approval Rejected	
2. Selection Process	Approval Request Submitted	Approval Path: {approvers}
2. Selection Process	Approved	

Category	Tracking Event	Event Detail
2. Selection Process	Approved Offer Recipient Changed	Changed to: {user}
2. Selection Process	Approvers Added	Added: {approvers}
2. Selection Process	Approvers Removed	Removed: {approvers}
2. Selection Process	Accepted	Event Date:
2. Selection Process	Canceled	
2. Selection Process	Created	
2. Selection Process	Expiration Date Updated	Modified from to
2. Selection Process	Extended (Verbally)	Event Date:
2. Selection Process	Extended (Written)	
2. Selection Process	In Negotiation	
2. Selection Process	Passed	
2. Selection Process	Refused	
2. Selection Process	Reneged	
2. Selection Process	Rescinded	
2. Selection Process	Start Date Updated	Modified from to
2. Selection Process	Submitted profile	Via Job-specific Application
2. Selection Process	Target Start Date Updated	Modified from to
2. Selection Process	Update Extended (Verbally)	Event Date:
2. Selection Process	Update Extended (Written)	
2. Selection Process	Application deleted	
2. Selection Process	Undeleted application	
2. Selection Process	Event date changed	For action: From : To :
2. Selection Process	Candidate file snapshot taken	Candidate File Snapshot
2. Selection Process	Unsuccessful Candidate	Candidate File Snapshot
3. Comments	Comments added	
3. Comments	Grade deleted	
3. Comments	Grade entered	New grade: %
4. Screening	Results received	{service} {provider}
4. Screening	Screening results migrated	Following a version change
4. Screening	Service requested	{service} {provider}
4. Screening	Service status changed to {status}	{service} {provider}

Category	Tracking Event	Event Detail
4. Screening	Screening tab has been modified	Screening tab snapshot
5. Questions and Skills	Update (Answer to a question)	Question: ***Answer before change:
5. Questions and Skills	Update (Skill details)	Skill: ***Details before change:
5. Questions and Skills	Disqualified	
5. Questions and Skills	No longer disqualified	
5. Questions and Skills	Answer to a question - Update from requisition	Question: ***Answer before change:
5. Questions and Skills	Prescreening tab has been modified	Prescreening tab snapshot
6. Regulations	Regulations - Initial entry	EEO (USA) information entered
6. Regulations	Regulations - Initial entry	Employment Equity (Canada) information entered
6. Regulations	Regulations - Update	EEO (USA) information updated
6. Regulations	Regulations - Update	Employment Equity (Canada) information updated
6. Regulations	Regulation tab has been modified	Regulation tab snapshot
7. Candidate Info	Contact information - Initial entry	
7. Candidate Info	Contact information - Update	
7. Candidate Info	Contact Information - Update	{Field Name} before change: *
7. Candidate Info	Basic profile - Update	{Field Name} before change: *
7. Candidate Info	New password generated	
7. Candidate Info	Candidate shared	The information on this candidate has been shared with:
7. Candidate Info	Exported to SAP	
7. Candidate Info	Profile tab has been modified	Profile tab snapshot
8. Resume	Cover Letter - Update	Cover letter before change: Details
8. Resume	Pasted resume - Update	Pasted resume before change: Details
8. Resume	Career Objectives - Update	Career objectives before change: Details
8. Resume	Supplementary Comments - Update	Supplementary comments before change: Details
8. Resume	Education - Added	

Category	Tracking Event	Event Detail
8. Resume	Education - Removed	
8. Resume	Education - Update	{Field Name} before change:
8. Resume	Work experience - Added	
8. Resume	Work experience - Removed	
8. Resume	Work experience - Update	{Field Name} before change:
8. Resume	Resume tab has been modified	Resume tab snapshot
9. Correspondence	Correspondence sent	
9. Correspondence	Message Printed	
9. Correspondence	Sent	
10. Attachment	File attached	
10. Attachment	File deleted	
11. Candidate File Update	Entered the candidate's profile	Via Capture Resume
11. Candidate File Update	Submitted profile	
11. Candidate File Update	Submitted profile	Via File Import
11. Candidate File Update	Updated profile	
11. Candidate File Update	Updated profile	Following a request for more information
11. Candidate File Update	Updated profile	Via File Import
11. Candidate File Update	Updated the candidate's profile	Via Capture Resume
11. Candidate File Update	Application updated	
11. Candidate File Update	Application updated	Via File Import
11. Candidate File Update	Updated the candidate's application	Via Capture Resume

Merging Candidate Files

As a recruiter, you will often find duplicate candidate files in your normal course of business after performing a quick search or an advanced search. If you find potential duplicate files, you can use the merge action to merge the candidate files into one file. The merge action is available in the following contexts:

- Quick Search
- Advanced Search
- Candidate folders

1. In the search results page, select two candidate files.
2. Click Merge... in the toolbar.
3. In the Merging Candidate Files window, select the candidate file that will be enhanced with the content of the other file (i.e., the master file), enter comments and specify if you wish to send a notification to the candidate or the agent.

The system suggests a master file as follows:

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

4. Click Done.

To determine if the two candidate files are duplicate files, the system performs a duplicate check against fields specified by your system administrator.

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

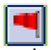
If there is a match between the fields, the system merges the two candidate files. The master candidate file is enhanced with the content of the duplicate file, and the duplicate file is then deleted. When a merge occurs, the content of the duplicate file is added to the content of the master candidate file. For the Education block, field content is copied over if Institution, Program or Education Level are different. For the Work Experience block, field content is copied over if Employer or Job Function are different. Note that the content of custom fields is also merged.

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

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

These messages are available in the Correspondence Manager and can be customized:

- Duplicated Candidate Email, Candidate
- Duplicated Candidate Email, Agent

The  icon is set on the new candidate file to notify requisition owners who have this candidate in their selection process.

Events relating to the merge action are displayed in the candidate file Tracking tab:

Events	Details
Candidate file merged	This candidate file has been enhanced with the content of the following file:
Candidate file merged	This candidate file has been merged with the following file:

Things to consider

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

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

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

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

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

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

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

Is it not possible to batch delete duplicate candidate files.

9 Searching for Candidates

Overview

The **Search for Candidates** link lets you search for candidates who have applied for a job or who have submitted their candidate profile. You can search by keyword, last update, internal/external candidates, disqualified candidates, as well as within a geographic region (zip/postal code, radius location) region.

To access the search feature:

1. In the main menu, click **Search for Candidates.** The **Advanced Candidate Search** page opens.

Buttons and Icons

Back to Menu Return to the **Welcome** page.	Save Save the information in a requisition or in a candidate file.
Cancel Cancel the requisition you are creating without saving the changes.	Move from one page to another or move directly to the first page or to the last page of a list.
Add ► Add a selected element to a list of available elements.	◄ Remove Remove elements from a list of selected elements.
Search Launches the search process.	Save as Default Uses the search criteria displayed on the search page criteria as default search values.
Clear Clear all search criteria.	Search... Open selector windows.
⊞ More Criteria Click to view additional search criteria, or to hide search criteria.	Open the calendar.
Print Click to print your search results.	Click to match a candidate to a requisition. The requisition selector opens.
Share... Click to share candidates with internal and/or external users.	Click to add or remove columns in the candidate list. If only one list format is available, the **List Format** button will not be available.

Searching for Candidates

1. In the main menu, click **Search for Candidates.** The **Advanced Candidate Search** page opens.
2. If activated by your system administrator, you might have the ability to select the requisition for which you want to archive search criteria and results. To do so, open the selector window to select a requisition.

This feature is only available to U.S. clients in order to comply with a new regulation of the *Office of Federal Contract Compliance Programs* (OFCCP) regarding the collection of gender, race and ethnicity data for each candidate. When performing a search, search criteria and/or results are archived in the database. The information is kept in the database for two years.

3. Enter as many criteria as necessary. The various fields are described in "Understanding Search Fields" on page 9-4.
4. Determine if you want to view **Disqualified Candidates,** and **External** and **Internal** candidates.
5. Click **Search**.

Understanding Search Fields

Keywords

The Advanced Search returns keywords found in candidate names, addresses, phone numbers, pasted resumes, cover letters, additional information, text answers to prescreening questions, the last three files candidates attached, the last two files recruiters attached, program descriptions, institution descriptions, employers' names, job function descriptions, recruiter comments, source descriptions, event descriptions, and all text-based custom fields.

Conjunctions, prepositions, articles and other words in English that are not key to searches are ignored by the search engine. Such words are often called "stop words". However, stop words in languages other than English are treated as valid search terms. For example, if you search for "les institutions" (the French equivalent of "the institutions"), the search engine would consider both "les" and "institutions" to be search terms.

The attached files that are searched must be in a supported format: Word, Excel, WordPerfect, text, rich text, HTML, and PDF (Acrobat). All system-supported formats may not be allowed by your company.

Last Update

To limit the candidates retrieved by the most recent creation date or the date the candidate file or application was updated by a Manager WebTop user or the candidate, select from the Last Update list or use the calendar icons.

When performing a search, the date is truncated in Universal Time (UTC) such that hours are not considered. As a result, candidate search results could vary slightly.

Possible choices are:

- Does not matter
- Last 2 Days
- Last 7 Days
- Last 14 Days
- Last Month
- Last 3 months
- Last 6 months
- Last 12 months

External/Internal Candidate

To limit the candidates who are retrieved to either external or internal candidates, select from the External/Internal Candidate list. Possible choices are:

- Does not matter: search for both internal and external candidates
- External: search for external candidates only
- Internal: search for internal candidates only

Disqualified Candidates

Search on candidates who have been disqualified during the prescreening process. Possible choices are:

- Excluded
- Included

Place of residence

You can search where candidates live by specifying the actual and surrounding geographical area or postal code. Possible choices are:

- Location
- Within X miles of Zip/Postal Code
- Within X miles/km of Location

To do so, perform one of the following:

- In the **Place of Residence** section, to specify an exact geographic location, click . The **Location Selector** window opens.
    - Select a location.
    - Click **Done**.
- In the **Place of Residence** section, to specify a geographic location with the surrounding area, select either "Within x Miles of Location" or "Within x km of Location".
    - Click . The **Location Selector** window appears
    - Select a location.
    - Click **Done**.
- In the **Place of Residence** section, to specify a ZIP code or postal code with the surrounding area, select either "Within x Miles of ZIP/Postal Code" or "Within x km of ZIP/Postal Code".
    - Enter the ZIP code or postal code.
    - Choose a country.

The "Within x Miles of ZIP/Postal Code" or "Within x km of ZIP/Postal Code" search results could include candidates living outside the specified area or exclude candidates living within the specified area. This can occur if candidates indicated a city as their place of residence but did not specify their ZIP code or postal code.

A user type permission is available to control whether a user is authorized to search for candidates located outside the locations associated to the groups he/she belongs to. When this permission is granted, the **Place of Residence** search criterion becomes a mandatory field (asterisk beside the field name) with a default value. Also, this permission forbids the use of the radius search feature, which is not restricted by country, but rather by latitude and longitude. The groups to which the user belongs determines which locations the **Place of Residence** search criterion shows. See your system administrator to activate this permission.

Location Selector

Lets you select a location. You can enter a location in the field, and then press Enter on your keyboard. If you have selected a state/province or city, the **Location Selector** opens. You can also click  to open the **Location Selector,** and then select a specific location. See "Location Selector (single or multiple)" on page 14-5.

More Criteria (+)

To view other search criteria that were configured by your system administrator, click **More Criteria.** If no additional criteria were selected by your system administrator, **More criteria** will not appear.

Candidate Search Results

After a search, the **Candidate Search Results** window opens. It contains candidates who meet the specified criteria.

The search engine can retrieve any number of candidates although, for performance reasons, only the top 300 best matches are displayed. However, more than 300 candidates be viewed by performing multiple searches with different date ranges: Last update is between…and…

For example, by performing two separate searches (March 2003 to February 2004 and March 2004 to February 2005), you would in fact be able to view and save candidates from March 2003 to February 2005, or up to 600 candidates.

If the search results span several pages, use the navigation icons or the **Show** list to find candidates quickly. The **Show** list only filters candidates from the original results list (up to 300).

Since the candidate database is updated about every ten minutes, records that were recently modified, either by the candidate or the recruiter, may not appear in the initial search results. If you expect to see a particular record in the search results and it is not displayed, wait at least ten minutes and then repeat the search.

On the **Candidate Search Results** page, you can

- Configure your list format.
- Go back to your search query and change your search criteria.
- Filter your search results.
- Print your search results.
- Select a candidate to open a **Candidate File.**
- Match a candidate to a requisition.
- Share a candidate with other users.
- Return to the **Welcome** page.

Additional Information on Candidate Search Results

In a candidate file, the search tool will search on:

- The most recent information on a candidate profiler.
- Information on the three most recent attachments provided by the candidate or by the recruiter (linked to the candidate information).
- Information contained in the two most recent attachments provided by the recruiter, and linked to any job specific application.

Candidate search results will also include comments made by the recruiter and the description of the source or the event linked to the candidate profiler and to job-specific applications.

Data	Most Recent Candidate Profiler File		Job-specific Application	
	Searchable	Can be viewed in a Candidate File	Searchable	Can be viewed in a Candidate File
Candidate Attachment (3 most recent)	Yes	Yes	Yes	Yes
Recruiter Attachment (2 most recent)	Yes	Yes	Yes	Yes
Recruiter comments	Yes	Yes	Yes	No
Source Description	Yes	Yes	Yes	No
Event Description	Yes	Yes	Yes	No
Other Information	Yes	Yes	Yes	No

If text is entered in the keyword field, the search results will only display information included in the most recent candidate information (except for the recruiter comments and source events linked to a job-specific application).

Other Advanced Search Options

When performing a search, the following options are available.

Icon	Description
	Prints candidate files. See “Printing Candidate Information” on page 9-9.
Match...	Matches candidates to requisitions. See “Matching Candidates to Requisitions” on page 8-5.
Share...	Shares a candidate with other recruiters. See “Sharing Candidates” on page 8-5.

Configuring the List Format

You can personalize your candidate list format directly from the search results page.

1. Click  to the right of the navigation buttons. The **List Format Selector** opens.
2. In the **List Format** menu, select a predefined list format or a personal list format.

The predefined list formats cannot be modified. See “List Format Selector” on page 6-10.

Printing Candidate Information

You can print candidate lists, candidate files, or specific content of selected candidate files.

1. If you want to print your search results, click **Print** to open the **Configure Printing** window.
2. If you want to print all the candidate files in the **Candidate Search Results** list, select **All Candidates.**
3. If you want to print only selected candidates, (previously selected in the **Candidate Search Result** list), click **Selected Candidates.**
4. In the **Content and Order** section, select **List only,** if you only want to print the list of candidates without any content information.
5. If you want to print content information on the selected candidates, select **Candidate File Details,** and then select the different sections you want to print.
6. In the **Options** section, select **Insert page break after each tab** if you want information to be printed by sections selected in **Content and Order** (Prescreening, Screening, Resume, etc.)
7. Select **Insert page break after each page,** if you want candidate files to be printed one after the other.

Please Note: If no page break information is selected, the candidate files will be printed one after the other and will include selected sections.

8. See "Printing a Candidate File" on page 8-13.

Boolean Operators, Syntax and the Keywords Field

You can use Boolean syntax in the **Keywords** field to construct sophisticated searches.

Use the AND operator between your search terms to search for candidate files that contain all of the terms. For example, a search for **university AND librarian** will retrieve candidate files that contained both the words **university** and **librarian**.

Use the OR operator between your search terms to search for candidate files that contain at least one of the terms. For example, a search for **university OR college** will retrieve candidate files that contained either word or both words.

Use the NOT operator to exclude candidate files that contain the terms you specify. For example, a search for **computer NOT technician** will retrieve files that contained the word **computer** but only if they did not contain the word **technician**.

The wildcard character * can be used while the wildcard character ? is not supported. You can place a wildcard character within or at the end of a word but not at the beginning of a word. For example, a search for **comput*** will retrieve all words that begin with **comput** such as computer, computing, computers, computation.

Stemming can be used by placing $ at the beginning of a word. The search engine searches for the word and its various forms. For example, a search for **$teach** will retrieve **teach**, **teaches**, **teacher**, **teaching**, and **taught**.

Quotation marks can be used to search for occurrences of an exact expression. For example, a search for **"database administrator"** will retrieve candidate files that contain the exact term **database administrator** with no terms or punctuation separating the two words.

Parentheses can also be used. Operations enclosed in parentheses are performed before other operations. For example, a search query for candidates who worked as marketing or advertising consultants could look like the following:

(market* or advertis*) and (consult* or agent or representative)

The search engine would retrieve candidate records that satisfy the two conditions:

- Candidate files containing a word that begins with **market** or **advertis** such as **market**, **markets**, **marketing**, **advertise**, **advertising**, **advertisement**.
  AND
- Candidate files containing **agent**, **representative**, or a word beginning with **consult** such as **agent**, **representative**, **consult**, **consults**, **consulting**, **consulted**, **consultant**.

Neither search terms, nor operators are case-sensitive.

If you do not use Boolean syntax and simply enter a number of words in the **Keywords** field, those candidate files that contain all of the terms will be retrieved.

If the words AND, OR, or NOT are present in the **Keywords** field, the search engine assumes they are Boolean operators. If you want to search for any of these words and do not want the search engine to treat them as operators, use quotation marks. For example, to search for the exact words "speaks

English but is not bilingual", enter the following in the **Keywords** field (including the quotation marks): "speaks English but is not bilingual".

10 Correspondence Manager

Overview

The Correspondence Manager is designed to help you send messages to candidates. It consists of a correspondence wizard that guides you through the process of sending correspondence to a candidate throughout the hiring process.

According to the action you decide to take in the Action Dialog window, the Send Correspondence... option can become available. For example, you could send a message to candidates to invite them to complete their profile, to notify them that their application has been rejected, etc.

Buttons and Icons

Context Provides information such as the name of the candidate, the title and number of the requisition, as well as the job, location and organization.	**Back** Return to the previous page.
Continue Go to the next step in the wizard.	**Cancel** Cancel the correspondence without saving the changes.
Send... Send your email correspondence. This button is only displayed when your message is ready to be sent.	**Print** Print a correspondence. This button is only displayed when the message is ready to be sent.
Edit... Edit the content of the message.	

Creating Correspondence While Changing a Candidate's Step or Status

If you are changing the step or status of multiple candidates and want to send them a message, see "Creating Correspondence for Multiple Candidates When Changing Their Step or Status" on page 10-5.

1. Display the candidate file of the candidate whose step or status you want to change and to whom you want to send correspondence.
2. Click **More Actions** and then click **Change Status...**
3. Click a new status in the **to** drop-down list.
4. Click the check box next to **Send Correspondence...** and then click **Done**. The Correspondence Manager opens.
5. Click the **Select a message template** field and then select a template.
6. Click a delivery method to select it.
    - Email
    - Printed Letter
    - Printed Fax

   For the printed fax, a cover page can be included. This cover page can be customized as is the case for other types of messages. However, there is only one cover page for the entire organization.

The **Correspondence Manager** does not actually send a fax or a letter. These actions must be performed manually by the hiring manager. However, the printing action in the **Correspondence Manager** is how the system registers that a fax or a letter has been sent.

7. If you wish, enter comments in the **Reference / Comments** field.
8. Click **Continue**.
9. Select each paragraph you want to include in your message. Click **Continue**. See "Overview" on page 8-2
10. For subsequent steps, see "Editing Correspondence Sent to a Single Candidate" on page 10-4.

Editing Correspondence Sent to a Single Candidate

To view the previous steps, see "Creating Correspondence While Changing a Candidate's Step or Status" on page 10-3.

1. On the following screen, click **Edit...**
2. Make your changes to the text and add file attachments if you wish.

   You can apply HTML formatting to the text. See "HTML Editor" on page 13-1. You can also copy text in the HTML Editor, including HTML formatted content such as HTML forms.

   You can add images to the message by using predefined logos.

3. Click **Done**.
4. Click **Continue**.
5. Click **Send...** The message sent to the recipient contains the changes you indicated.

Creating Correspondence for Multiple Candidates When Changing Their Step or Status

If you are changing the step or status of a single candidate and want to send the person a message, see "Creating Correspondence While Changing a Candidate's Step or Status" on page 10-3.

1. In the Requisitions list, click number in the Candidates column that corresponds to the requisition.
2. On the Candidates page, click the check box next to each candidate to whom you want to assign a new status and send the same correspondence. Selecting candidates who are at different steps and have different statuses creates conflicts; select candidates who are at the same step and have the same status in the workflow.
3. Click **More Actions** and then click **Change Status...**
4. Click a new status in the **to** drop-down list.
5. Click the check box next to **Send Correspondence...** and then click **Done**. The Correspondence Manager opens.
6. Click the **Select a message template** field and then select a template.
7. Click a delivery method and, if you wish, enter a comment in the Comments field.
8. Click **Continue** three times. For subsequent steps, see "Editing Correspondence Sent to Multiple Candidates" on page 10-6.

Editing Correspondence Sent to Multiple Candidates

To view the previous steps, see "Creating Correspondence for Multiple Candidates When Changing Their Step or Status" on page 10-5.

1. On the following screen, click **Edit All...**
2. When the "Changes made to individual message will be lost. Are you sure that you want to continue?" message appears, click **Yes**.
3. Make your changes to the text and add file attachments if you wish.

You can apply HTML formatting to the text. See "HTML Editor" on page 13-1. You can also copy text in the HTML Editor, including HTML formatted content such as HTML forms.

You can add images to the message by using predefined logos.

The file attachments will be sent to all recipients of the message.

4. Click **Done**.
5. If you wish, you can click the navigation icons to verify that your changes have been reproduced in the email message that will be sent to each candidate.
6. Click **Continue**.
7. Click **Send...** The message sent to all the recipients contains the changes you indicated.

11 Creating Reports

Using Taleo Reports

Recruiters, if they have access to the Staffing Metrics Reporter in the Manager WebTop, can view a wide range of custom and standard reports. Filtering and grouping features in InfoView and WebIntelligence enable users to determine which data is displayed in the reports and how it is organized and presented.

To access the Staffing Metrics Reporter:

1. From the main menu, click Reports.

Taleo reports are dealt with in more detail in the Staffing Metrics Reporter Guide.

12 Accessing Onboarding Processes

Accessing Onboarding Processes

Taleo Onboarding is available if your organization has acquired it.

Taleo Onboarding speeds up time to contribution for new employees and contractors by streamlining and automating the onboarding process, while reducing excessive paperwork and improving policy and legal compliance. It bridges the gap between promise and productivity with tools such as the New Hire Portal, specialized correspondence, fully customizable forms and automated workflow.

Taleo Onboarding is deployed as a separate but seamlessly integrated module designed to facilitate the onboarding process for permanent workers. Because of the modular design, future releases will also support onboarding and offboarding of contingent workers.

To access Taleo Onboarding:

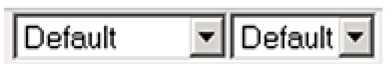
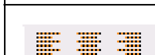
1. From the main menu, click Onboarding processes.

Onboarding processes are dealt with in more detail in the Onboarding User Manual.

13 HTML Editor

Overview

The HTML Editor in the Manager WebTop is available when you need to create, edit and format text when creating a requisition (Internal and External Descriptions) or when creating messages in the Correspondence Wizard. The HTML Editor provides the basic tools to help you create and enhance job internal and external job descriptions that will be posted on career sections and correspondence that will be sent to candidates, or to other users.

Tool	Description
	Cuts selected text.
	Copies selected text.
	Pastes selected text.
	Searches text.
	Sets font and font size.
	Inserts a link. See "Inserting a Link" on page 13-4.
	Verifies the spelling in the text. See "Using the Spell Checker" on page 13-4.
	Inserts a special character in the text. See "Selecting a Special Character" on page 13-3.
	Removes conflicting Word code when pasting text from MS Word. See "Cleaning Microsoft Word Code" on page 13-5.
	Sets text to bold.
	Sets text to italic.
	Sets text to underline.
	Sets the color of the text. See "Selecting a Text or Background Color" on page 13-3.
	Sets the background color of the text. See "Selecting a Text or Background Color" on page 13-3.
	Aligns text left, center, or right.

Tool	Description
	Indents text.
	Creates a numbered list or bulleted list.
	Creates a table in the Correspondence Manager only. See “Inserting a Table” on page 13-3.
	Displays an enlarged view of the job description.
	Displays HTML Editor help.
Preview	Previews your text.

Selecting a Text or Background Color

1. In the **HTML Editor**, click or . The **Color Selector** window opens.
2. Select a color for your text or background.
3. Click **Done**.

Inserting a Table

This tool is only available in the Correspondence Manager.

1. In the **HTML Editor**, click . The **Table Properties** window opens.
2. Enter the number of columns (1 to 100).
3. Enter the number of rows (1 to 100).
4. Enter the width of the table.
5. Select borders for the table or not.
6. Click **Done.**

Selecting a Special Character

1. In the **HTML Editor**, click . The **Character Selector** window opens.
2. Select the special character.
3. Click **Done.**

Using the Spell Checker

1. In the **HTML Editor**, click . The **Spell Checker** window opens.
2. Misspelled or unrecognized words are highlighted. You can:
   - Use one of the suggested words.
     1. In the **Suggestions** field, select the corrected word.
     2. Click **Change** to change this occurrence or **Change All** to change all occurrences of the word.
   - Change the word to something else.
     1. In the **Change to** field, enter the corrected word.
     2. Click **Change** to change this occurrence or **Change All** to change all occurrences of the word.
   - Ignore the word.
     1. Click **Ignore** to ignore this occurrence or **Ignore All** to ignore all occurrences of the word.
3. Click **Done** to close the spell checker and save your corrections.

Inserting a Link

1. In the **HTML Editor**, select the text. Click . The **Link Properties** window opens.
2. In the **Address** field, enter the address of the link with the proper protocol (Web site, email, etc.).
3. Click **Done.**

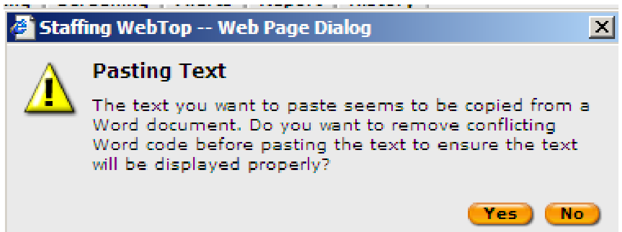
Finding Text

1. In the **HTML Editor**, click . The **Find** window opens.
2. Enter the search text in the **Find** field.
3. Select **Match whole word only** to find the exact text you entered and not just a fragment.
4. Select **Match case** to make the search case-sensitive.
5. Select **Up** or **Down** to search above or below the cursor position.
6. Click **Find** to start the search or to look for the next entry.
7. Click **Cancel**.

Cleaning Microsoft Word Code

In the HTML Editor, click  to remove conflicting Word code in existing requisitions.

When pasting text from a Word document in a current requisition, the following message appears:



14 Selection Tools

Overview

The Manager WebTop provides selection tools, such as selector windows and Show lists, to let you quickly find and sort elements in candidates and requisition lists. Show list and selector windows, found throughout the Manager WebTop, are used to make selections. The type of selector window varies according to the type of selection that is required.

Show List

Using the Show list is efficient because it limits the items displayed on the list to those that meet criteria you specify. The Show list helps you select criteria to filter your search. The list of available criteria varies according to the type of selection.

The Show list displays different menu boxes according to the selected criteria. For example, if you want to view candidates according to the First Name criteria, a contains box appears. The contents of this box varies according to the selected option.

More Criteria	Click ⊞ to add search criteria fields.
Any Criteria	When selected, the search results return at least one of the specified criteria.
All Criteria	When selected, the search results return all specified criteria.
Available xx	Shows the search results according to the selected criteria.

Selector Windows

Selector windows enable you to quickly find and select single or multiple items in a list. Selector windows have a variety of different names and are found throughout the application.

There are two types of selector window:

- Selector windows with a single pane which consists of a Show list and a list of items in a single window.
- Selector windows with a left pane and a right pane.

Left Pane

Show	This list is used to select the elements display order. • By Job: Displays the requisitions by job title. • By Location: Displays the requisitions by location. • By Organization: Displays the requisitions by organization.
Show Parent Folder Contents	Displays all elements in the parent folder of the tree structure. This option might not always be available.
Show Sub-folder Contents	Displays elements in the sub-sections of the tree structure.
Tree Structure	Represents your organizational hierarchy.

Selector windows containing a tree structure in the left pane have a button to collapse and expand the tree structure. By default, these selector windows are collapsed at entry, simplifying the interface and leaving that much more room for information in the list. When the tree structure is collapsed, the name of the item selected in the tree is displayed in the header.

Right Pane

The right pane contains a Show list and a list of elements associated with the folder or sub-folders selected in the left pane. When you click a folder or a sub-folder in the left pane, the list associated with the folder or sub-folders appears in the right pane.

More Criteria	Click to add search criteria fields.
Any Criteria	When selected, the search results return at least one of the specified criteria.
All Criteria	When selected, the search results return all specified criteria.
Available xx	Shows the search results according to the selected criteria.

Single Selection and Multiple Selections

Depending on the context, either the Single or Multiple Selector window will open. Single Selector windows contain the Available section and radio buttons. Multiple selector windows contain the Available and Selected sections and check boxes.

Using Selector Windows

Below is the standard procedure for using selector windows. The Job Field Selector is used as an example.

To select a job field:

1. In the left pane, from the **Show** list, select the structure display.
2. Select **Show Sub-folder Contents** if required.
3. Click **Refresh**.
4. In the right pane, from the **Show** list, select the search criteria. Click **More Criteria** to add search criteria.

   4a) Select **Any Criteria** or **All Criteria**.
5. Click **Refresh**.
6. For a single selection, select the job field in the **Available Job Fields** section.
7. For multiple selections, select the job fields in the **Available Job Fields** section. Click **Add**. The selected job fields now appear in the **Selected Job Fields** section.
8. Click **Done**.

Selector Window Criteria

The following pages presents search criteria of each selector window.

Organization Selector (single or multiple)

Available criteria for these windows are:

All	Displays all existing companies.
Company	Displays companies with specific company name elements.
Department	Displays companies with specific department elements.
Division	Displays companies with specific division elements.
Keyword	Displays companies according to a specific keyword in either the company, sector, department or division.

Your company levels may be labelled differently.

Job Field Selector (single or multiple)

Available criteria for these windows are:

All	Displays all existing job fields.
Category	Displays job fields with specific category name elements.
Function	Displays job fields with specific function name elements.
Speciality	Displays job fields with specific speciality name elements.
Keyword	Displays job fields according to a specific keyword in either the job field's category, function or speciality.

Your company levels may be labelled differently.

Location Selector (single or multiple)

Available criteria for these windows are:

All	Displays all existing locations.
World Region	Displays locations with specific world region name elements.
Country	Displays locations with specific country name elements.
State/ Province	Displays locations with specific state or province name elements.
City	Displays locations with specific city name elements.
Keyword	Displays locations according to a specific keyword in either the location's country, state, province, region or city.

Your company levels may be labelled differently.

Skill Selector

Available criteria for these windows are:

All	Displays all available skills.
Technical Skill	Displays skills with specific name elements.
Primary Skill of	Displays skills that are primary skills for a "category" and contain a specific element.
Keyword	Displays skills with a specific keyword
Visible by	Displays skills visible to all candidates, external candidates or internal candidates. This filter is only displayed if it has been activated in the Administrator WebTop.
Skill Library	Allows users to search for Taleo skills or {Company} skills that are not already defined in the company's Prescreening Skill Library.

Question Selector (single or multiple)

Available criteria for these windows are:

All	Displays all questions.
Question	Displays questions with specific elements.
Answer	Displays questions with specific answer elements.
Visible by	Displays questions visible to all candidates, external candidates or internal candidates. This filter is only displayed if it has been activated in the Administrator WebTop.

Agent Selector (single or multiple)

Available criteria for these windows are:

All	Displays all existing agents.
Name	Displays agents with specific name elements.
Agency	Displays agents who belong to a specific agency.
Specialities	Displays agents whose speciality matches the requisition's structure.

Requisition Selector

Available criteria for these windows are:

All	Displays all existing requisitions.
Requisition Number	Displays requisitions with a specific requisition number.
Recruiter	Displays requisitions with a specific recruiter name element.
Job Title	Displays requisitions with a specific title element.
Department	Displays requisitions with a specific department element.
Status	Displays requisitions with a specific status element.
Status Details	Displays requisitions with a specific status detail element.
Requiring Attention	Displays requisitions that need urgent attention (AIF Flag).
Keyword	Displays requisitions with a specific keyword.
Matching Requisitions	This option is available when matching candidates. It lets you modify the criteria used to associate requisitions and candidates.

Position Selector

Available criteria for these windows are:

All	Displays all existing positions.
Position ID	Displays positions with a specific ID element.
Job Code	Displays positions with a specific job code element.
Title	Displays positions with a specific title element.

Department Selector

Available criteria for these windows are:

All	Displays all existing departments.
Department Number	Displays departments with a specific department number element.
Department Name	Displays departments with a specific department name element.
Hiring Manager	Displays departments with a specific hiring manager name element.

Recruiter	Displays departments with a specific recruiter name element.
Effective	Displays departments that are effective for a specific time period.

Job Template Selector

Available criteria for these windows are:

All	Displays all existing job templates.
Job Code	Displays job templates with a specific job code element.
Owner	Displays job templates with a specific owner name element.
Effective	Displays job templates with a specific effective date element.
Title	Displays job templates with a specific title element.
Keyword	Display job templates with a specific keyword.

User Selector (Single and Multiple)

Available criteria for these windows are:

All	Displays all existing users.
Frequent Collaborators	Displays the list of collaborators defined in My Setup. To be available, the Collaborators field must be activated by your system administrator.
Suggested Users	Displays the owners (recruiter, recruiter assistant, hiring manager, hiring manager assistant), the collaborators and the frequent collaborators associated to the requisition. However, only users who are able to complete the selected action are available for selection. To be available, the Collaborators field must be activated by your system administrator and you must access the User Selector from a requisition.
Name	Displays users with specific name element.
Email Address	Displays users with a specific email element.
Employee ID	Displays users with a specific employee ID number element.
Title	Displays users with a specific title element.
Department	Displays users with a specific department element.
User Type	Displays users with a specific user type element.
Group	Displays users from a specific user group.

Employer Selector

Available criteria for these windows are:

All	Displays all existing employers.
Employer	Displays employers with a specific name element.

Institution Selector

Available criteria for these windows are:

All	Displays all existing institutions.
Institution	Displays institutions with a specific name element.
Type	Displays institutions with a specific type element.

Program Selector

Available criteria for these windows are:

All	Displays all existing programs.
Program	Displays programs with a specific name element.

Time Zone Selector

Available criteria for this window are:

All	Displays all available time zones.
Location	Displays time zones with a specific location element.
Time Zone Description	Displays time zones with a specific description element.
GMT +/-	Displays time zones with a specific Greenwich Mean Time element.

Source Selector

Available criteria for these windows are:

All	Displays all sources.
Source Name	Displays sources with a specific name element.
ID	Displays sources with a specific ID.

Type	Displays sources of a specific type. For example, job boards, billboards, news groups, magazine and trade publications, professional associations, etc.
Visibility	Displays sources that are internal or external.
Origin	Displays sources with a specific name element (Taleo system sources or user-defined sources).

Skill Selector (Left Pane)

Show Skills from

The left pane of the Skill Selector window slightly differs from that of other selector windows: it contains an additional list called Show Skills from. This list contains the following options:

Taleo	The complete Taleo skills library classified according to generic Job fields.
{Company}	Skills resulting from the mapping of your company Job fields to the Taleo Job fields. As a result, the {Company} skill list contains skills that are considered relevant for your company.
Skill Library	Skills selected by your company among the Taleo skills library (that is, skills identified as pertinent by your company). These skills are classified according to the Location and Job fields of your company.

Organization-Location-Job (OLF) Group Sections

Job Group Section

1. Click Select... The Selection Menu opens.
2. Use the lists to select a job category, function, and speciality. Click Done. The selected values appear in the Job section.
3. Click to clear the selections.

Or

1. Enter a value in the field and click .
2. If there is an exact match, all fields above it are filled automatically. For example, if you select a speciality and there is an exact match, the Category and Function fields are filled automatically.

   If there is no exact match, the Job Field Selector window opens. Select the job field.

   The selected values appear in the Job section.
3. Click to clear the selections.

Or

1. Click . The Job Field Selector window opens.

2. Select a category, function and speciality. Click **Done**. The selected values appear in the **Job** section.
3. Click to clear the selections.

Organization Group Section

1. Click **Select...** The **Selection Menu** opens.
2. Use the lists to select a company, sector, department, and division. Click **Done**. The selected values appear in the **Organization** section.
3. Click to clear the selections.

Or

1. Enter a value in the field and click .
2. If there is an exact match, all fields above it are filled automatically. For example, if you enter a division, and there is an exact match, the **Sector** and **Department** fields are filled automatically.

   If there is no exact match, the Organization Selector window opens. Select the company, sector, department, and division.

   The selected values appear in the Organization section.
3. Click to clear the selections.

Or

1. Click . The **Organization Selector** window opens.
2. Select an organization, sector, department, and division. Click **Done**. The selected values appear in the **Organization** section.
3. Click to clear the selections.

Primary Location Group Section

1. Click **Select...** The **Selection Menu** opens.
2. Use the lists to select a country, state/province, region, and city. Click **Done**. The selected values appear in the **Location** section.
3. Click to clear the selections.

Or

1. Enter a value in the field and click .
2. If there is an exact match, all fields above it are filled automatically. For example, if you select a region, the name of the state/province and country are filled automatically.

   If there is no exact match, the Location Selector window opens. Select the country, state/province, region, and city.

The selected values appear in the Location section.

3. Click  to clear the selections.

Or

1. Click . The **Location Selector** window opens.
2. Select the country, state/province, region, and city. Click **Done**. The values you selected appear in the **Location** section.
3. Click  to clear the selections.

15 Scoring and Weighting

Scoring and Weighting

ACE Recruiting™ enables you to get to your top candidates instantly, without sorting through volumes of unqualified applicants.

How does ACE Recruiting work?

- The candidate is asked prescreening (skills and job-specific) questions.
- A level of importance is attached to certain answers.
- By selecting answers, candidates are automatically prescreened.

The Four Steps of ACE Recruiting

There are four steps to the ACE Recruiting process:

1. ACE Requisitions - Abilities, Certifications, Experience

   <u>Defining positions and identifying the ideal candidates</u>

   The ACE requisition uses the ideal candidate criteria to determine prescreening skills and/or job-specific questions, as well as to determine the scoring strategies appropriate for the requisition.

2. ACE Communications - Automated Communication Exchange

   <u>Automated system messages and candidate identification</u>

   Provides recruiters with real-time notification of candidates meeting the ACE criteria threshold. This threshold was established on the requisition to determine a top candidate.

3. ACE Candidate Management - Accelerated Candidate Evaluation

   <u>Scoring, sorting and selection system</u>

   Provides automated prescreening activities that cut cycle time. You have options to sort candidates to focus your time and energy on those you have identified as top candidates.

4. ACE Hire Review/Analysis - Assessing Candidate Excellence

   <u>Structured approach to measuring quality of hires</u>

   Provides you with a review stage to measure the entire ACE process and build quality in overall hiring. This assists you in evaluating the quality of ACE candidates to ensure that ACE criteria are reflective of ideal candidates.

Key Benefits of ACE Recruiting

Each ACE step enhances your hiring process. The entire ACE process improves consistency, quality and objectivity. This in turn streamlines hiring time frames and improves the overall quality of hires.

Weighting and Criteria for Skills and Questions

To score candidates, two actions must be taken when attaching questions and skills to requisitions and templates.

- Specify whether criteria are considered requirements or assets.
- Determine the weighting of the questions and skills.

Using Criteria that are Required or Assets

It is important to design questions that correctly score candidates based on their actual work experience and skills.

For example, if you want candidates who know Java and who consider their knowledge of C an asset, then the question could be worded as follows:

- Question: Which of the following programming languages do you know best?
- Answers: Java (required) / Perl / C (asset)
- Candidate's answer: C

The candidate will be correctly identified as having the asset but not the requirement.

When having an asset *implies* having a requirement, the question must be designed to address both criteria. For example, the following question requires that candidates have at least two years of experience. Six years of experience is considered an asset.

- Question: How many years of experience do you have?
- Answers: Two (required)/Three to five/Six or more (asset)
- Candidate's answer: Six or more

The candidate will be incorrectly identified as not meeting the requirement. In this case, it would be more accurate to create two questions:

- Question 1: Do you have two years of experience or more?
- Answers: Yes (required)/No
- Candidate's answer: Yes

- Question 2: How many years of experience do you have?
- Answers: Less than two years/Three to five years/Six or more (asset)
- Candidate's answer: Six or more

The candidate will be correctly identified as meeting the requirement and the asset.

Skill Assessment

The skill assessment score consists of three parts: Proficiency/Last Used basic score, Proficiency/Experience Rectifier and Interest Weight. The skill score is the sum of the basic score and rectification value, multiplied by the interest weight. The maximum result is 100.

Proficiency/Last Used Basic Score

This is the basic score attributed to a skill. It is based on a candidate's level of proficiency and the last time the skill was used.

	Last Used					
Proficiency	Never	Current	Last year	1-3 years ago	3-4 years ago	5+ years ago
None	0	0	0	0	0	0
Beginner	5	25	20	15	10	5
Intermediate	10	50	40	30	25	20
Advanced	20	80	70	60	50	40
Expert	30	100	90	80	70	60

Proficiency/Experience Rectification

The score from the Proficiency/Last Used Score Basic table is rectified by the candidate's declared experience as per the following table. The underlined numbers represent off-limit answers and could be considered invalid.

	Experience				
Proficiency	No exp.	- 1 year	1-3 years	3-4 years	5+ years
None	0	+5	+10	+15	+20
Beginner	0	+5	+10	+15	+20
Intermediate	-10	0	+5	+10	+15
Advanced	-20	-10	0	+5	+10
Expert	-30	-20	-10	0	+5

Interest Weight

Skill assessment should attribute a higher score to a candidate who is a passionate beginner than to a bored expert. Therefore, the following scaling factor is applied to the score calculated so far.

Interest	Weight	Description
None	0.5	divide by 2
Low	0.5	divide by 2
Medium	1	current score
High	1.25	+ 25%

Proficiency Level Definitions

None	Candidates have no experience or training regarding the skill.
Beginner	Candidates have received basic training and can perform the skill with some assistance. They received classroom or field training, either as an apprentice or through an internship.
Intermediate	Candidates have completed at least one successful experience. Help from an expert may be required occasionally, but candidates can usually perform the skill themselves.
Advanced	Candidates can perform the skill without any assistance. They are recognized within their company as "the people to ask" regarding the skill. They might be known in the industry as a specialist. They have extensive experience and could teach the subject if they had teaching skills.
Expert	Candidates can answer all questions about the skill and industry-related questions. They have contributed to developing, defining, or improving the skill. They have published a paper on the subject and advanced people actively seek their advice. They are often offered jobs.

Experience Level Definitions

None	Candidates never had a job where they were required to perform the skill.
Less than 1 year	Candidates possess between 1 and 11 months of work experience during which they had to perform the skill.
1 to 3 years	Candidates possess between 12 and 35 months of work experience during which they had to perform the skill.
3 to 5 years	Candidates possess between 36 and 59 months of work experience during which they had to perform the skill.
5 years +	Candidates possess 60 months or more of work experience during which they had to perform the skill.

Last Used Level Definitions

Never	Candidates have never performed the skill.
Current	Candidates perform the skill as part of their current employment.
Last Year	Candidates successfully performed the skill within the last 11 months.
1 to 3 years ago	Candidates successfully performed the skill between 12 and 35 months ago.
3 to 5 years ago	Candidates successfully performed the skill between 36 and 59 months ago.
5 years ago or +	Candidates successfully performed the skill between 60 months ago or more.

Interest Level Definitions

None	Candidates have absolutely no interest in performing or learning the skill.
Low	Candidates have a lot of experience and key knowledge regarding the skill but have little interest in performing the skill often.
Medium	Candidates would be willing to perform the skill daily in their job.
High	Candidates have a high interest in jobs that require them to perform the skill. Performing the skill is a high source of motivation. They are willing to participate in improving how the skill is performed at the company.

16 FAQs

Frequently Asked Questions (FAQs)

1. I am creating a requisition, and I don't see all the pages described in the Creating a Requisition chapter.
   - Pages and Information Blocks may vary according to the requisition workflow selected by the system administrator.
   - New pages and information blocks may have been created.
   - Pages and information blocks may also have been renamed.
2. I am creating a requisition and I cannot see the EEO fields on the Administration page.
   - EEO applies to the United States only. The United States location was not selected in Primary Location or Other Location on the Structure and Template page.
3. I am creating a requisition and I cannot see the EE fields on the Administration page.
   - EE applies to Canada. The Canada location was not selected in Primary Location or Other Location on the Structure and Template page.
4. I am looking for a specific template and my results show 0 templates. Why can't I find the template I am looking for?
   - When selecting a job template in the Job Template Selector, check the left pane. If Requisitions is selected in the Show field, change Requisitions to All.
   - If By Job, By Location or By Organization, is selected, change the selection to view other Job Templates.
   - Double check that you are on the specific structure folder or sub-folder for the template you are seeking.
   - The Requisition Type of the job template has been disabled.
5. When I create a requisition, I don't see the Requisition Types options at the beginning of the process.
   - If only one requisition type is enabled at your organization, all the requisitions will be created with the same requisition type. In this case, the requisition type window does not appear when you create a new requisition.
6. When I create a requisition, I don't see the Requisition Autofill page
   - The Requisition Autofill setting may not be enabled in your user setup.
   - To enable Requisition Autofill, click Modify My Setup on the Welcome page. The My Setup window opens.
   - On the Preferences tab, select the Requisitions sub-tab.
   - Select I want to use the "automatic filling" option of the requisition wizard.
7. When I create a requisition, I don't see the Posting Options page.
   - If only one posting option is available at your organization, all the requisitions will be created with the same posting options. In this case, the Posting Options page does not appear when you create a new requisition.
   - You may not have the permission to post requisitions. In some organizations, only recruiters can post requisitions.
8. On the External Description page, what is the Job Board Summary Description text field used for?
   - Some job boards limit the number of words or characters used for the job description. To accommodate this requirement, it is necessary to write a very short job description (maximum 1,000 characters).
   - When this field is used, only this description will be passed on to the job board.

9. How can I find the requisitions I own?
    - On the **Welcome** page, click **Requisitions** in **View my Requisitions and Candidates.** The **Requisitions and Candidate** page opens. The requisitions that you own or share with a recruiter are listed under **My Requisitions.** On the main menu, click **View My Requisitions.**
10. How can I find a recruiter's comments in the system?

On a **Candidate File**

- The recruiter or other users can add comments in a candidate file. The comments appear on the **Tracking** tab.

On a **Requisition**

- To view the comments included on a requisition, select **View My Requisitions** on the main menu to open the requisition list.
- Select a requisition. The comments appear on the **History** tab in the **Comments** column.

11. When is it no longer possible to make changes to a requisition?

    To make changes to a requisition, the requisition must be in **Draft** status. Once the status is changed to **Open** or **Posted,** the hiring manager must contact the recruiter (click **Contact Recruiter**, or send a **Comment**, or call the recruiter), to request changes on the requisition.

12. Can a hiring manager see the **ACE** alert icon?
    - Yes, hiring managers can see the **ACE** alert icon in the candidate list if the **ACE** column is available in the customizable Candidate List Format. If the **Ace** candidate column is not available, please contact your system administrator. See "List Format Selector" on page 6-10.
    - The recruiter/owner of the requisition can send an **ACE Alert** email notification to the hiring manager.
13. Can a hiring manager see the **AIF** icon indicating if changes have been made to his or her requisition?
    - Yes, the **AIF** column is always visible in the requisition list and in the candidate list. When changes are made to a candidate file or to a requisition owned by the hiring manager, the **AIF** flag will appear next to the candidate file.
14. In the **Correspondence Manager,** I am using the email message templates. How do I send the email to more than one person?
    - Use a semicolon to separate names (you can use or not use a space after the semicolon).
15. If an email message (created using the **Correspondence Manager**) is sent to an invalid email address, will it bounce back to the sender?
    - No, the message goes nowhere and no one is notified.
16. I received a **Taleo (-1)** error. What can I do?
    - Record all the steps you took prior to receiving the error.
    - Report the error to your system administrator who will forward the information to **Taleo** for investigation if necessary.
17. The window did not load completely or loaded all white. What should I do?
    - Close the browser and re-launch the application.
    - If it still happens, check your browser settings according to the technical requirements.
    - If the problem still occurs, re-boot your computer.
    - If the problem persists, Report the error to your system administrator who will forward the information to **Taleo** for investigation if necessary.