TalentLink Administrator's Guide 16.0

Lumesse TalentLink v16.0

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Lumesse

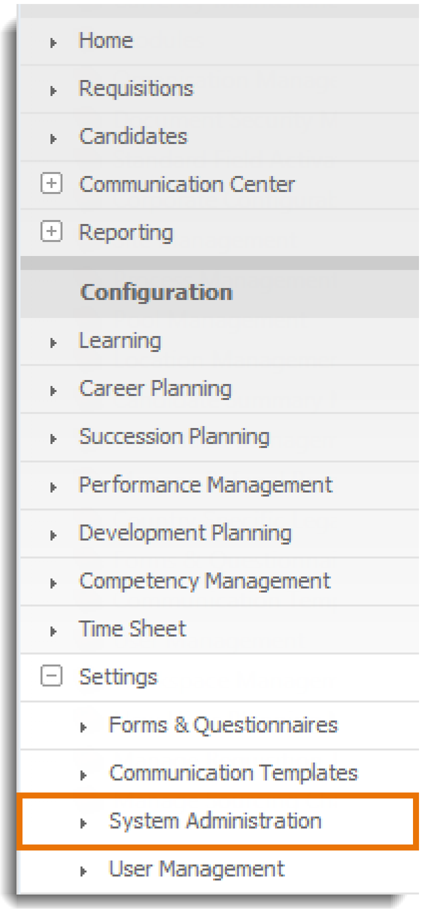
Configuring your Company Default Settings

The **Company Configuration** section contains all the default settings for your company. We recommend you configure all the default settings prior to configuration of your platform. All changes performed here have an impact on the whole platform and are visible to all users.

Accessing Configuration Pages

To open the TalentLink Configuration pages:

1. Type your URL and log in as the system administrator.
2. From the **Settings** section of the left dynamic menu, select **System Administration**.



Company Configuration Settings

1. On the *Configuration* page, select **Company Configuration**.

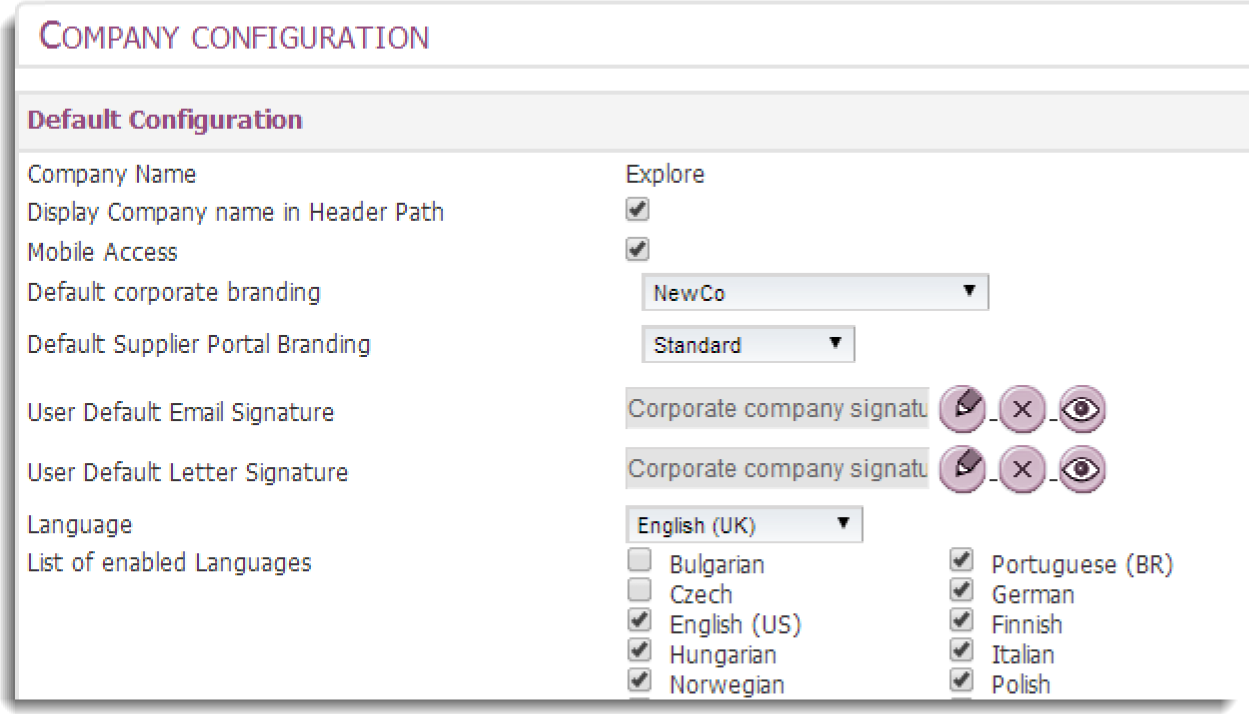
From the *Company Configuration* page you can configure the following default values for your company:

- Default configuration settings (see page 14)
- Role assignment (see page 18)
- Search and matching configuration (see page 19)
- Hiring process (see page 20)
- Front office web services (see page 21)
- Account mail templates (see page 22)

ⓘ Many of the configuration settings can also be assigned on a per organisation basis, or even per individual user (such as granting mobile access or creating an email signature).

Default Configuration Settings

Some settings here will apply to your whole system, while others are global default settings that can be modified across the lower organization levels if required.

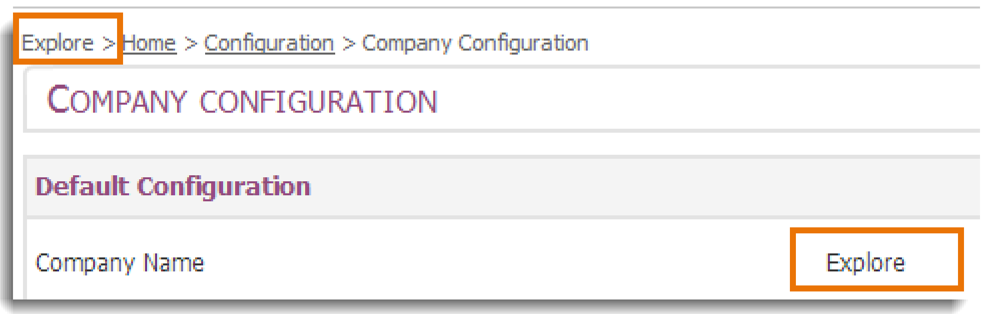


Company Name

The company name users enter on the login page, and which appears on job offers.

Display Company Name in Header Path

Display the name of your company in the top-left corner of the navigation bar on all pages.



Mobile Access
Specify whether all users can access the mobile version of TalentLink on their compatible mobile devices. Users will log in using the same credentials they use when logging into the back office. If you do not want to assign this globally you can leave the option unselected and assign access per organization or to individual users.

Default Corporate Branding
Specify the default corporate branding that all users see when they log into TalentLink. If you wish to create different branding specifications per organization, or for different users, you can work with your Lumesse consultant to create one or more branding specifications that can be assigned at lower levels.

Default Supplier Portal Branding
Specify the default supplier branding that applies to Supplier Portals.

User Default Email Signature
Select a pre-defined default email signature for all users in the slice.

User Default Letter Signature
Select a pre-defined default letter signature for all users in the slice.

ⓘ For instructions for creating signatures refer to Creating Signature Templates (see page 320).

ⓘ To select a signature click . To clear click . To preview click

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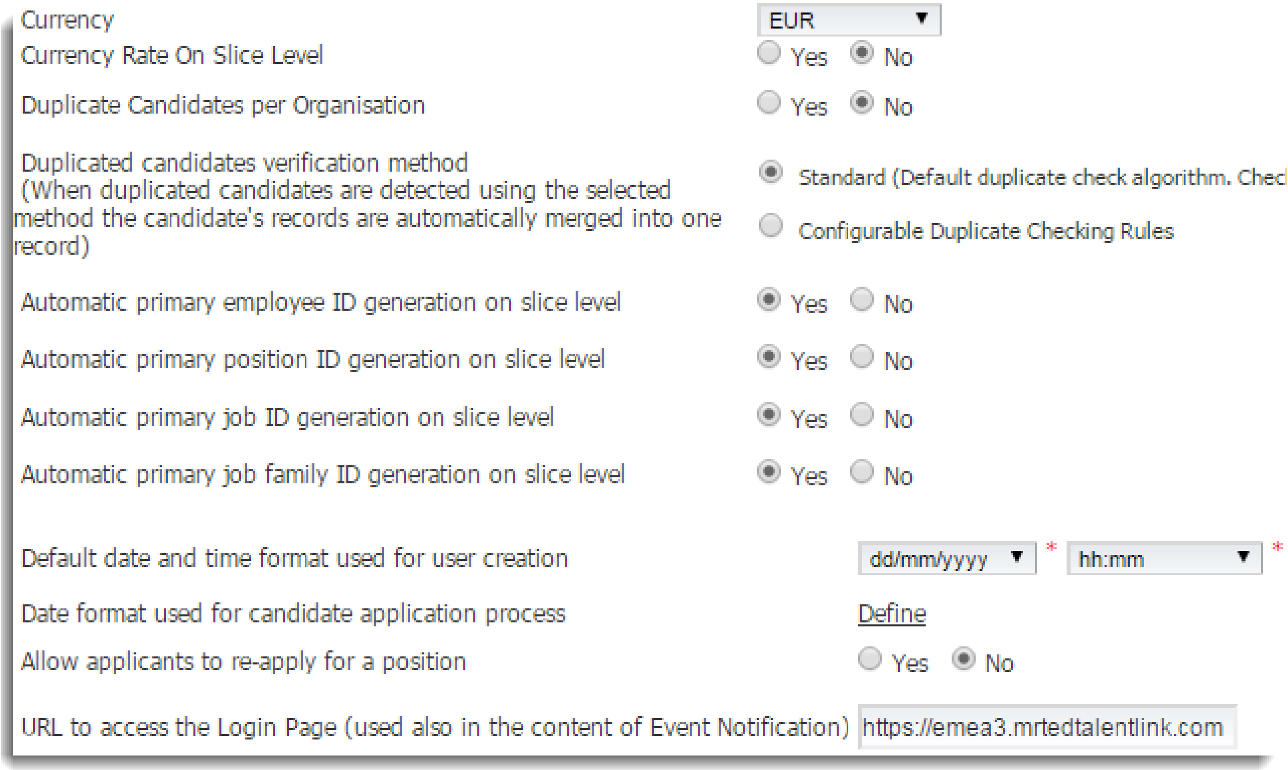
Language

Set a default language to be used when sending emails relating to user accounts (password modification, account activation, and so on). Each user will be able to modify this in their User Preferences.

List of Enabled Languages

Select the languages to use on the platform. All values within the List of Values (LOVs) need to be translated in the activated languages so that users see the values in their own language.



Currency	EUR
Currency Rate On Slice Level	Yes / No
Duplicate Candidates per Organisation	Yes / No
Duplicated candidates verification method (When duplicated candidates are detected using the selected method the candidate's records are automatically merged into one record)	Standard (Default duplicate check algorithm. Chec / Configurable Duplicate Checking Rules
Automatic primary employee ID generation on slice level	Yes / No
Automatic primary position ID generation on slice level	Yes / No
Automatic primary job ID generation on slice level	Yes / No
Automatic primary job family ID generation on slice level	Yes / No
Default date and time format used for user creation	dd/mm/yyyy * hh:mm *
Date format used for candidate application process	Define
Allow applicants to re-apply for a position	Yes / No
URL to access the Login Page (used also in the content of Event Notification)	https://emea3.mrtedtalentlink.com

Currency
Select the default currency in use across the slice. The values that appear here are set by the GSA in the **Currency** field (from the *Configuration* page select **Standard Field Activation** then **Currency**).

Currency Rate on Slice Level
If set to **Yes**, you can define slice-level default (base currency) and currency rate values. If set to **No**, you can define default (base currency) and currency rate values at the department level.

Duplicate Candidates per Organization
A duplicate is a candidate who has two or more records across an organization. For example, they have applied for jobs with two or more of a recruitment company's end clients. By default the system merges these candidates into a single candidate (provided their first name, last name and email address/alternative email address all match). This prevents duplicate candidates existing for an organization.

If you select this option, such candidates are not automatically merged across the organization. This is most likely to be of use in recruitment companies that are recruiting for more than one employer, and the same candidate may therefore apply for jobs with more than one company.

Duplicated Candidates Verification Method
(Used in conjunction with **Duplicate Candidates per Organization**) If **Standard** is selected duplicate candidates are checked using the system defaults (first name, last name and email address/alternative email address). If **Configurable Duplicate Checking Rules** is selected additional options will appear such as Social Security Number, Zip Code, etc. Selecting any of these options adds them to the list of items used to check for duplicate candidates.

These checking rules are applied at slice level; you cannot set different checking options for local organizations.

Automatic Primary Employee ID Generation on Slice Level
Specify whether a new employee's ID will be generated automatically at slice level.

Automatic Primary Position ID Generation on Slice Level
Specify whether a new position's ID will be generated automatically at slice level.

Automatic Primary Job ID Generation on Slice Level
Specify whether a new job's ID will be generated automatically at slice level.

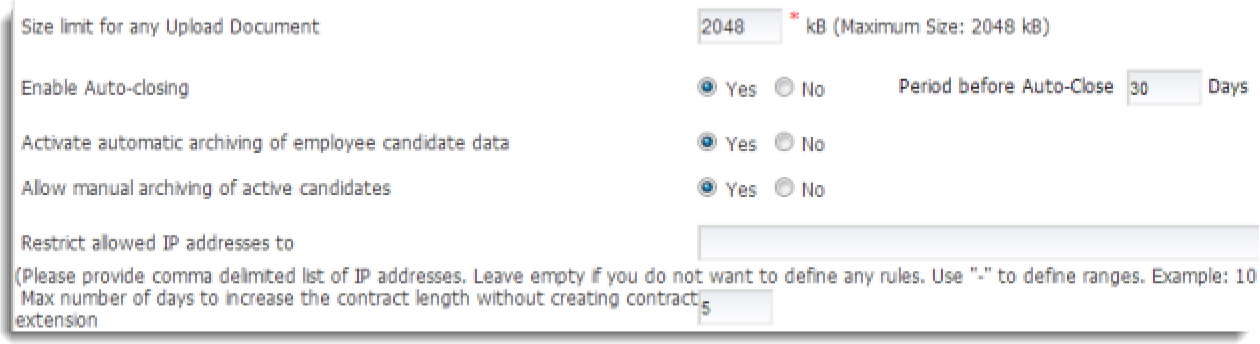
Automatic Primary Job Family ID Generation on Slice Level
Specify whether a new job family's ID will be generated automatically at slice level. (A job family is a group of roles or functional names, for example Marketing, Sales, and so on.)

Default Date and Time Format used for User Creation
Specify the default date and time format for all new users. Users can change this afterwards to suit their preference.

Date Format used for Candidate Application Process
Select the date format to be used when a candidate applies for a post. Clicking **Define** opens a new window where you can select different time formats for different languages.

Allow Applicants to Re-apply for a Position
If **Yes** is selected candidates can reapply for a position where they have previously been rejected. If **No** is selected a candidate can reapply but will be automatically assigned a status of *Rejected*.

Login and Event Notification URL
Default address proposed to the user for email notifications sent by the system (for new tasks, candidates or availabilities that need to be defined). The user has direct access to the platform login page from the email received.



Size Limit for any Upload Document
Maximum file size for user and candidate document uploads.

Enable Auto-Closing
When a job is created in TalentLink the recruiter must specify the number of hires for the position. Auto-closing closes the job automatically when the specified number of hires has been reached. All other active candidates are automatically put in a *Closed* status so they can be considered for archiving in accordance with the Data Privacy rules. Candidates will not receive a notification email.

Period before Auto-Close
This sets the default number of days before the auto-close process begins; the clock starts ticking from when the last hire is made for the position.

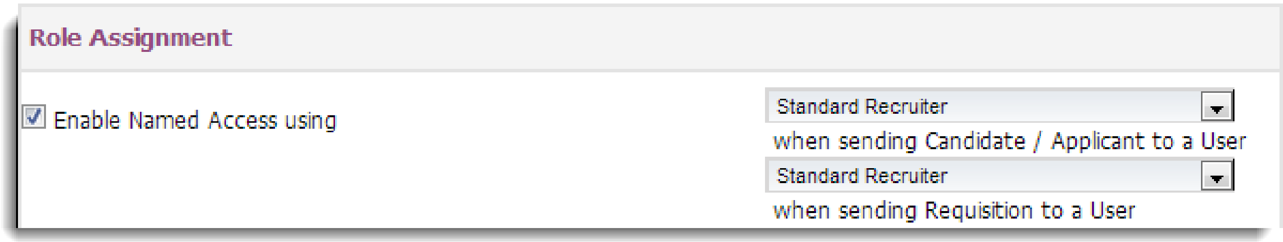
Activate Automatic Archiving of Employee Candidate Data
If Yes, employee candidates can be automatically archived under certain conditions, for example, employees with an unlimited contract.

Allow Manual Archiving of Active Candidates
Active candidates can be manually archived by users who have the appropriate rights.

Restrict Allowed IP Addresses to
TalentLink can only be accessed from the URLs specified here. The list of addresses can be configured as a single comma delimited list.

Max Number of days to Increase the Contract Length Without Creating Contract Extension
This option forces recruiters who want to modify the dates of not yet accepted condition forms to enter a new contract end date that is no higher than the maximum number of days set here. For example, if the value is 3 you can only specify a new contract end date that is equal to the previous end date plus a maximum of three days.

Role Assignment

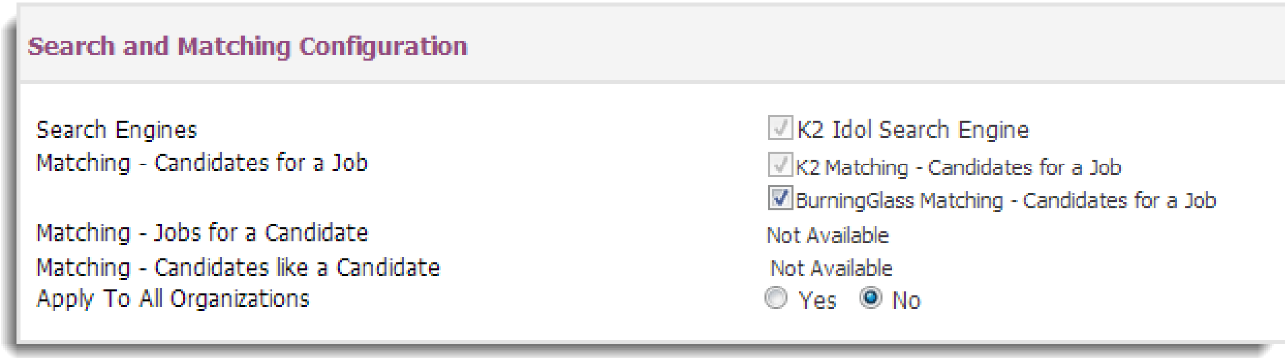


Enable Named Access Using
When assigning a candidate file, assigning an applicant, or sending a job to a user, you can assign a role to the recipients that allows them to access the sent items even if they are not authorized (based on their standard profile).

ⓘ Seek your TalentLink consultant's advice before changing these options as these settings affect the whole company and any sub-organizations.

Search and Matching Configuration

This section appears if Matching functionality is activated for your slice.



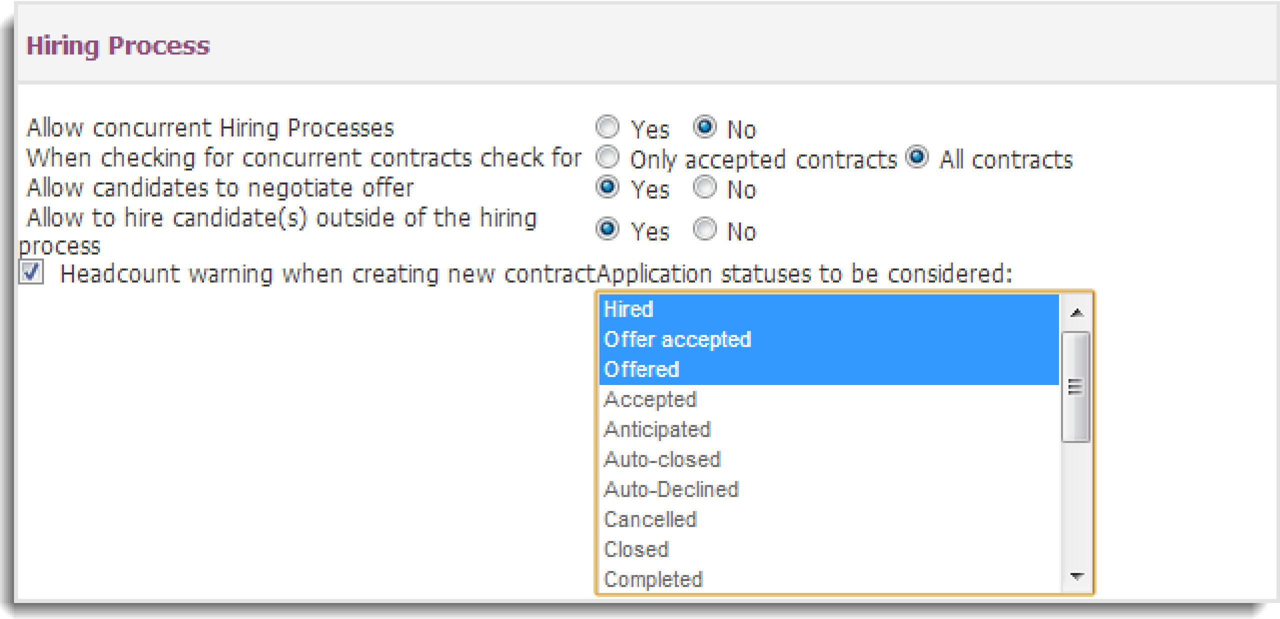
Search Engines - K2 Idol is the default search engine for TalentLink. This cannot be changed.

Matching - Candidates for a Job - There are two methods for automatically matching candidates to requisitions with TalentLink Recruiting:

- K2 matching (also known as Profile matching), uses an online form type called Profile to identify candidates who match specific criteria
- BurningGlass matching is a value-added service that must be activated by Lumesse. This enables automated matching of candidates to requisitions

If matching functionality is activated you can choose to **Apply To All Organizations** or none.

Hiring Process


Hiring Process

Allow concurrent Hiring Processes — Yes / No
When checking for concurrent contracts check for — Only accepted contracts / All contracts
Allow candidates to negotiate offer — Yes / No
Allow to hire candidate(s) outside of the hiring process — Yes / No
Headcount warning when creating new contract
Application statuses to be considered:
Hired
Offer accepted
Offered
Accepted
Anticipated
Auto-closed
Auto-Declined
Cancelled
Closed
Completed

Allow Concurrent Hiring Processes

If **Yes** is selected, when a single candidate is in a *Hired, Offer Accepted* or *Offered* status on multiple positions, users will receive a warning prompt that another hiring process is active for the same period.

When Checking for Concurrent Contracts Check for

If **Only accepted contracts** is selected, the system looks only for contracts that are *Accepted* and that have start and end dates which overlap the specified period (so the current behaviour should remain unchanged).

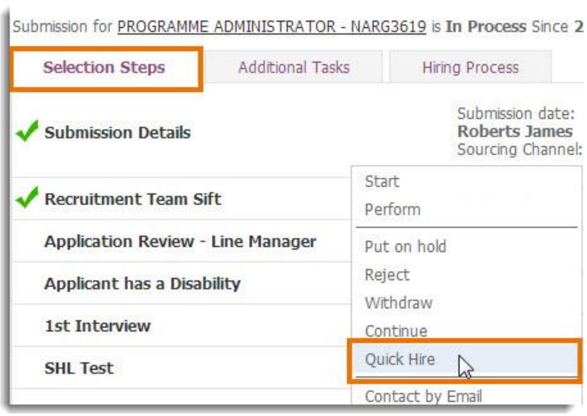
If **All contracts** is selected, the system performs a concurrent contract check by looking for all contracts that have start and end dates which overlap the dates of the contract being created/modified.

Allow Candidates to Negotiate Offer

If **Yes**, a candidate can negotiate the terms of any offer made to them through TalentLink. The email received by the candidate will contain a Counter Offer button, as well as buttons to Accept or Decline.

Allow to hire Candidate(s) Outside of the Hiring Process

If **Yes**, a **Quick Hire** option will be available for every step in the Selection Process. This enables users to skip any remaining steps and change the candidate's status to *Hired*.

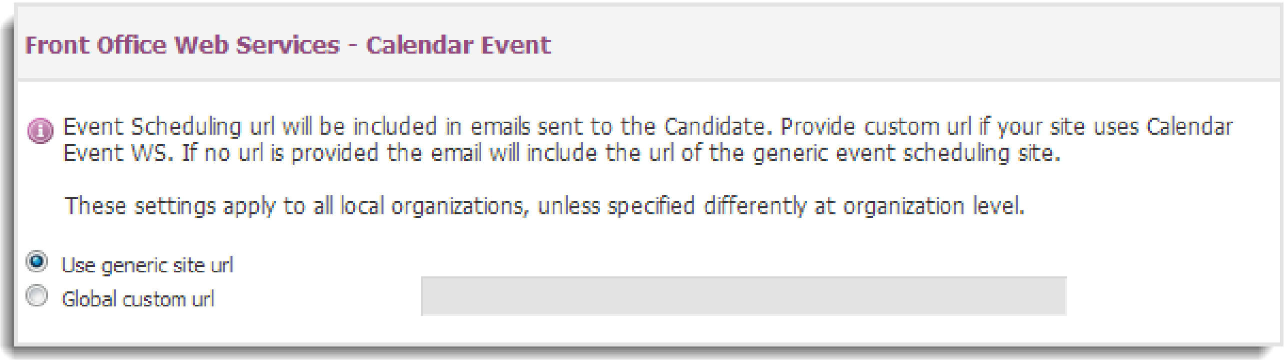


Headcount Warning when Creating new Contract

This enables you to define the application statuses to be considered in the available headcount check. If this checkbox is selected, when the requisition headcount configured here has been reached, recruiters will receive a warning message when trying to create an offer.

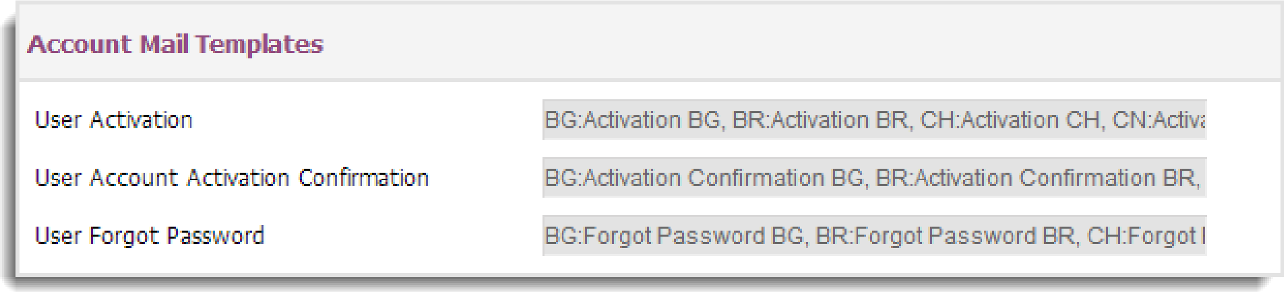
Front Office Web Services

This section enables you to define the URL to be included in emails sent to candidates.



Account Mail Templates

This section enables you to assign system notification emails to be used for **User Activation**, **User Account Confirmation** and **User Forgot Password**.



Clicking inside the grey areas causes a new window to appear where you can preview and select the templates for each language. These email templates are managed from the left dynamic menu by selecting **Settings>Communication Templates** then selecting *Email used in Administration* from the **Document Type** dropdown list.

Managing Currency Conversion Rates

The currency conversion feature enables you to define and manage conversion rates for the currencies you work with. This makes it possible for you to track costs in different currencies and produce reports in the currency of your choice. You can:

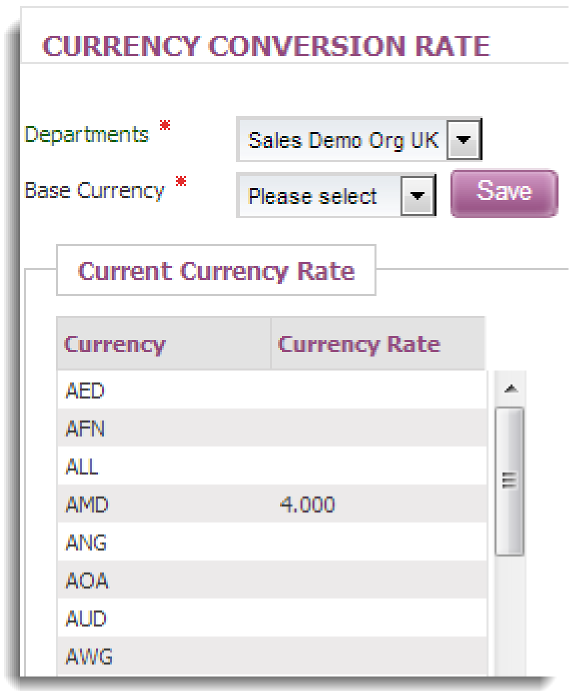
- Add and edit conversion rates
- Define the date interval a conversion rate is valid for
- Keep a history of conversion rates with their dates

ⓘ Currency conversion rates are ONLY applied to Talent Management functionalities: defined currency settings are NOT taken into account when adding a cost entry to a requisition or when defining a contract for a new hire.

In the global configuration settings **Settings > System Administration > Company Configuration**, you can apply default (base currency) rates across the whole slice, or define them at department-level.

If **Currency Rate on Slice Level** is set to **Yes**, you can define slice-level default (base currency) and currency rate values.

If **Currency Rate on Slice Level** is set to **No**, you can define default (base currency) and currency rate values at the department level.



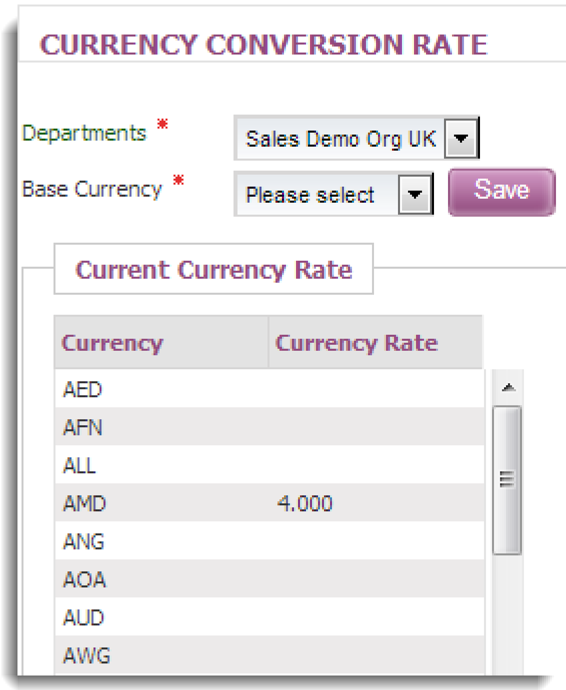
Currency Conversion Rate

ⓘ Only users who are assigned the role *HR Admin* can configure currency conversion rates. The *HR Admin* role is used to support Talent Management enhancements in TalentLink.

When defining currencies you cannot define more than one conversion rate per day. You cannot enter a rate for the base currency, which is always 1.

1. From the **Settings** section of the left dynamic menu, select **System Administration,** then **Currency Maintenance**.

   The *Currency Conversion Rate* page is displayed.

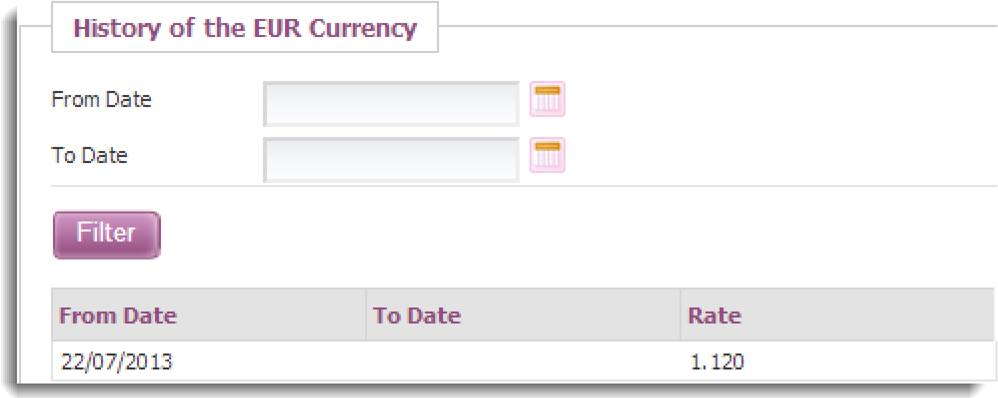


2. From the **Department** dropdown list select a department to set its currency rate.
3. From the **Base Currency** dropdown list select the currency to be used as the base for the currency conversion then click **Save**.
4. Click **OK** to confirm your action.
5. In the **Current Currency Rate** section, select a currency to set its rate. If rates have already been set for currencies they are displayed in this section.

   You can now view the History of the Currency (see page 25) or Edit the Currency Conversion Rate (see page 25) as required.

History of the Currency

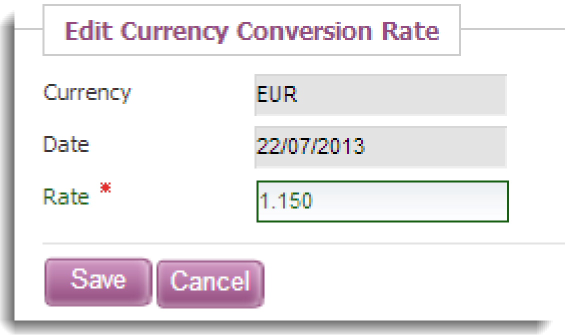
After you select a currency, any history associated with it is displayed.



You can view the history by **From Date** and **To Date** or filter the information as required.

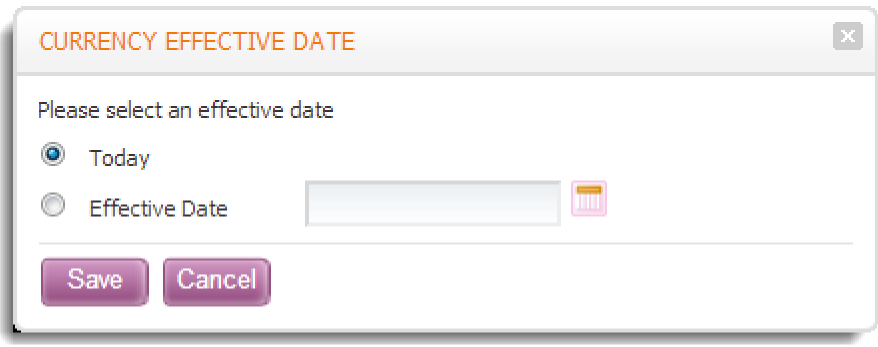
Editing the Currency Conversion Rate

1. Select a **Currency** from the list and type the **Rate** you require, then click **Save**.

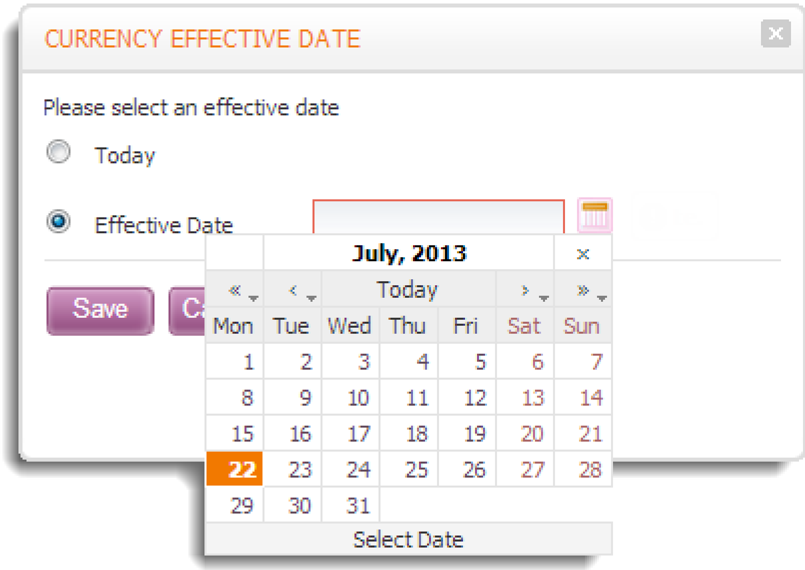


2. Select a **Date** from which the rate will take effect.

ⓘ You cannot have gaps in the dates: a rate for a currency is valid until the next rate for the same currency starts.



If you select **Effective Date** you can either type a date manually or click the calendar icon to display a pop-up calendar.



ⓘ You can only select **Today** or an earlier date. You cannot select a date that is later than today's date. If you select **Today** and save the new rate you cannot specify any rates for earlier dates, although you can change the rate for today.

3. After you specify the date click **Save.**

   The new rate is displayed in the **Current Currency Rate** section and a new record is displayed in the **History** section.

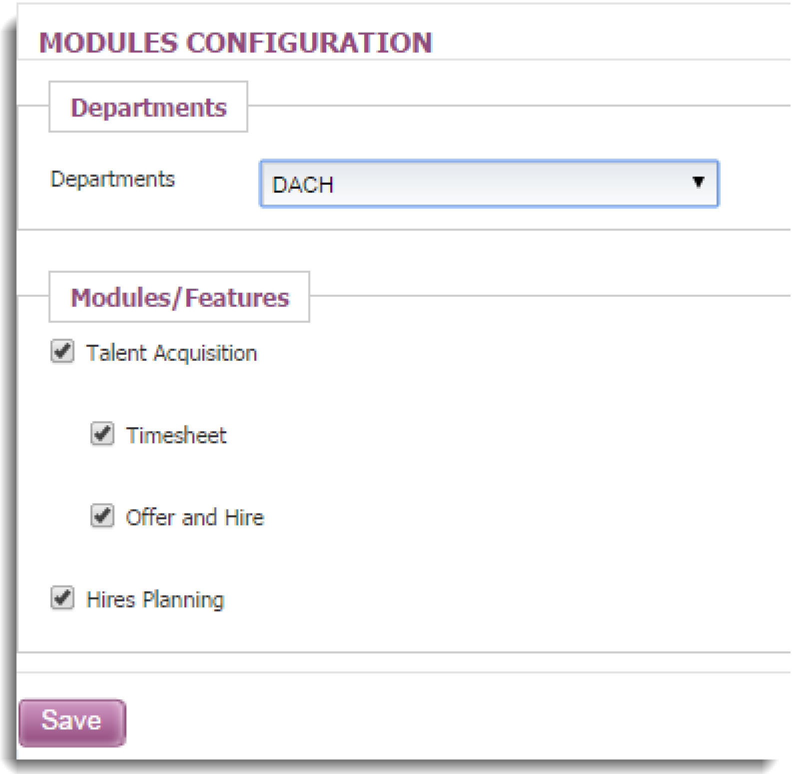
Activating Modules

The GSA can activate the required modules to enable users to use the additional features. This is done at organization level.

How to Activate a Module

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Modules**.

   The *Modules Configuration* page displays a list of available modules/features.



2. From the **Departments** dropdown list, select the required organization.
3. Select the modules/features you want to activate. Deselecting a module turns it off at organization level.
4. Click **Save**.

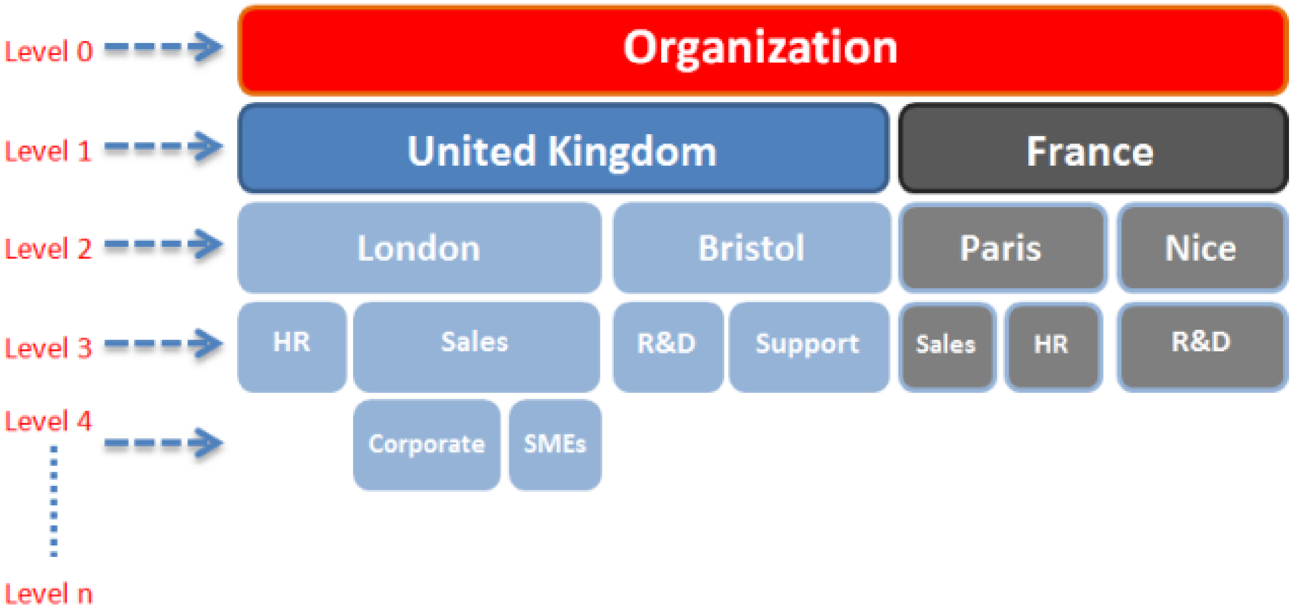
Managing Organization Breakdown Structure and Properties

TalentLink's security model is based on the Organization Tree. There is a level 0 Company Node, then multiple level 1 organizations, followed by unlimited levels of child units.

The organization structure can be configured in different ways. For example:

- Functional areas (Marketing, Sales, Finance)
- Location (Europe, Asia, North America, UK, France, India, China)
- Activities (Oilfield, Network solutions)
- Companies (Holdings, Offices)
- Customers (useful for recruitment outsourcing process companies who run recruitment for several organizations)
- Recruitment-based (Permanent, Contract, Students, Internships, Senior, Junior)
- Divisions
- Products (Plastics, Steel)

The following organization structure is based on Locations and Functional Areas:



Why do you need an Organization Breakdown Structure?

Creating an organization structure enables you to:

- Give users access to information within a sub-organization, but not necessarily across the whole company
- Restrict user access to specific sub-organizations
- Configure local organizations differently from the global default settings
- Create different branding from the global back office branding

- Define specific processes per organization such as Job Approval Process, Application and Selection Processes, Referrals, etc

How Settings are Inherited

In general, all settings from a parent node are inherited by the child organization, provided that those settings are not configurable at child level as well.

Key Configuration Rules

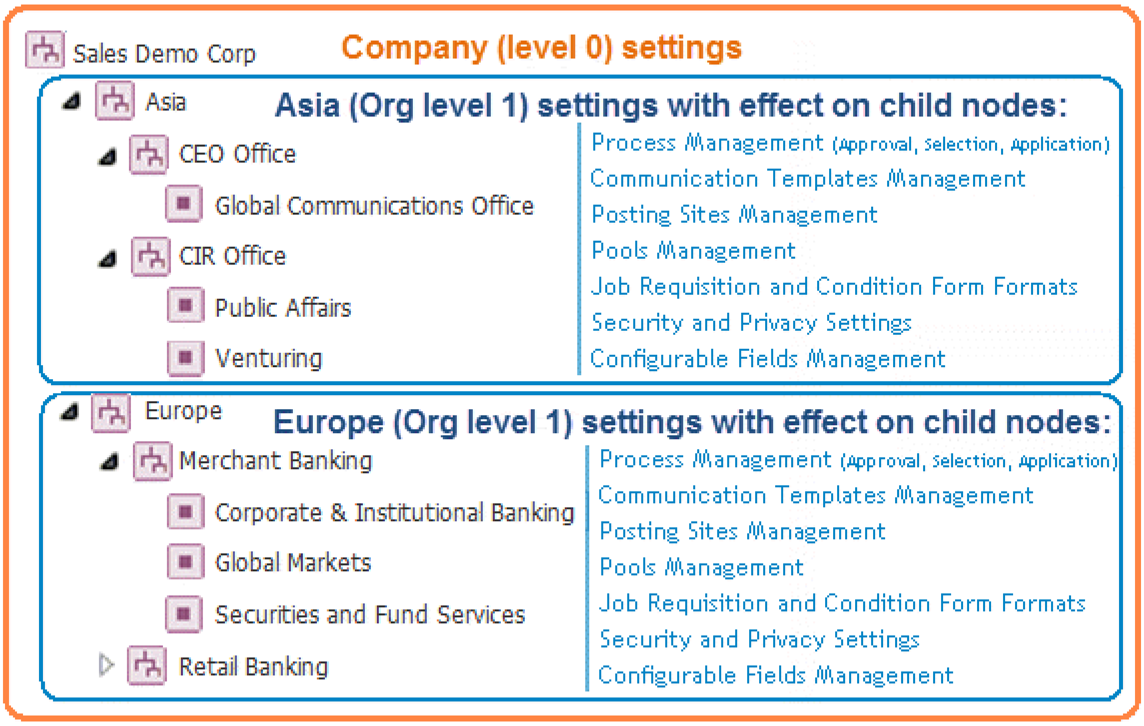
- Some settings are configured at Company Configuration (level 0) and are in force for the whole Account (all organizations). These include:
  - Languages enabled
  - General selection rules (concurrent hiring processes, re-application possibility)
  - Document upload size limit
  - Auto-closing possibility
  - Role assignment settings
  - Search and matching configuration

  For more information refer to Default Configuration Settings (see page 14).

- Level 1 organizations carry crucial settings that are inherited by all child organizations that sit below them. These include:
  - Approval process
  - Selection process
  - Application process
  - Communication templates
  - Posting sites configuration
  - Pools management
  - Default job requisition and condition form formats
  - Document security settings
  - Data privacy statement settings
  - Configurable field management

  These settings may vary between different level 1 organizations and it is therefore important to understand which level 1 organization is parent to each level 2 – level n organization.

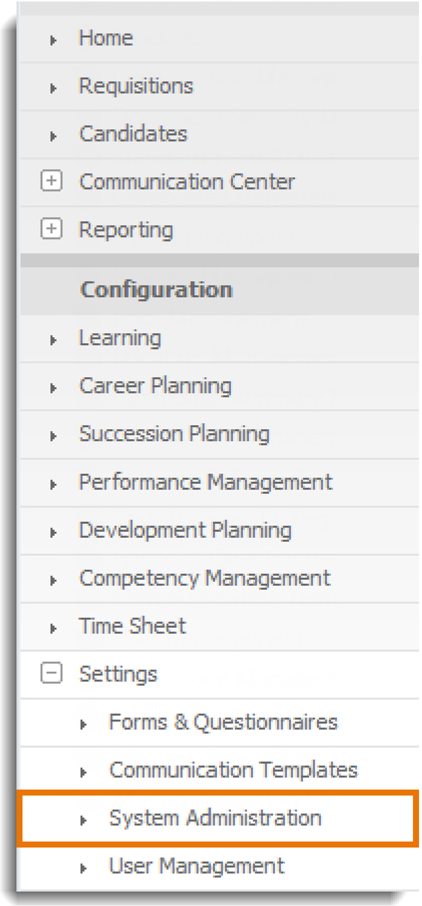
Jobs are created in any level 2 – level 1 organization.



Accessing your Organization Breakdown Structure

The Organization Breakdown Structure (OBS) is accessed from the *Configuration* page.

1. From the **Settings** section of the left dynamic menu, select **System Administration**.



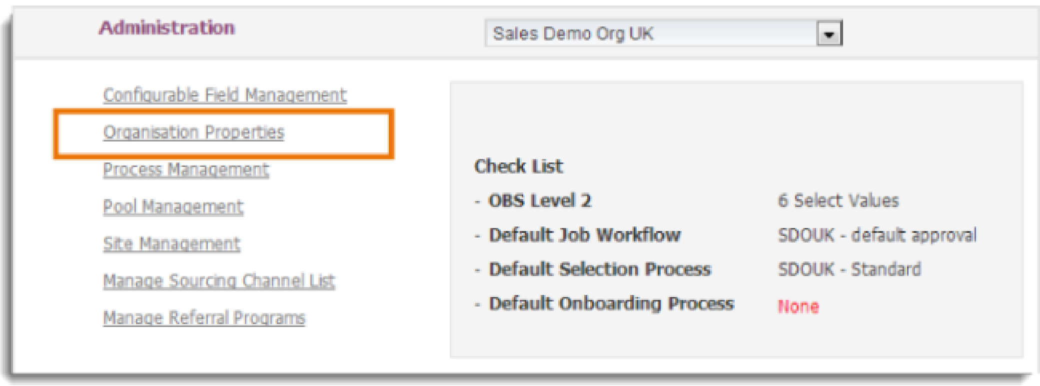
Global Systems Administrator's access to the Organization Breakdown Structure

The GSA can create a new organization (with or without sub-organizations) or refine the existing organization tree by clicking **Organization Breakdown Structure** in the **Global System Administration** section.

Local Systems Administrator's access to the Organization Breakdown Structure

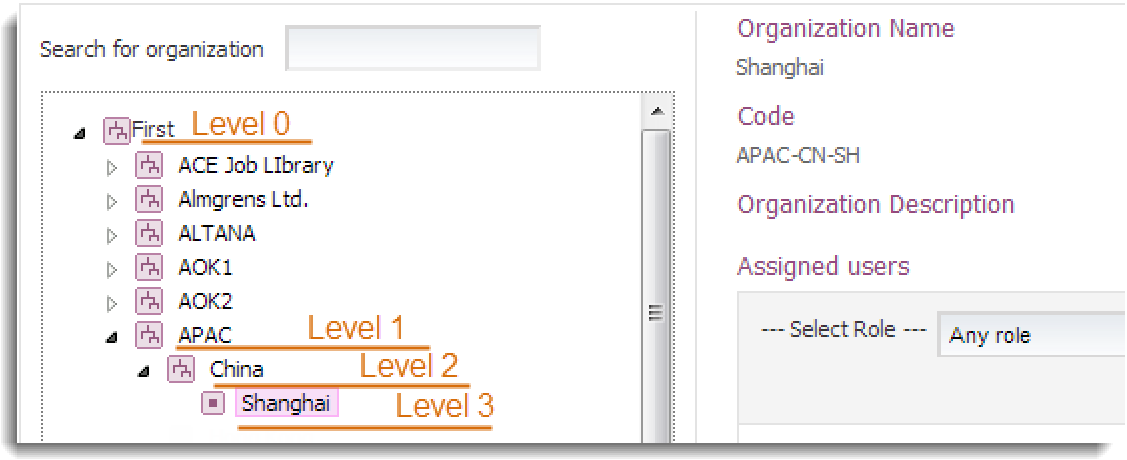
The LSA can create and manage organizations (unlimited levels) for their own Level 1 organization.

- If you have access to only one organization click **Organization Breakdown Structure**.
- If you have access to more than one organization select your organization in the **Administration** dropdown list then select **Organization Properties**.



Navigating your Organization Structure

The *Organization Management* page displays a graphical representation of the company organization.



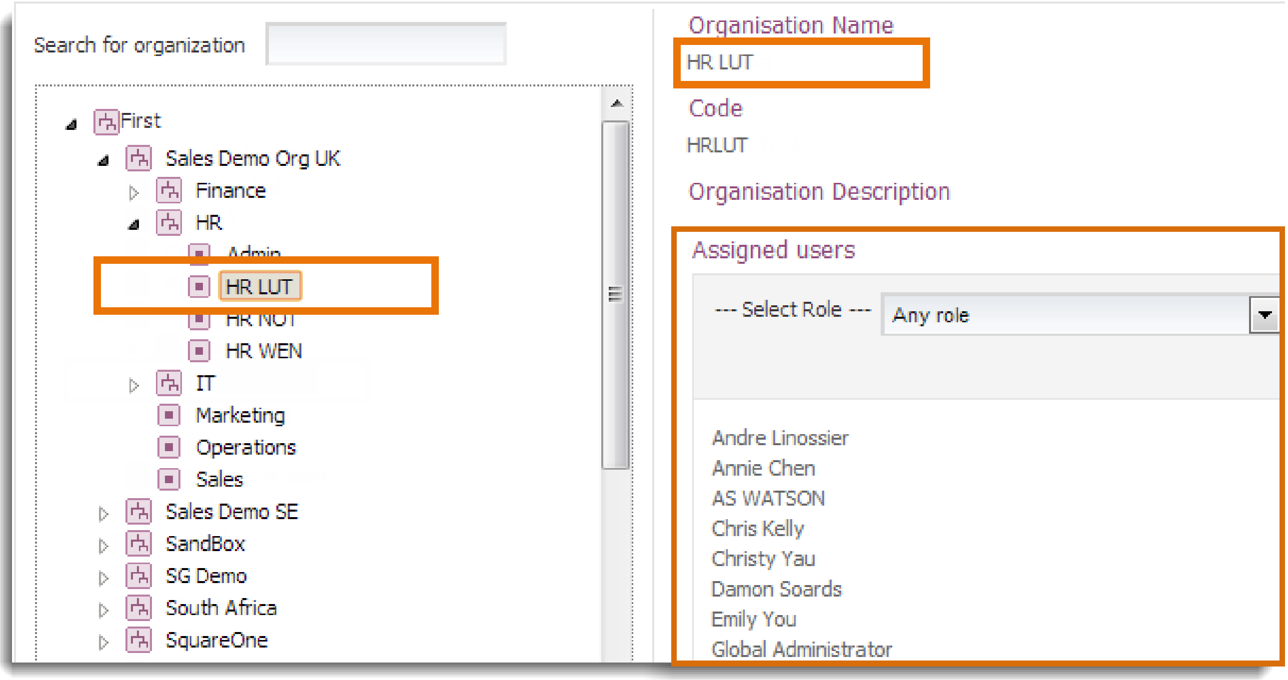
Parent nodes are indicated by next to their name.

If the organization unit does not have any child nodes appears next to its name.

1. To locate an organization type its name into **Search for organization** or click the nodes to expand the lower levels.
   - To collapse a node, click it again.
2. Click the organization name (at any level) to view selected organization properties (Name, Code, Description).

How the Security Model Works

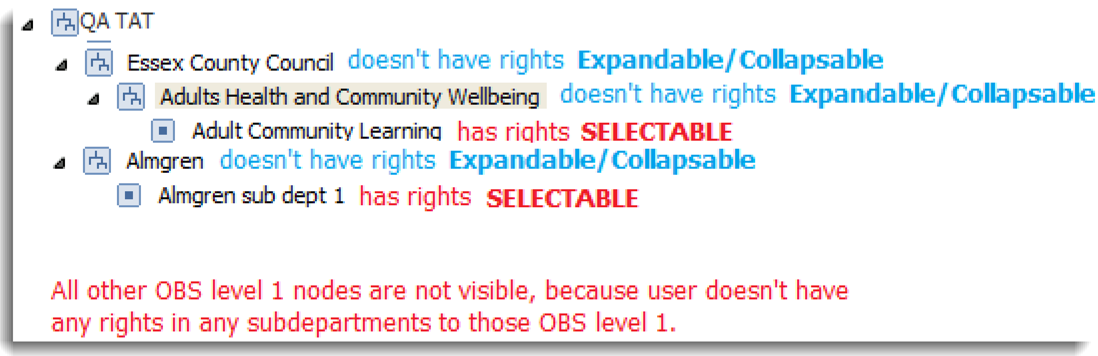
The security model enables you to assign roles to users within a given organization. Users with rights and roles in organization A will not have access to data specifically for organization B. As the Organization Chart is strictly connected with User Management, in the **Organization Management** section you can easily view assigned users, create new users and grant roles.



The organization tree always reflects actual dependencies and presents the full node from level 0 down to the level where you have roles assigned (even if you do not have roles in parent departments).

You can only select departments in which you have rights assigned. You cannot select departments for which you have no rights assigned, even if the departments are visible on the tree.

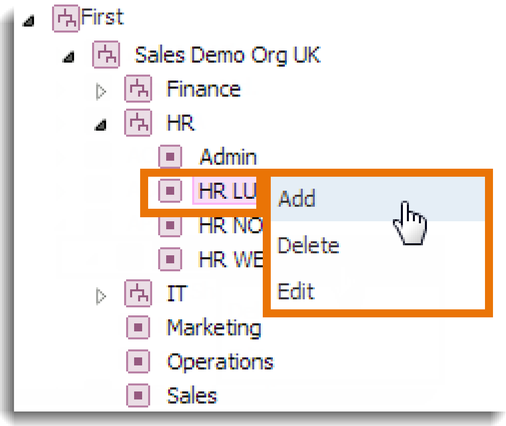
You can expand/collapse the departments for which you have no rights assigned.



Managing Organization Breakdown Structure (OBS)

GSA users can alter the organization structure by adding, deleting and editing nodes (LSAs can alter their local organization structure). These actions are available from the node menu.

1. Right-click on a node name to display the menu.



In the example above, the user wants to add a new child organization to the level 3 organization *HR Luton*. The new node will be a level 4 organization and will inherit its basic properties from the parent level 1 organization.

The only action available for the Company Node (level 0) is Add Child Node. It is not possible to edit or delete the level 0 node.

Definable Organization Properties depend on the organization levels. A Level 0 organization (company) defines the most general settings. For more information refer to Default Configuration Settings (see page 14).

For lower levels, a distinction must be made between level 1 organizations and sub-level child nodes. Level 1 organizations define a number of properties which are inherited by all dependant child organizations. It is not possible to overwrite these settings at child organization level.

The following table lists the definable properties for Level 1 Organization Breakdown Structures and child organizations along with any inheritance pattern.

Level 1 Property	Child nodes to Level 1	Description
Organization Name Code Description		Name and Code of the organization. Both must be unique. The Code is used as a prefix for system generated job numbers created in this organization. You can also provide a description of organization.
Mobile Access	Inherited	Gives users access to the mobile version of TalentLink. This can be switched off for individual users.
Currency for Cost Tracking	Inherited	The Currency used to calculate costs in the organization (see page 23).
Default Document Security Rule	Inherited	Enables or restricts access to documents (see page 50).

Level 1 Property	Child nodes to Level 1	Description
Organization Name Code Description		Name and Code of the organization. Both must be unique. The Code is used as a prefix for system generated job numbers created in this organization. You can also provide a description of organization.
Data Privacy Statement for Hires	Inherited	All candidates who are hired take this value as their DPS. If country-specific data retention periods have been activated (see page 275) this setting is not available.
Default Data Privacy Statement	Inherited	Default DPS. This value is used as the default DPS at the local Career Site. If a candidate applies through the Career Site that is local to this organization the default DPS value is displayed. Candidates can overwrite this setting. If country-specific data retention periods have been activated (see page 275) this setting is not available.
Expiration period for job invitations	Inherited	The number of days (between 1 and 30) after which a job invitation sent to candidates expires.
Show date of birth in PIF	Inherited	Relates to the Age Discrimination Act. Specifies whether to display the candidate's date of birth and age in the Back Office.
Enable Candidate Age	Inherited	Relates to the Age Discrimination Act. Defines whether it is possible to search for candidates by age in the Back Office. The default value is No.
Search	Inherited	Enable Candidate Age Search is only displayed when Show date of birth in PIF is set to Yes.
Enforce Salary Range Check	Inherited	The Salary offered in the condition form must be within the range defined in the job requisition.
Standard (flexible) Job Ad Template	Inherited	Specifies the type of job advert available. Selecting the checkbox enables users to create job adverts. De-selecting the checkbox enables use of a job advert template which contains information pre-defined by the GSA/LSA.
Interview schedule in job context	Inherited	Activates the *Interview Scheduler* tab, which then becomes visible on all requisitions. *Interview Scheduler* enables line managers to group their interview slots together for a specific requisition, rather than making those slots available to any requisitions. ⓘ Once this feature is activated it cannot be switched off (the checkbox cannot be unticked). The *Interview Scheduler* tab will remain visible to users, but it does not have to be used.

Level 1 Property	Child nodes to Level 1	Description
Organization Name Code Description		Name and Code of the organization. Both must be unique. The Code is used as a prefix for system generated job numbers created in this organization. You can also provide a description of organization.
OFCCP feature general settings	Inherited	Settings related to the OFCCP module (OFCCP activate search, maximum record limit and enforce invite to express interest). Where the OFCCP is activated for the organization, the OFCCP activate Search-Recording feature must be set to Yes. This ensures where there is a possibility to reject a candidate the recruiter must provide a reason for rejection.
Default Organization Branding	Inherited	Company logo and colours as a part of the User Interface (UI).
Default Organization Supplier Branding	Inherited	The default branding assigned to the supplier portal / agency. This option is only available where the supplier portal branding has been defined.
Email signature	Option to inherit	Communication template used to create email signatures in the organization. (see page 320)
Letter signature	Option to inherit	Communication template used to create letter signatures in the organization. (see page 320)
Rating Scale for Candidates	Inherited	Enables users to assign a ranking to candidates using a subjective scale.
Accepted upload file extensions for candidate	Inherited	List of acceptable file types that a candidate can upload (see page 39).
Recruitment Context, Job Requisition and Condition Form Formats	Inherited	Configuration of default job requisition and condition form formats used for permanent or contractor recruitment (see page 41). *Permanent* is the default context.
Timesheet Configuration	Inherited	Configuration of Timesheet module (see page 48).

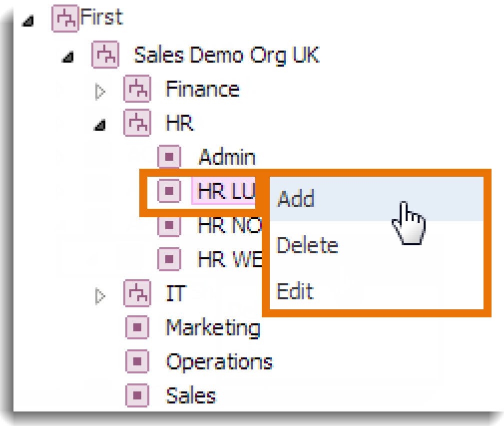
There are functional differences between Level 1 organization properties child nodes. These are listed as a series of links at the bottom of the *Organization Properties* page. These links are absent for child nodes below Level 1.

Accepted upload file types for candidate
Assign Recruitment Context
Define Job Requisition format for Permanent Recruitment
Define Job Requisition format for Contractor Recruitment
Define Condition Form format for Permanent Recruitment
Define Condition Form format for Contractor Recruitment
Timesheet Configuration

Adding an Organization

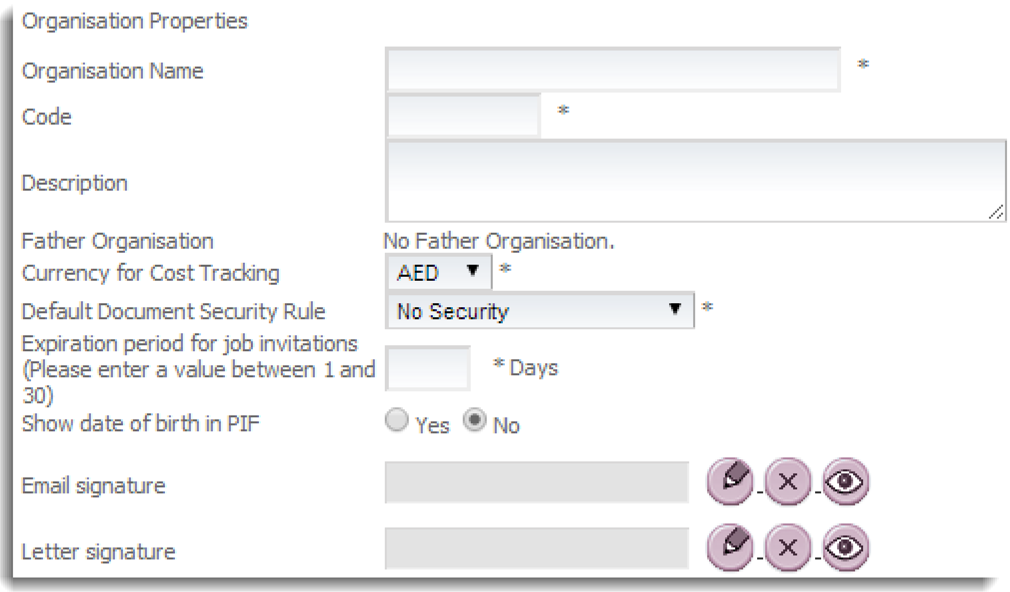
Before a new organization is added, some properties must be specified. Available options depend on the organization level. Some properties are defined only for level 1 organizations and are inherited by any child organizations in the same node. Please refer to the table in Managing Organization Breakdown Structure (see page 35) for more information.

1. Access the *Configuration* page (see page 31).
2. To add a new organization, right-click the parent node and select **Add**.

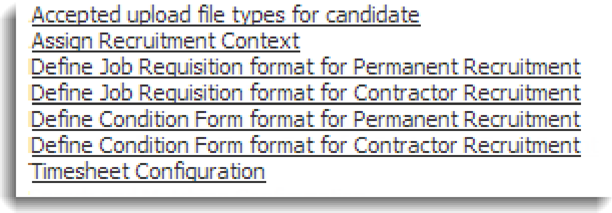


3. Fill in the fields as required then click

ⓘ Refer to the table in Managing Organization Breakdown Structure (see page 35) for a definition of each field.

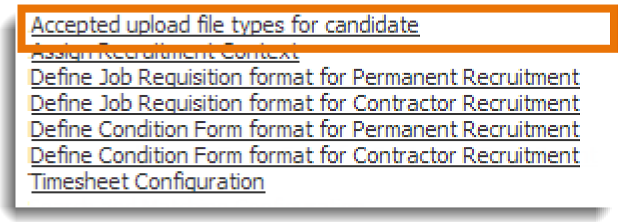


If this is a Level 1 organization you can now assign the recruitment context, and define the Job Requisition and Offer/Condition Forms, etc. The links that enable you to do this will appear at the bottom of the *Organization Properties* page when you open it for editing. Refer to Assigning the Recruitment Context (see page 41) and Configuring Timesheets (see page 48) for full instructions.

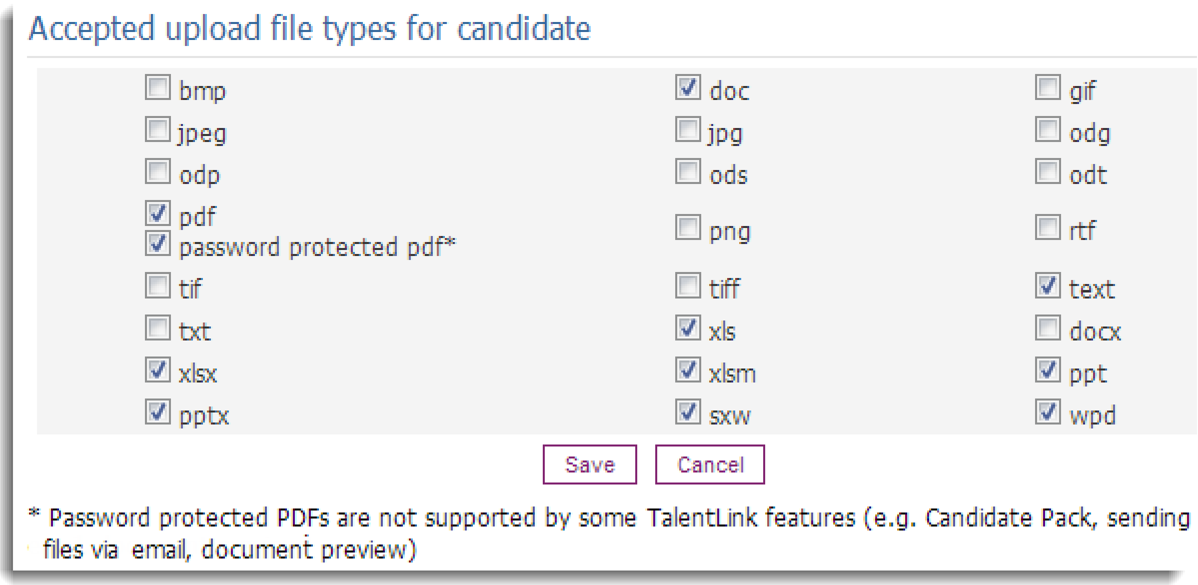


Defining the Accepted Upload File Types for Candidates

1. To define the type of files the candidate can upload click **Accepted upload file Types for candidate**.



2. Select checkboxes to select the file types that can be uploaded by the candidate then click **Save**.

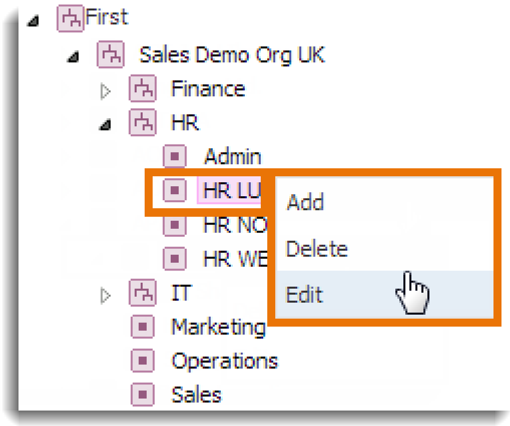


ⓘ If you uncheck the **password protected pdf** checkbox, candidates will not be able to upload this type of file as part of their candidate pack.

ⓘ If you select this option, the upload will succeed, but managers will see a blank document and an error message explaining that a secure pdf has been attached.

Editing an Organization

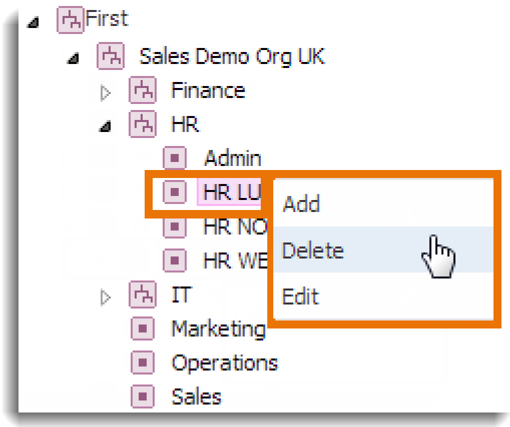
1. Access the *Configuration* page (see page 31).
2. To edit an organization's properties, right-click a node and select **Edit**.



Deleting an Organization

ⓘ If there is anything linked to this OBS level, such as processes, users, email templates etc., these must be deleted first before you can delete the organization.

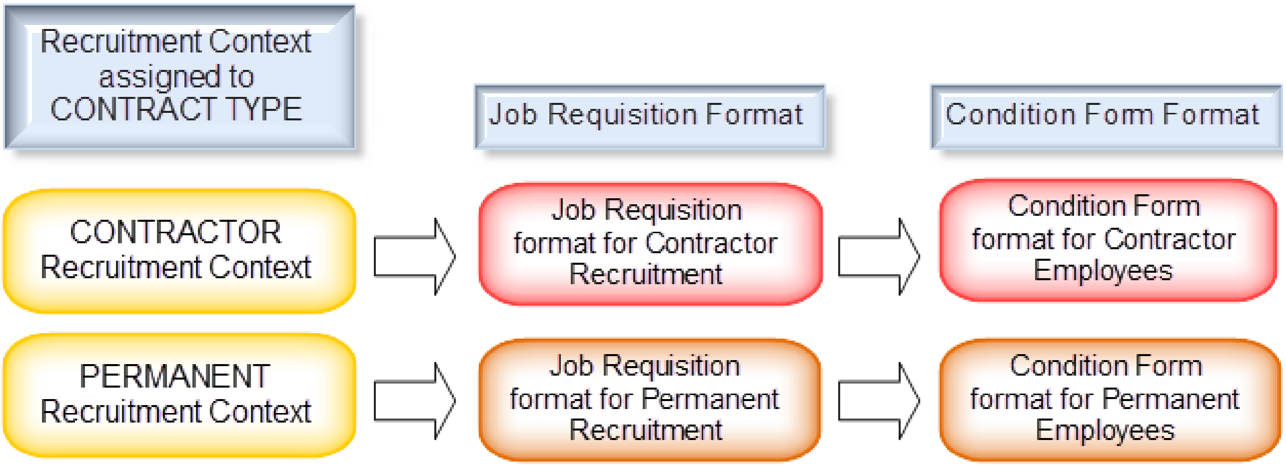
1. Access the *Configuration* page (see page 31).
2. To delete an organization, right-click a node and select **Delete**.



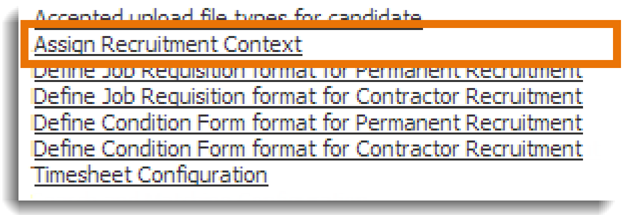
Assigning the Recruitment Context (Permanent or Contractor)

You can differentiate between Job Requisition and Offer/Condition Form formats based on two types of recruitment contexts - permanent and contractor.

For example, a condition form for contractor recruitment requires different options (rates, timesheet activation and configuration) to one for permanent employees.



1. Access the *Organization Properties* (see page 31) page then at the bottom of the page click **Assign Recruitment Context.**



In the **Assign Recruitment Context** section two important properties are defined:

- Contract Types which can be activated/deactivated for the organization

- Recruitment Context which can be selected for active contract types

Assign Recruitment Context

Define Assignments

	#	Values	Permanent	Contractor
☑	1	Limited Agreement (Limited contract)	○	●
☑	2	Unlimited Agreement (Unlimited contract)	●	○
☐	3	Graduate/Campus (Graduate)	○	○
☑	4	Hourly Worker (Temporary Contract) - *(Deactivated)*	○	●
☐	5	Internship (Internship)	○	○
☑	6	Permanent Volume (Permanent Volume Process)	●	○
☑	7	Temporary (Temporary)	○	●
☐	8	Speculative Roles (Speculative Roles) - *(Deactivated)*	○	○

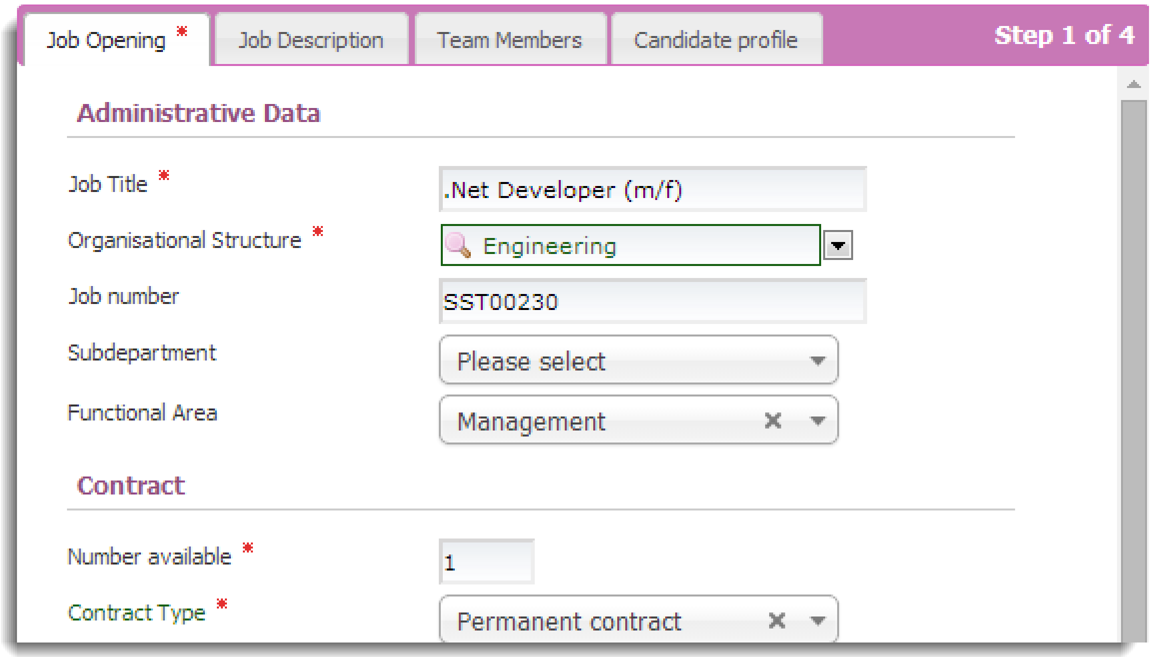
Save Cancel

For example, **Fixed Term Contract** is set in the **Permanent** recruitment context. If a job requisition is raised with a fixed term contract assigned, the condition form to be filled in for a successful candidate is the one defined for **Permanent** recruitment context.

2. Select checkboxes and radio buttons to set values as required, then click **Save**.

Requisition Forms

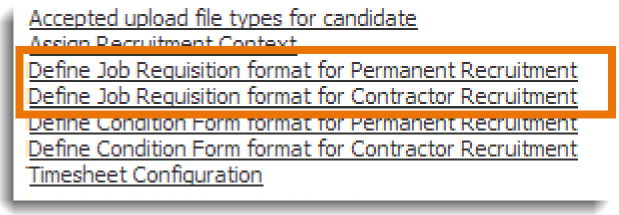
A requisition form is the template a user completes when they want to request a recruit. These forms can be different per OBS level AND per recruitment context (permanent or contractor).



Defining the Job Requisition Format

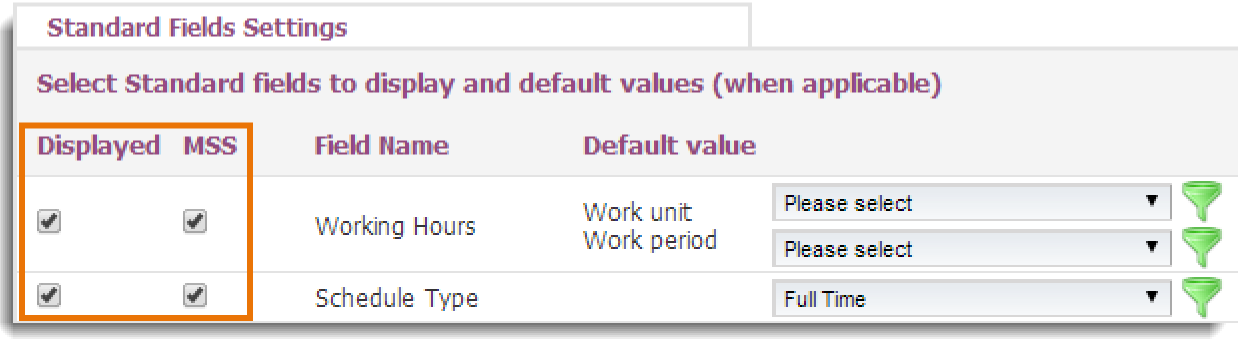
You can define a job requisition format for permanent recruitment and another for contractor recruitment. These enable you to define possible/required information that must be provided when creating contractor or permanent job requisitions.

1. To define a format, select the appropriate link from the *Organization Properties* (see page 31) page:
   - **Define Job Requisition format for Permanent Recruitment**
   - **Define Job Requisition format for Contractor Recruitment**

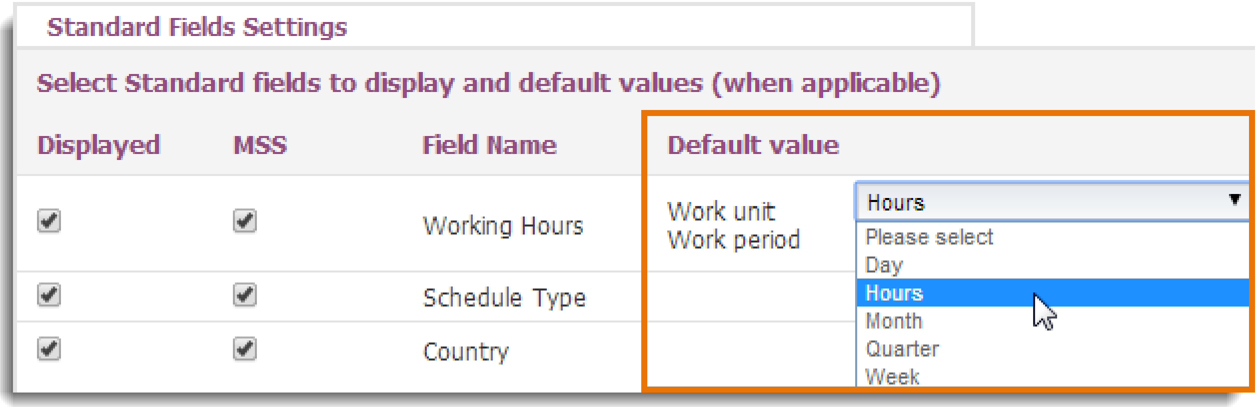


2. Select which fields you want to display to Advanced users or MSS users in the Job Requisition form.

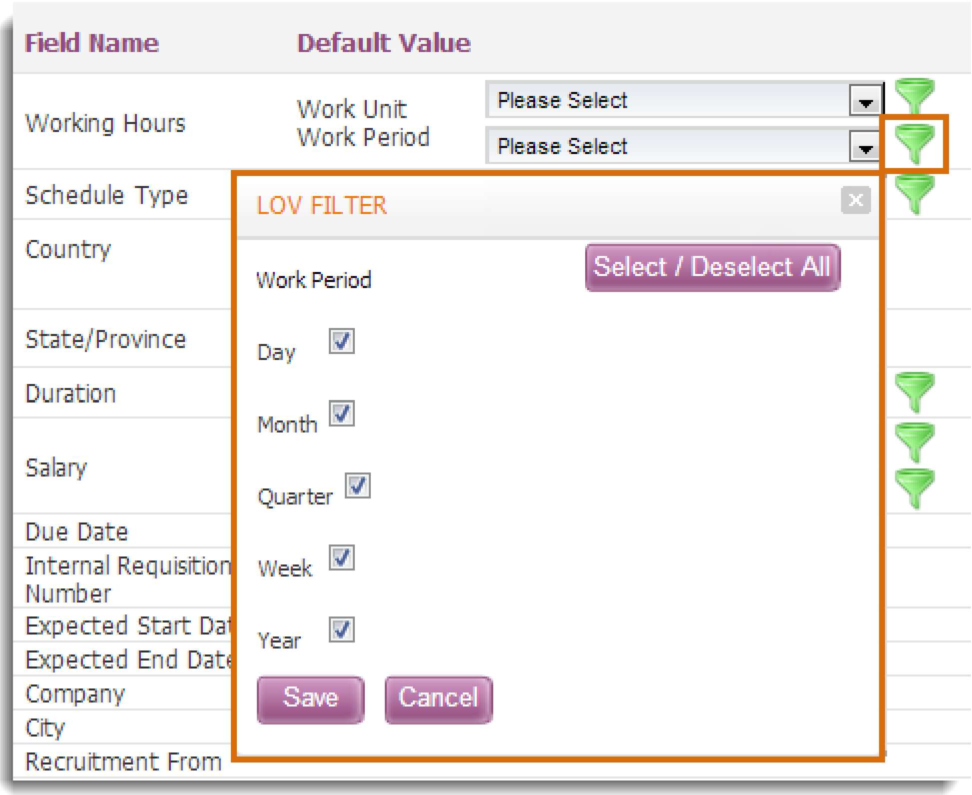
   Selecting **Displayed** will make the field visible to Advanced users. Selecting **MSS** will make the same field visible to users with access to the MSS portal. If a field is not selected in the MSS column that field will not be seen by MSS users - only Advanced users will be able to see and complete it.



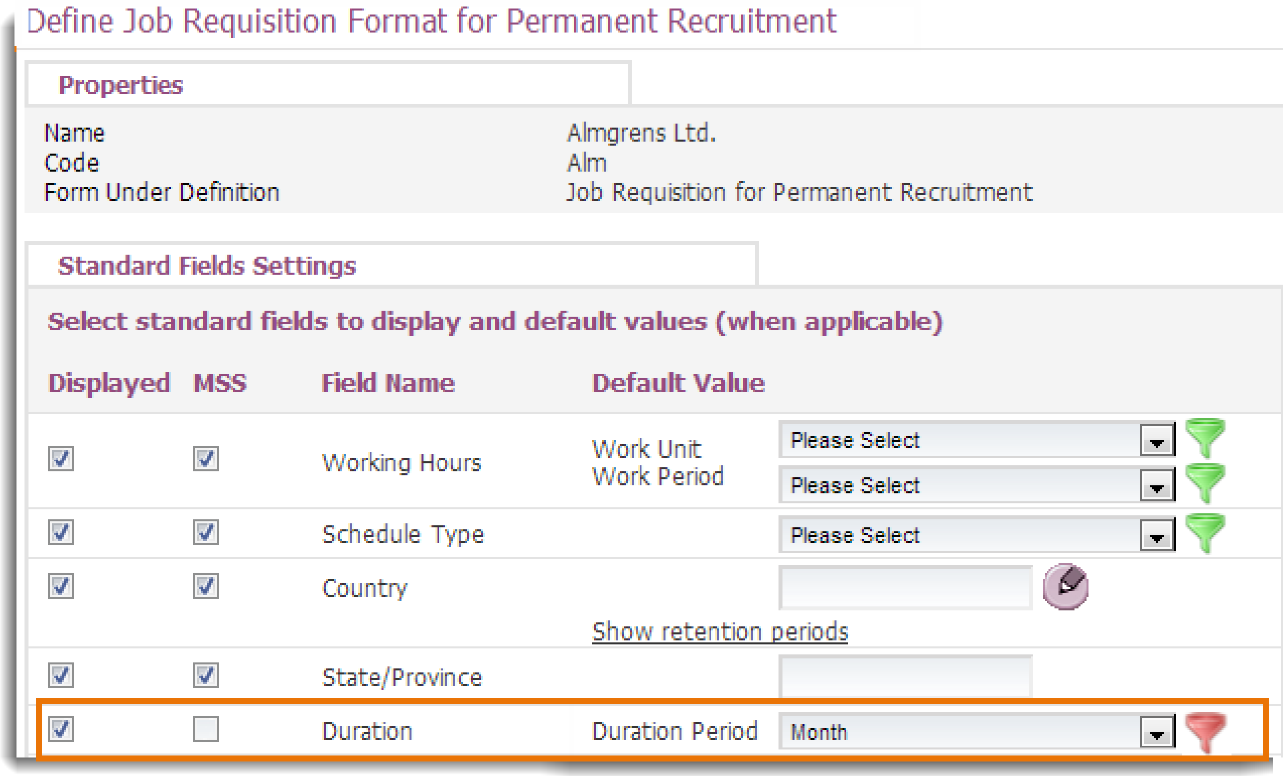
3. You can set default field values for your organization if required by selecting them from each list.



4. You can also filter which values appear in LOVs by clicking  and selecting values as required.



If the GSA or LSA has created any configurable fields (these will be at the bottom of the page) you can change their order by dragging and dropping. You cannot change the order of standard fields.



In the previous example, for permanent recruitment the **Duration** field is only available in job requisition definitions raised by Advanced users and the default value is locked as **Month** (other LOV values have been filtered out). This field is not visible in requisitions raised by Manager Workspace users.

Offer/Condition Forms

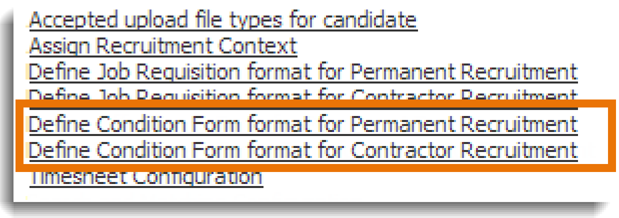
An offer (or conditions) form is the template a user completes at the Hire stage to define the content of the offer and contract to be presented to the candidate. These forms can be different per OBS level AND per recruitment context (permanent or contractor).

Defining the Offer/Condition Format

You can define a condition form format based on recruitment context. This enables you to decide what information must be provided when raising condition forms for contractors or permanent employees.

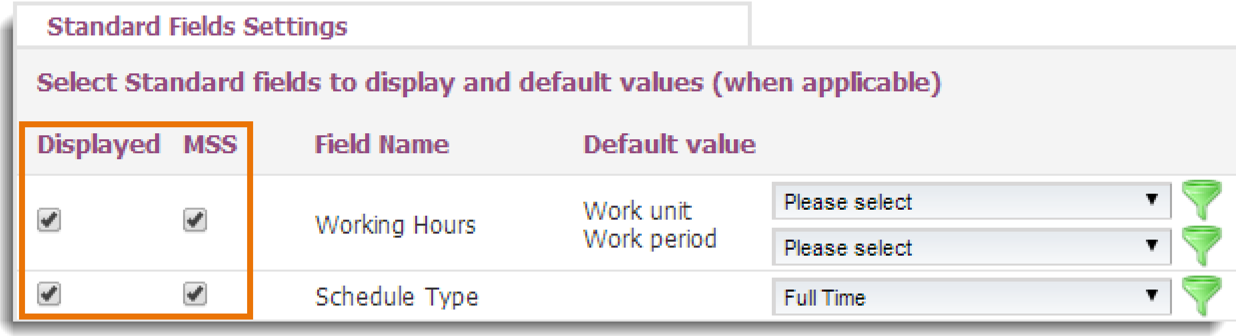
1. To define a format, select the appropriate link from the *Organization Properties* (see page 31) page:
    - **Define Condition Form format for Permanent Recruitment**

- **Define Condition Form format for Contractor Recruitment**



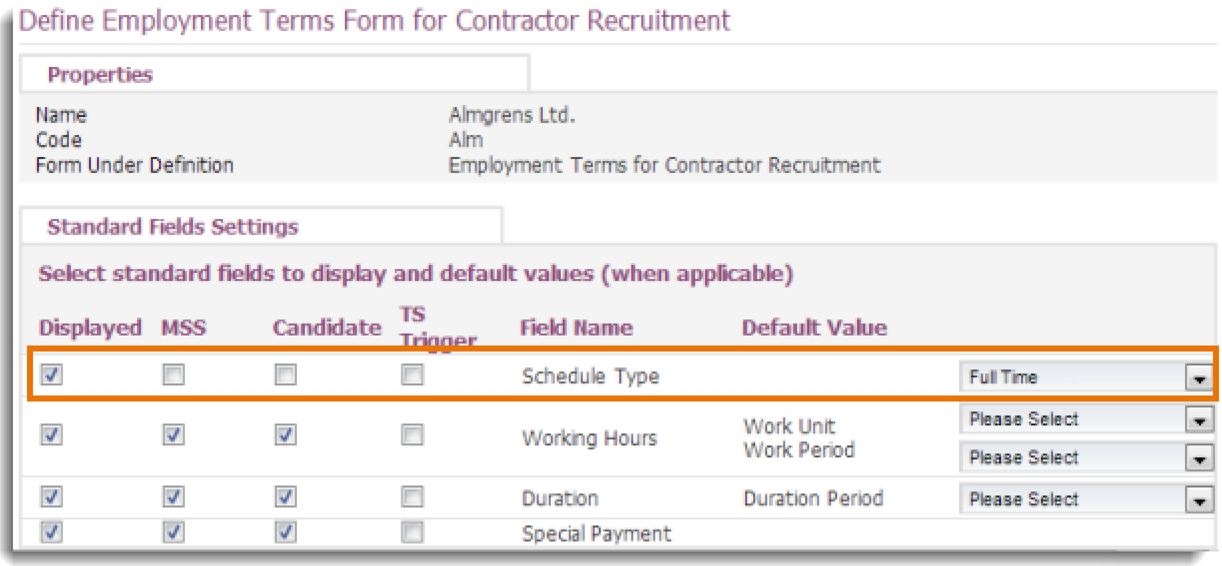
2. Select fields you want to display in the Condition form.

   Selecting **Displayed** will make the field visible to recruiters. Selecting **MSS** will make the field visible to managers or users with access to the MSS portal.



   TS Triggers (Timesheet triggers) are explained in Timesheet Adjustment Configuration (see page 48).

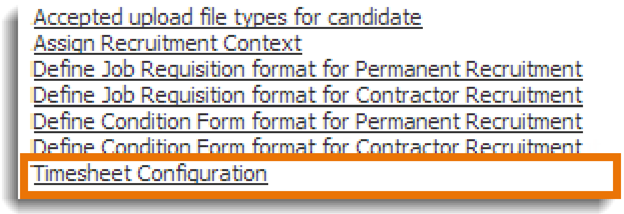
3. You can set default field values for your organization if required by selecting them from each list.



In the previous example, for contractor recruitment the **Schedule type** field is only available for condition forms raised by Advanced users and the default value displayed is **Full Time**. This field is not visible in condition forms raised by Manager Workspace or Candidate users.

Configuring Timesheets

General timesheet configuration is done in the **Timesheet Configuration** section.



However, the Timesheet Adjustment schema is defined in the Offer/Employment Terms Form (see page 46).

Configuring Timesheet Adjustments

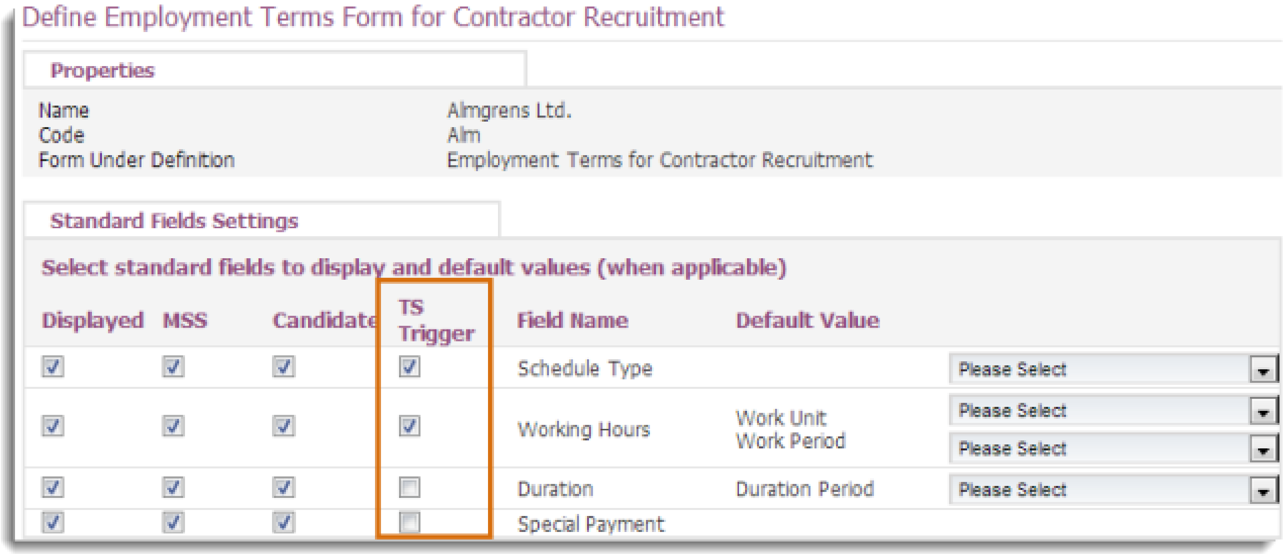
The Timesheet Adjustment Configuration mechanism enables you to change contract conditions after an offer is accepted by a contractor candidate and their timesheets are generated. In such cases, any timesheets that have already been approved are withdrawn, and the following new types are generated:

- A Reversal Timesheet (a copy of the existing Timesheet with negative worked time/units)
- A Correction Timesheet

The following general rules apply to the timesheet adjustment mechanism:

- If contract dates change, only approved timesheets that are outside the newly defined contract/extension dates are withdrawn
- If the contract rates change, all approved timesheets are withdrawn
- If employment terms change, only certain specified changes cause the approved timesheets to be withdrawn. These are described next.

Employment terms that cause timesheet adjustments are configured in the Define Employment Terms Form for Contractor Recruitment. Each field in this form may be set as a timesheet trigger. Any update made to such conditions activates the timesheet adjustment mechanism.



In the example shown, changes to the **Schedule Type** and **Working Hours** will trigger the timesheet adjustment mechanism. However, if **Duration** or **Special Payments** are changed, the mechanism is not triggered as those conditions are not specified as timesheet triggers.

For more information please refer to the separate document *Contingent and Timesheet Configuration*.

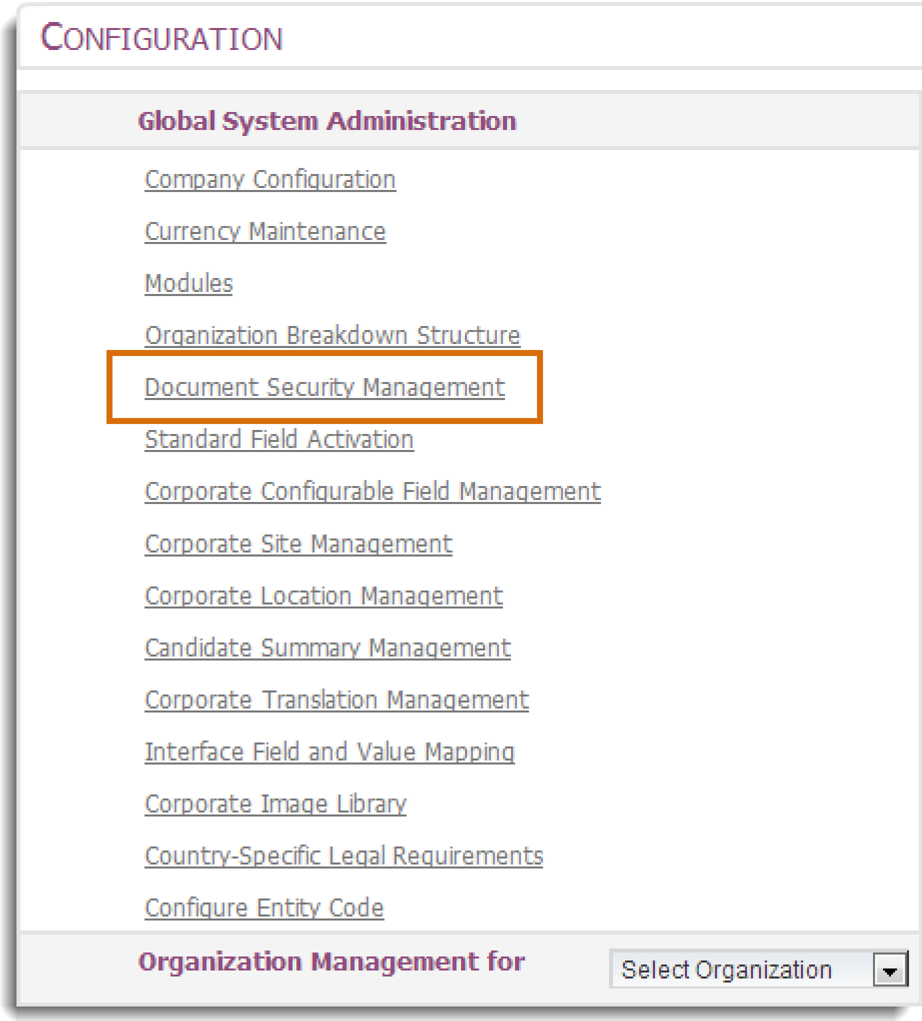
Lumesse

Managing Document Security Rules

Document Security Management defines keys that lock certain documents and assigns keys to specific users to enable them to open these documents.

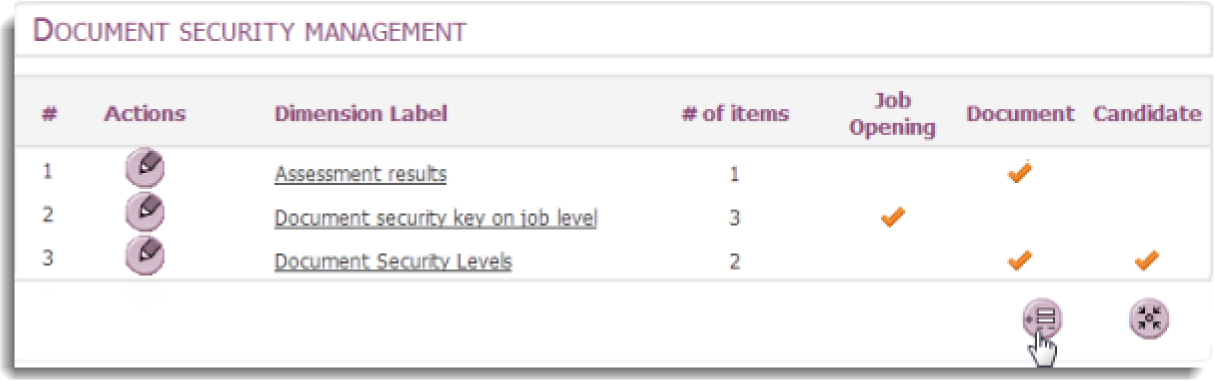
Setting Up Document Security

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. On the *Configuration* page, select **Document Security Management**.

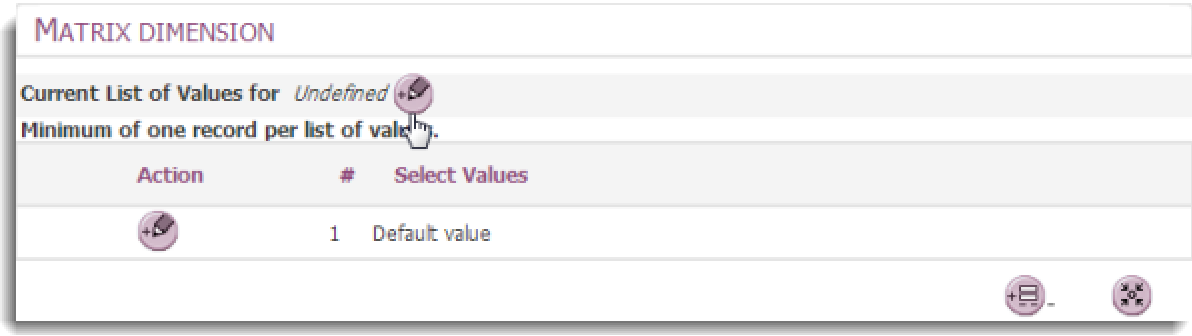


Lumesse

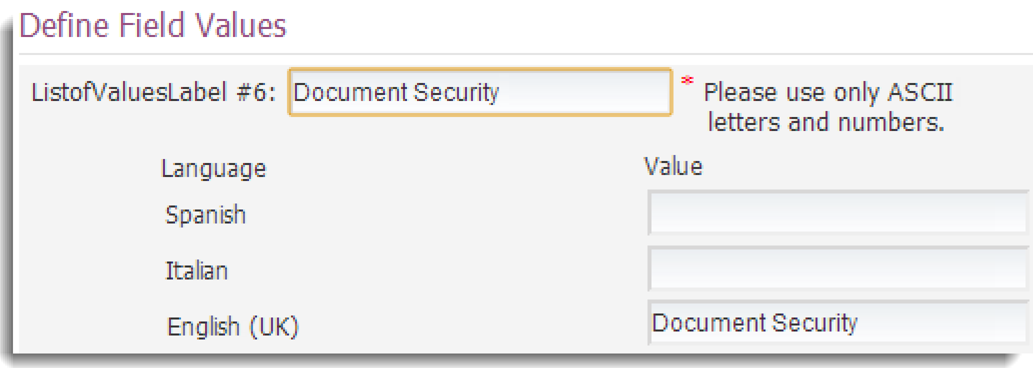
3. On the *Document Security Management* page click



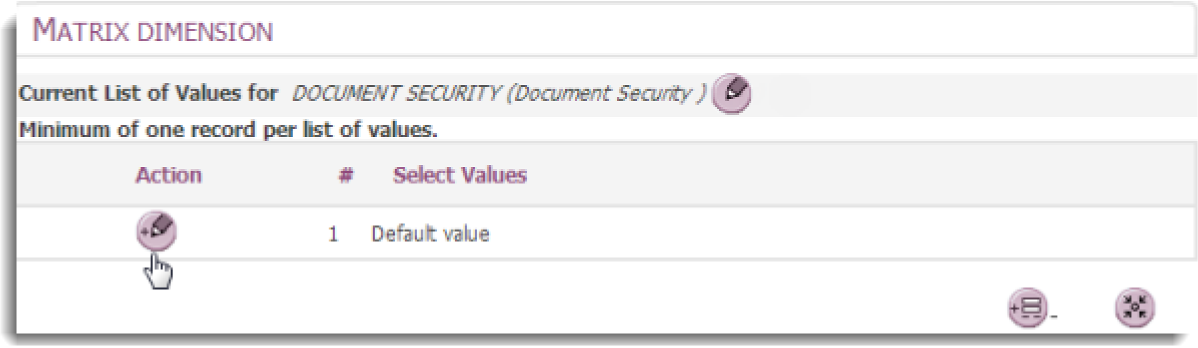
4. On the *Matrix Dimension* page, click next to **Current List of Values for**.



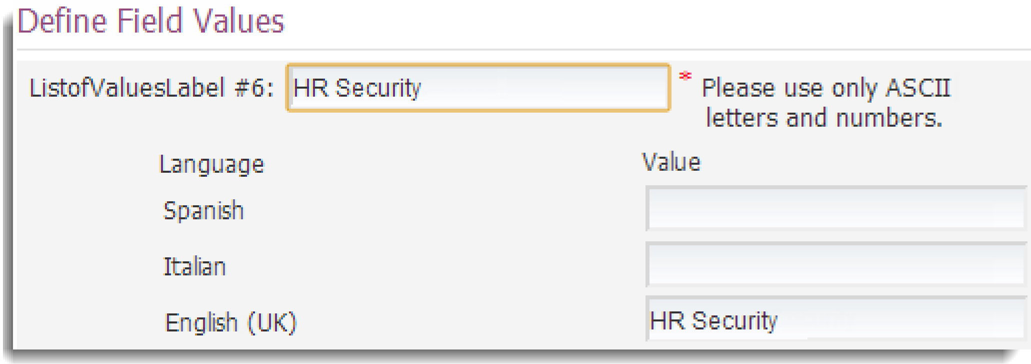
5. Type the name of the document security rule then click **Save & Close**.



6. Click below **Action**.

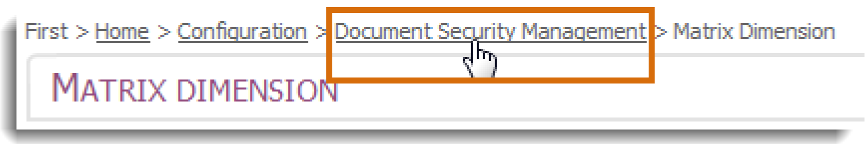


7. Type the values for this document security rule then click **Save & Close**.

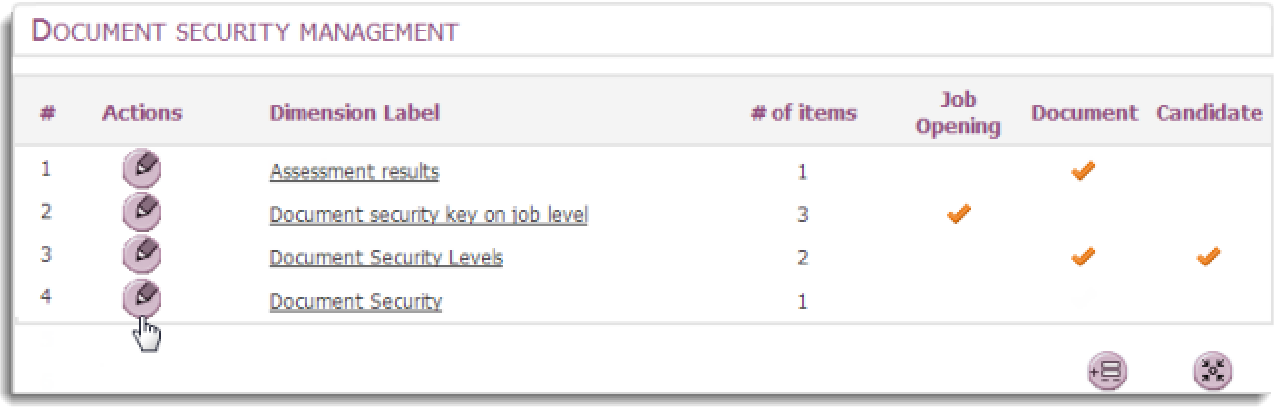


The *Matrix Dimension* page displays the document security list of values.

8. From the breadcrumb navigation bar, click **Document Security Management**.

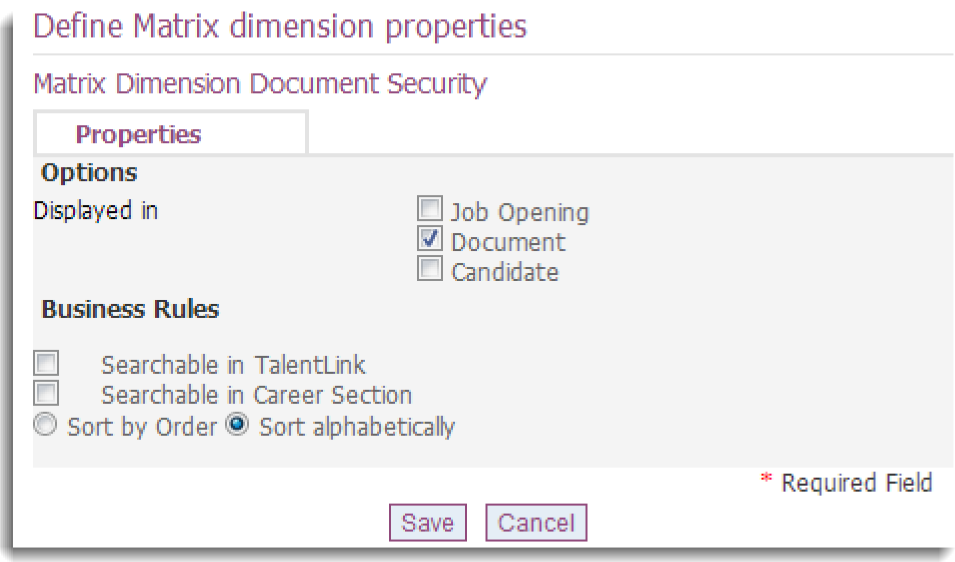


9. Click  below **Actions** to set the properties for the Document Security Management rule.



The *Properties* page is displayed.

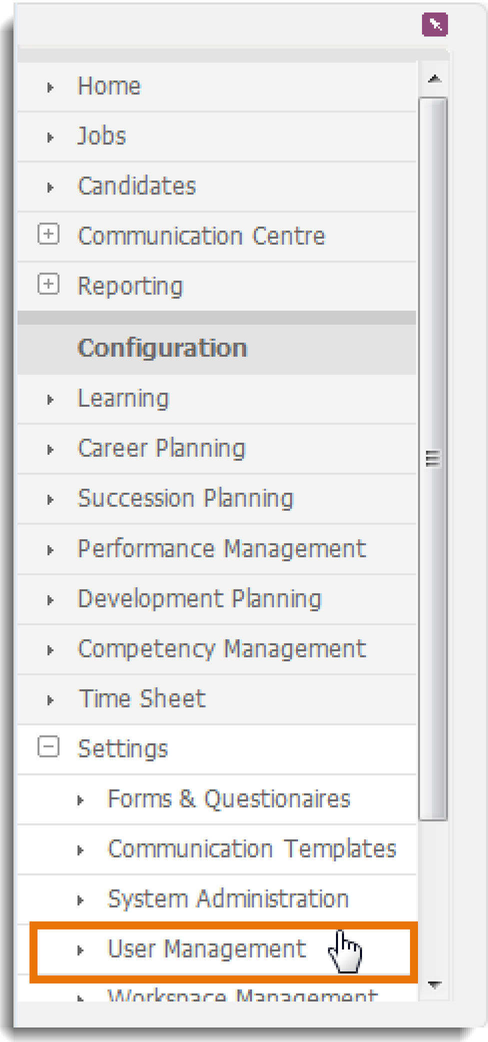
10. Select **Document** then click **Save** to activate the security rule.



Activating Document Security for Users

To use the document security rules, users who are allowed to lock and unlock certain documents must be issued with the security key as follows:

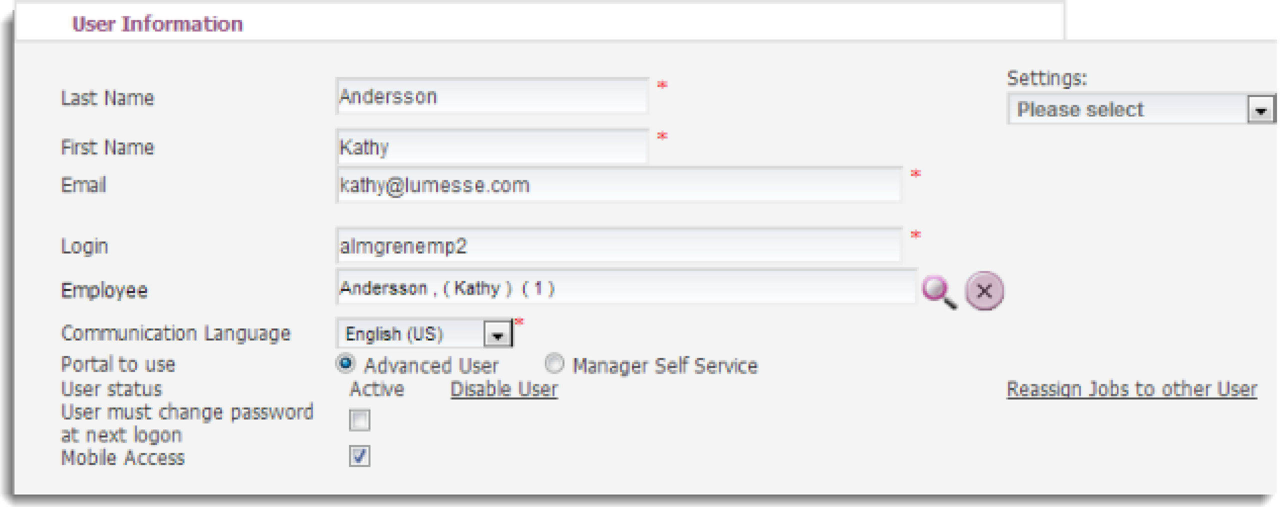
1. From the **Settings** section of the left dynamic menu, select **User Management**.



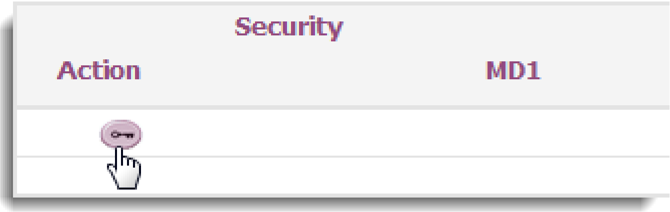
The list of users is displayed.

2. Click the name of the user to whom you want to issue the security key.

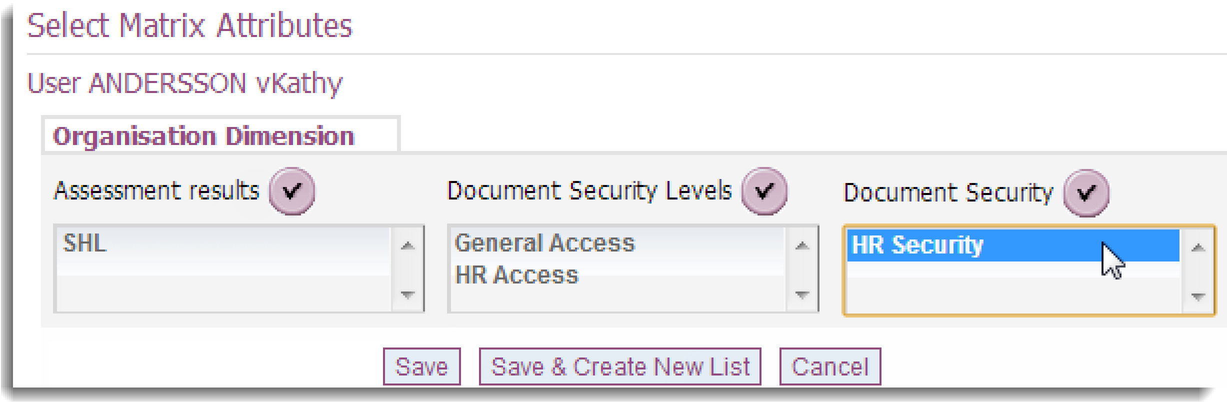
The user profile is displayed.



3. Scroll down to the **Security** section, then click  to activate the key for this user.



4. Select **Document Security**, then click **Save**.



The security key is activated for the user.

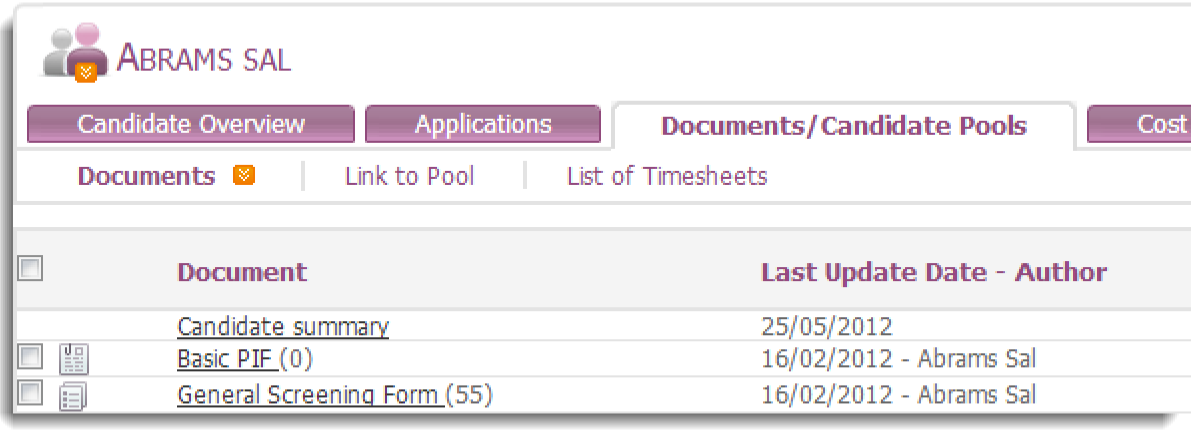
Lumesse

Locking and Unlocking Documents

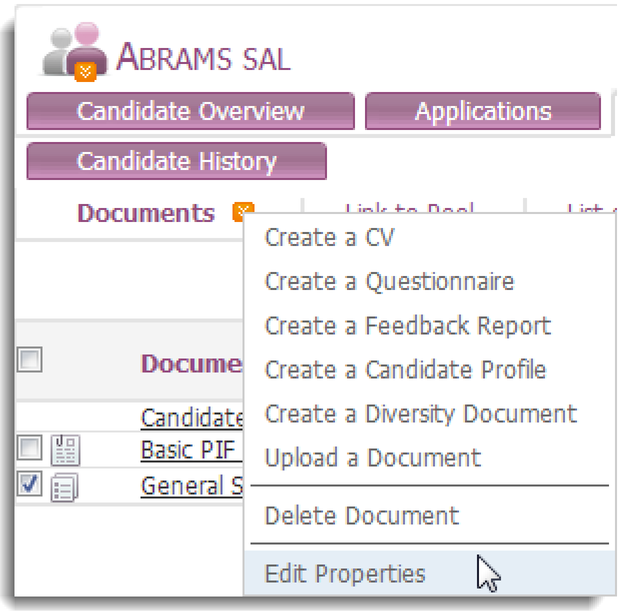
ⓘ To lock and unlock documents, you must have an activated security key in your user profile (see page 54).

To lock a document:

1. Go to the candidate file and select the *Documents/Candidate Pools* tab.

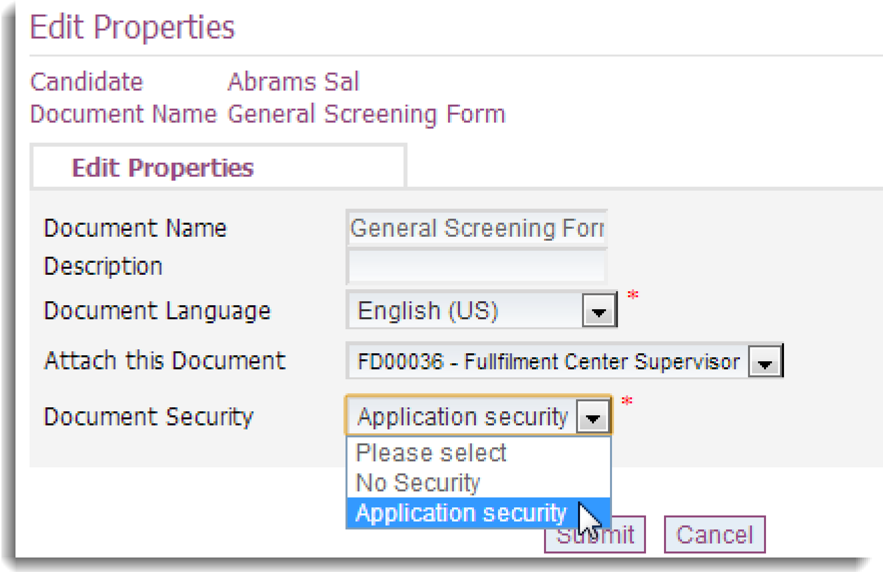


2. Select the checkbox next to the document that you want to lock.
3. Click next to **Documents**.



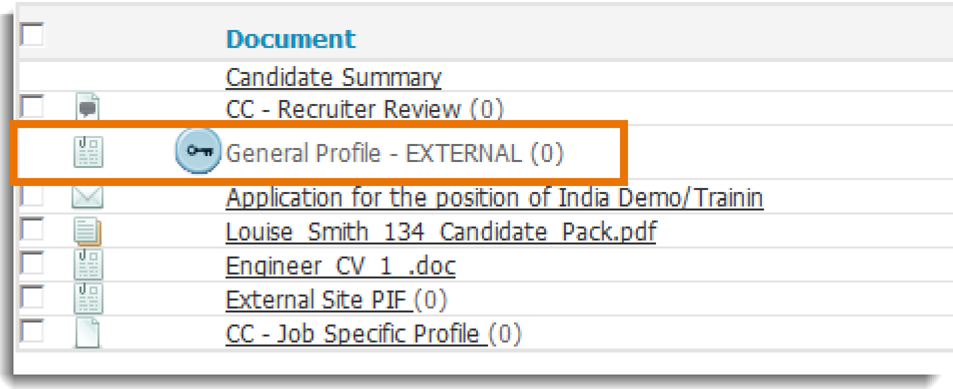
4. From the menu, select **Edit Properties**.

The *Edit Properties* page is displayed.



5. Select the security level you want from the **Document Security** dropdown list.
6. Click **Save**.

The document is locked and only users with the security key can access it. If a user does not have access to a document a key icon will appear next to its name in the document list and there will be no checkbox to enable it to be selected.



Activating Standard Fields

ⓘ Only a GSA can manage standard fields.

Standard fields are required by the system, therefore their names cannot be edited. Standard fields are used in different parts of the system including the Requisition Template, Condition Form, and the Personal Information Form (PIF).

1. From the **Settings** section of the left dynamic menu, select **System Administration** then **Standard Field Activation**.

STANDARD FIELD ACTIVATION

#	Field Label	# of items
1	Job Description Fields	6
2	MrMs	3
3	EEO Job Category	0
4	Region	1762
5	Closing Period	3
6	Country	205
7	Level	4
8	Salary period	6
9	Currency	152
10	Data Privacy Statement	10
11	Marital status	6
12	Work period	5
13	Work unit	5
14	Budgeted	2
15	Image location (for branded job adverts)	4

Most standard fields are LOVs. The fields on this page are separated by a horizontal line.

- The first two fields - Job Description and MrMs - are editable. This means you can relabel them and edit the values behind the fields (the dropdown list content)
- The remaining fields are non-editable, meaning that you cannot relabel them or edit them the values
- You cannot switch off a field, but you CAN switch off some of the *values* so that they aren't visible to users
- All field values that are switched on are visible globally; be careful not to switch off values that are already in use
- You cannot add any new values to a standard field

Editable Fields

The following fields are editable:

Job Description Fields

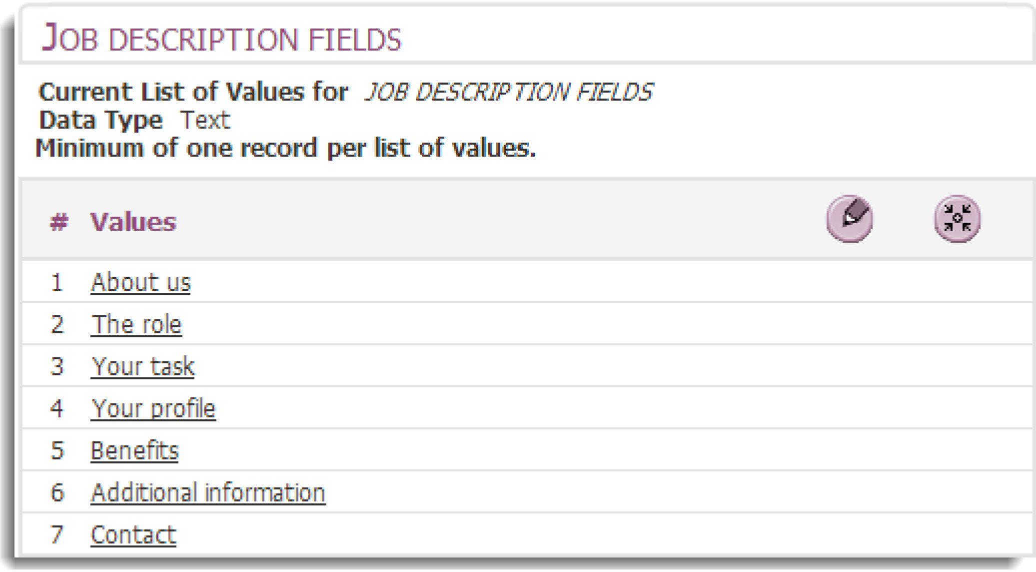
The Job Description fields are used in the **Job Description** and the **Job Advertisement** sections of job vacancies.

ⓘ If you modify these fields, the changes are instantly propagated to all existing job openings on every OBS level.

---

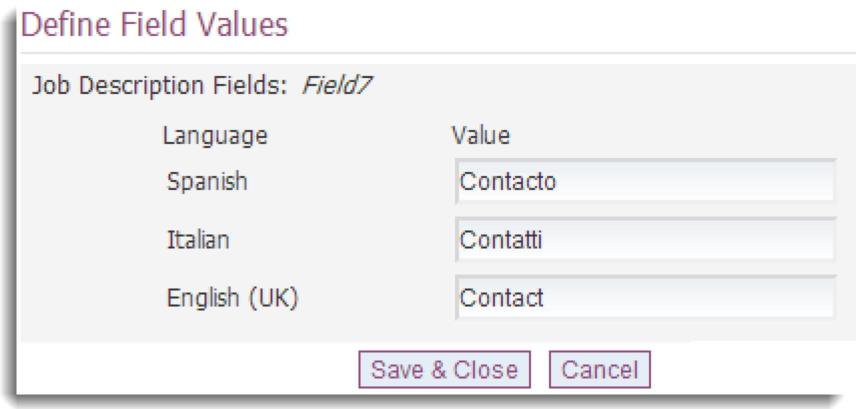
1. From the *Standard Field Activation* page, select **Job Description Fields**.

   The list of values for the Job Description fields is displayed, as shown in the following example.



2. Select the value you want to change.

   The *Define Field Values* page is displayed, as shown in the following example.

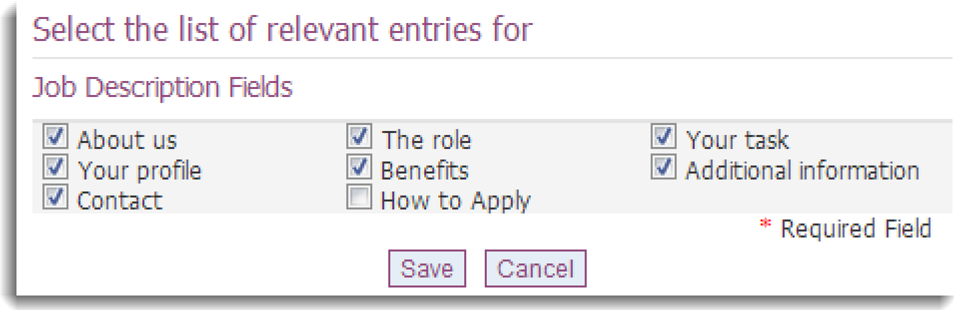


3. Type the label translations as required then click **Save & Close**.

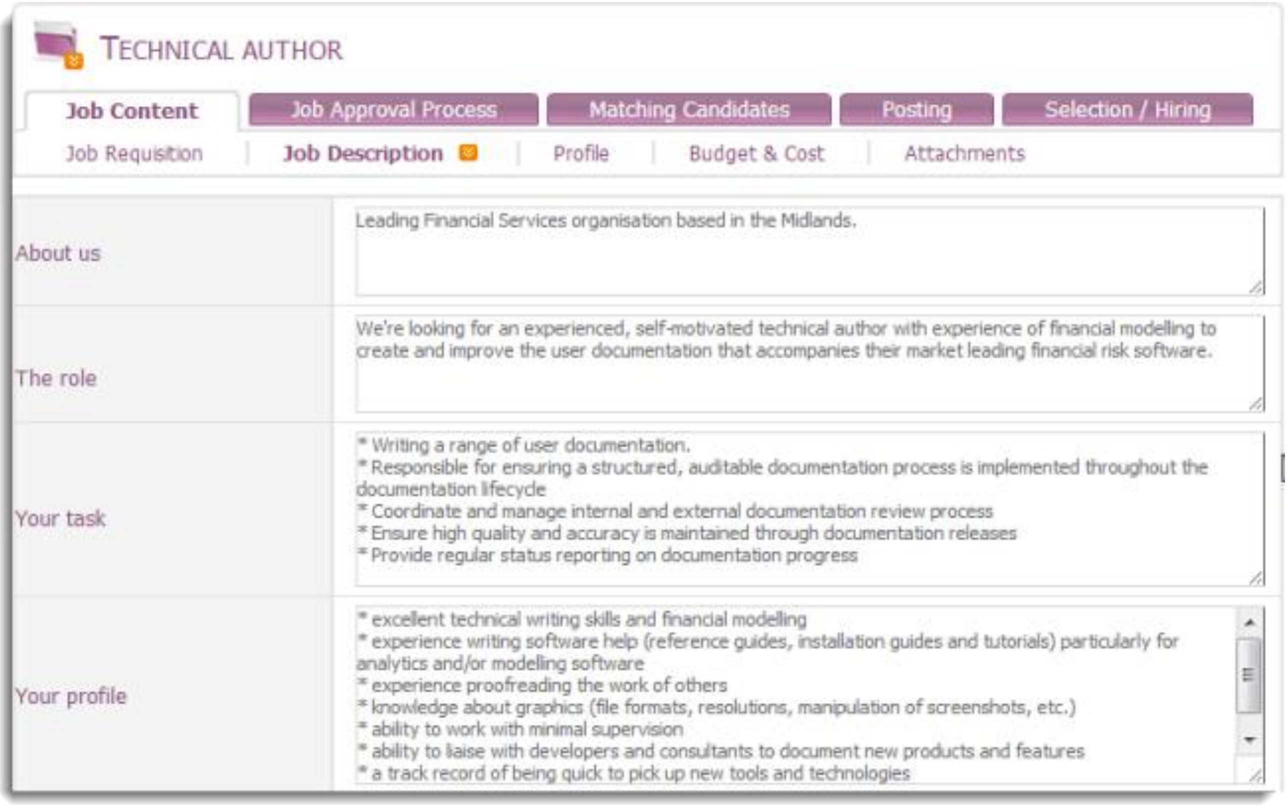
   On the *Job Description Fields* page, you can create a maximum of eight values. You can deselect any values that are not needed.

4. Click to select/deselect the values.

5. Select or deselect checkboxes as required then click **Save**.



The following image shows an example of the Job Description fields as they would appear in the **Job Description** and **Job Advertisement** section of Job Openings.



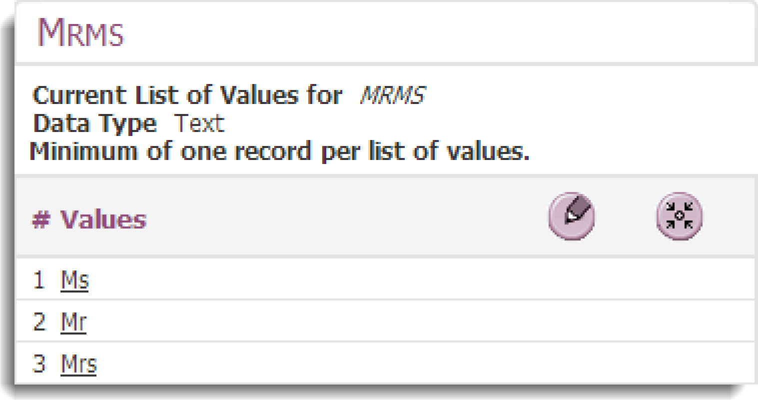
MrMs

The MrMs field is used to address the candidate (or employee) with their correct courtesy title in emails and merged Word™ documents.

Based on the gender of the candidate (defined in the candidate/employee Personal Information File), the courtesy title can be defined for all the languages of the platform.

1. From the *Standard Field Activation* page, select **MrMs**.

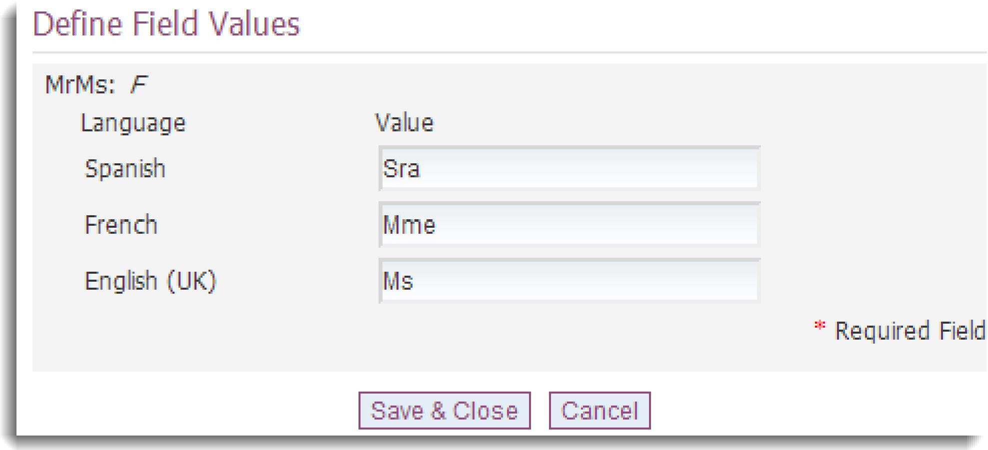
The list of values for MrMs field is displayed, as shown in the following example.



2. Select the value you want to change.

   The *Define Field Values* page is displayed, as shown in the following example.

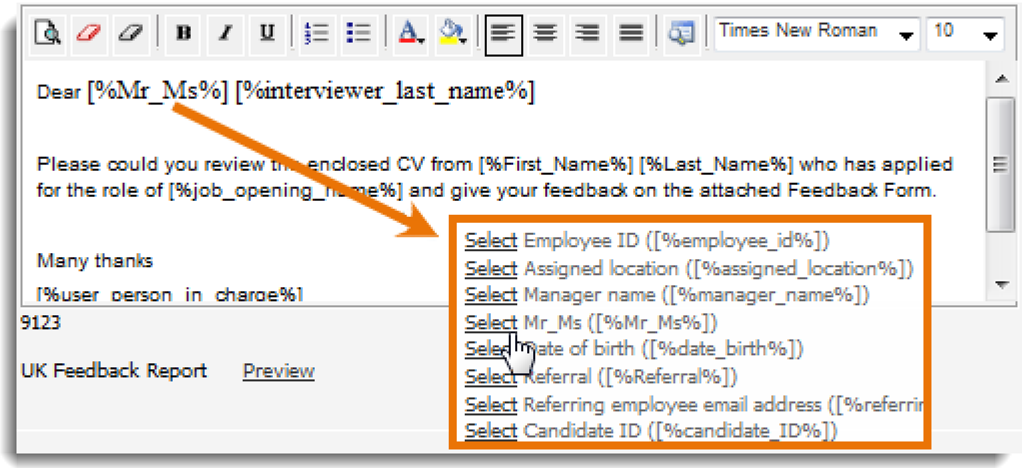
   ⓘ In addition to the courtesy title for men and women, you can also define the courtesy title for candidates/employees whose gender is not specified. This is the generic Ms/Mr value.



3. Type the label translations as required, then click **Save & Close**.

   In the email or letter sent to the candidate, after merging, the **Mr_Ms** field is replaced with the defined value.

ⓘ The Mr_Ms field can be found in the list of merge fields in Template Management, as well as in the list of merge fields available in Word™ merge.



Non Editable Fields

For all standard fields below the grey line you cannot re-label them or edit the values. You can select or deselect the values so that they aren't available, but you cannot add new values.

In general, you can select all values for each of the fields. For example, you may want all countries and all regions.

However, there may be instances where only a small number of available values are relevant to your company. For example, if your company only deals in Euros you want to select only these monetary units in the **Currency** field.

STANDARD FIELD ACTIVATION

#	Field Label	# of items
1	Job Description Fields	6
2	MrMs	3
3	EEO Job Category	0
4	Region	1762
5	Closing Period	3
6	Country	205
7	Level	4
8	Salary period	6
9	Currency	152
10	Data Privacy Statement	10
11	Marital status	6
12	Work period	5
13	Work unit	5
14	Budgeted	2
15	Image location (for branded job adverts)	4

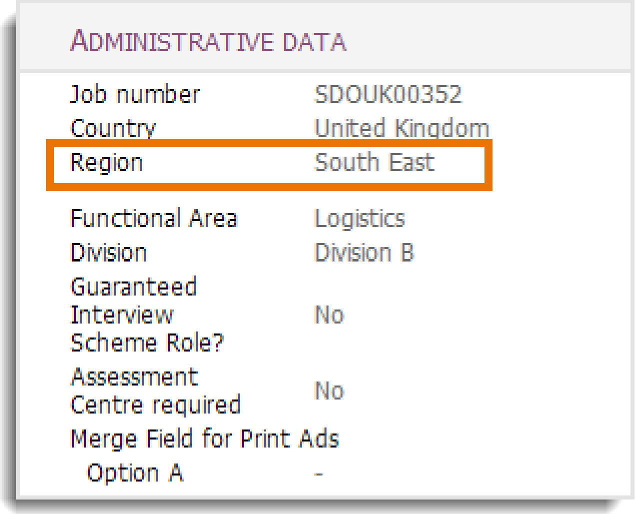
EEO Job Category

The Equal Employment Opportunity functionality is not currently used and has no values.

Region

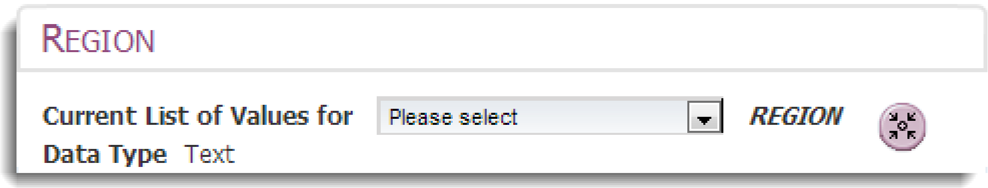
The Region values are linked to the Country values (see page 66).

The Region appears in the **Administrative Data** section on the *Job Requisition* tab.



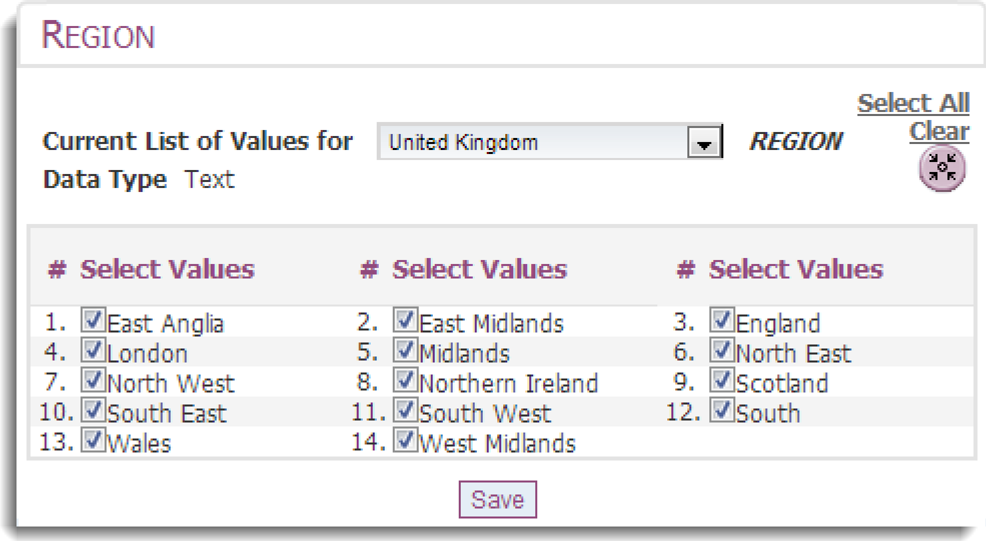
1. From the *Standard Field Activation* page, select **Region**.

   The list of values for the Job Description fields is displayed, as shown in the following example.



2. From the dropdown list, select the Country for which you want to select/deselect Regions.
3. Click  and select/deselect individual Regions.
   - To select every Region click **Select All**.

- To clear every Region select **Clear**.

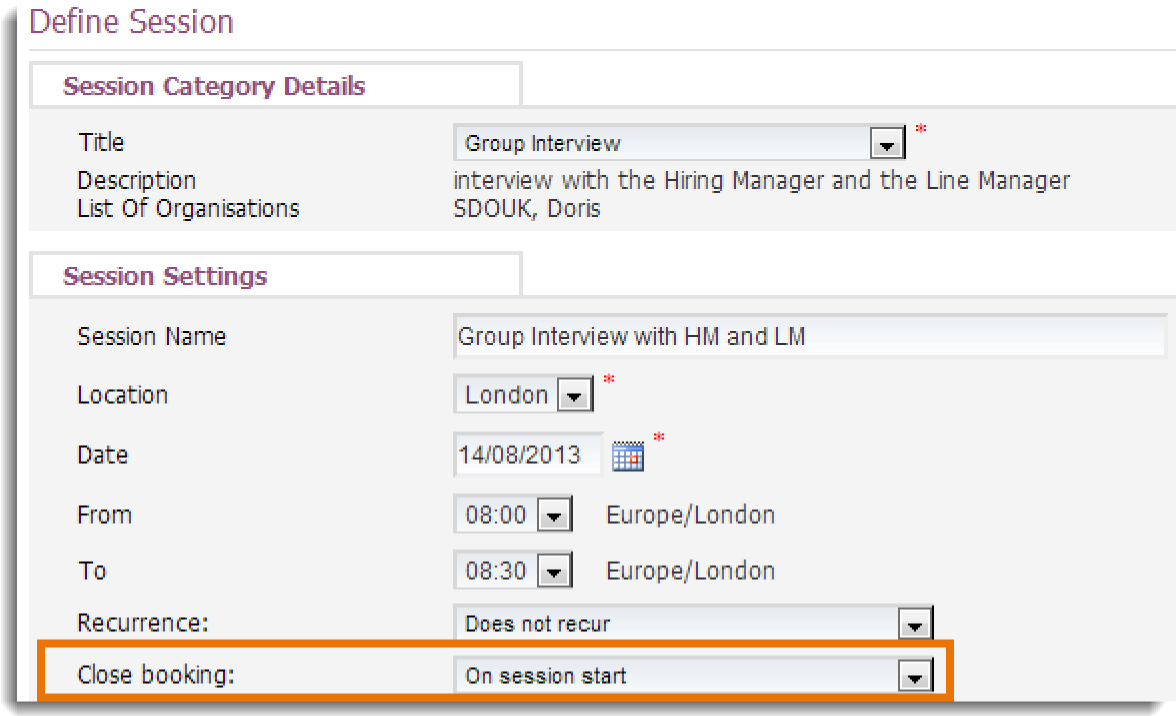


4. When you have made your selections click **Save**.

Closing Period

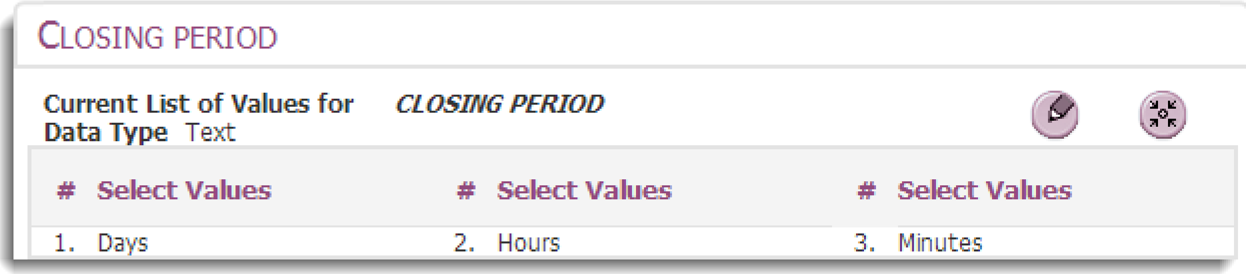
The Closing Period value is used during Session Management. The values enable a user to define a specific time to close the booking before the Session starts.

Users select the Closing Period when creating a Session, as shown in the following example.

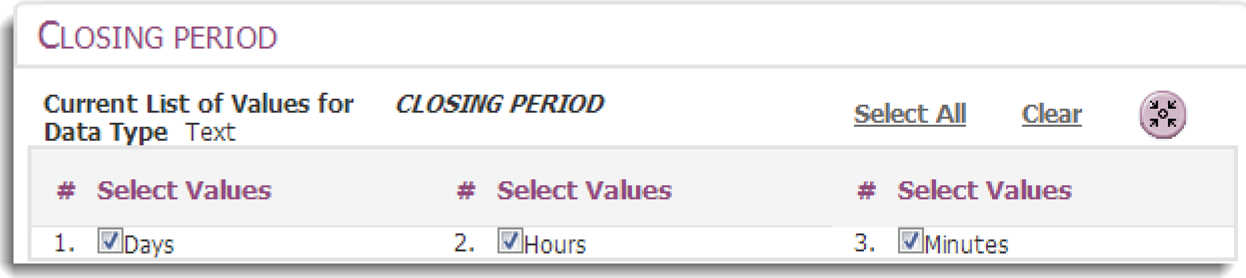


1. From the *Standard Field Activation* page, select **Closing Period**.

For the Closing Period you can create a maximum of three values. You can deselect any values that are not needed.

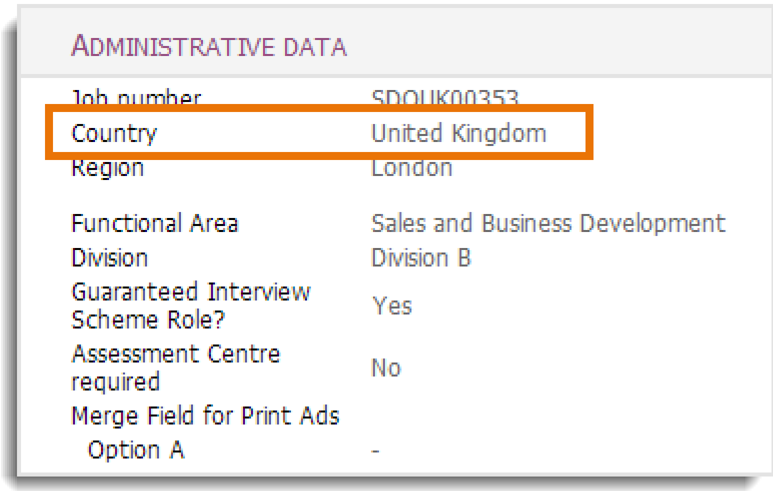


2. Click and select/deselect the Closing Periods, then click **Save**.



Country

The Country field is visible on the *Job Requisition* tab, in the **Administrative Data** section of Job Openings.



1. From the *Standard Field Activation* page, select **Country**.
2. Click and select/deselect individual Countries.
   - To select every country click **Select All**.

- To clear every country select **Clear**.

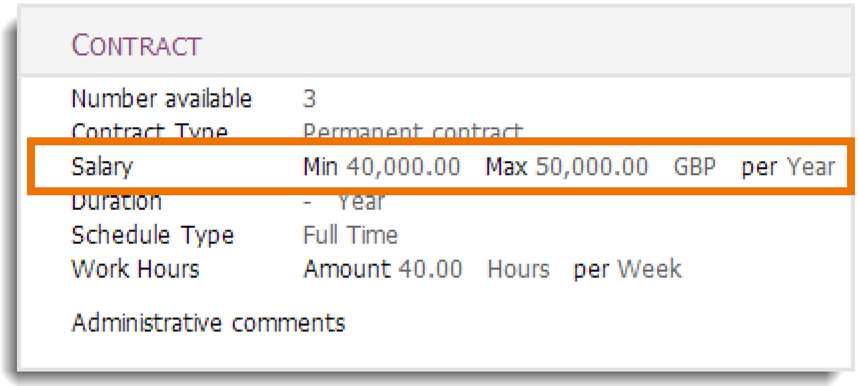
3. When you have made your selections click **Save**.

Level

ⓘ This functionality is not currently used.

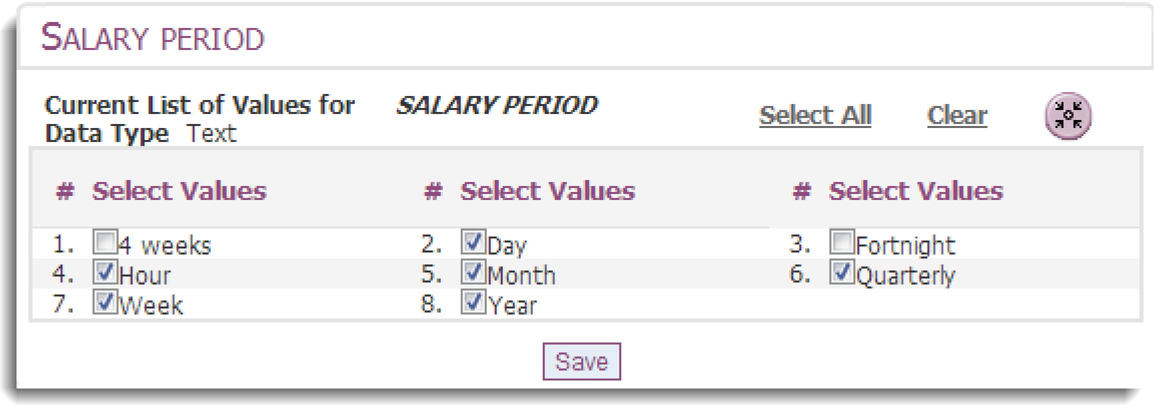
Salary Period

The **Salary Period** field is visible in the *Job Requisition* tab of Job Openings, in the **Contract** section.



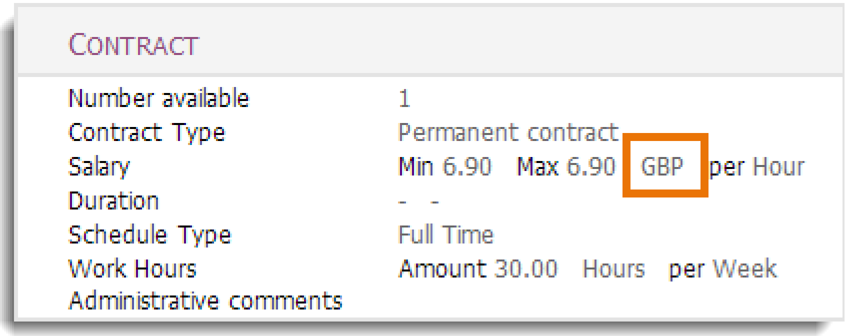
1. From the *Standard Field Activation* page, select **Salary period.**

2. Click and select/deselect the Salary Period values, then click **Save**.



Currency

The **Currency** field is displayed in the *Job Requisition* tab, in the **Contract** section.



ⓘ The value set at the Organization level (Currency for Cost Tracking) is displayed in the **Budget & Cost** section of the Job Openings.

1. From the *Standard Field Activation* page, select **Currency**.
2. Click and select/deselect individual Currency values.
   - To select every currency click **Select All**.

- To clear every currency select **Clear**.

CURRENCY

Current List of Values for *CURRENCY*
Data Type Text

#	Select Values	#	Select Values	#	Select Values
1.	AED	2.	AFN	3.	ALL
4.	AMD	5.	ANG	6.	AOA
7.	AUD	8.	AWG	9.	AZN
10.	BAM	11.	BBD	12.	BDT
13.	BHD	14.	BIF	15.	BMD
16.	BND	17.	BOV	18.	BSD
19.	BTN	20.	BWP	21.	BYR

3. When you have finished making your selections click **Save**.

Data Privacy Statement

The Data Privacy field is visible in the Personal Information Form (PIF) that candidates complete when they apply.

Administrative Information

Application Source Type	Agency
Candidate Source	UK - Recruitment Agency 2
Sourcing Medium	Database
Data Privacy Statement	1 Year

The Data Privacy Statement field sets the time period of the Data Privacy Statement (DPS). The time period can be set from one month up to 25 years. The candidate's information will be automatically archived from either:

- The date a candidate becomes inactive (no more active applications), plus the period of the DPS

  OR

- The date on which the consent to retain data is made, plus the period of the DPS

1. From the *Standard Field Activation* page, select **Data Privacy Statement**.
2. Click and select/deselect the Data Privacy Statement Period values as required, then click **Save**.

DATA PRIVACY STATEMENT

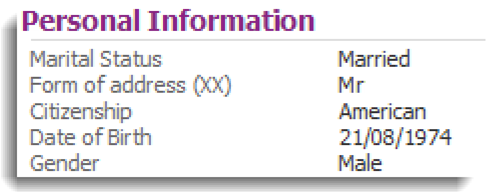
Current List of Values for *DATA PRIVACY STATEMENT*
Data Type Text

#	Select Values	#	Select Values	#	Select Values
1.	3 Months	2.	6 Months	3.	1 Year
4.	18 Months	5.	2 Years	6.	3 Years
7.	4 Years	8.	5 Years	9.	6 Years
10.	7 Years				

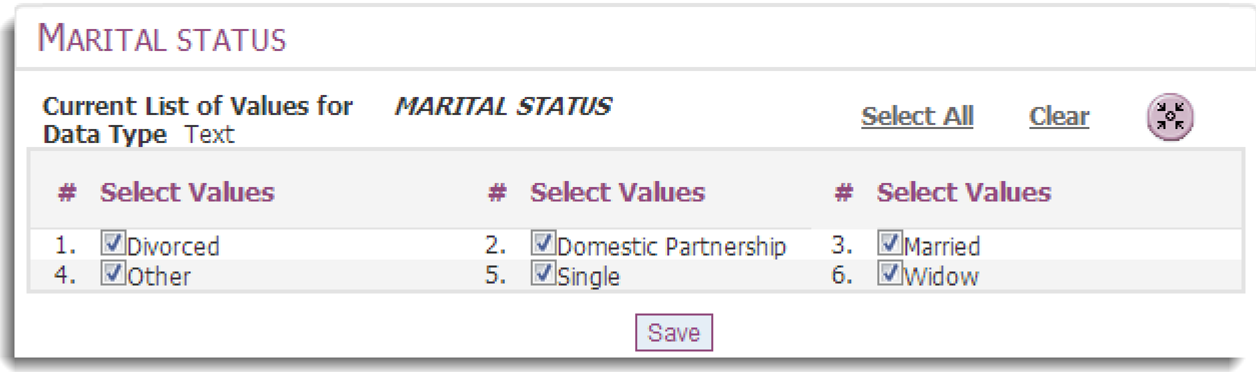
Marital Status

The **Marital Status** field is part of the Personal Information Form which candidates must fill in when they apply.

The Marital Status field is displayed in the Personal Information section of the Candidate Summary as shown in the following image.

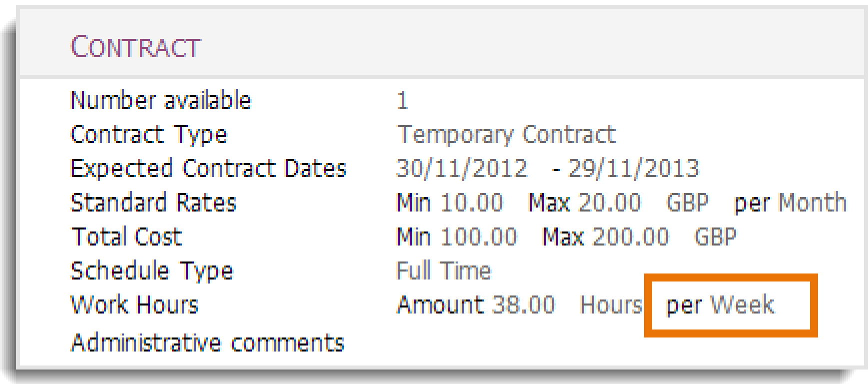


1. From the *Standard Field Activation* page, select **Marital status**.
2. Click and select/deselect the Marital Status values, then click **Save**.



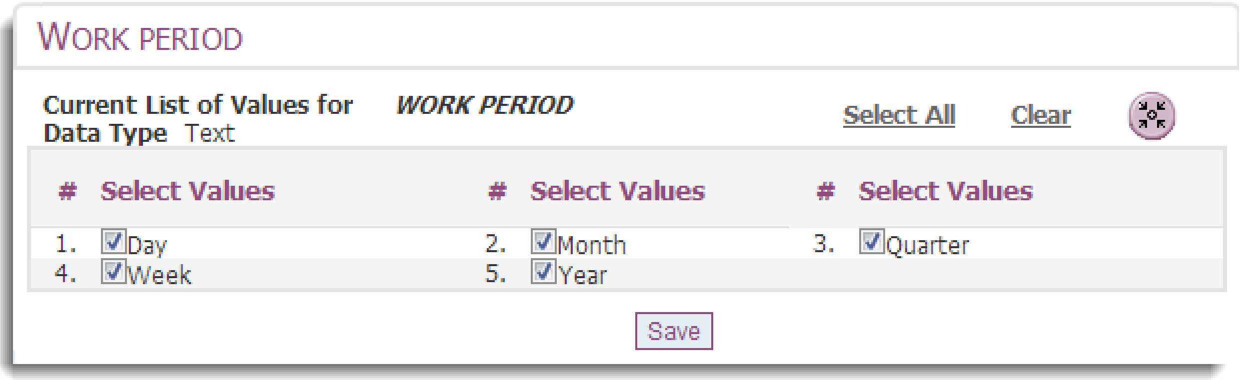
Work Period

The **Work Period** field is visible on the **Job Requisition** section of Job Openings.



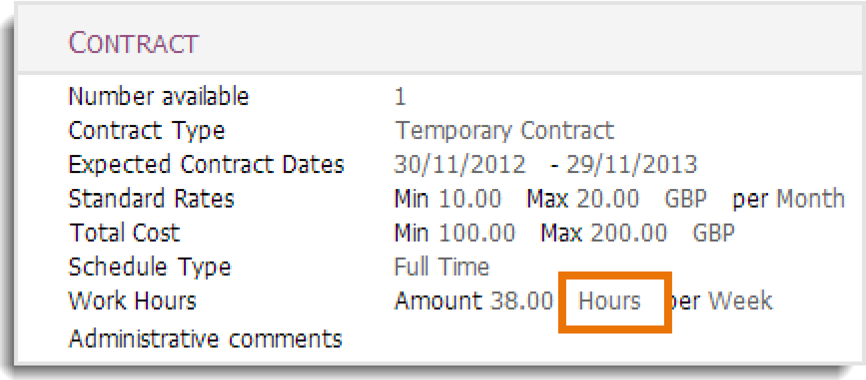
1. From the *Standard Field Activation* page, select **Work period**.

2. Click and select/deselect the Work Period values, then click **Save**.

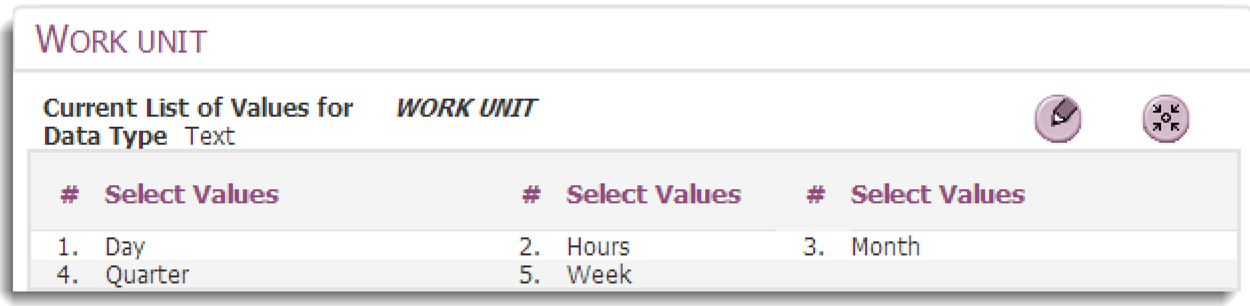


Work Unit

The Work Unit appears in the **Contract** section on the *Job Requisition* tab.

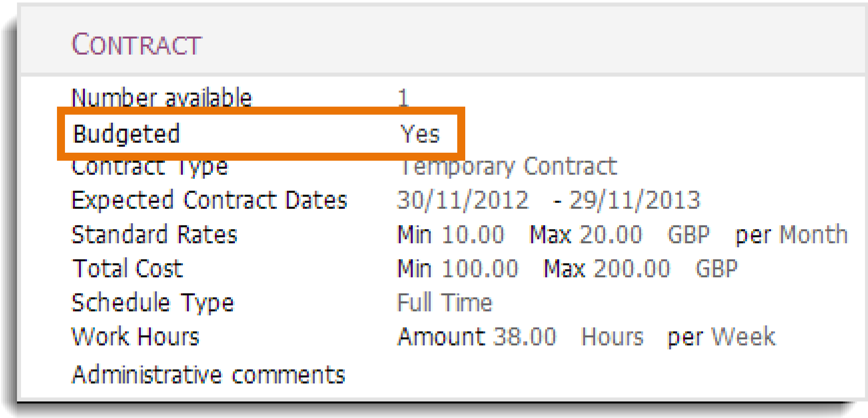


1. From the *Standard Field Activation* page, select **Work unit**.
2. Click and select/deselect the work unit values, click **Save**.



Budgeted

The Budgeted values are used when the New Hires Planning module is switched on (see page 371). The Budgeted values are used when creating a job requisition and are visible in the **Contract** section of the *Job Requisition* tab.



1. From the *Standard Field Activation* page, select **Budgeted**.
2. Click and select/deselect the Budgeted values, then click **Save**.

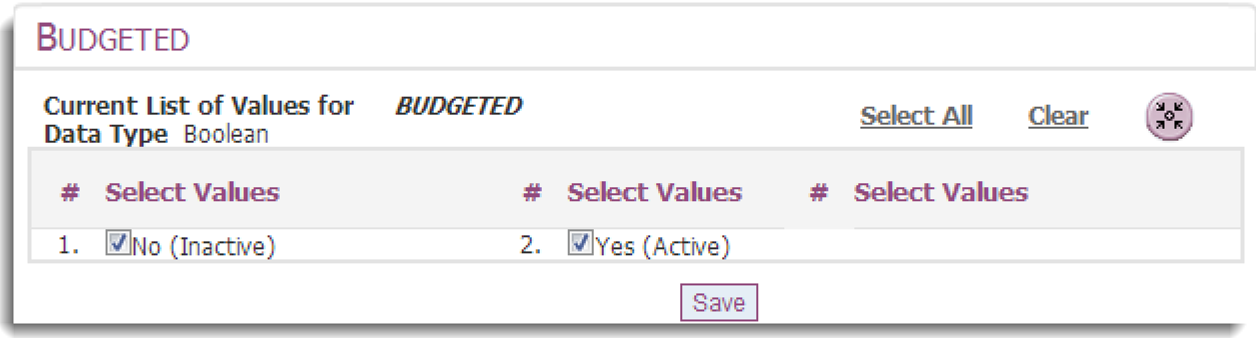
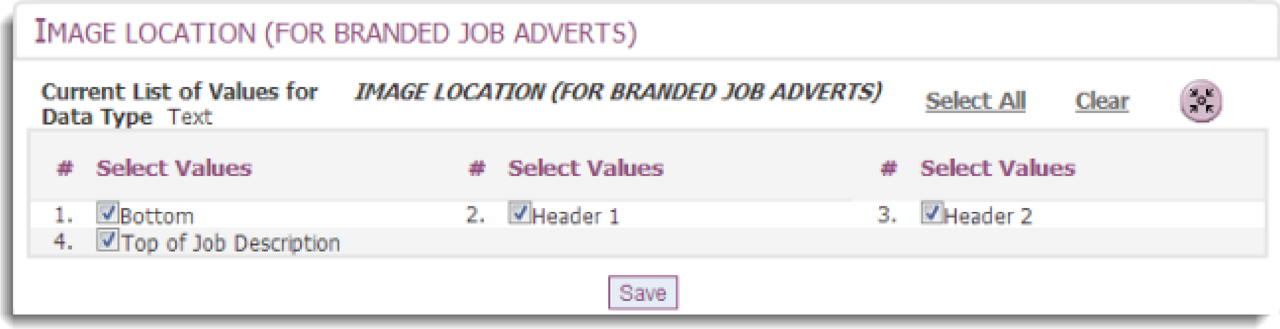


Image Location (for branded job adverts)

This refers to TalentLink's Image Library feature, which enables corporate approved images to be added to careers site job advertisements. Image Location values are used to specify the location of images on a job advert. For more information on where these images can be used please refer to Applying Corporate Branding to Job Advertisements (see page 381).

1. From the *Standard Field Activation* page, select **Image location (for branded job adverts)**.

2. Click and select/deselect the Image Location values, then click **Save**.



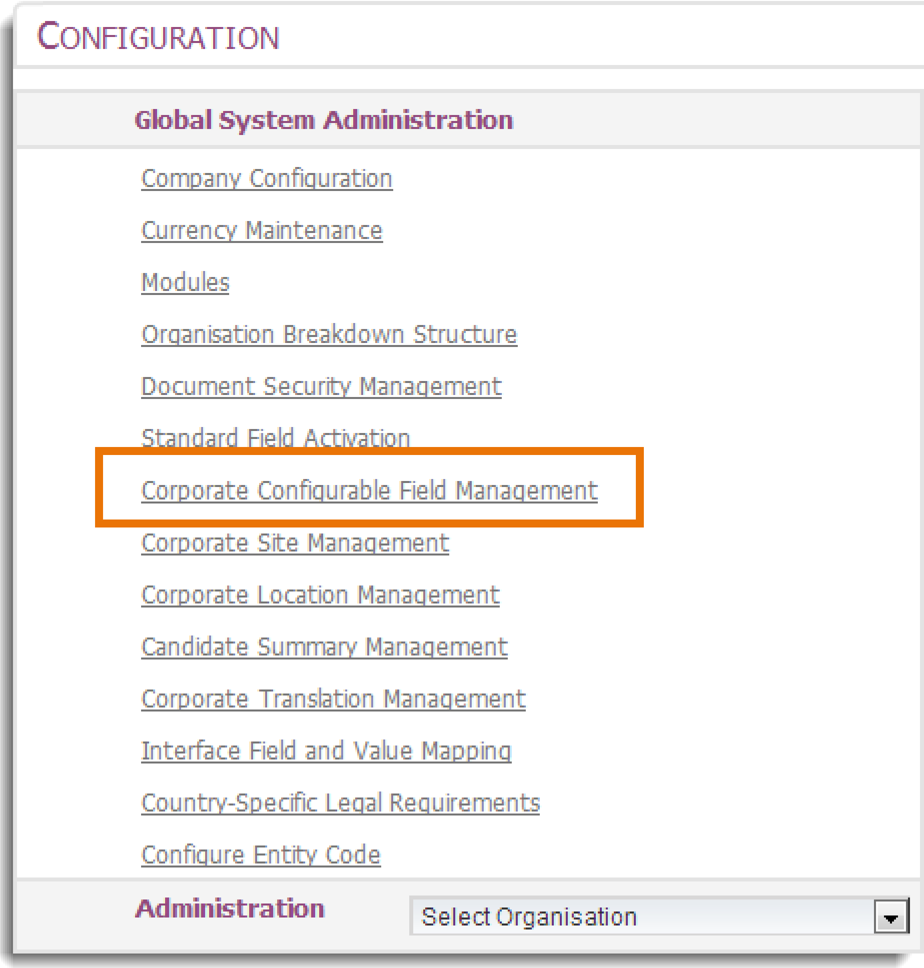
Managing Company Configurable Fields

Configurable fields are used in different parts of the system including the Requisition Template, Condition Form, and the Personal Information Form (PIF). The GSA can add and modify the values of *standard* configurable fields but cannot change the labels as these are used system-wide. Other fields are fully configurable and defined by the GSA. This is useful for reporting fields to ensure consistency, as well as creating fields that are commonly used in multiple organizations.

Accessing Configurable Fields

Global System Administrators (GSA) accessing Configurable Fields Management

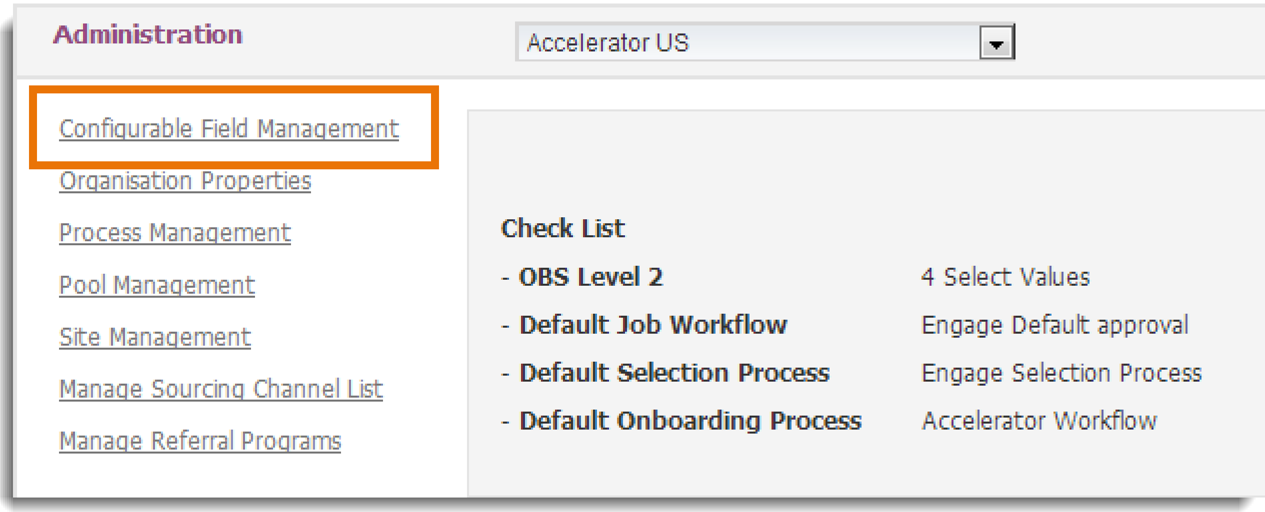
1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the *Configuration* page, select **Corporate Configurable Field Management**.



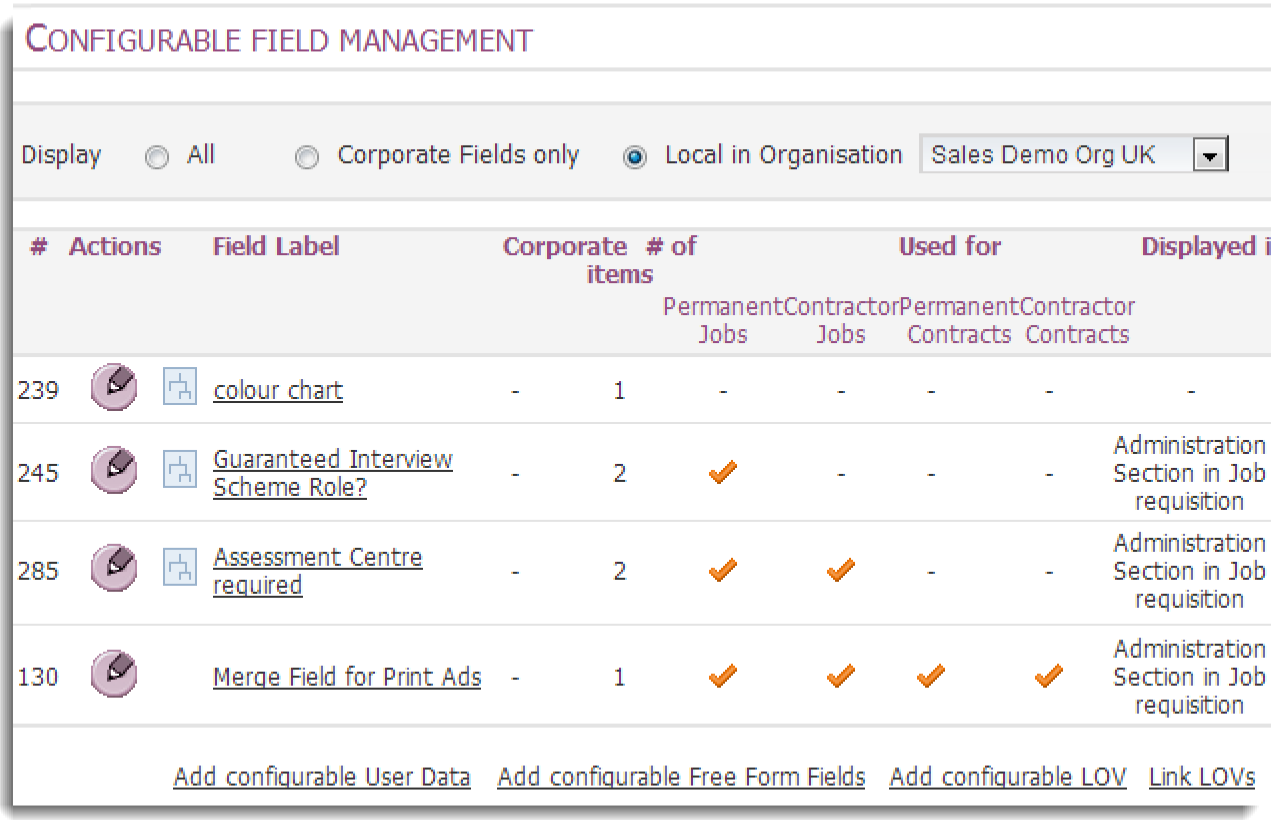
Local System Administrators (LSA) accessing Configurable Fields Management

1. From the **Settings** section of the left dynamic menu, select System Administration.

2. From the **Administration** dropdown list select an organization, then select **Configurable Field Management**.



For both GSAs and LSAs the next page displayed is the *Configurable Field Management* page.

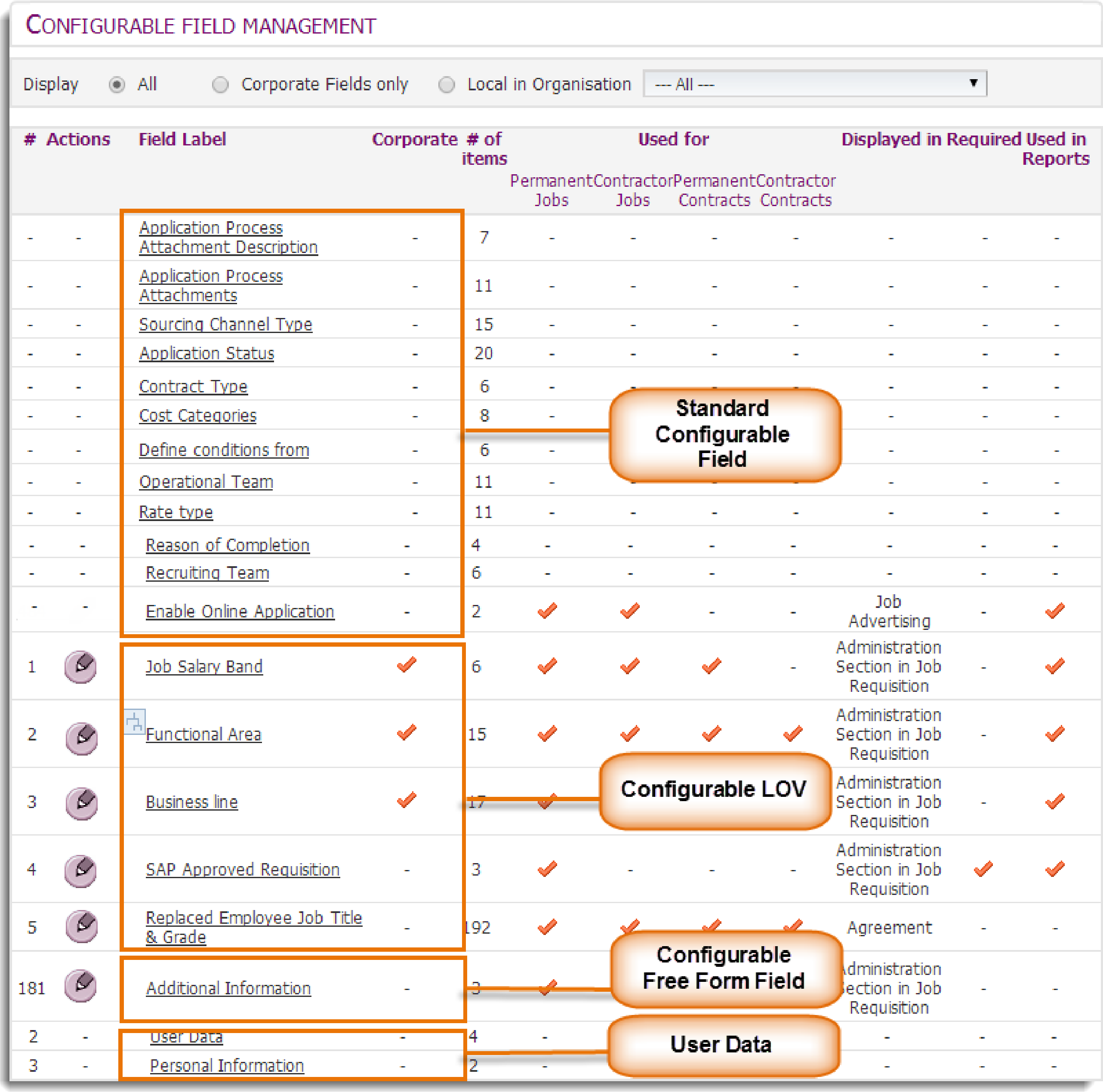


On the *Configurable Field Management* page, you can distinguish between the following types of field:

- Standard configurable fields (see page 77)
- Company configurable fields (see page 92)
- Configurable free form fields (see page 93)

✦ User data (see page 99)

You can also create linked lists by defining relationships between configurable LOVs.



CONFIGURABLE FIELD MANAGEMENT

Display ◉ All ○ Corporate Fields only ○ Local in Organisation --- All ---

#	Actions	Field Label	Corporate	# of items	Used for: Permanent Jobs	Used for: Contractor Jobs	Used for: Permanent Contracts	Used for: Contractor Contracts	Displayed in	Required	Used in Reports
-	-	Application Process Attachment Description	-	7	-	-	-	-	-	-	-
-	-	Application Process Attachments	-	11	-	-	-	-	-	-	-
-	-	Sourcing Channel Type	-	15	-	-	-	-	-	-	-
-	-	Application Status	-	20	-	-	-	-	-	-	-
-	-	Contract Type	-	6	-				-	-	-
-	-	Cost Categories	-	8	-				-	-	-
-	-	Define conditions from	-	6	-				-	-	-
-	-	Operational Team	-	11	-				-	-	-
-	-	Rate type	-	11	-	-	-	-	-	-	-
-	-	Reason of Completion	-	4	-	-	-	-	-	-	-
-	-	Recruiting Team	-	6	-	-	-	-	-	-	-
-	-	Enable Online Application	-	2	✔	✔	-	-	Job Advertising	-	✔
1		Job Salary Band	✔	6	✔	✔	✔	-	Administration Section in Job Requisition	-	✔
2		Functional Area	✔	15	✔	✔	✔	✔	Administration Section in Job Requisition	-	✔
3		Business line	✔	17	✔				Administration Section in Job Requisition	-	✔
4		SAP Approved Requisition	-	3	✔	-	-	-	Administration Section in Job Requisition	✔	✔
5		Replaced Employee Job Title & Grade	-	192	✔	✔	✔	✔	Agreement	-	-
181		Additional Information	-	3	✔				Administration Section in Job Requisition	-	-
2	-	User Data	-	4	-				-	-	-
3	-	Personal Information	-	2	-				-	-	-

ⓘ The fields displayed in the overview depend on the configuration of your company.

Standard Configurable Fields

ⓘ Only the Global System Administrator can access these fields.

CONFIGURABLE FIELD MANAGEMENT

Display ◉ All ○ Corporate Fields only ○ Local in Organisation --- All ---

#	Actions	Field Label	Corporate	# of items	Used for: Permanent Jobs	Used for: Contractor Jobs	Used for: Permanent Contracts	Used for: Contractor Contracts	Displayed in	Required	Used in Reports
-	-	Access Type	-	3	-	-	-	-	-	-	-
-	-	Application Process Attachment Description	-	2	-	-	-	-	-	-	-
-	-	Application Process Attachments	-	8	-	-	-	-	-	-	-
-	-	Sourcing Channel Type	-	15	-	-	-	-	-	-	-
-	-	Application Status	-	20	-	-	-	-	-	-	-
-	-	AutoCodeType	-	2	-	-	-	-	-	-	-

All standard configurable fields are LOVs.

- All active values in the LOVs are used across all your organizations
- You cannot deactivate a field, but you CAN activate or deactivate some of the field *values*
- Field values can be deactivated by deselecting them
- You CAN add new values to a standard configurable field. This is a key difference between standard *configurable* fields and standard fields (see page 58)

Default values are created by the system and cannot be modified or deleted; these are indicated by this icon

1. Click to preview the system default values.
2. Click to add a new value, to edit a user-added value or to delete a user-added value.
3. To change the order of the values, enter the position number to which you want to move the value then click to move the value up or down as required.

Sourcing Channel Type

The Sourcing Channel Type affects the way candidates are created in the Back Office. Default values are created by the system and cannot be modified or deleted (these are displayed as read only values). However, you can create additional values, which can be edited as required.

1. From the *Configurable Field Management* page (see page 74), select **Sourcing Channel Type**.

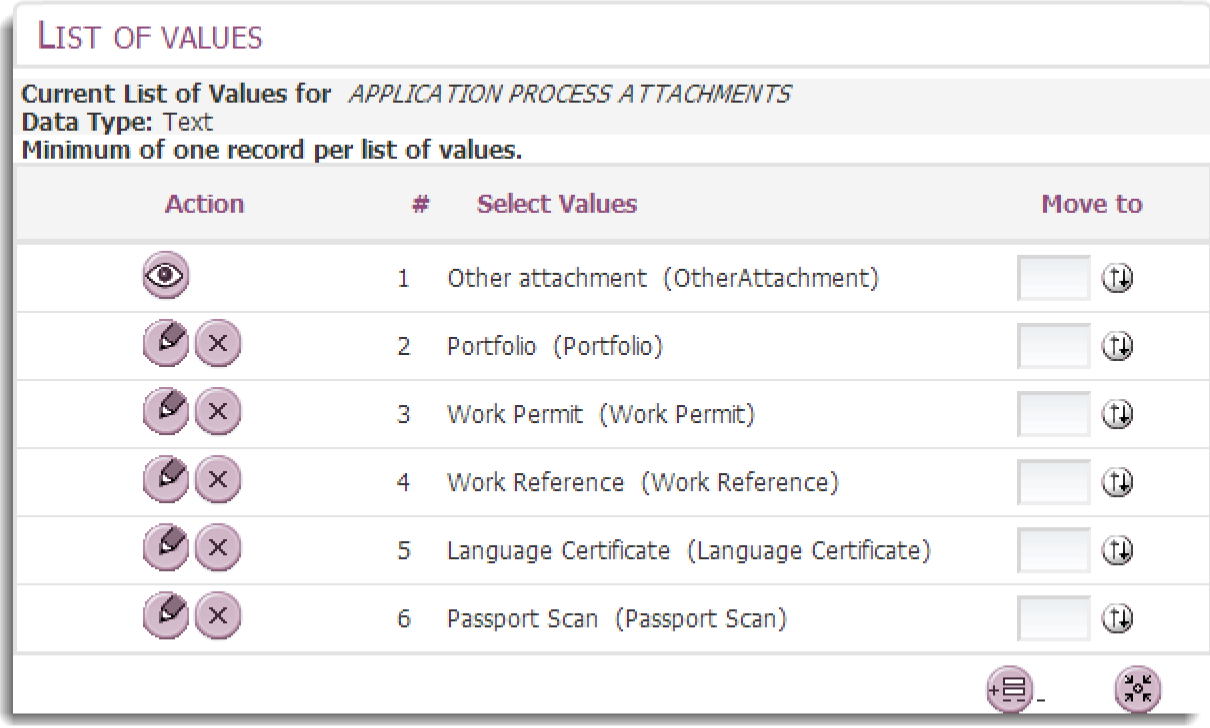
Current List of Values for *SOURCING CHANNEL TYPE*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Agency (Agency)	
	2	ExternalReferral (ExternalReferral)	
	3	External site (ExternalSite)	
	4	InternalReferral (InternalReferral)	
	5	Internal site (InternalSite)	
	6	Job Board (JobBoard)	
	7	Other (Other)	
	8	TalentLink (Talentlink)	
	9	Social Recruiting (SocialRecruiting)	
	10	TalentSource (Corporate) (GlobalAggregatorJobboard)	
	11	TalentSource (Local in Organization) (LocalAggregatorJobboard)	
	12	Job Distribution (Corporate) (JobDistributionCorporate)	
	13	Job Distribution (Local in Organization) (JobDistributionLocalInOrganization)	

Application Process Attachments

This field refers to the attachments a candidate can upload during the application process. The maximum number of attachments is 20.

1. From the *Configurable Field Management* page (see page 74), select **Application Process Attachments**.



LIST OF VALUES

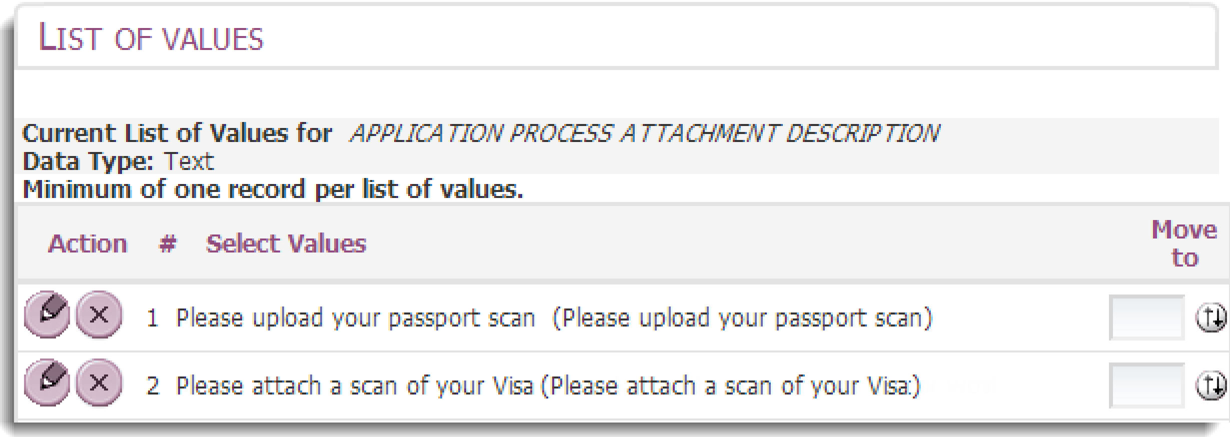
Current List of Values for *APPLICATION PROCESS ATTACHMENTS*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Other attachment (OtherAttachment)	
	2	Portfolio (Portfolio)	
	3	Work Permit (Work Permit)	
	4	Work Reference (Work Reference)	
	5	Language Certificate (Language Certificate)	
	6	Passport Scan (Passport Scan)	

Application Process Attachment Description

To help candidates understand which documents they must attach during the application process, you can add a short description beside each attachment. The description text is configured as an LOV so that users can select the appropriate explanation for each attachment.

1. From the *Configurable Field Management* page (see page 74), select **Application Process Attachments Description**.

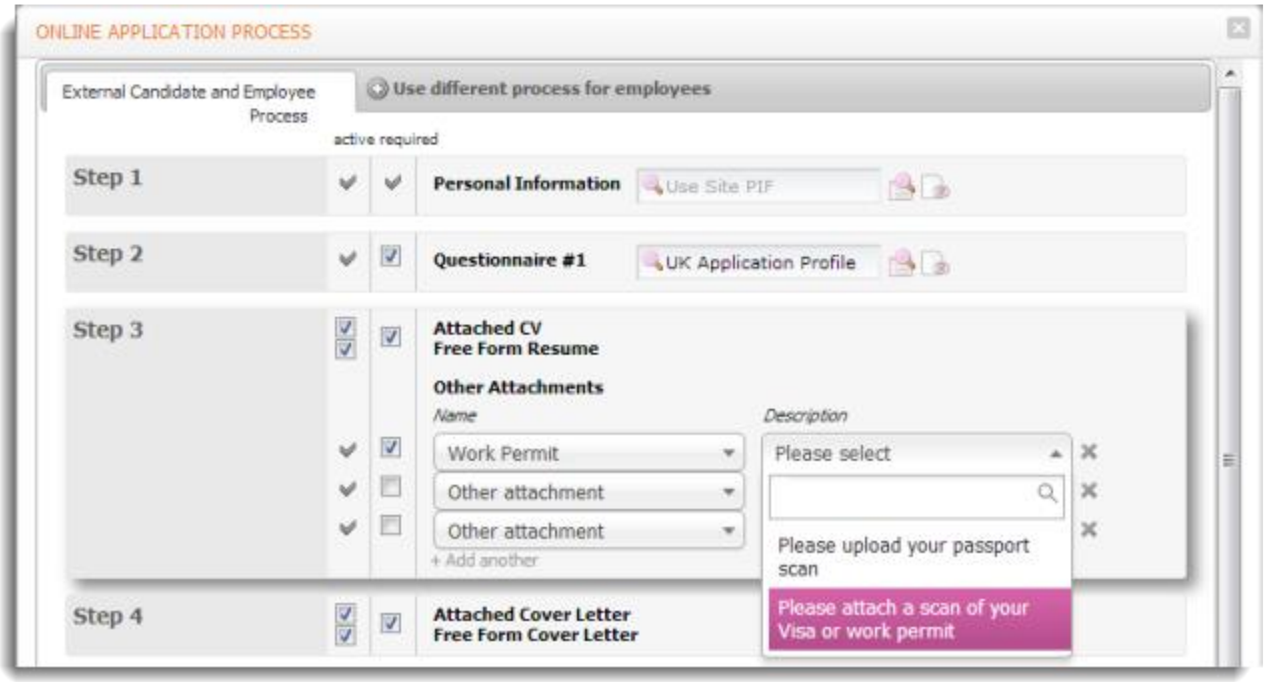


LIST OF VALUES

Current List of Values for *APPLICATION PROCESS ATTACHMENT DESCRIPTION*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Please upload your passport scan (Please upload your passport scan)	
	2	Please attach a scan of your Visa (Please attach a scan of your Visa:)	

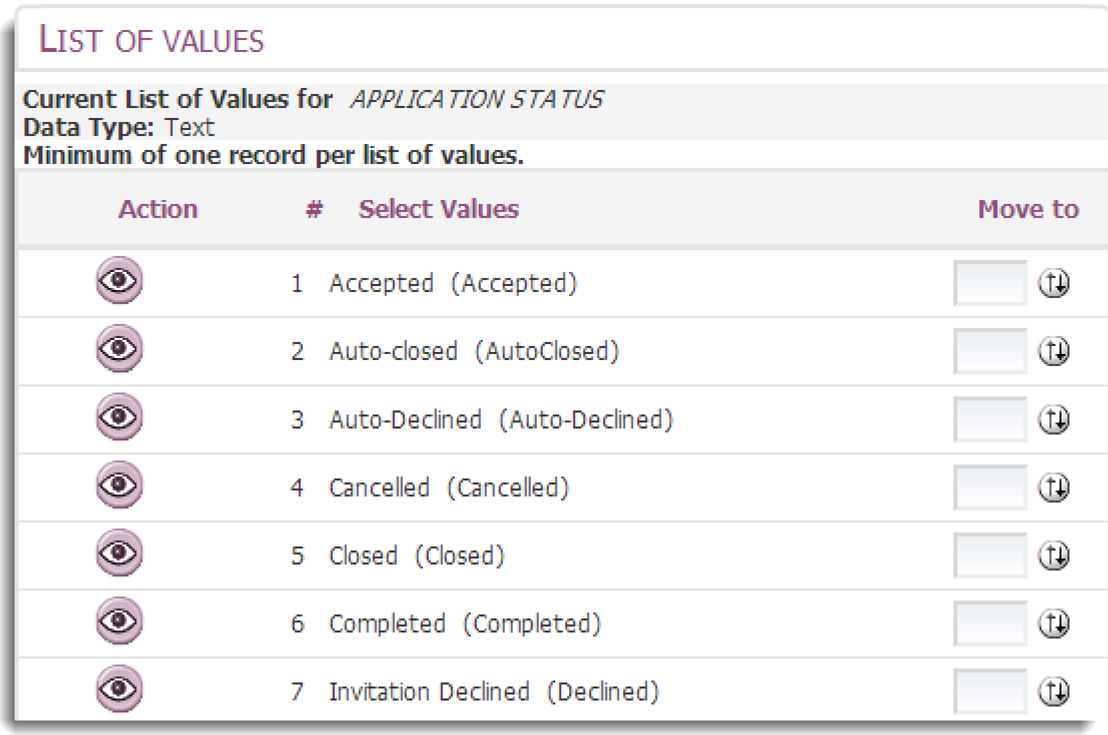
The LOV values will be available to users in the **Description** dropdown list on the *Online Application Process* page.



Application Status

This field refers to the Status that applications can have.

1. From the *Configurable Field Management* page (see page 74), select **Application Status**.



LIST OF VALUES

Current List of Values for *APPLICATION STATUS*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Accepted (Accepted)	
	2	Auto-closed (AutoClosed)	
	3	Auto-Declined (Auto-Declined)	
	4	Cancelled (Cancelled)	
	5	Closed (Closed)	
	6	Completed (Completed)	
	7	Invitation Declined (Declined)	

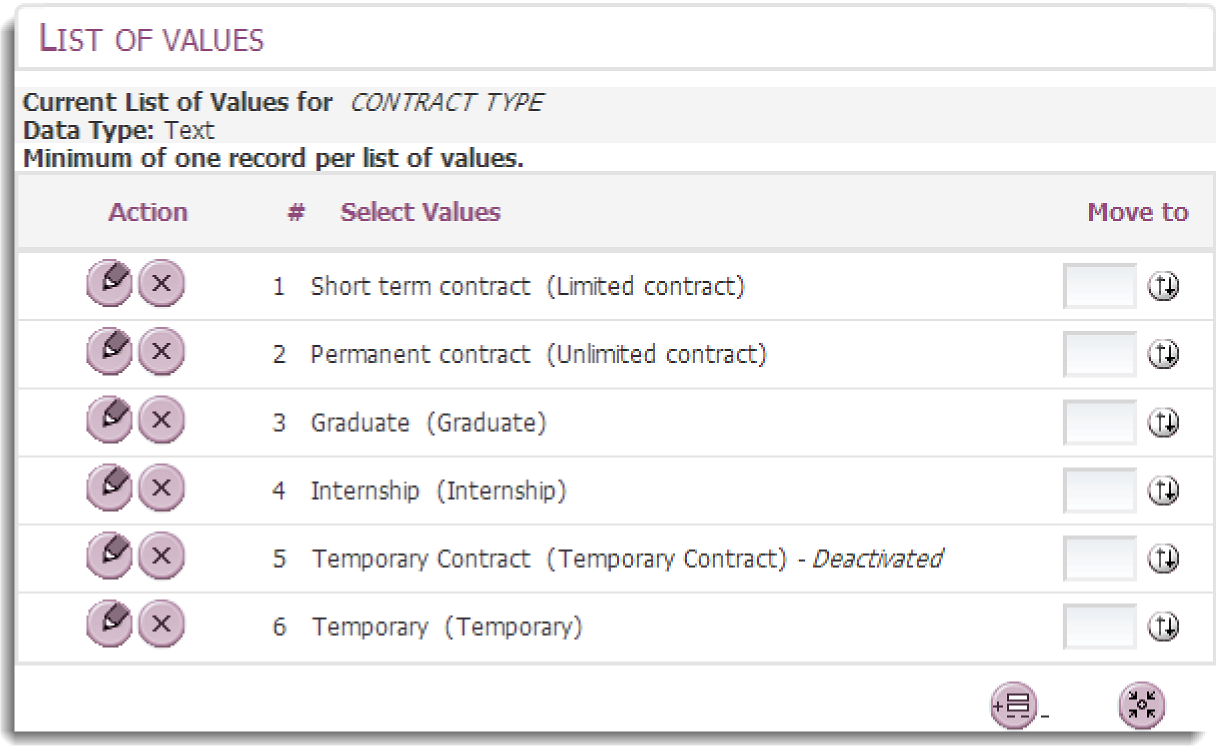
ⓘ The default application statuses are linked to steps in the Selection Process, for example *In Process* means that the applicant file has been reviewed and pushed through into the Selection Process (when the status automatically changes from *New* to *In Process*).

ⓘ Any customized application statuses you create are simply used as labels and are not linked to the Selection Process. Your custom application statuses are only available when manually updating the application status of a candidate. In addition, it is not possible to link any automatic actions or emails to your custom application status or to perform a bulk status update.

Contract Type

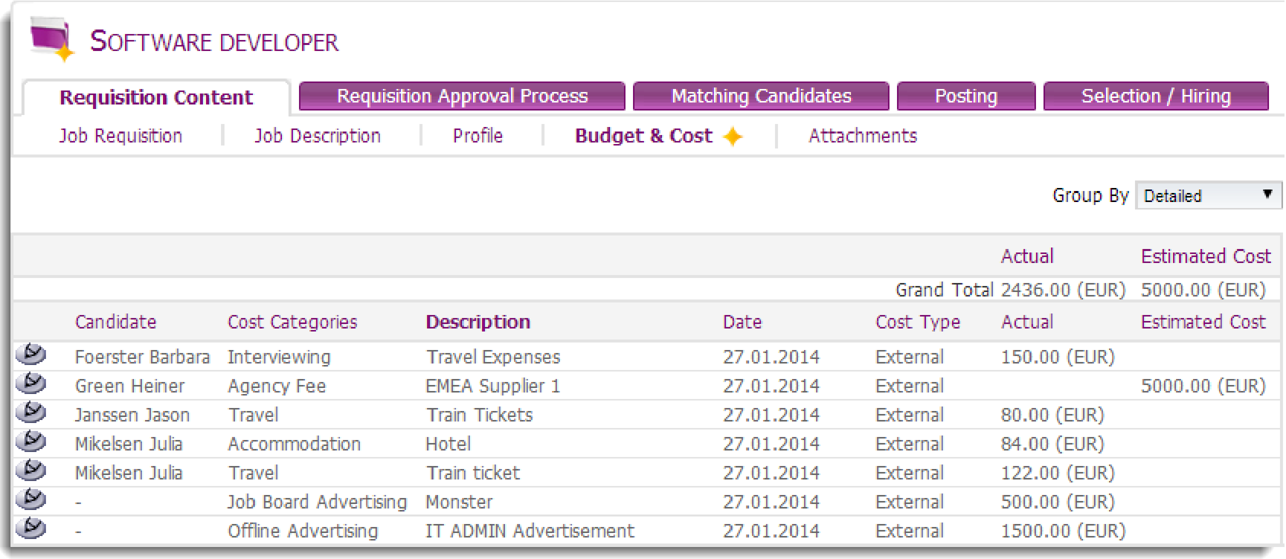
This field refers to the types of contract that can be defined.

1. From the *Configurable Field Management* page (see page 74), select **Contract Type**.

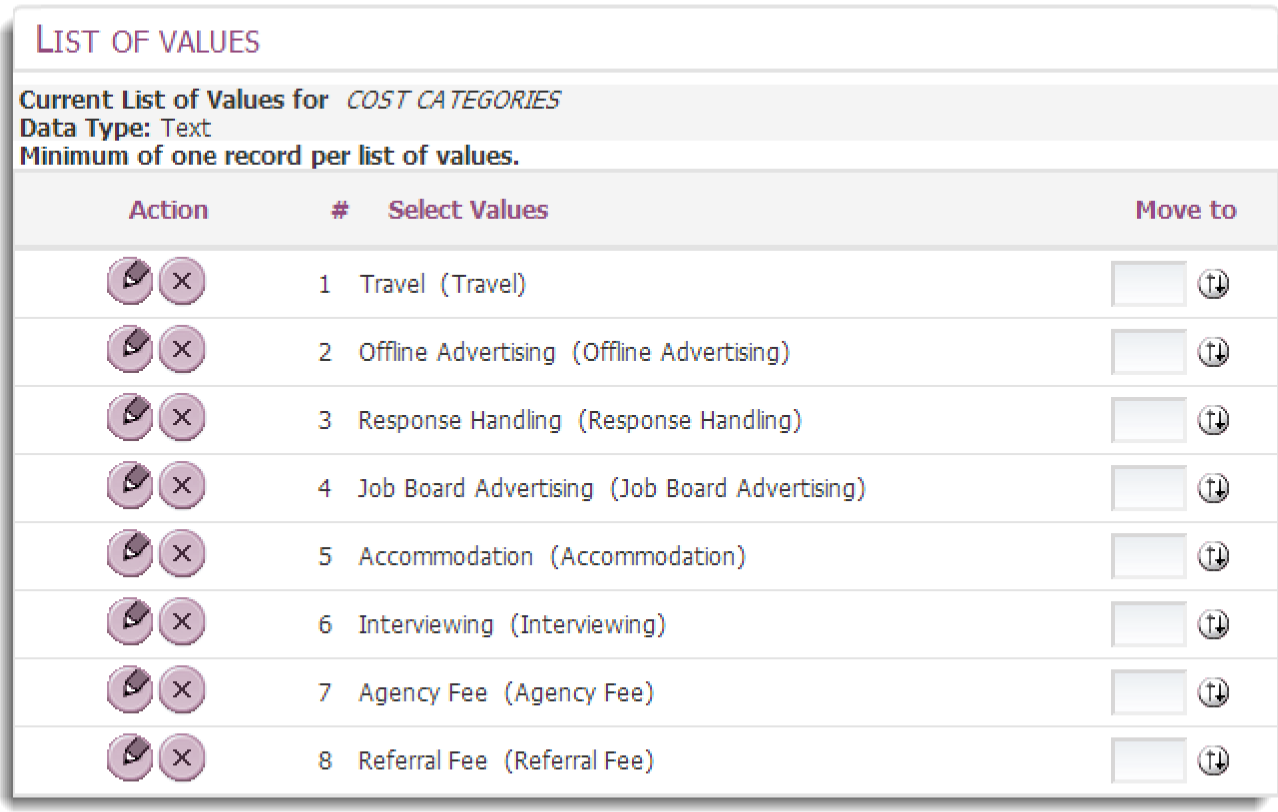


Cost Categories

This field refers to the categories of cost displayed when Budget and Cost are calculated for a job vacancy or a candidate. Cost categories have no default values.



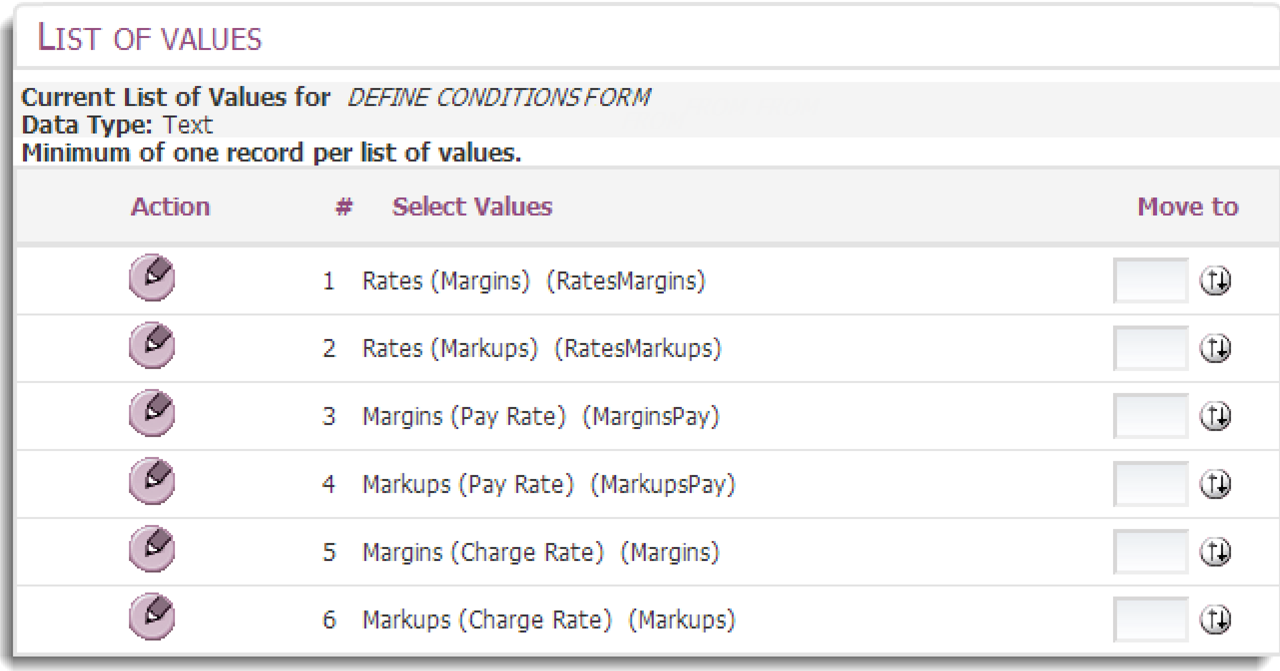
1. From the *Configurable Field Management* page (see page 74), select **Cost Categories**.



Define Conditions Form

The values of this field are used in the Condition form for Contractors, when creating Rates.

1. From the *Configurable Field Management* page (see page 74), select **Define Conditions Form**.



Lumesse

Job Status

This field refers to the status the job vacancy may take during its lifecycle.

1. From the *Configurable Field Management* page (see page 74), select **Job Status**.

LIST OF VALUES

Current List of Values for *JOB STATUS*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Closed (Closed)	
	2	Closed / Filled (ClosedFilled)	
	3	Open (Open)	
	4	On hold (On hold)	
	5	Cancelled (Cancelled)	
	6	Draft (Draft)	
	7	Anticipated (Anticipated)	
	8	New (New)	

ⓘ You can manually change the status of a job by going to the Job Opening page and selecting **Edit Job Status**.

ⓘ When you create a job, the status is automatically set to **Open**. When the headcount is filled, the job status is automatically set to **Closed/Filled**, which triggers certain actions: automatic un-posting of the job and auto-closing of any open applications linked to the job (if this was previously configured).

Rate Type

This field defines the types of rates that must be specified for contractors.

Rate Types are available in the Condition Form for Contractor Recruitment.

Rates *	Rate type	Rate unit	Pay rate	P/S M/M	Supplier rate	S/C M/M	Charge rate	Overall M/M
Rate1	Standard	Hour	0	30	0	35	0	0
Rate2	OT1	Hour	24.7	35	38	0	38	35
Add								

1. From the *Configurable Field Management* page (see page 74), select **Rate type**.

LIST OF VALUES

Current List of Values for *RATE TYPE*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Standard (Standard)	
	2	Overtime1 (OT1)	
	3	Overtime2 (OT2)	
	4	Sick leave (Sick leave)	
	5	Holiday (Holiday)	

Reason of Completion

The Reason of Completion values are used when a candidate's contract ends, for example when the contract end date is reached. This field has no default values. You can add, edit or delete values as required.

The Reasons of Completion list is available when you manually update an application status to completed.

1. From the *Configurable Field Management* page (see page 74), select **Reason of completion**.

LIST OF VALUES

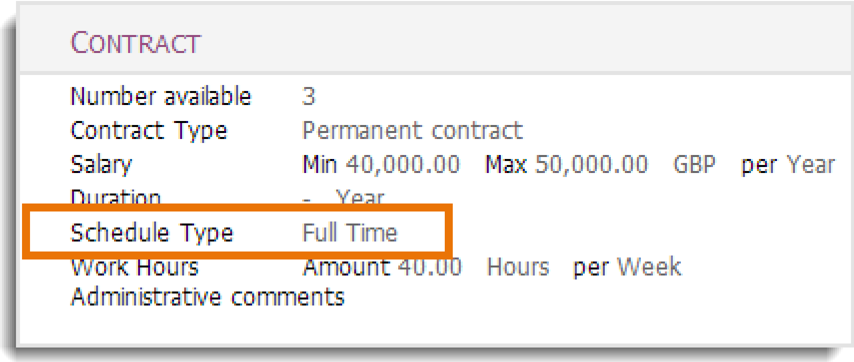
Current List of Values for *REASON OF COMPLETION*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Early Finisher (Early Finisher)	
	2	Natural Finisher (Natural Finisher)	
	3	TUPE transfer (TUPE transfer)	
	4	Internal Transfer (Internal Transfer)	

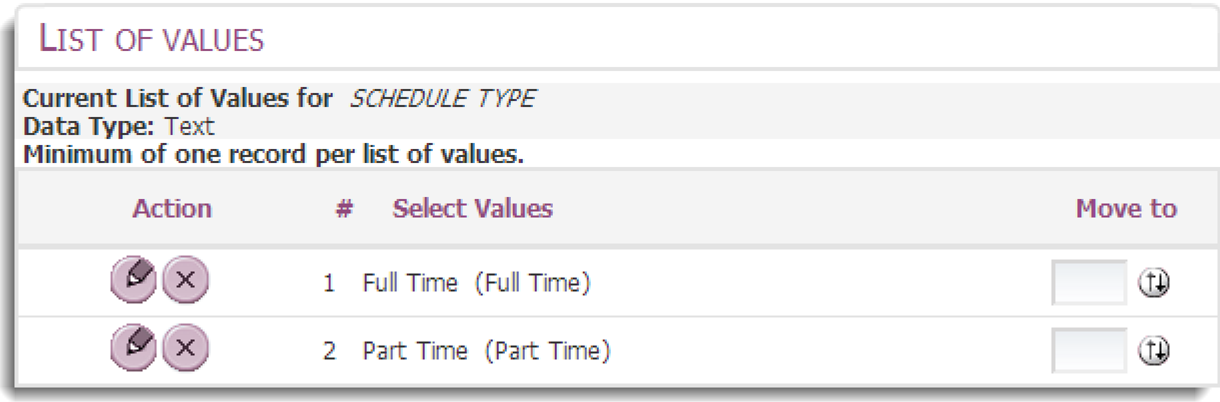
Schedule Type

The Schedule Type has a number of default values. You can add new values, and change or delete existing values.

The Schedule Type appears in the **Contract** section on the *Job Requisition* tab of the Job.



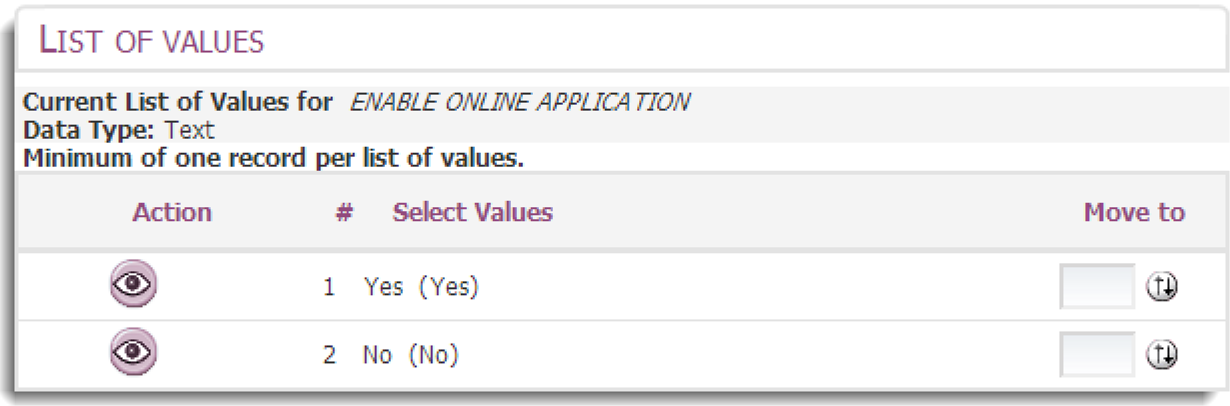
1. From the *Configurable Field Management* page (see page 74), select **Schedule type**.



Enable Online Application

This field has default values (**Yes** or **No**) which cannot be edited

1. From the *Configurable Field Management* page (see page 74), select **Enable Online Application**.



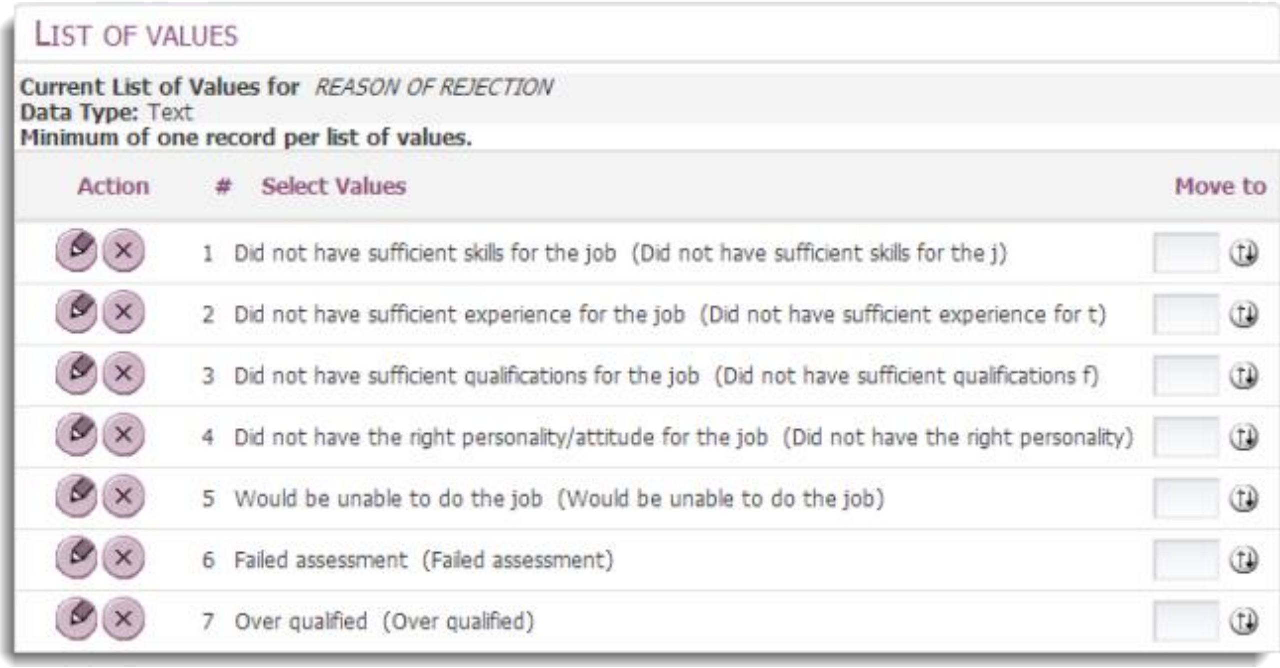
Reason of Rejection

These values inform recruiters of the reason why an application is rejected.

The Reason of Rejection list is available when you reject a candidate during the selection process or when you manually update an application status to **Rejected**.

ⓘ Where the OFCCP Search-Recording feature (see page 35) has been activated for an organization, the Reason of Rejection LOV is a required field.

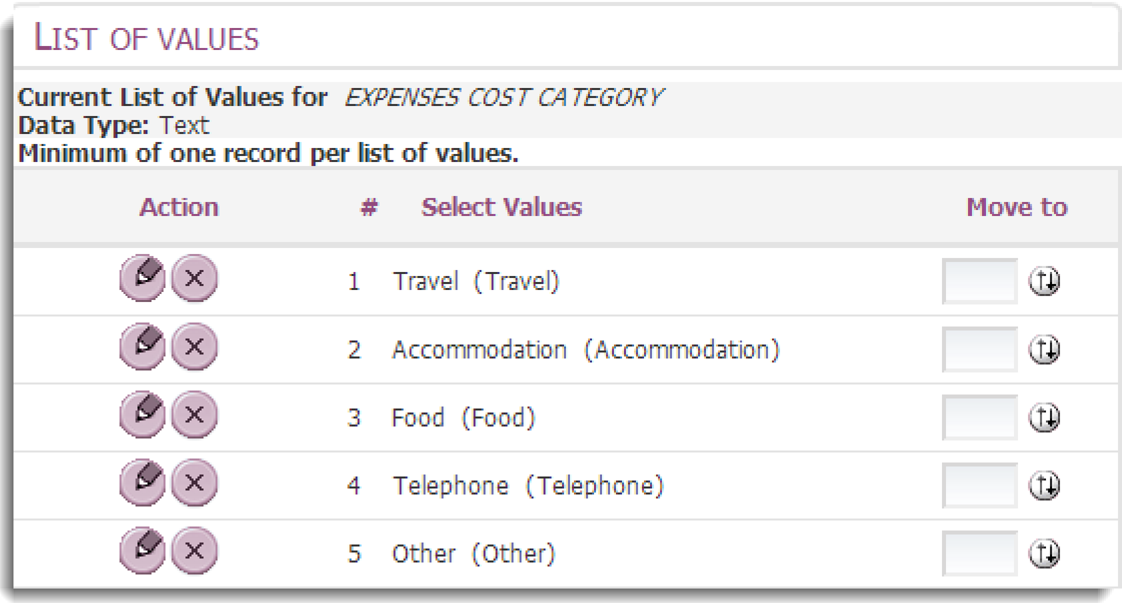
1. From the *Configurable Field Management* page (see page 74), select **Reason of Rejection**.



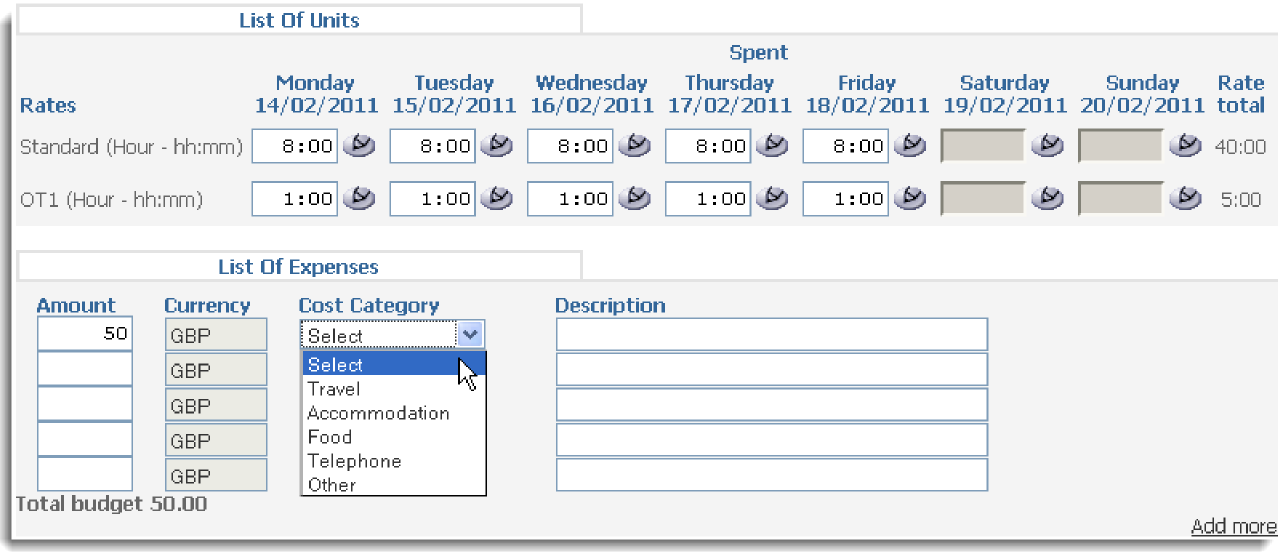
Expenses Cost Category

These values define the type of expenses entered in timesheets. The **Expenses Cost Category** field has no default values. You can add new values, and edit or delete existing values as required.

1. From the *Configurable Field Management* page (see page 74), select **Expenses Cost Category**.



The Expenses Cost Category list is available in the Timesheet page of a hired candidate.



Hours Rates for Timesheet

The **Hours Rates for Timesheet** field has no default values. You can add new values, and edit or delete existing values as required.

1. From the *Configurable Field Management* page (see page 74), select **Hours Rates for Timesheet**.

Proposal Source in Succession Planning

The **Proposal Source in Succession Planning** field has four default values:

- Manager
- HR
- External Source
- Project Manager

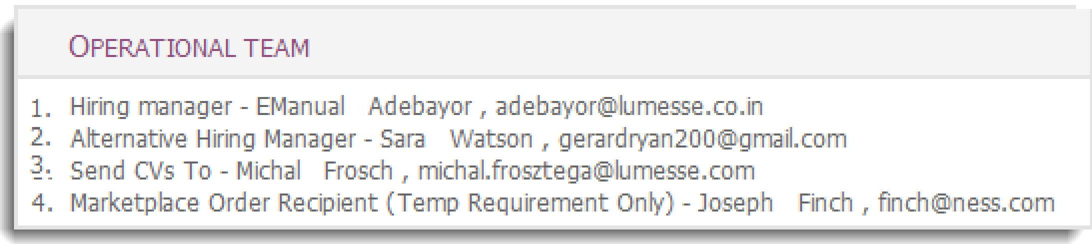
You can add new values, and edit or delete existing values as required.

1. From the *Configurable Field Management* page (see page 74), select **Proposal Source in Succession Planning**.

Operational Team

The Operational Team is used for Manager Workspace users. Only Manager Workspace users can be selected as Operational Team members in a job requisition. The Operational Team LOV contains three system default values, which can be activated or deactivated; these cannot be deleted. You can create LOVs for additional team members.

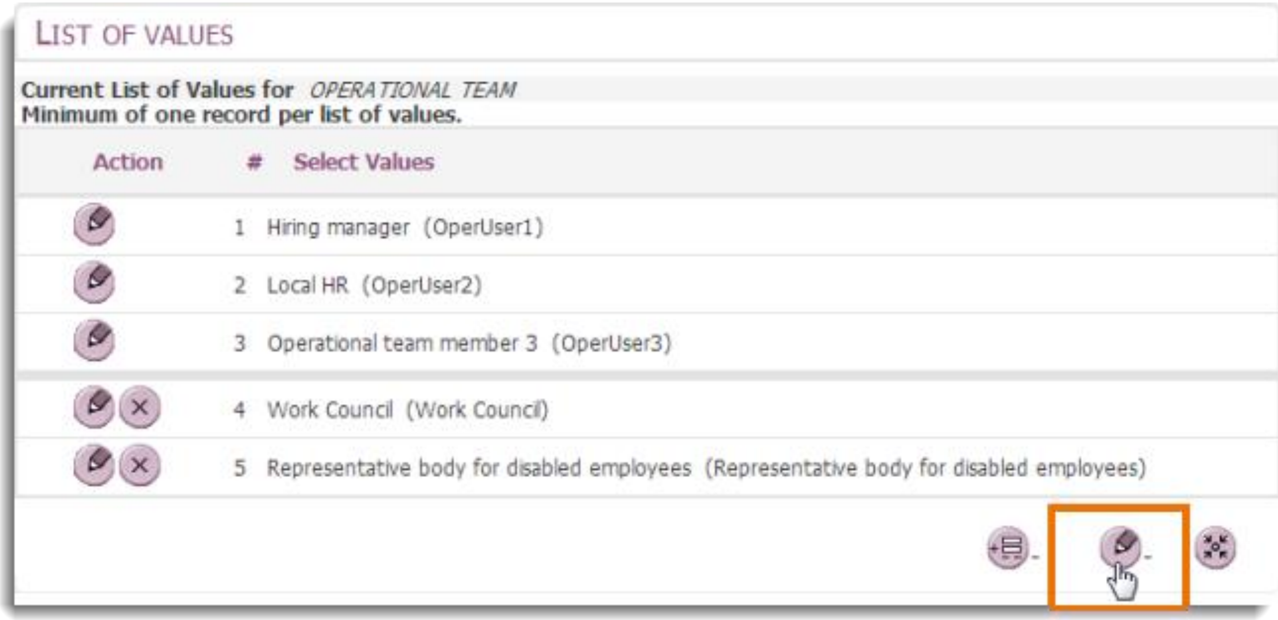
Operational Team fields are visible on the *Job Requisition* tab of job vacancies.



1. From the *Configurable Field Management* page (see page 74), select **Operational Team**.

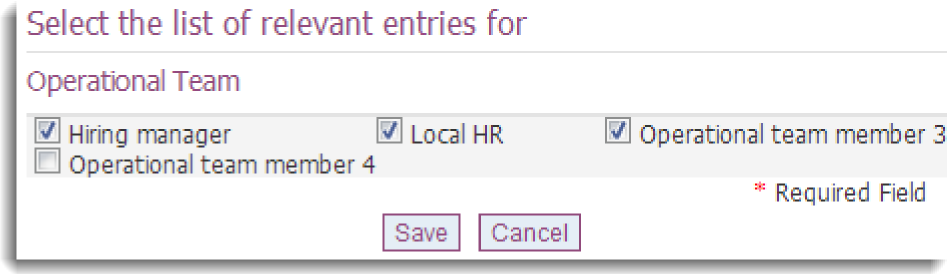
For the Operational Team you can create a maximum of four values. You can deselect any values that are not needed.

2. From the *List of Values* page click  at the bottom of the list to select/deselect the values.



ⓘ The operational team can be fully deactivated. Deselect all the values in the operational team if you do not want the operational team to be visible in the requisition.

3. Click **Save** after activating or deactivating the values.

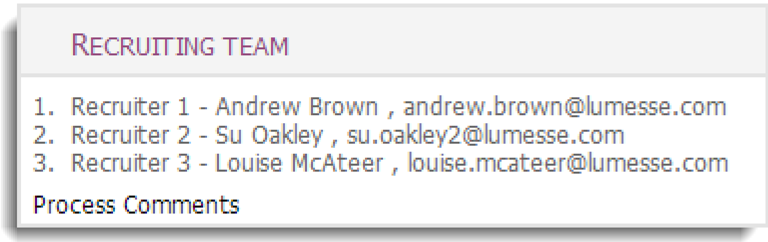


Recruiting Team

The Recruiting Team LOV contains three system default values, which can be activated or deactivated; these cannot be deleted. You can create LOVs for additional Recruiting Team members.

ⓘ If you modify these fields, any changes are instantly propagated to all existing job vacancies.

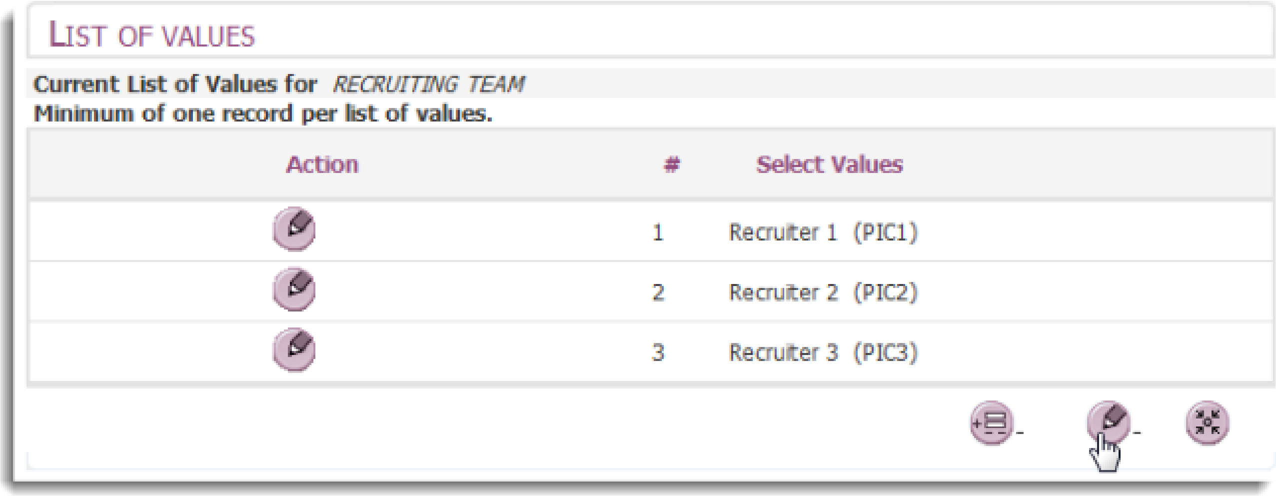
The Recruiting Team fields are visible on the *Job Requisition* tab of job vacancies.



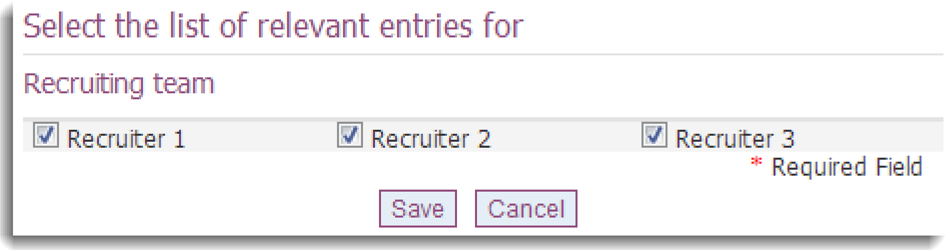
1. From the *Configurable Field Management* page (see page 74), select **Recruiting Team**.

For the Recruiting Team you can deselect any values that are not needed.

2. Click  at the bottom of the list to select/deselect the values.



3. Click **Save** after activating or deactivating the values.



Adding your own Configurable Fields

Both GSAs and LSAs can add new fields.

Global System Administrators (GSAs) can add fields on a global level. These fields can be made mandatory for all local organizations or available to use on an optional basis.

LSAs can only add fields in their local organization. These fields can be made mandatory or optional.

- New fields can be added for use in the Job Requisition Template or Condition Form, but not in the Application Form
- New fields can be LOVs or free form (five different formats include text, date and integer)
- You can specify field properties to set where the field will display, whether it is mandatory, and if it is searchable

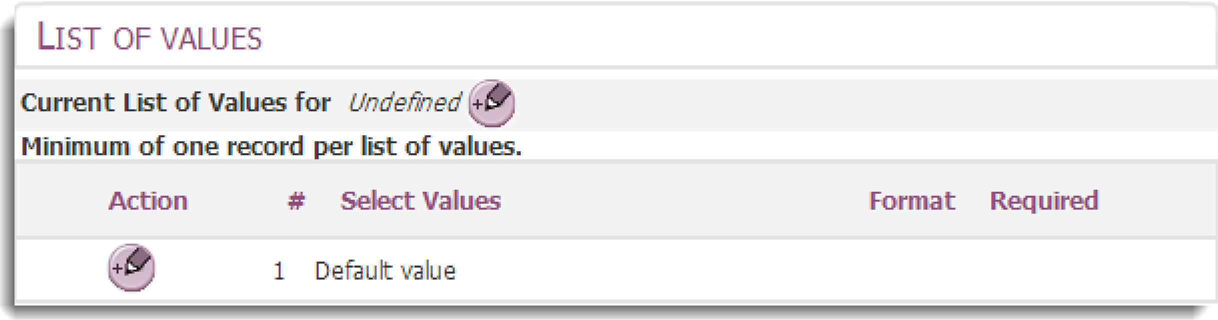
Creating a Configurable Free Form Field

Free Form fields let users enter in data, as opposed to selecting values from a dropdown list.

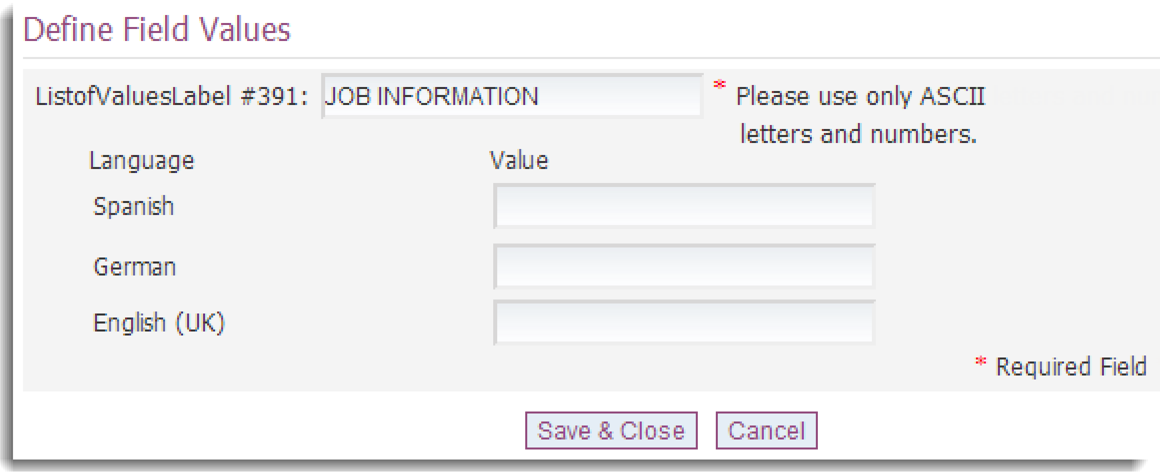
Setting up a Configurable Free Form Field is a two-stage process: to make the field visible the GSA must manually activate it for each local organization (see page 96).

GSAs can create both local and corporate fields. Local System Administrators only have access to the local fields in their organization.

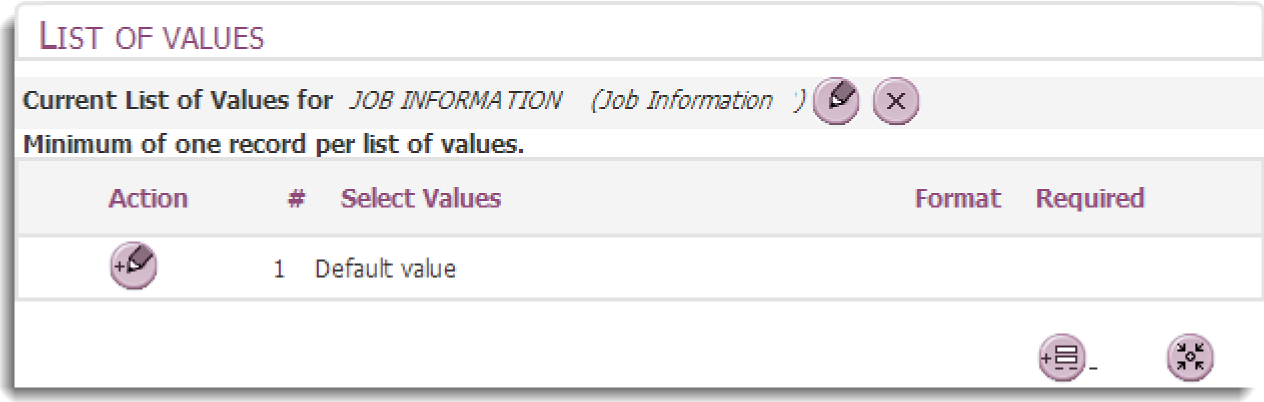
1. From the bottom of the *Configurable Field Management* page (see page 74), click **Add configurable Free Form Fields**.
2. Click next to **Undefined** on the *List of Values* page.



3. Type the field name label and any required translations of that field name then click **Save & Close**.



4. There is always a default value: click to edit the default value and replace this with your own.

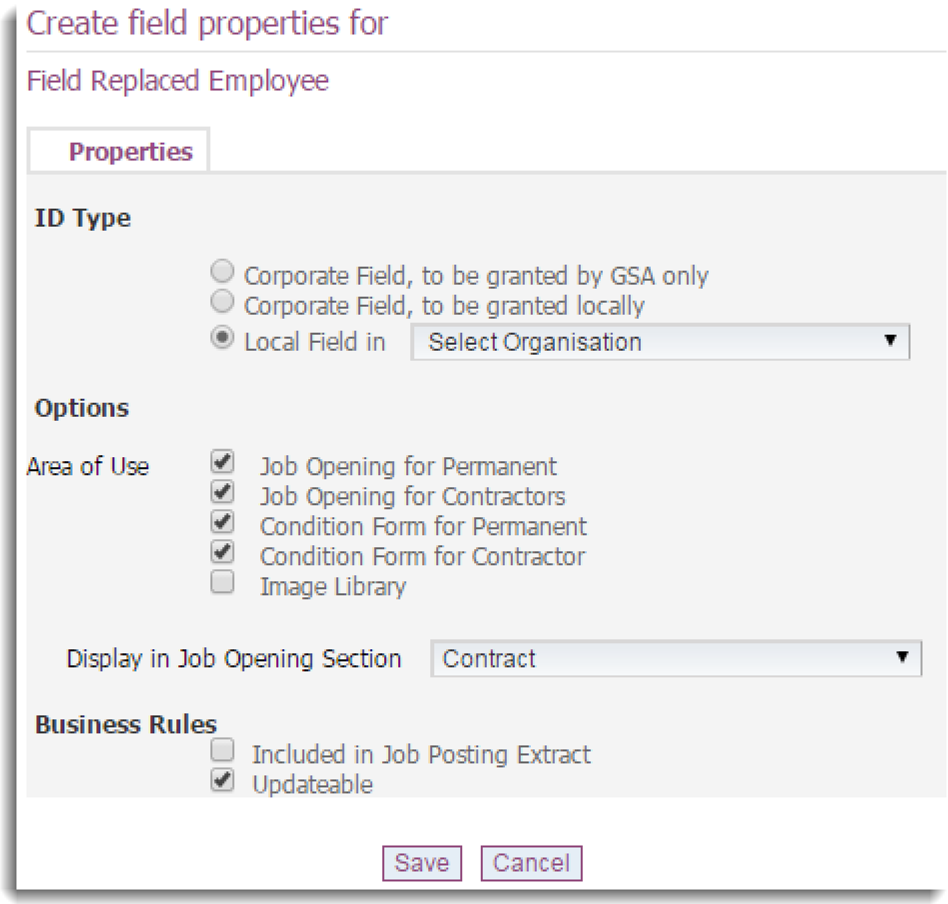


5. Select the **Format**. This restricts what type of data can be entered in the field.
   - Date - This displays as a calendar with a date format selector
   - Integer - Uses whole numbers only including negative numbers; no decimal numbers
   - Numeric - Uses any numerical value including decimals
   - Text - Uses any letters, numbers or special characters
   - Text Area - Provides a larger area than a Text field
6. To make this field mandatory for users to fill in select **Required**.
7. Click **Save & Close**. The words 'Default value' have been replaced with whatever you typed.
8. To add more fields to this group, on the far right of the page click
9. Repeat the previous steps until all values have been added.

Specifying where the Field can be used

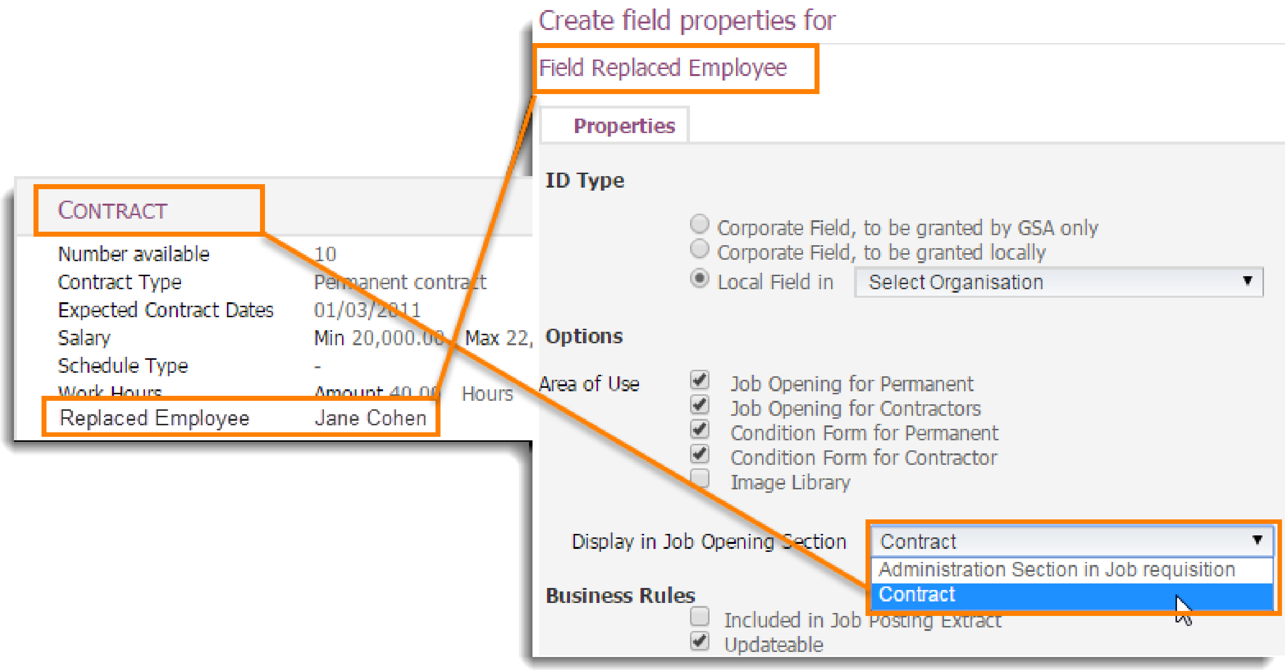
The properties of a configurable Free Form Field must be set up on a per company basis. The **Options** section on the *Field Properties* form defines where the field is used and where it is displayed.

1. Click next to the appropriate Free Form Field to set up the field properties.



2. Set the **Field Type**:
   - **Corporate Field, to be granted by GSA only** - Corporate field that is granted only by the GSA and applies to all Level 1 organizations of the company.
   - **Corporate Field, to be granted locally** - Corporate field that can be granted to several organizations by the GSA.
   - **Local Field in** - Field that is granted to one organization. The GSA must select this organization from the dropdown list.
3. Select the **Area of Use** for the field and the section of the job vacancy in which it will display.
   - **Area of Use** - Select areas where this field is available for use (within the Job Requisition or Condition Form).

- **Display in Job Opening Section** - Select the section of the job vacancy where the field will be displayed (*Administration Section* or *Contract*).



1. Set the **Business Rules**:
   - **Included in Job Posting Extract** - The field is displayed in job postings sent to agency email addresses or agency portals.
   - **Updateable** - The field is updatable in the area where it is displayed. If this Business Rule is not activated, users cannot add or change values for the field.
2. Click **Save**.

Activating Free Form Fields

A new Free Form Field must be activated at the Organization level before it can be displayed in the Job Requisition/Condition Forms for a department. Refer to Configurable Lists of Values (see page 92) for more information.

ⓘ This option is only available for GSAs. Local System Administrators only have access to the organization of which they are in charge.

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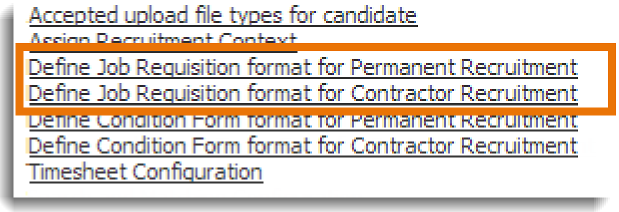
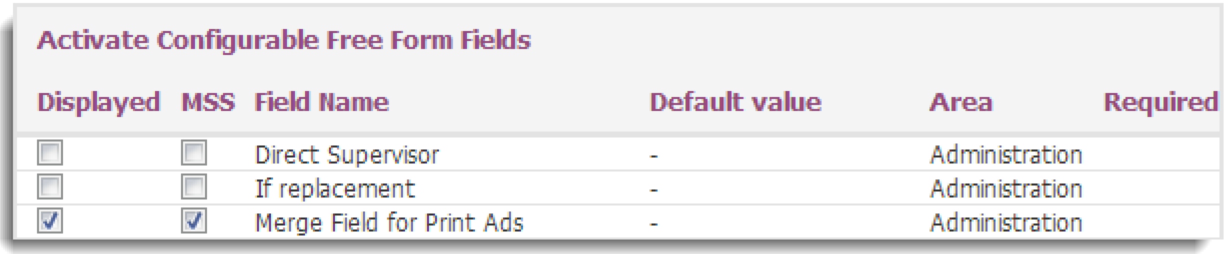
1. From the **Settings** section of the left dynamic menu, select **System Administration**.

2. From the *Configuration* page, select **Organization Breakdown structure**.

3. Right-click the name of the organization in which you want to display the field and select **Edit**.
4. At the bottom of the *Organization Properties* page, select **Define Job Requisition format for Permanent Recruitment** or **Define Job Requisition format for Contractor Recruitment**.



5. In the **Activate Configurable Free Form Fields** section, activate the required Configurable Free Form Fields for the different Job Requisition Formats.



Activate Configurable Free Form Fields

Displayed	MSS	Field Name	Default value	Area	Required
☐	☐	Direct Supervisor	-	Administration	
☐	☐	If replacement	-	Administration	
☑	☑	Merge Field for Print Ads	-	Administration	

ⓘ All the settings defined at organization level are propagated to the sub-organizations.

The **Order** section provides an overview of the fields which will be displayed in the Job Requisition, as well as details of where the fields are displayed.

6. To change the order of the values, drag and drop them into position.

Order

Drag and Drop Below to Rearrange The Order	List of Values	Free Form Field	List of Values #
Administration			
Functional Area	✓		2
Division	✓		26
Guaranteed Interview Scheme Role?	✓		245
Assessment Centre required	✓		285
Merge Field for Print Ads		✓	130

Editing a Configurable Free Form Field

1. To add, edit or delete a value for a Free Form Field, click the name of the field from the *Configurable Field Management* page (see page 74).

1	Job Salary Band	✓	6	✓	✓	✓	-	Administration Section in Job requisition	-	✓
2	Functional Area	✓	14	✓	✓	✓	✓	Administration Section in Job requisition	-	✓
3	Business line	✓	9	✓	✓	✓	✓	Administration Section in Job requisition	-	✓

2. Click to add a new value, to edit an existing value, or to delete a value.

LIST OF VALUES

Current List of Values for *JOB INFORMATION (Job Information)*

Minimum of one record per list of values.

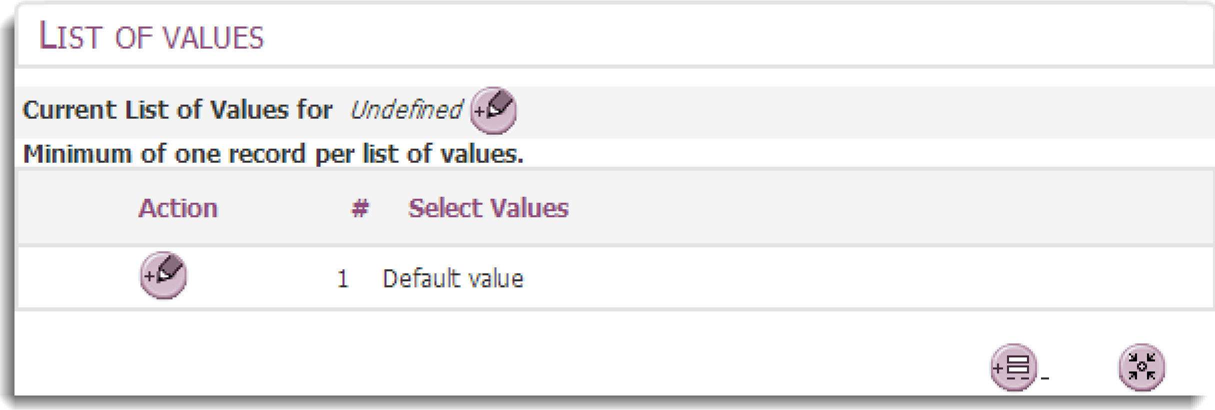
Action	#	Select Values	Format	Required
	1	Default value		

3. Change the value as required, then define the translations and the format in which it will be filled in.
4. Specify whether this is a required field, then click **Save & Close**.

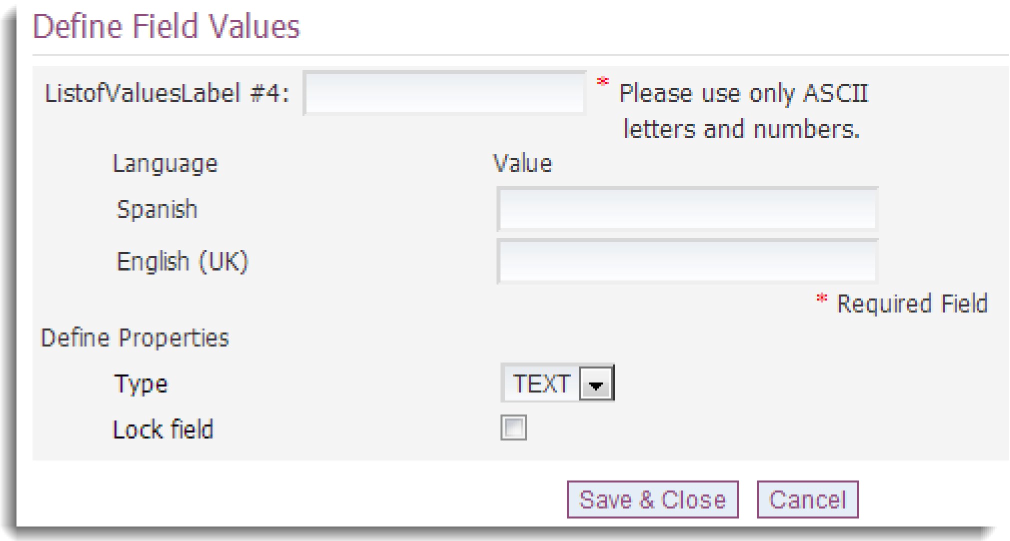
Adding User Data Fields

You can configure the data you want to store for users. For example, mobile number, address, and so on. This data can be used as merged fields in email templates.

1. From the bottom of the *Configurable Field Management* page (see page 74), click **Add configurable User Data**.



2. Click next to **Undefined**.

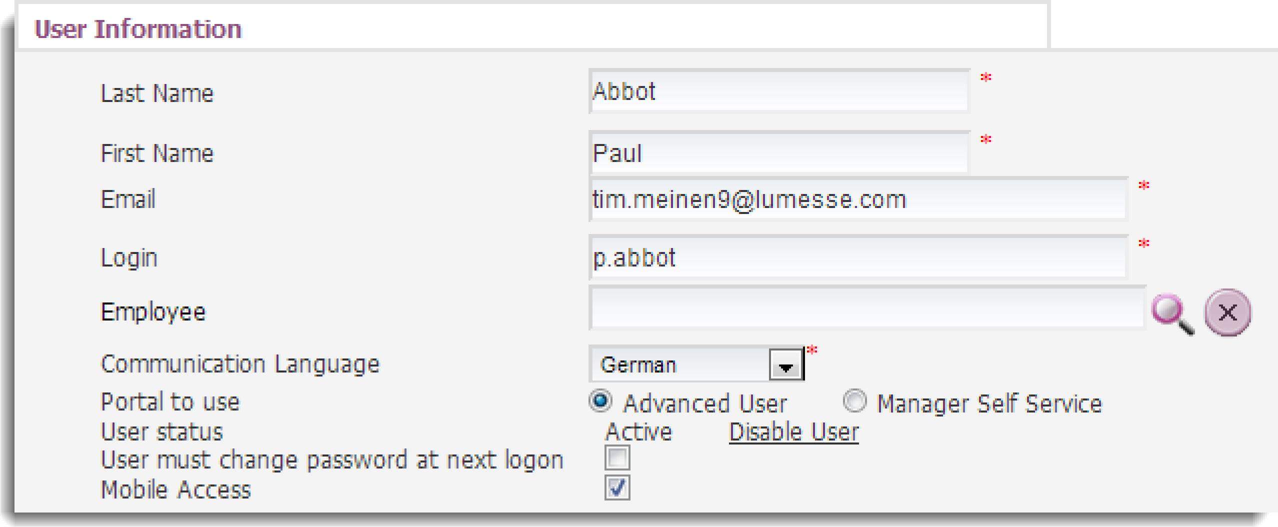


3. Enter information as required and select the **Lock field** checkbox if you do not want users to edit the LOV.
4. Click **Save & Close**.

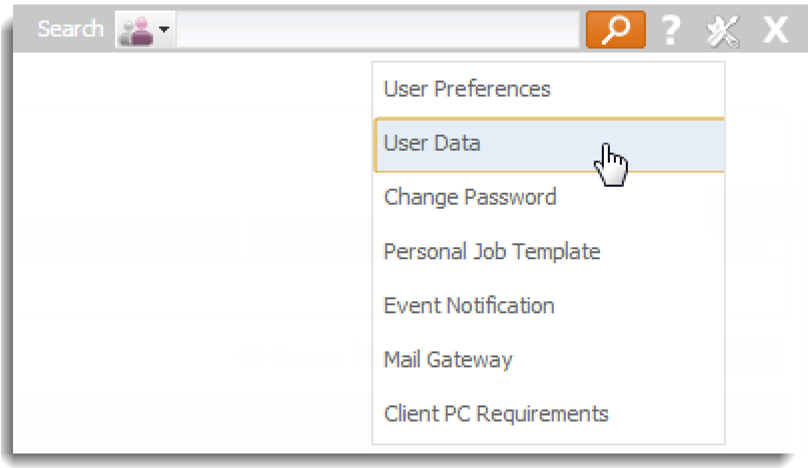
> ⓘ If the LOV is locked a TalentLink user will not be able to change this field when they access **Preferences > User Data**.

5. Define the first value by clicking corresponding to the Default value.
6. Click to create values for the User Data.
7. Enter the required information, then click **Save & Close**.

The user data appears in the **User Information** section for each user.



The User Data is also visible to the user and can be filled in by them on their Workspace Header.



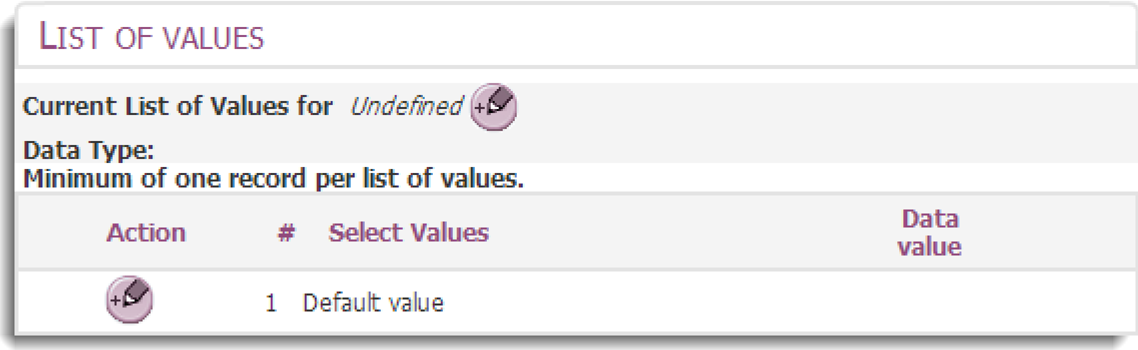
Creating a Configurable LOV

ⓘ Setting up an LOV is a two-stage process: to make the LOV visible the GSA must manually activate it for each local organization (see page 105).

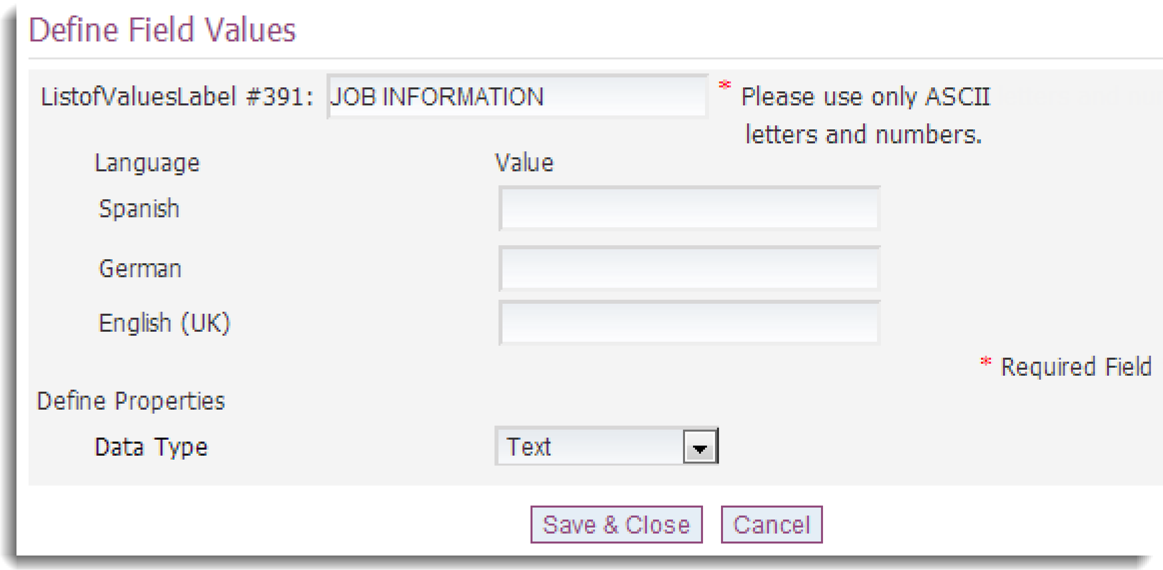
Configurable lists of values (LOVs) are presented as dropdown lists from which recruiters can select values. To create an LOV you need to give it a field label name, then add values (the content in the dropdown list).

1. From the bottom of the *Configurable Field Management* page (see page 74), click **Add configurable LOV**.

2. Click next to **Undefined**.



3. Type the field name label of the LOV and any required translations of that field name.



4. Select the LOV **Data Type**.
   - Integer - Whole numbers only including negative numbers; no decimal numbers
   - Text - Any letters, numbers or special characters
   - Numerical - Any numerical value including decimals
   - Positive Integer - Whole numbers only starting from 1; no negative numbers
   - Boolean - Not used

ⓘ This field ensures all values defined for the LOV must be of the same data format.

---

5. Click **Save & Close**.

   Now you need to add values to the LOV.

6. There is always a default value: click to edit the default value and replace this with your own.

Action	#	Select Values
	1	Default value

7. Click **Save & Close**. The words 'Default value' have been replaced with whatever you typed.

8. To add more values to the new LOV, on the far right of the page click
9. Type your value and translations, then click **Save & Close**. Repeat until all values have been added.

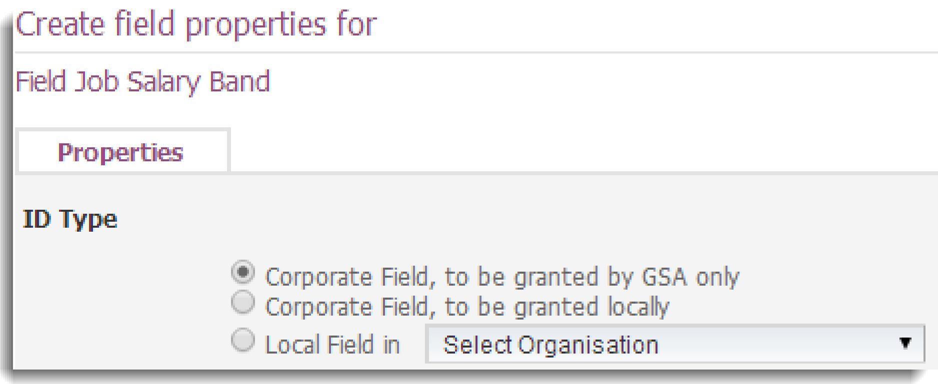
Specifying where the LOV can be used

The Properties of a configurable field must be set up on a per company basis. In the **Properties** section, you can define the type of LOV, the Display Options (places where the LOV will be visible) and the Business Rules for each LOV.

1. Click next to the LOV to specify the properties.

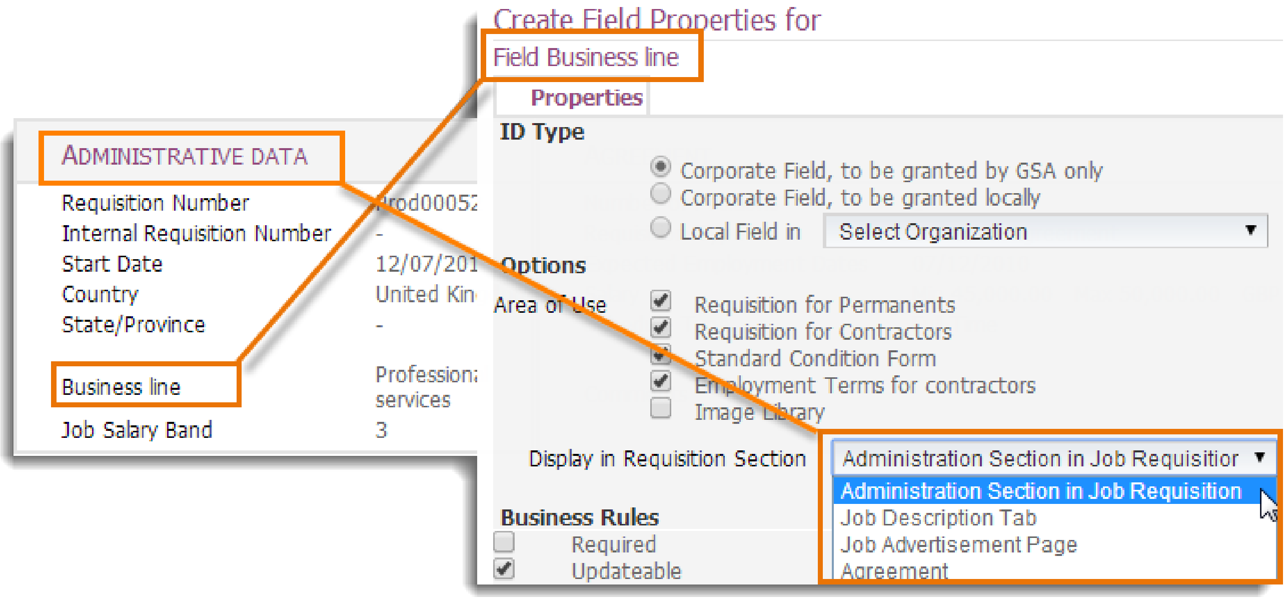
1			Job Salary Band	✓	6	✓	✓	✓	-	Administration Section in Job requisition	-	✓
2			Functional Area	✓	14	✓	✓	✓	✓	Administration Section in Job requisition	-	✓
3			Business line	✓	9	✓	✓	✓	✓	Administration Section in Job requisition	-	✓

2. Select the appropriate **ID Type**.



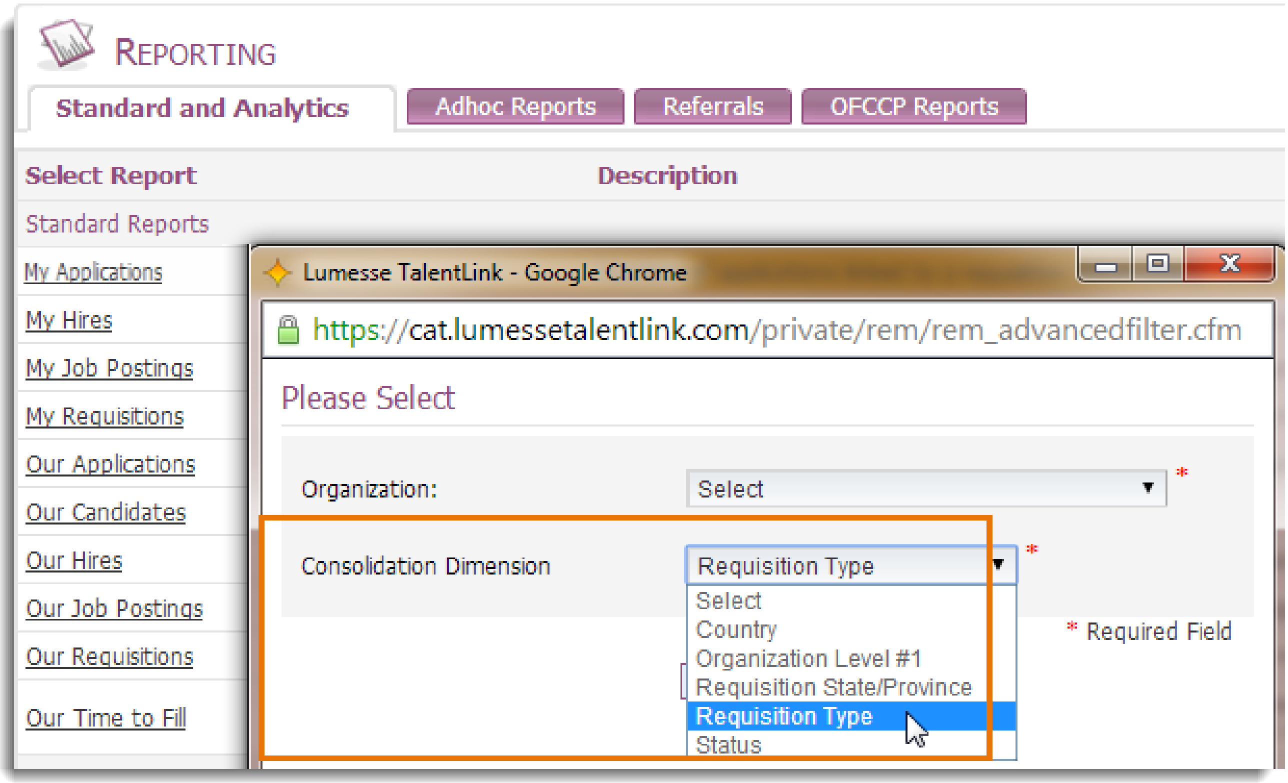
- **Corporate Field, to be granted by GSA only** - Corporate field that is granted only by the GSA and applies to all level 1 organizations within the company.
- **Corporate Field, to be granted locally** - Corporate field that can be granted to several organizations by the GSA.
- **Local Field in** - Field that is granted to one organization. The GSA must select this organization from the dropdown list.

3. Select the **Area of Use** for the LOV and the section of the job vacancy in which the LOV will display.
   - **Area of Use** - Select areas where this field is available for use (within the Job Requisition or Condition Form).
   - **Display in Job Opening Section** - Select the section of the job vacancy where the field will be displayed (*Administration, Job Description, Job Advert* or *Contract*)



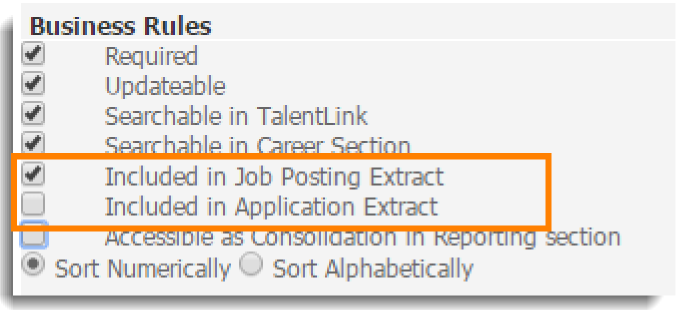
4. Select the **Business Rules** that apply by selecting the appropriate check boxes. Business Rules define how the LOV is used and where it is/isn't displayed (see next topic for more details on hiding LOVs).
   - **Required** - The LOV is required in any area where it is displayed.
   - **Updateable** - The LOV is updatable in the area where it is displayed. If this business rule is not activated, users cannot add or change values for the LOV.
   - **Searchable in TalentLink** - This LOV can be used to run a search in the Back Office (this kind of search is available in the *Job Openings* page, if you filter on one organization) or the Front Office. This provides a better candidate experience, and enables the representation of large lists of value on the front end. Additionally a group of Linked Lists can now be used to search for requisitions in the Back Office.
   - **Searchable in Career Section** - The LOV is searchable in the Front Office.
   - **Included in Job Posting Extract** - The LOV is displayed in job postings sent to agency email addresses or agency portals.
   - **Included in Application Extract** - The LOV is displayed in Applications extractions.

- **Accessible as Consolidation in Reporting section** - This business rule enables users to choose the LOV as a Consolidation Dimension (sorting criteria) in any OUR standard reports.



Hiding an LOV from Job Posting and Application Extracts

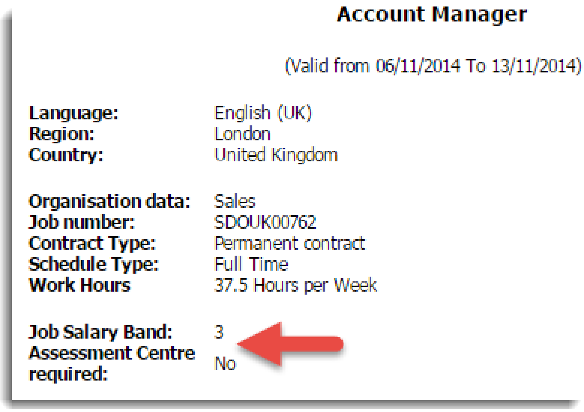
The Business Rules associated with each LOV define where it will be displayed.



Included in Job Posting Extract

This option controls which fields are visible to agencies. When an agency views a requisition's details within their portal or via an email link they will see all the details of the advert including some additional values typically from the requisition e.g. cost centre, location, etc. You can deselect this option to hide fields that are internally sensitive or not relevant to the agency.

Agency posting with field 'Guaranteed Interview Scheme' displayed



Same posting with this field hidden

Included in Application Extract

This option controls which fields are visible when extracting job application data to be sent to an external system. You can deselect this option to hide fields which are not relevant.

Activating a Configurable LOV

A new LOV must be activated at the Organization level before it can be displayed in the Job Requisition or the Condition Forms belonging to a department. There are different Requisition and Condition Form formats depending on the recruitment contexts available:

- Permanent Context (for permanent jobs)
- Contractor Context (for contractors)

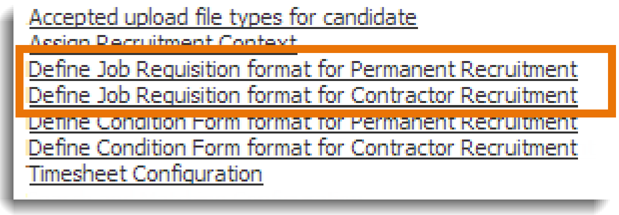
Depending on your company's requirements, you can assign specific fields for each recruitment context.

ⓘ This option is only available for GSAs. Local System Administrators only have access to the organization of which they are in charge.

---

1. From the **Settings** section of the left dynamic menu, select **System Administration,** then **Organization Breakdown Structure**.

2. Right-click the name of the organization in which you want to display the field and select **Edit**.
3. From the bottom of the *Organization Properties* page, select **Define Job Requisition format for Permanent Recruitment** and/or **Define Job Requisition format for Contractor Recruitment**.



4. From the **Configurable LOV** section, activate the required LOVs for the different Job Requisition Formats.

ⓘ You can also restrict or grant access to certain fields for Manager Workspace users by selecting or deselecting the fields in the MSS column. Manager Workspace users cannot see fields which are not configured for them.

5. You can select a **Default Value** for these fields. This value is pre-selected when you create a new job vacancy for this department.

   The **Order** section provides an overview of the fields displayed in the Job Requisition, as well as details of where the LOVs are displayed.

6. To change the order of the values, drag and drop them into position.

Order			
Drag and Drop Below to Rearrange The Order	List of Values	Free Form Field	List of Values #
Administration			
Functional Area	✔		2
Anticipated Headcount	✔		160
Assessment Centre required	✔		285
Purchase Order Information		✔	109

Editing a Configurable LOV

1. From the *Configurable Field Management* page (see page 74), select the appropriate name from the **Field Label** column.

   The *List of Values* page is displayed.

LIST OF VALUES

Current List of Values for *PROFESSIONAL CREDENTIAL TYPE*
Data Type: Text
Minimum of one record per list of values.

Action	#	Select Values	Move to
	1	Certificate (Certificate)	
	2	Membership (Membership)	

2. Click to add a new value, to edit an existing value, or to delete a value.
3. To change the order of the values, type the position number to which you want to move the value, then click to move the value up or down as required.

Linking LOVs

You can create dependencies between pre-defined configurable LOVs by linking them to create parent/child relationships. In the example shown below, the top level of the list (Parent) is **List Level 1,** the second level (Child) is **List Level 2**, and the lowest level (Child) is **List Level 3**.

By using this feature, you can make forms much easier for the user to complete. For example, you can create a dependency between the Country LOV and City LOV during a job application. When the user selects **UK** from the parent Country LOV, the child City LOV is only populated with UK cities.

When a Configurable LOV is being used in a linked list the symbol is displayed to the left of the **Field Label** on the *Configurable Field Management* page.

1. Click to view the relationships of the item.

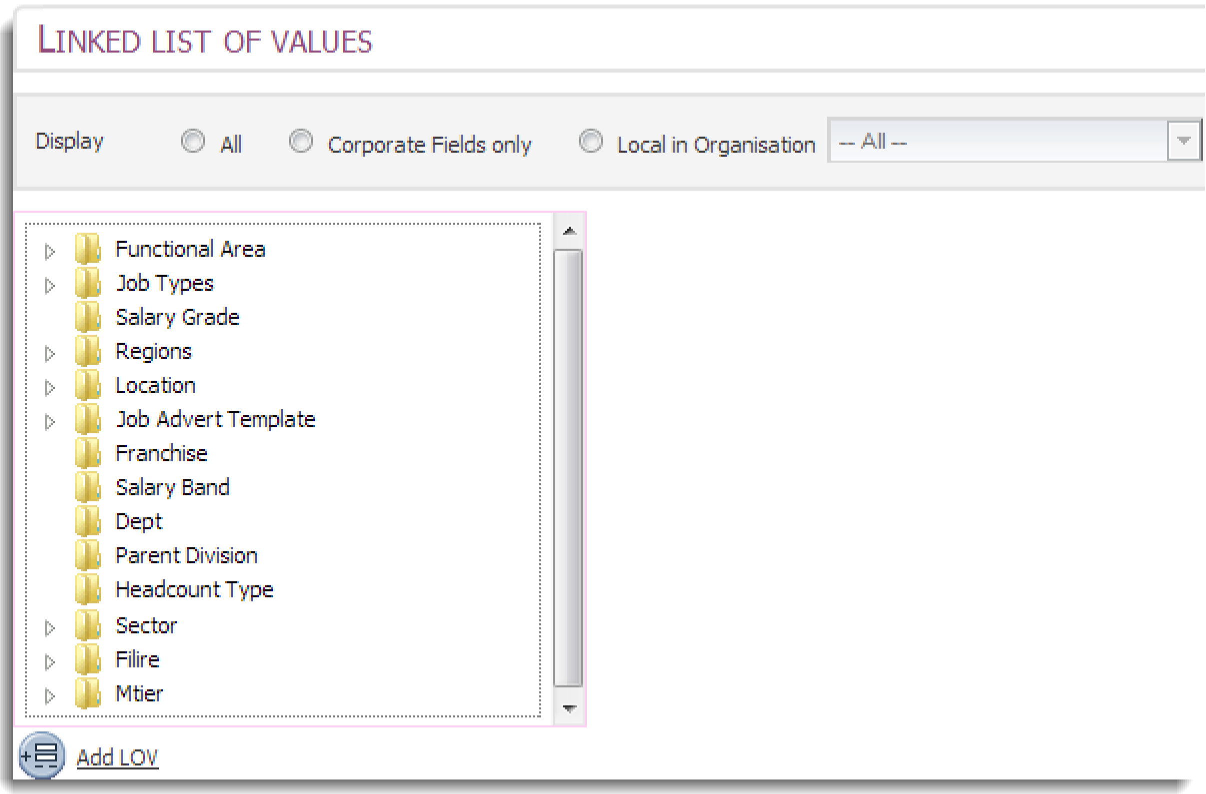
The linked lists can be made available (see page 102) in Job Requisition Forms and Condition Forms, and activated (see page 105) in the same way as non-linked Configurable LOVs.

Creating a Linked List

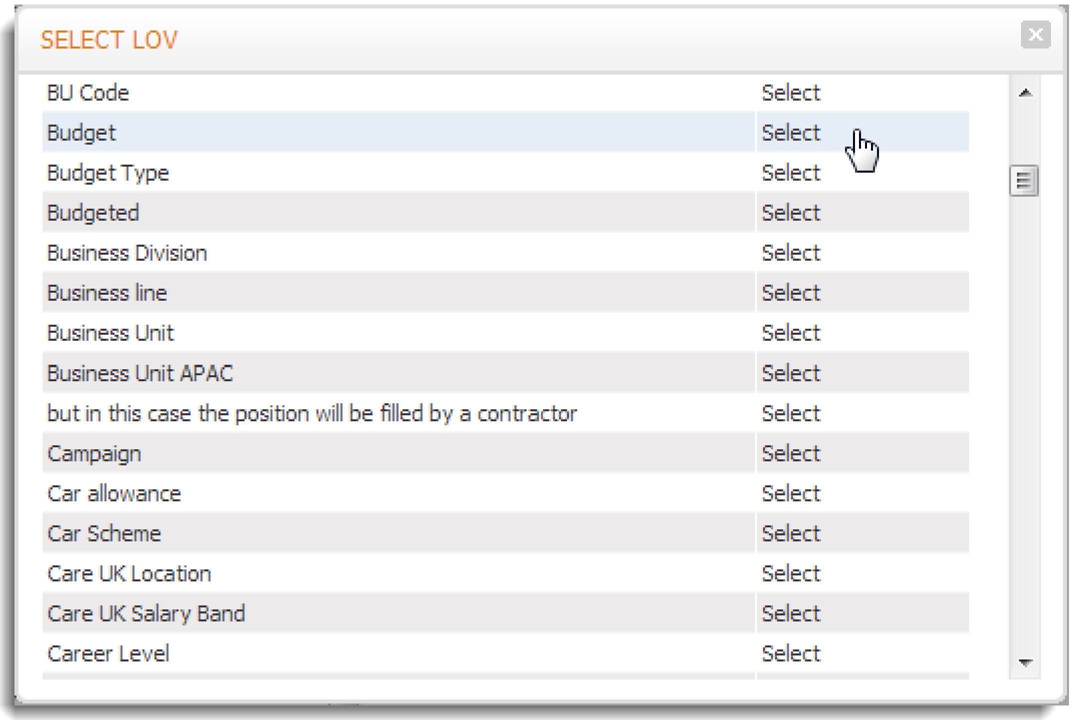
1. From the bottom of the *Configurable Field Management* page (see page 74), click **Link LOVs**.

   The *Linked List of Values* page is displayed.

2. Click **Add LOV**.



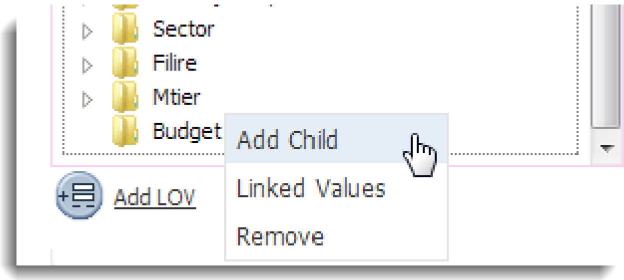
3. Click **Select** next to the name of the Configurable LOV you want to use as the top level (Parent) in your linked list.



ⓘ The Configurable LOV must have already been defined so it is listed in the Select LOV dialog box. Refer to Create a Configurable LOV (see page 100) for more information.

The LOV is added to the bottom of the linked list tree structure.

4. Right-click the top level of your list, then select **Add Child** from the pop-up menu.



5. Click **Select** next to the name of the Configurable LOV you want to use as the second level (Child) in your linked list.

The LOV is added as a child to the parent LOV.

You can continue to add children to all levels of the list until the linked list is complete. The parent list can be linked to multiple children. A child list can be linked to more than one parent list.

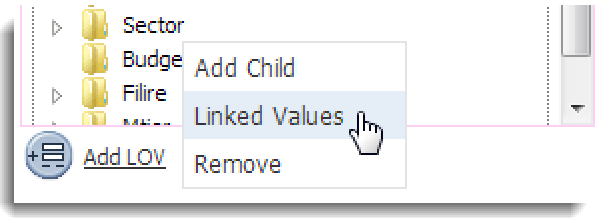
Editing a Linked List

To link values in child level lists to a value in parent level lists:

1. From the bottom of the *Configurable Field Management* page (see page 74), click **Link LOVs**.

   The *Linked List of Values* page is displayed.

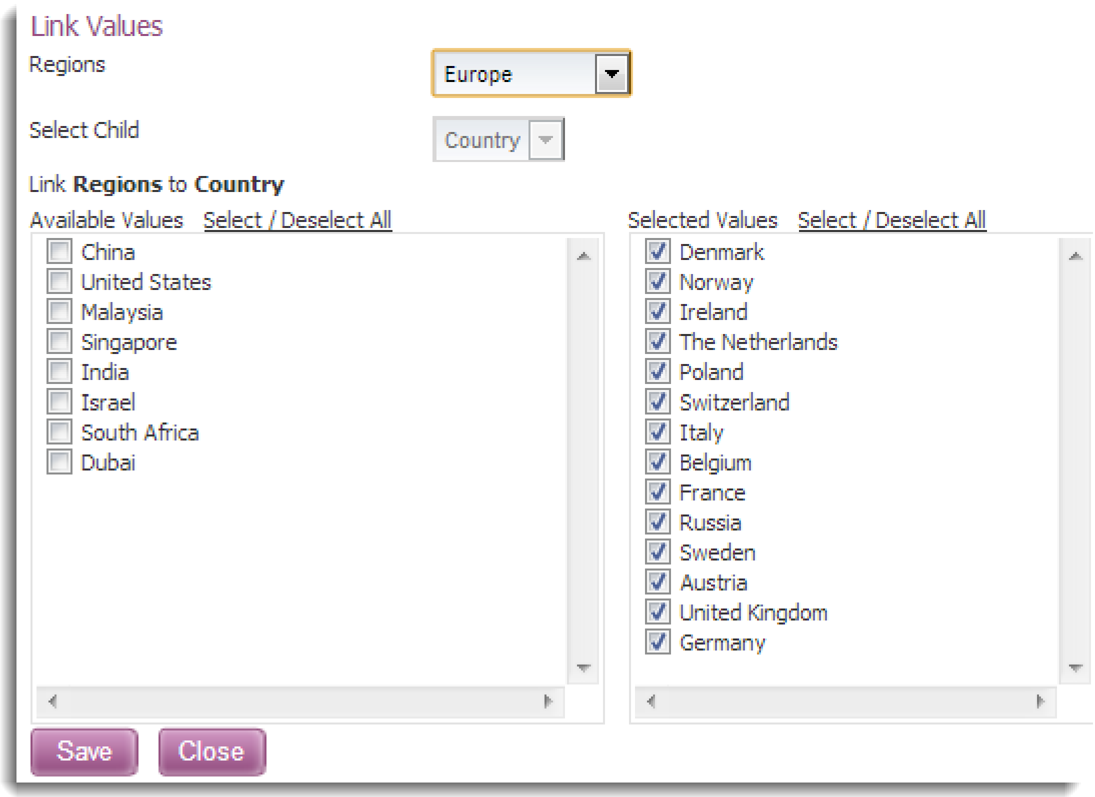
2. Right-click the parent list value, then select **Linked Values** from the pop-up menu.



   The **Link Values** section is displayed. This section is used to assign the values in the child level list to the value in the parent level list.

   The left side (Available Values) lists those values which can be assigned as children. The right side shows which values have already been assigned.

3. Select a parent value from the dropdown list then select / deselect child values and click **Save**.



4. Select another value in the parent dropdown list.

   The Link Values table automatically updates.

5. Repeat steps 3-4 for all values in the lists.

Deleting a Linked List

1. Right-click the list value, then select **Remove** from the pop-up menu.
2. Click **OK** to confirm your action.

ⓘ You cannot delete a list value if it has child list values.

Managing Job Posting Sites

Site Management concerns the management of job posting sites, including creating posting site links, configuring Search Agents, configuring Talent Portals, configuring the TalentLink Source sites, and so on.

You can configure a specific layout and LOVs depending on the type of posting site and the target.

1. To display the *Site Management* page, from the **Settings** section of the left dynamic menu, select **System Administration**, then **Site Management**.

   The Site Management area is divided into the following sections:

- Career Sites (see page 112)
- Other Sourcing Channels (other posting channels) (see page 113)
- Technical Sites (see page 113)
- Agencies (see page 113)
- TalentLink Source Sites (see page 114)

Career Sites

The *Career Sites* tab is used to post jobs on Intranet and Internet client websites. Their configuration is defined using various criteria:

- CSS Configuration – Manage CSS stylesheets
- Site Layout - Set the data privacy statement and period, and so on
- Site Map – Set the job description URL
- Category Lists (optional) - Used as search criteria for candidates and linked to syndication-specific components
- Search Agent - Enables candidates to receive notifications by email about posted jobs that match previously chosen criteria
- Talent Portal - Enables candidates to create their own homepage on the customer's website and to manage their personal information and applications
- Auto-Posting rules - Set auto-posting to other pre-configured sites
- Career Site Layout Components - For career sites, specific components need to be developed. These components are inserted in the client web pages and linked to our data
- Email a Friend – Enables candidates to share job advertisements with their friends by email

Other Sourcing Channels (other posting channels)

The *Other Sourcing Channels* tab is dedicated to any other posting method.

Job offers can be sent by email to career websites (Monster, Jobcareers, and so on), any other sites (for example, university sites) and to agencies. They can also be posted directly on a website using a specific interface developed for the client by Lumesse.

Technical Sites

A Technical Site is not a stand-alone entity but is linked to one or more job boards/agencies/external sites, and is used to store the CSS.

A Technical Site is a ready made portable layout which is used to support the online Application Processes used by Agencies, and Other Sourcing Channels. It can be used in Application Processes when you post a job to an agency, an external site, a job board, through social recruiting or Other Sourcing Channels.

Agencies

From the *Agencies* tab you can:

- Configure an Agency's contact and bank details
- Post a job description to Agencies by email or directly on a dedicated Agency Portal
- Enable Agencies to submit applications to TalentLink following a dedicated application process

The Agency Portal is a website using the TalentLink Syndicated (SYD) technology. Deploying an Agency Portal is as simple as deploying any internal website or career website using SYD components. Lumesse provides a set of SYD components that enables preferred suppliers to:

- Get direct access to Agency contact and bank details, and update them accordingly
- Access the communicated job postings and submit applications
- See the progress of submitted applicants
- Get a list of all submitted applicants and communicated documents or data
- Add information
- Withdraw applications
- See an application's status
- View contract terms for submitted candidates
- Trace activity of their on-site contractors

When an Agency Portal uses the SYD technology, it benefits from all of its advantages, particularly the custom branding feature. Consequently, an Agency Portal can be deployed with your own corporate branding applied to the SYD components used.

TalentLink Source Sites

ⓘ TalentLink Source is a value added service that will only be visible if it has been paid for then activated by Lumesse resources.

The *TalentSource* tab provides a list of all Sourcing Channels available to you for use with TalentLink Source. You can:

- Configure a Sourcing Channel for use with TalentLink Source, including specifying the channel's URL, setting up a user name and password for access to it, mapping fields from TalentLink to the new job board, and specifying for how long a job should be posted
- Edit a Sourcing Channel
- Deactivate a Sourcing Channel so it cannot be used to post jobs through TalentLink Source. Deactivating ensures that the channel can be activated again in future if required
- Activate a Sourcing Channel that has been deactivated in the past

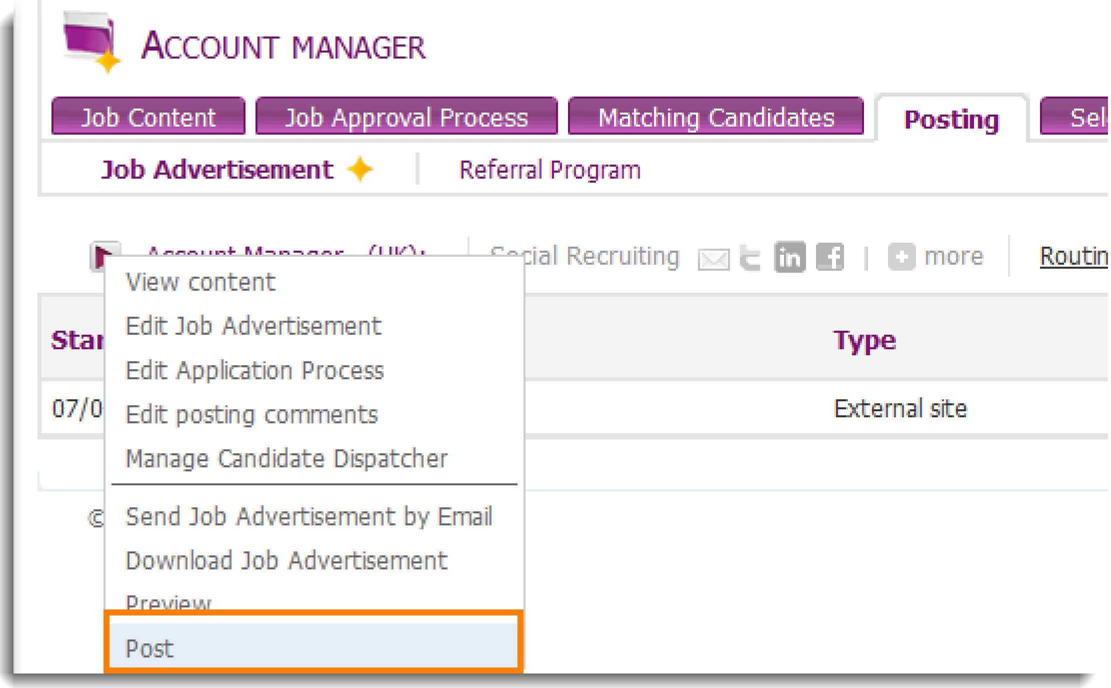
What Happens when a Job Advertisement is Posted

As soon as the sourcing channel is made *Active* it will be available to users to post to from the job requisition *Posting* tab.

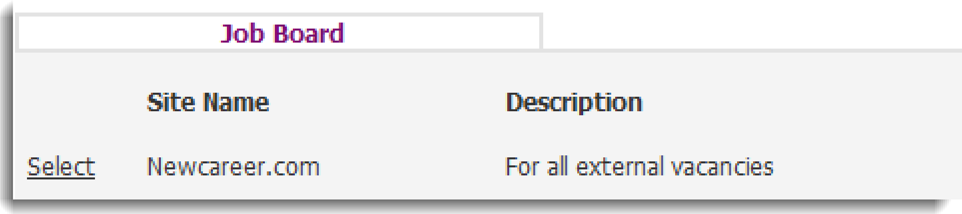
It is possible to:

- Post a role
- Define the start and end date of the posting
- Un-post a role manually
- See the status of the posting
- Access the posting history, including the sent file

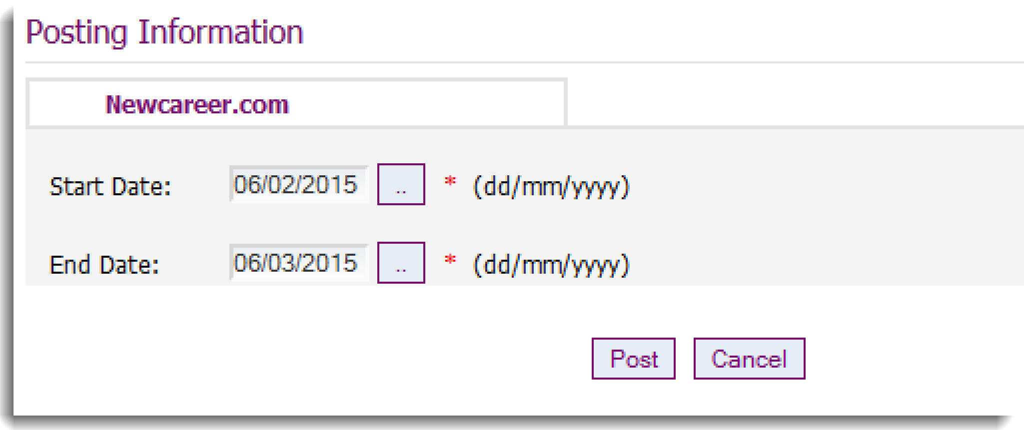
1. From the *Posting* tab of a requisition click the job title and select **Post**.



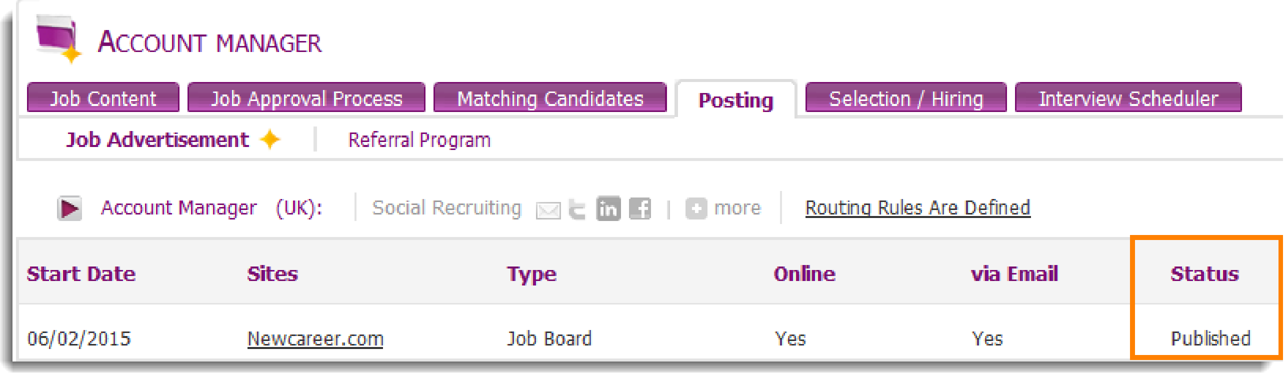
The sourcing channel name is displayed, including the description defined in the configuration.



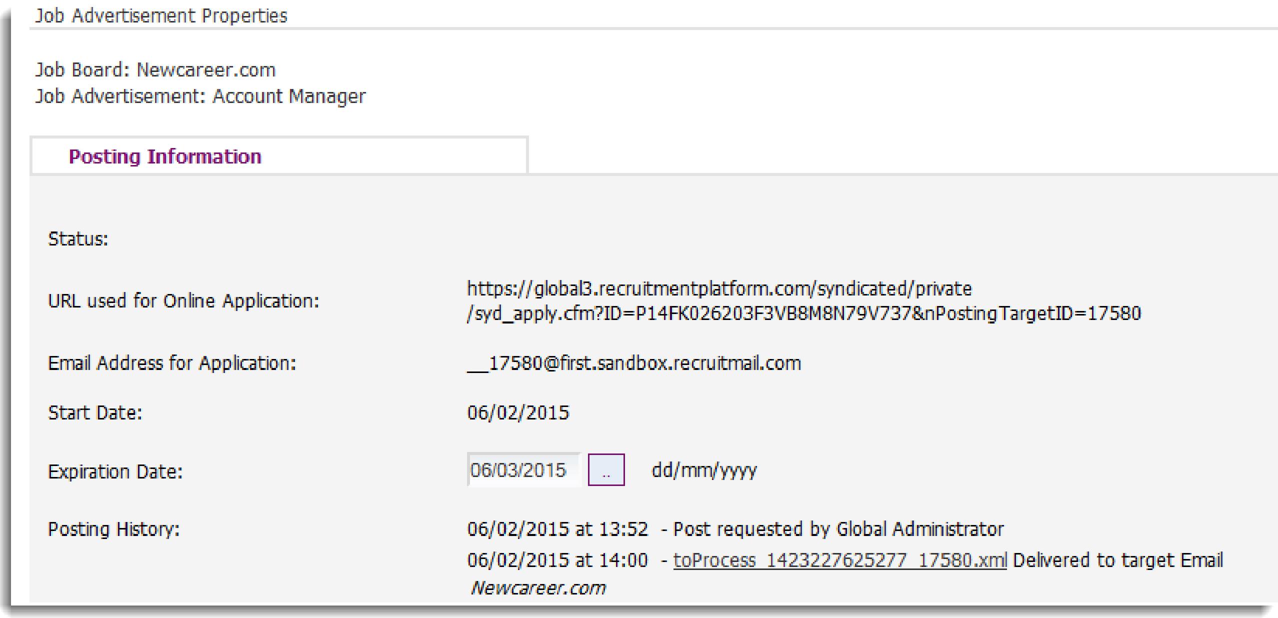
The default posting period is displayed and can be edited as required.



The posting is sent, usually within 15 minutes, and the status shows as *Published*.

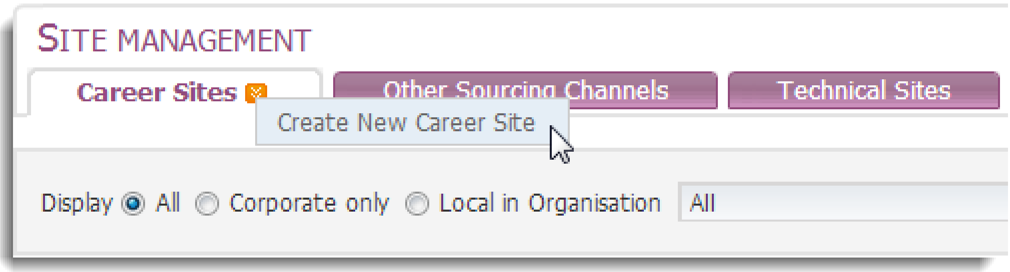


Clicking on the job board name link displays the job Posting Information including links to the sent file.

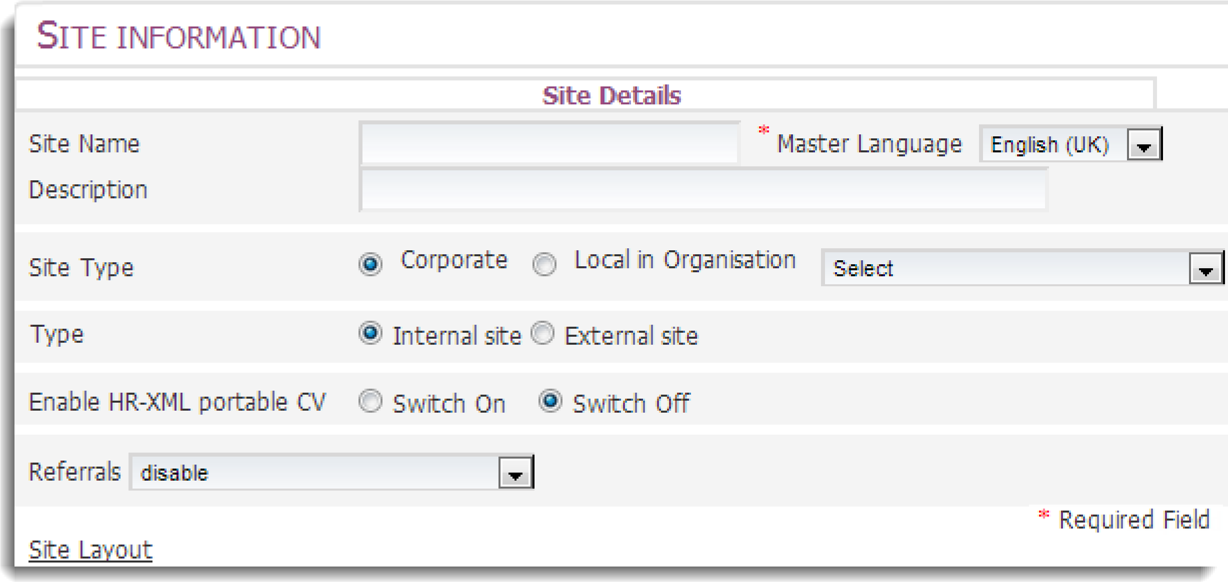


Creating Career Sites

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Site Management**.
2. Click next to *Career Sites* to display the menu, then select **Create New Career Site.**



3. Type the name and a brief description of the site, then select the **Master Language**.



4. Set other options as required then click **.**

The fields on this page are explained in Site Information (see page 117).

ⓘ You can either save and close now, or configure the Site Layout (see page 124). If you choose the second option, your site is still saved.

Site Information

To access the *Site Information* page:

1. From the *Career Sites* tab, click **Edit** next to the name of the site.

2. From the *Site Information* page, you can access the following details:

   Site Name and **Description**
   This is displayed during the job posting process.

Master Languages
The master language for the site.

Site Type
This can be **Corporate** or **Local in Organization**.

Type and **Technical ID**
The posting type (internal or external), and unique technical ID of the selected site.

Enable HR-XML portable CV
If this setting is enabled for a career site, candidates will be able to make multiple applications using the same CV that is saved to their hard drive in HR-XML format. When a candidate fills in the job application forms they will see an option to extract that information into HR-XML format. Later, when the candidate applies for another job they will not need to fill in the forms again, but can use the option Apply with HR-XML CV; this will automatically parse the fields correctly.

Anonymous Candidates feature
If this is **On**, recruiters do not have access to the personal details of any candidates who have applied for jobs posted on this site. Refer to Anonymous Candidates (see page 118) for more information.

Site Activation
Activate or deactivate the site.

Referrals
Enable or disable referrals.

Additional Content Languages
Any additional languages used on the site.

Anonymous Candidates

The **Anonymous Candidates** feature is activated per customer site (External or Internal), and external Sourcing Channels that enables candidates to stay anonymous to their recruiters. This can avoid discrimination claims. The option to decrypt candidates in the Selection Process is related to this feature. Refer to Activating the Anonymous Candidates Functionality (see page 118) for more information.

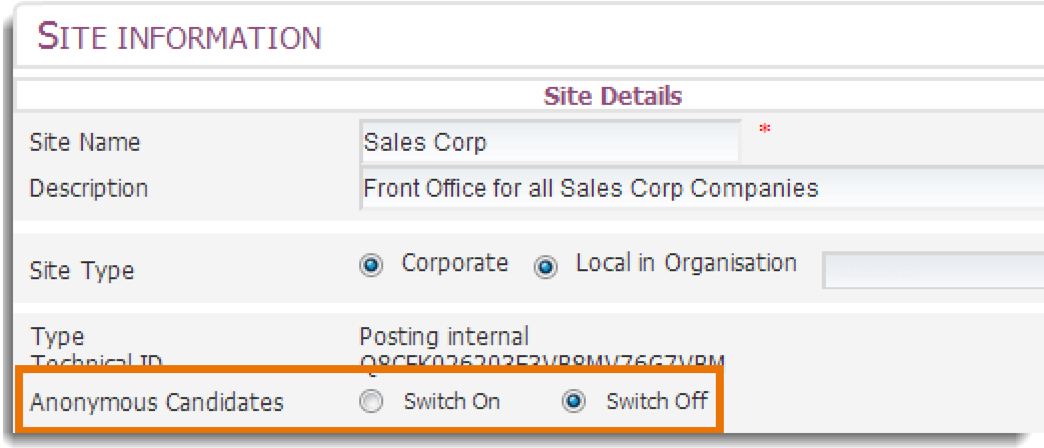
By activating this feature, certain candidate data remains invisible to the recruiter, who will not be aware of the candidate's name, gender, age and other such details. Of course, this only refers to structured information that comes from filling in the Personal Information Form (PIF).

If the Application Process on the customer site includes the option for the candidate to attach a document, recruiters will see the content of these documents and it is possible that they may see the candidate's personal details there. As a solution in such cases, you should limit the recruiter's access to candidate details by removing such attachment options in the Application Process for jobs published on the site.

Activating the Anonymous Candidates Functionality

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Site Management**.
2. On the *Careers Site* tab, locate the site on which you want to enable Anonymous Candidates, then click **Edit**.

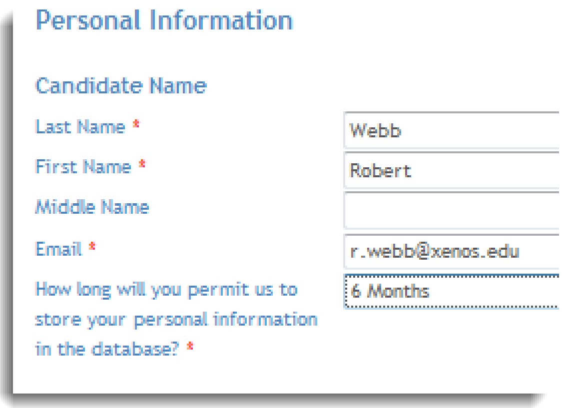
3. On the *Site Information* page beside **Anonymous Candidates**, select **Switch On**, then click



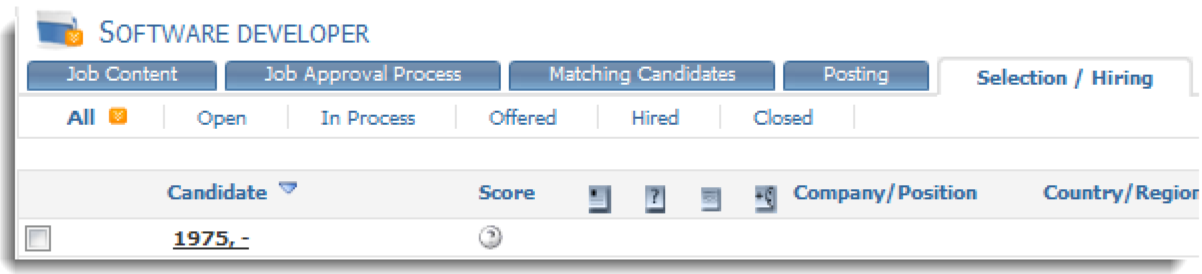
Using the Anonymous Candidates Functionality

To view the effect of the Anonymous Candidates feature:

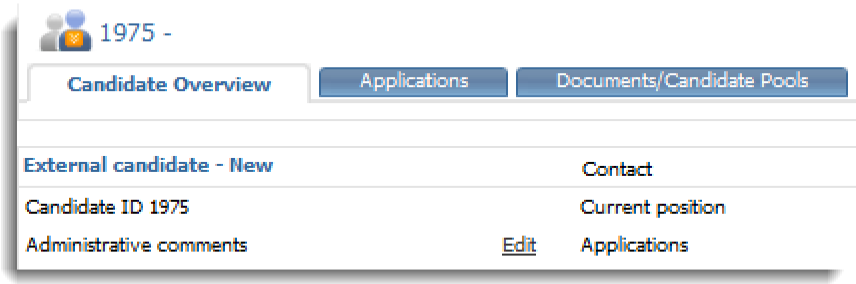
1. Apply for a published job as a candidate through the Front Office.
2. Fill in the PIF and complete all the other steps in the Application Process.



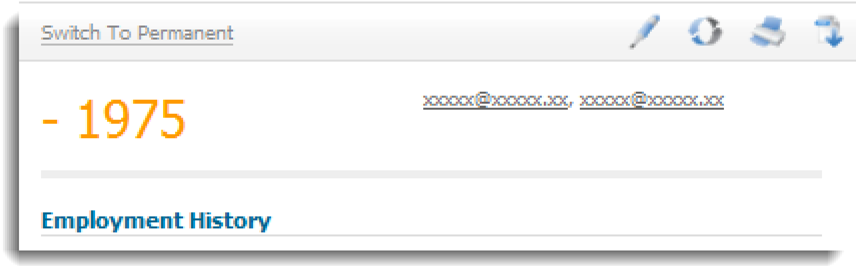
When the file is created, the name of the candidate is not visible; the Candidate ID number is displayed instead, as shown in the following image.



In the *Candidate Overview* page, the candidate data and email address is encrypted.

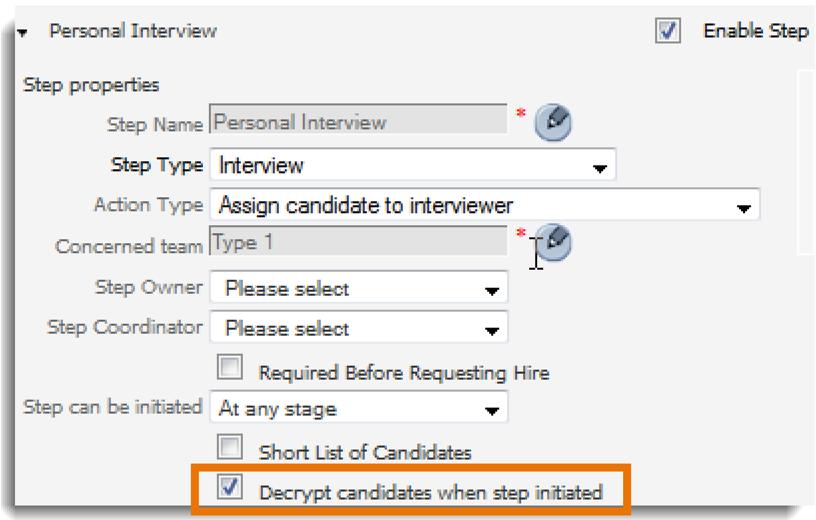


Similarly, the data in the Candidate Summary form is also encrypted.



The Selection Process can continue for this candidate even if the personal details are not available; the name of the candidate is not important to the recruiter.

A candidate cannot remain anonymous forever as you cannot hire an anonymous person. Therefore, in the Selection Process configuration, there is an option to decrypt hidden candidate data on each step. Depending on which step you decide that data should be revealed, the candidate's details will be made visible to the recruiter.

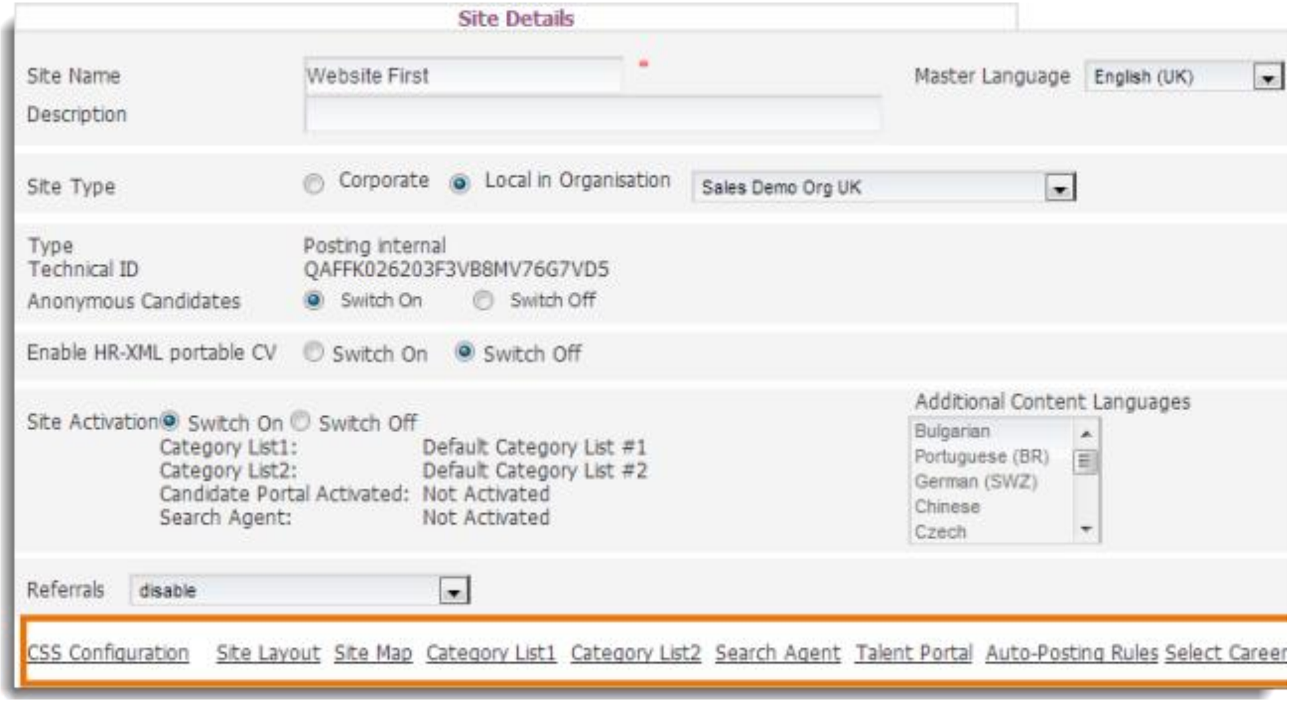


For more information, refer to Editing Step Properties (see page 194) in the *Managing Job Approval and Selection Processes* chapter.

ⓘ If a candidate is already present in the database and applies for a new position, their data is not anonymous. This is because the candidate has already gone through a Selection Process.

Configuring a Career Site

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Site Management**.
2. From the *Career Sites* tab, click **Edit** next to the name of the site.
3. Select any of the site configuration options at the bottom of the *Site Information* page.



Career Site configuration is divided into the following sections:

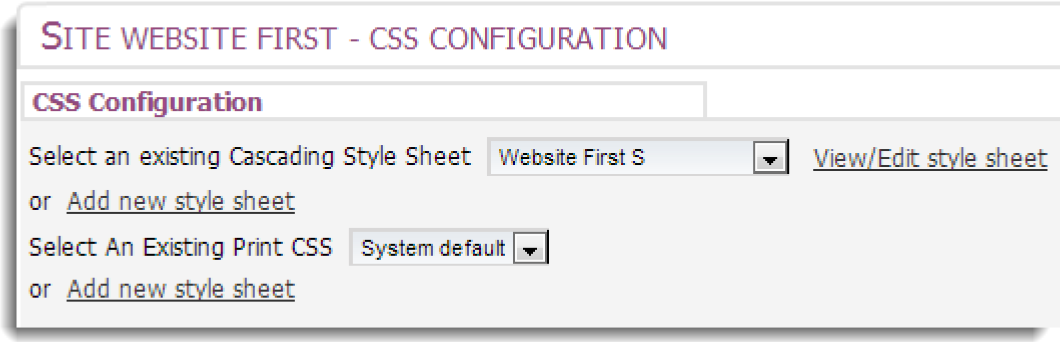
- CSS Configuration (see page 122)
- Site Layout (see page 124)
- Site Map (see page 130)
- Category Lists (see page 131)
- Search Agent Configuration (see page 133)
- Talent Portal Configuration (see page 135)
- Auto-Posting Rules (see page 137)
- Career Site Layout Components (see page 138)
- Email a Friend (see page 139)

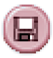
Configuring a Cascading Style Sheet

Style sheets define the look of the Application Process initiated on a career site. You can use any of the CSSs configured for the company, or create a new one and customise it to meet the specific career site's requirements. The same rule applies to candidate PIF printouts (Print CSS). You can select a CSS from the list or define a new one.

Using an existing CSS

1. From the bottom of the *Site Information* page (see page 121), select **CSS Configuration**.

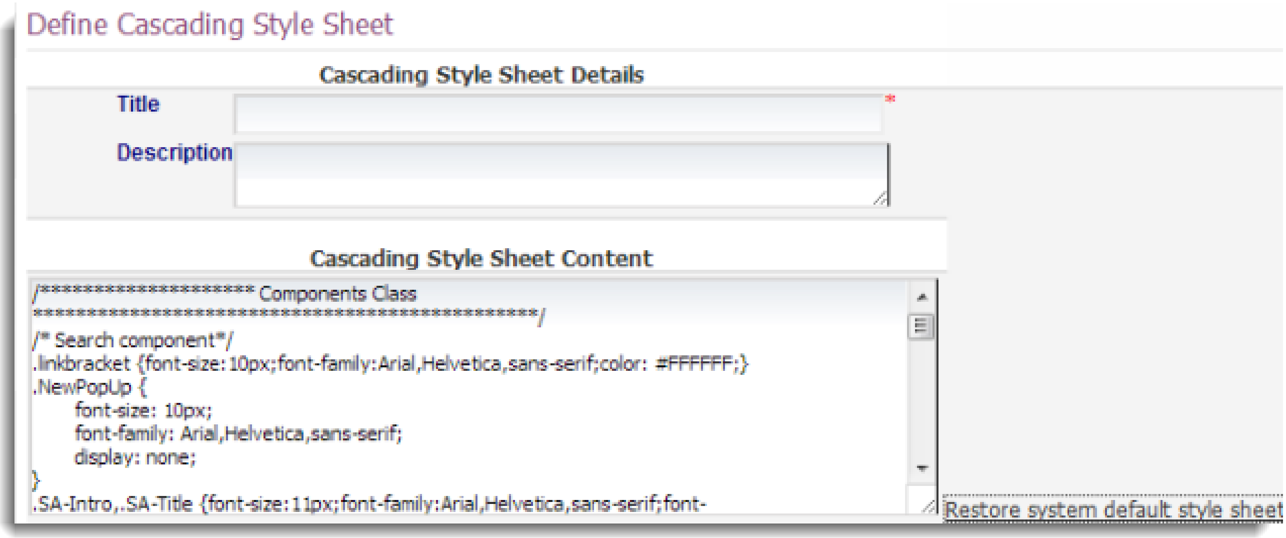


2. Select an Application Process and/or candidate PIF Print CSS from the dropdown lists then click 

Adding a CSS

To add a new CSS for either the Application Process or the PIF Printout:

1. From the *Site Information* page (see page 121), select **CSS Configuration**.
2. Click **Add new style sheet**.
3. Type the **Title** and **Description** of the new CSS.
4. Enter the new CSS into the **Cascading Style Sheet Content** section.



5. Select **Restore system default style sheet** to display the default style sheet, then customise this based on your needs.

You can enter colour and font codes for the style sheet of the client site. This style sheet exists by default, enabling you to modify only the required features.

If you want to base your new style sheet on the client site's existing style sheet, first obtain that style sheet and integrate it into the default style sheet. The table in Cascading Style Sheet Configuration contains explanations of the required HTML component codes.

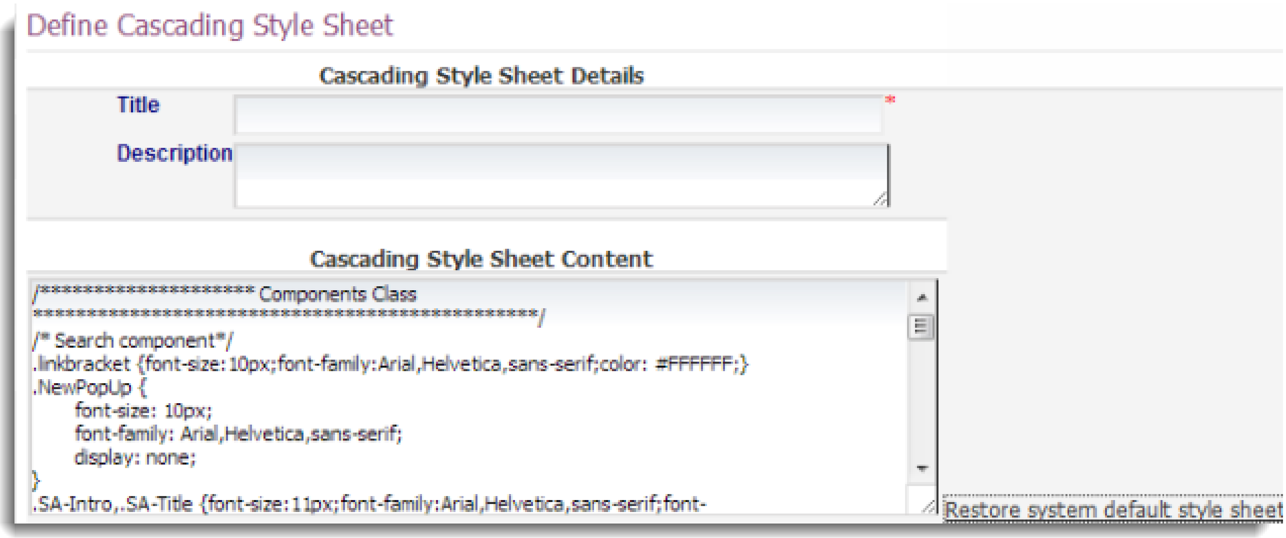
Cascading Style Sheet Configuration

Section	Description
/* Welcome component*/	Contains all the HTML codes used for the welcome page of the Powered By site.
/* Job Description component*/	Contains all the HTML codes used for the description component of the Powered By site.
Application Process Class	Contains all the HTML codes used for the candidate application file component.
CHP Class	Contains all the HTML codes used for the candidate portal layout.
Template	Contains all the styles used in the template layout (questionnaire and résumé) in the Application Process.

Configuring Printing CSS

You can define your own cascading style sheets (CSSs) using the CSS configuration of the Site Management in the Back Office. This enables you to specify the presentation of the candidate application process for printing purposes based on the desired format.

1. Type the **Title** and **Description** of the new CSS.
2. Select **Restore system default style sheet** to display the default style sheet, then customise this based on your needs.

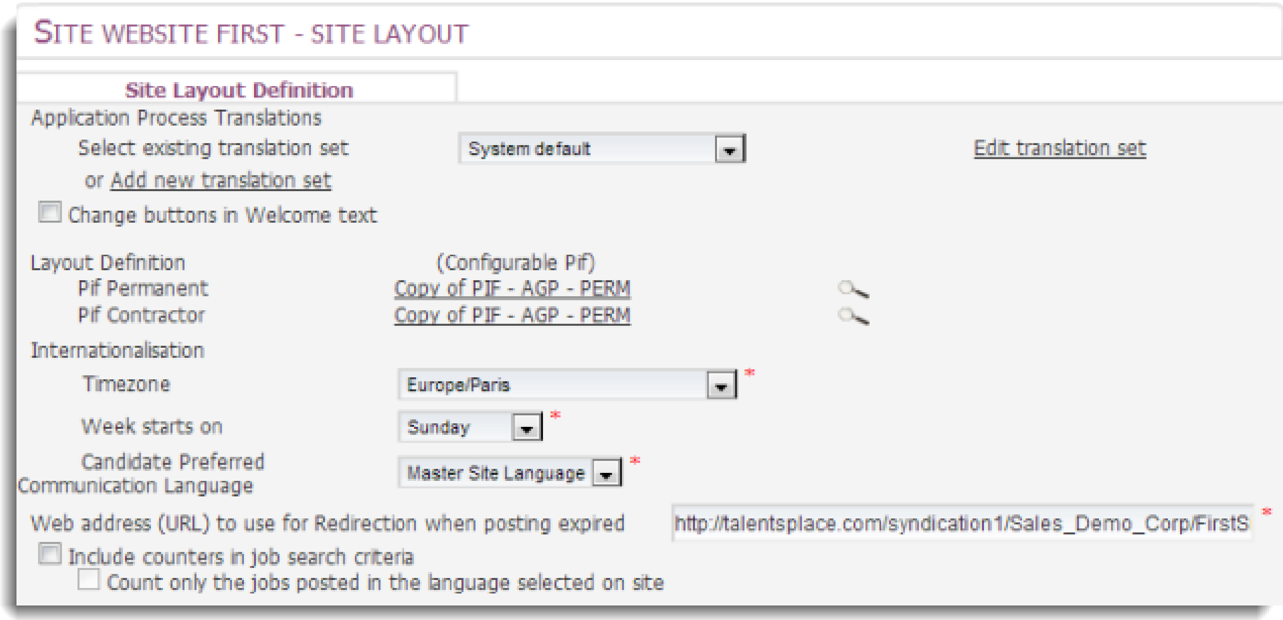


Site Layout

1. From the bottom of the *Site Information* page (see page 121), select **Site Layout**.
2. Select the **Translation Set** to replace the default labels used in the Application Process.

   If nothing is selected, the system defaults are displayed.

   You can edit the selected translation set or create a new set, if required.



3. Select **Change buttons in Welcome text** to change the default **Continue** value into **I accept**.
4. In the **Layout Definition** section you must select a PIF to use for Permanent and Contractor candidates.

   You must predefine at least one PIF before you can select it here. These are configured either from a blank form using the Form Builder or by copying and editing one of the system-defined Best Practice PIFs (see page 307).

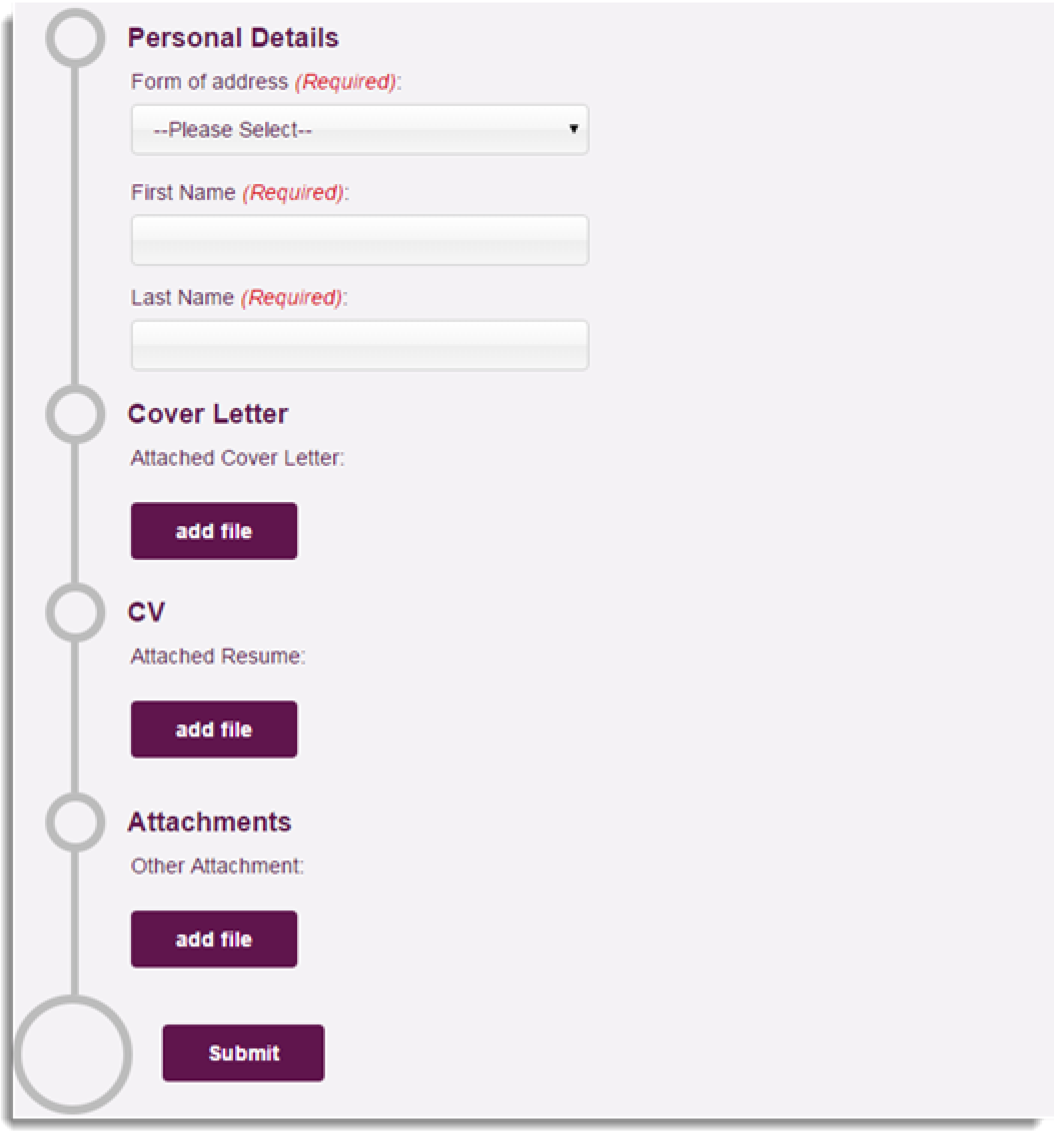
   If only one PIF is defined, it will be used for all jobs.

   After selecting a PIF you can preview it by clicking

One Page Application Process

ⓘ This component will only be available if it has been activated on your corporate career website by Lumesse.

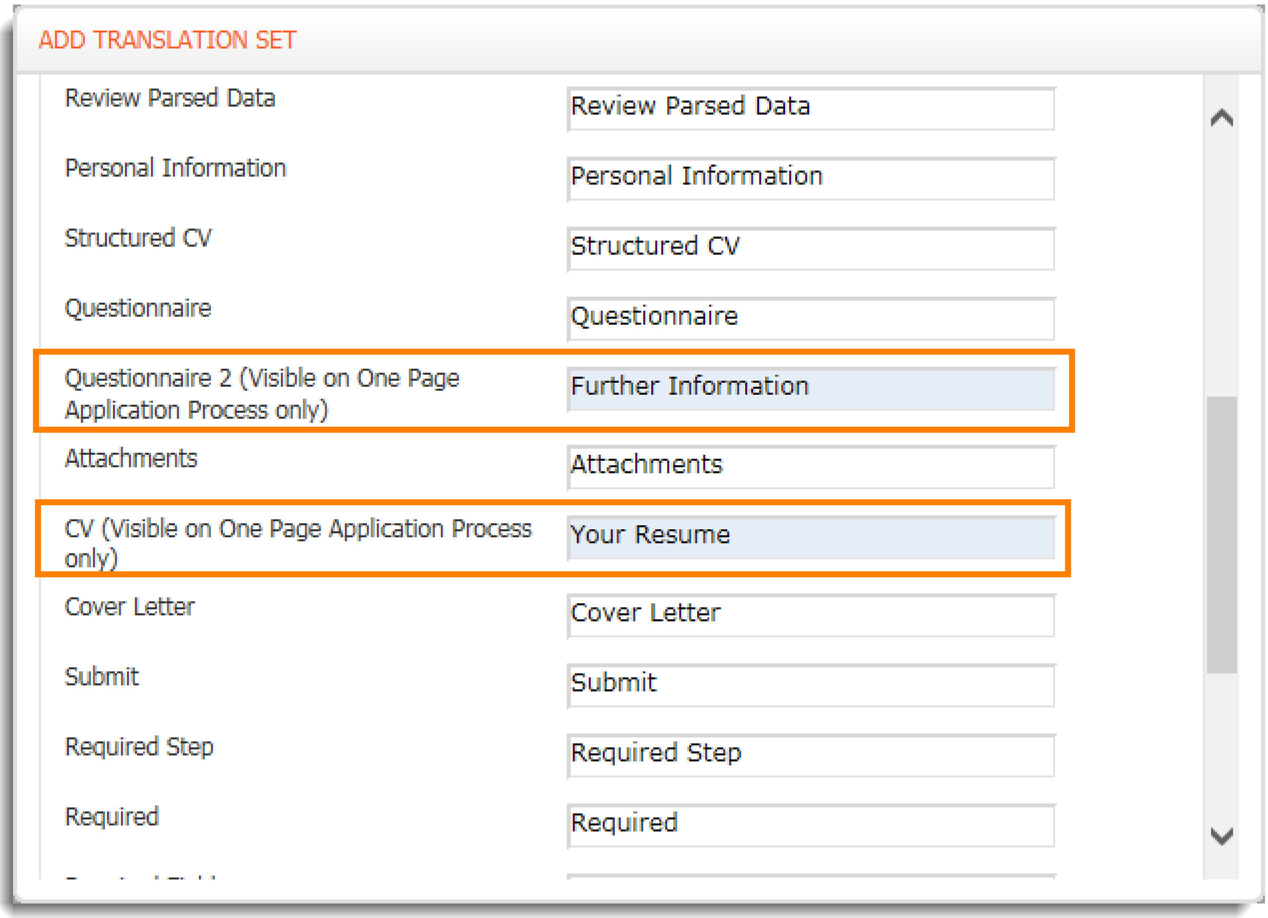
From TalentLink 15.0 Lumesse gave system administrators the ability to set up a one page Application Process component that can be embedded in your career site. The traditional TalentLink Application Process was managed through a series of top level tabs. Each step in the process configured by the administrator would need a separate click by the candidate to move between the tabs. These tabs have been replaced by sections displayed on a single page which the user can scroll down to move between each step. This is particularly useful for candidates who apply using mobile devices.



The system administrator can configure the names of the steps displayed on the page. This is done by adding translations to be used in the Application Process while configuring the site layout of the career site.

1. From the bottom of the *Site Information* page (see page 121), select **Site Layout**.
2. Add or edit a **Translation Set** to replace the default labels used in the Application Process.

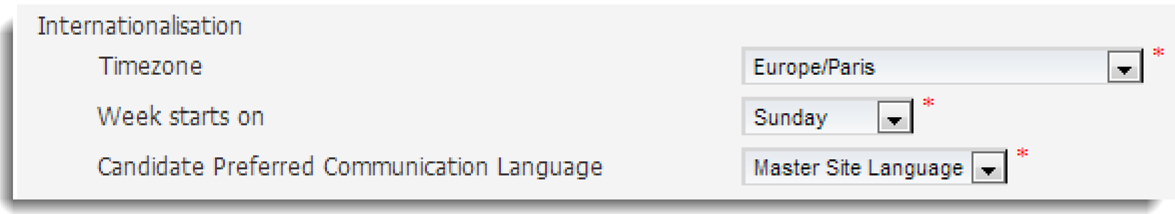
Additional labels used only in the one page Application Process are **Questionnaire 2** and **CV**.



ⓘ Customers who use the one page Application Process component on their career sites can also configure the full text of the Data Privacy Statement (see page 127) displayed on the online application forms, along with the text introducing the statement.

Internationalisation

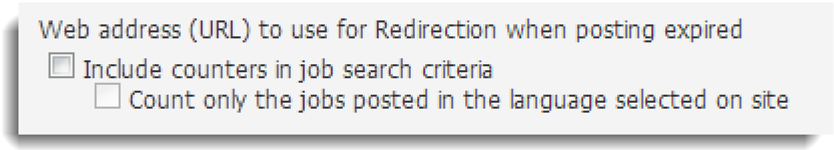
1. Select the **Time Zone** in which the Career Site operates and select other options as required.



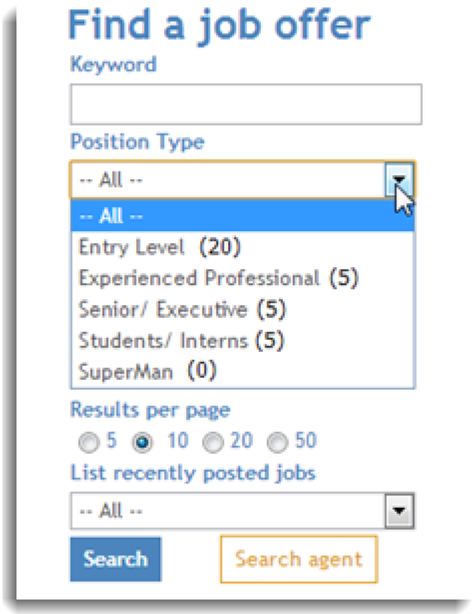
Web Address and Counters

1. Enter a web address to use for redirection if required.

If a requisition is no longer posted, any candidate using the URL (mail alert, job board, and so on) of this job is redirected to this page.



2. Select **Include counters in job search criteria** if you want the search results to display the actual number of matches to the candidate. This will help candidates to broaden or narrow their search accordingly.

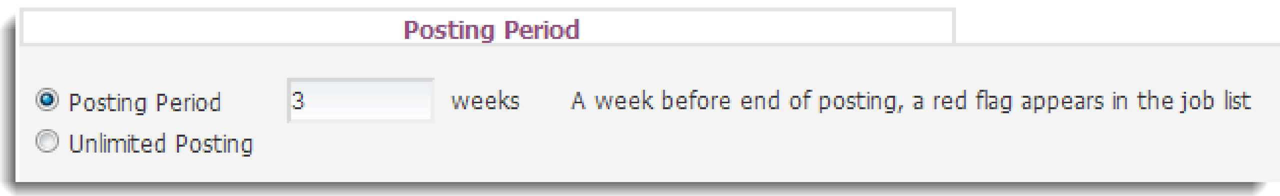


Posting Period

The **Posting Period** specifies the default posting period on the site.

Unlimited Posting sets an unlimited posting period for all jobs by default.

Unposting actions can only be done manually if an unlimited posting period is specified.



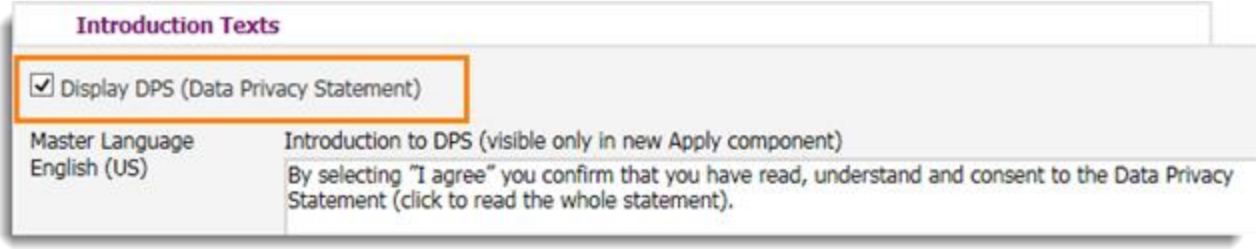
Introduction Texts

1. Enter welcome text for job vacancies that have a questionnaire.

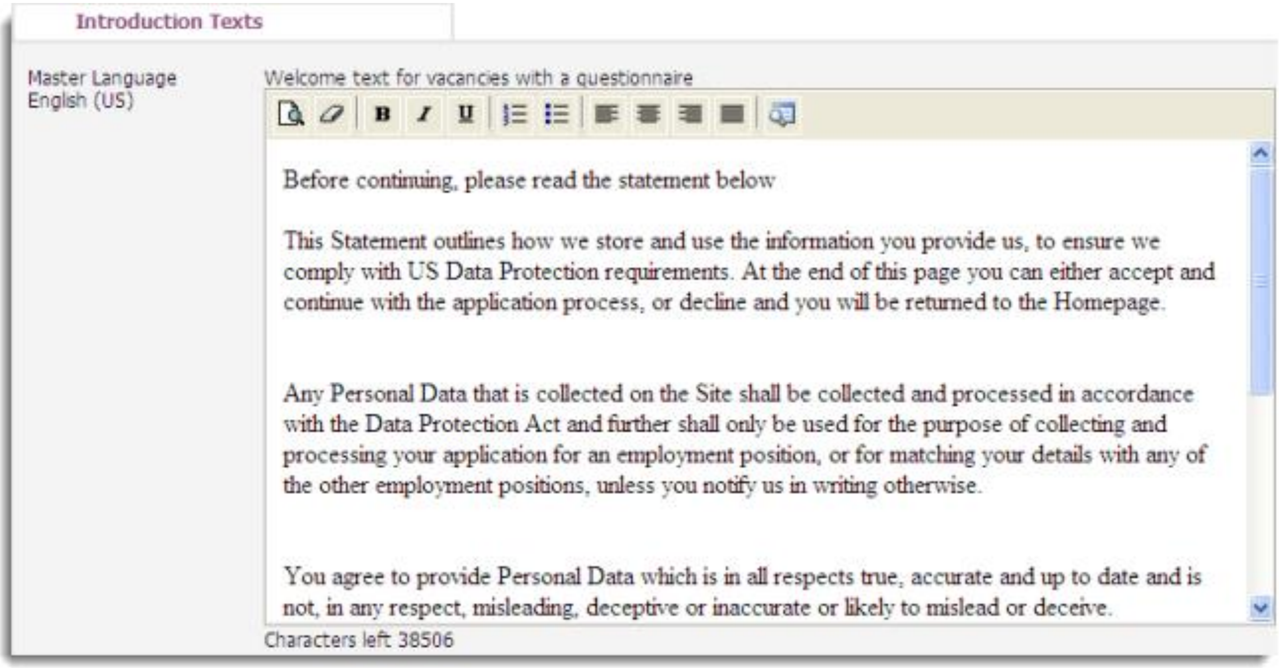
   This message appears in the first window of the application file when a candidate applies for the job. Most companies include their Data Privacy Statement in this introductory text.

ⓘ If you are using the single page Application Process the Data Privacy Statement will appear as a link on the online application form. Clicking the link will open a new window containing your text.

ⓘ If you do not want the privacy statement to display you can de-select the checkbox that appears at the top left of the **Introduction Text** section (this will only be visible if you have activated the one page Application Process).

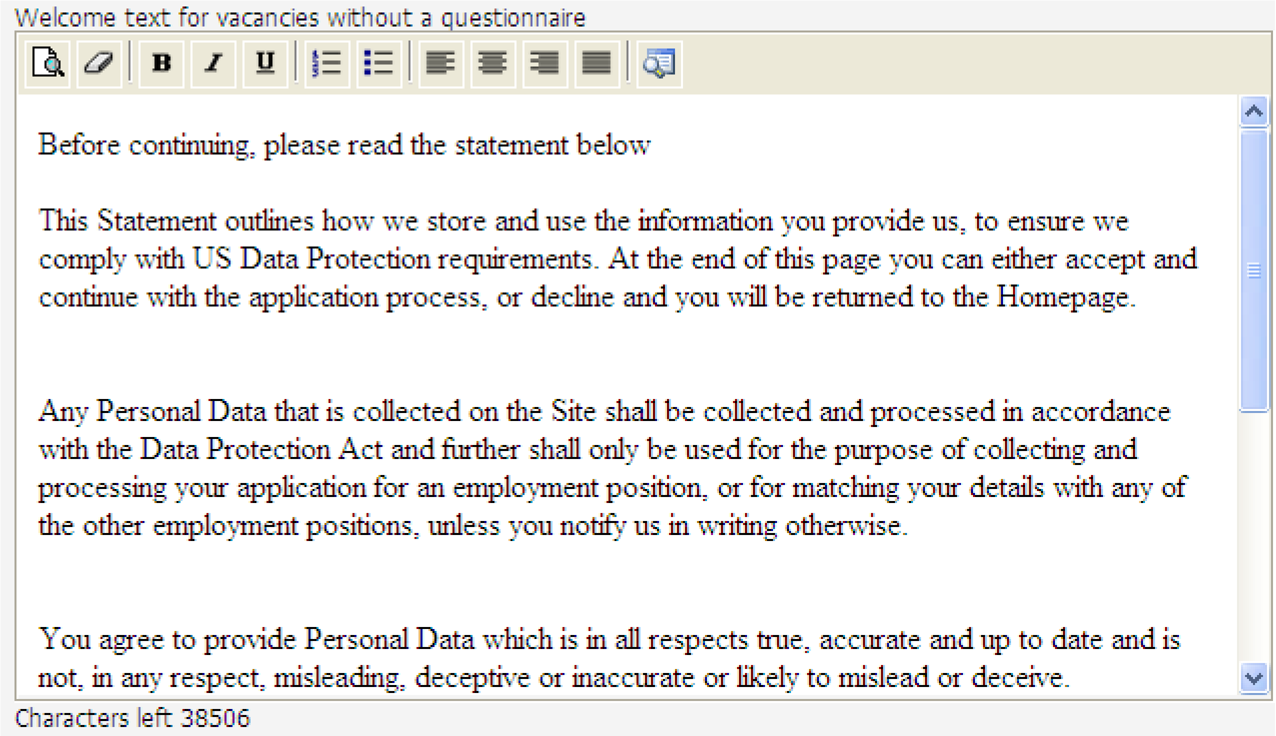


ⓘ



2. Enter welcome text for job openings that do not have a questionnaire.

This message appears in the first window of the application file when a candidate applies for a job. Most companies include their Data Privacy Statement in this introductory text.



You can provide Introduction texts for the Master language as well as any Additional Content Languages.

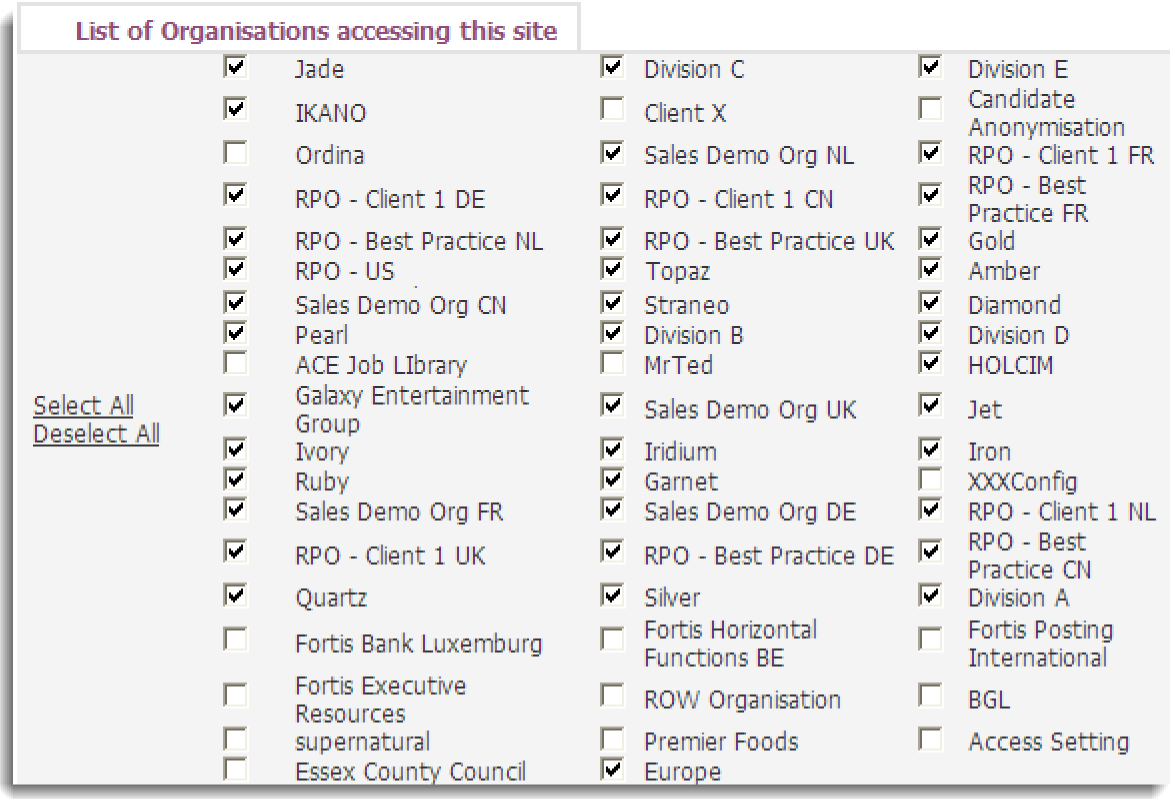
The last text is visible on all application pages if the Save Application functionality is activated. The sentence must finish with the word "here" (since this is the hyperlink to the functionality to save your application halfway). For example, **To save your application click here**.

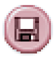
ⓘ Do not enter the word "here" since this is standard in the system.

List of Organisations Accessing this Site

Only selected organizations are authorised to post jobs on this site. You do not need to select all the organizations because they may not all need to post jobs. Other organizations can be selected later.

ⓘ The Organizations List is only available for Corporate type sites. If a Site is set to Local in a given organization, you cannot grant posting rights to another OBS.

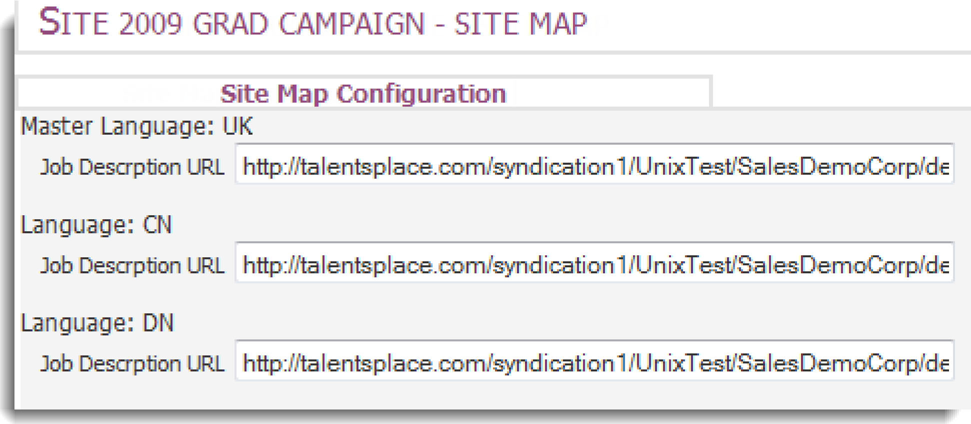


1. Enter the required information, then click 

Site Map

1. From the bottom of the *Site Information* page (see page 121), select **Site Map**.

Once a job vacancy is posted on a career site, a web page containing the job description becomes available to the public. The URL address of this page is called the Job Description URL.



The Job Description URL is used in various system actions. For example, it is included in the email in the Send Job to a Friend feature (see page 256), and is also embedded in the Update shared on social networks, if Social Recruiting is used.

The Job Description URL must be provided by the client web master.

ⓘ You must provide a Job Description URL for a master language and any other languages enabled in the career site.

Category Lists

A Category List is a group of values that can be associated with a job posting. This list enables candidates to search a company career site based on one of the values associated with a job. You can create Category Lists according to the requirements of your company, for example, a Category List based on experience levels:

- Junior
- Senior

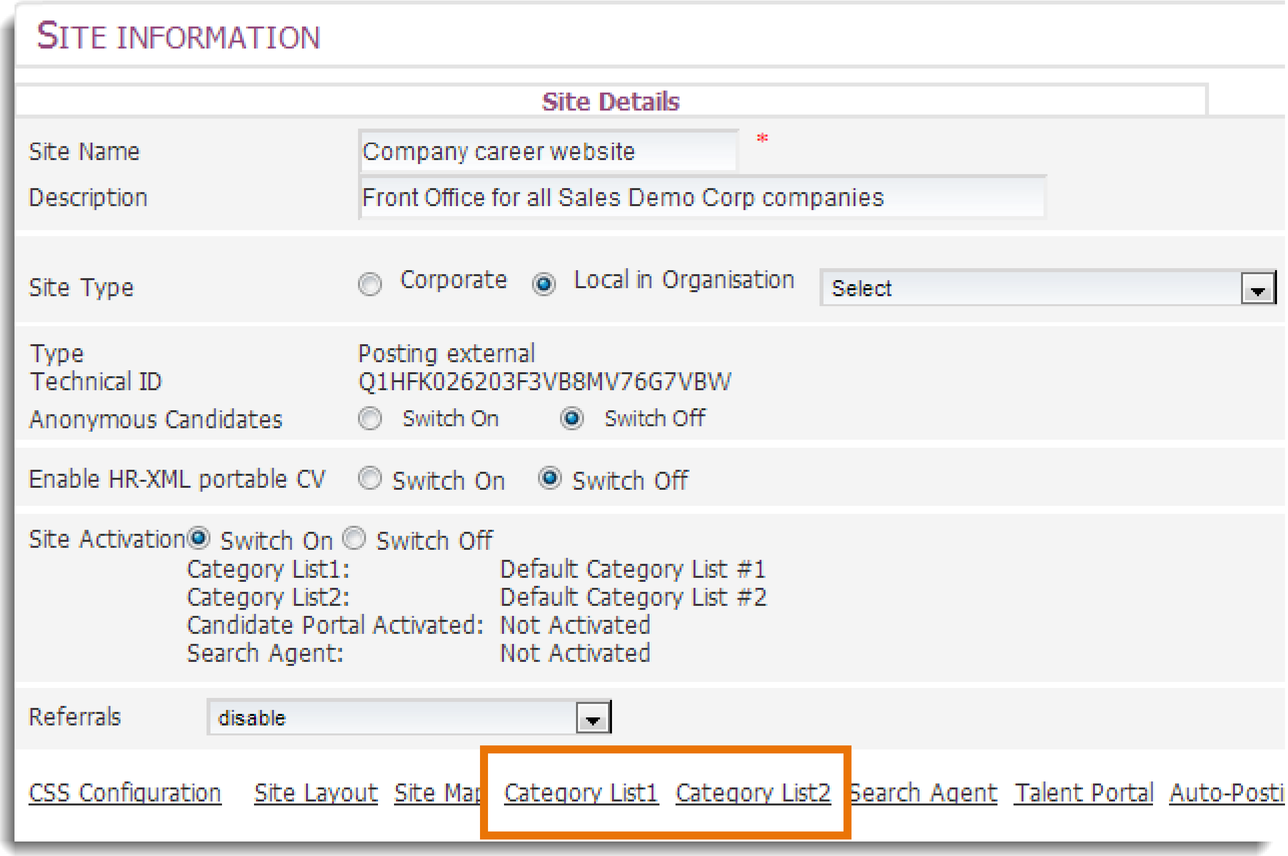
Or on a functional area that then becomes a search criteria on the site:

- Marketing
- Engineering

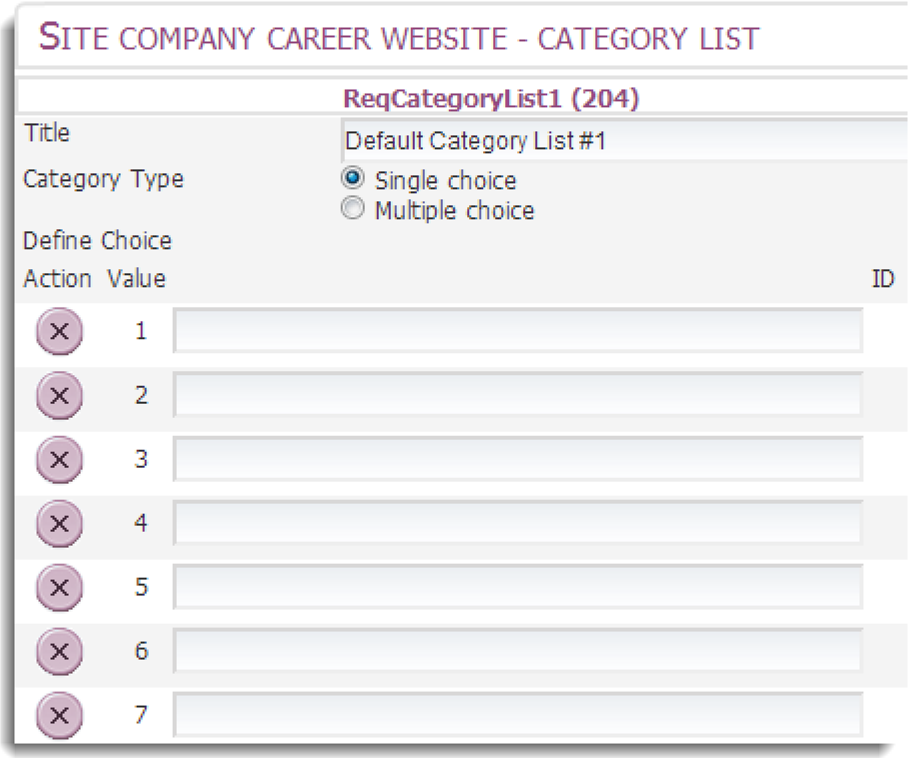
ⓘ It is not possible to run reports on category lists so we recommended that you use LOVs.

---

1. Select **Category List 1** or **Category List 2,** as required from the options at the bottom of the *Site Information* page (see page 121).



2. Type the **Title** of the Category List and set other options as required.



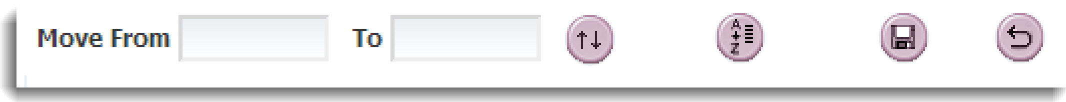
Title - The title for the Category List, for example, Department, Business Unit, Geographical area etc.

Category Type: Single choice - If you select this option, only one category is associated with the posting. This means that a job linked to this category is displayed only if the candidate searches on the value of this category.

Category Type: Multiple choice - If you select this option, the job posting can be found by candidates searching for each of the categories, for example, a position available in both France and England if the list relates to geographical areas.

The list of fields allows you to enter up to 49 values.

3. To change the order of the values, at the bottom of the page type the number of the line you want to move into the **Move From** field.



4. Type the number of the destination line in the **To** field.

Search Agent

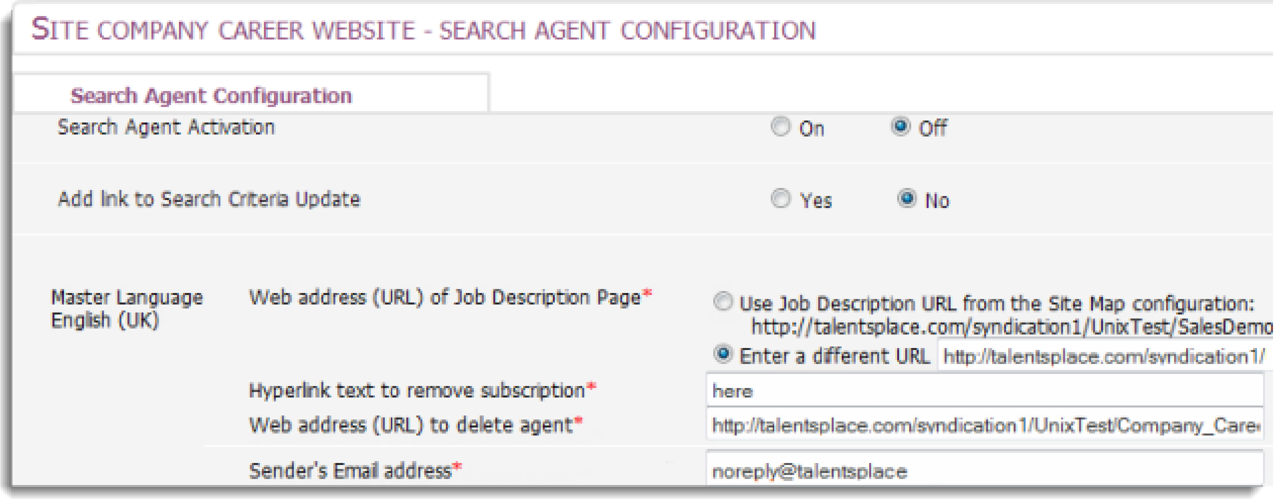
The Search Agent Configuration page comprises:

- The welcome message sent when activating the Search Agent
- The notification message sent when the Search Agent finds posted jobs
- Configuration of the page to unsubscribe from the Search Agent

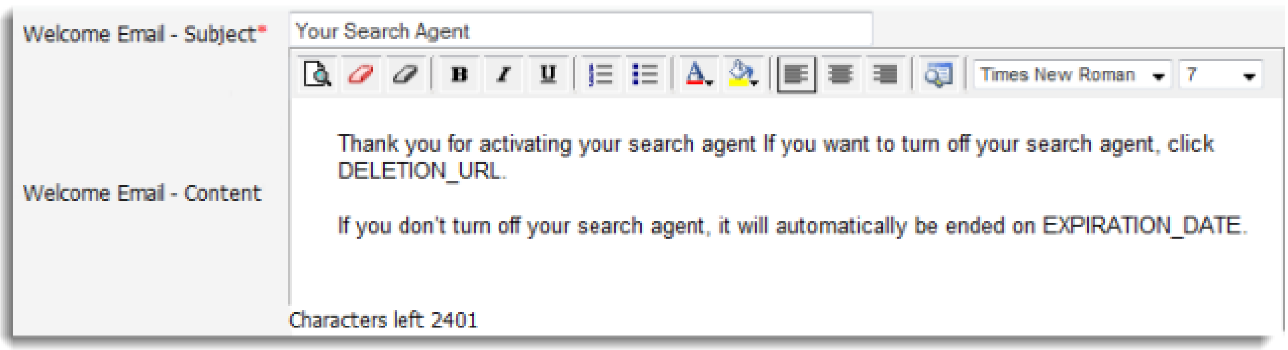
✦ Configuration of the Search Agent Update page

ⓘ These texts should be as clear as possible because all candidates receive them. The sender's email box must be the same as the one used for searches, and must answer their questions.

1. From the bottom of the *Site Information* page (see page 121), select **Search Agent**.
2. Activate the site after all the mandatory fields are filled in.



3. If **Add Link to Search Criteria Update** is set to **Yes**, the candidate can change/edit their Search Agent using the link you provide.
4. Use the Job Description URL configured in the Site Map section (see page 130) or provide a different URL.
5. Type the hyperlink that enables candidates to unsubscribe from the Search Agent.
6. Type the client site URL of the web page to delete the Search Agent; this will be provided by the client's web master.
7. Type the default sender address for all Search Agent emails. This field must contain a valid address.
8. Type the subject of the welcoming email. It is better to keep this neutral, for example, "Thank you for activating your search agent", because candidates may receive this email at their place of work.

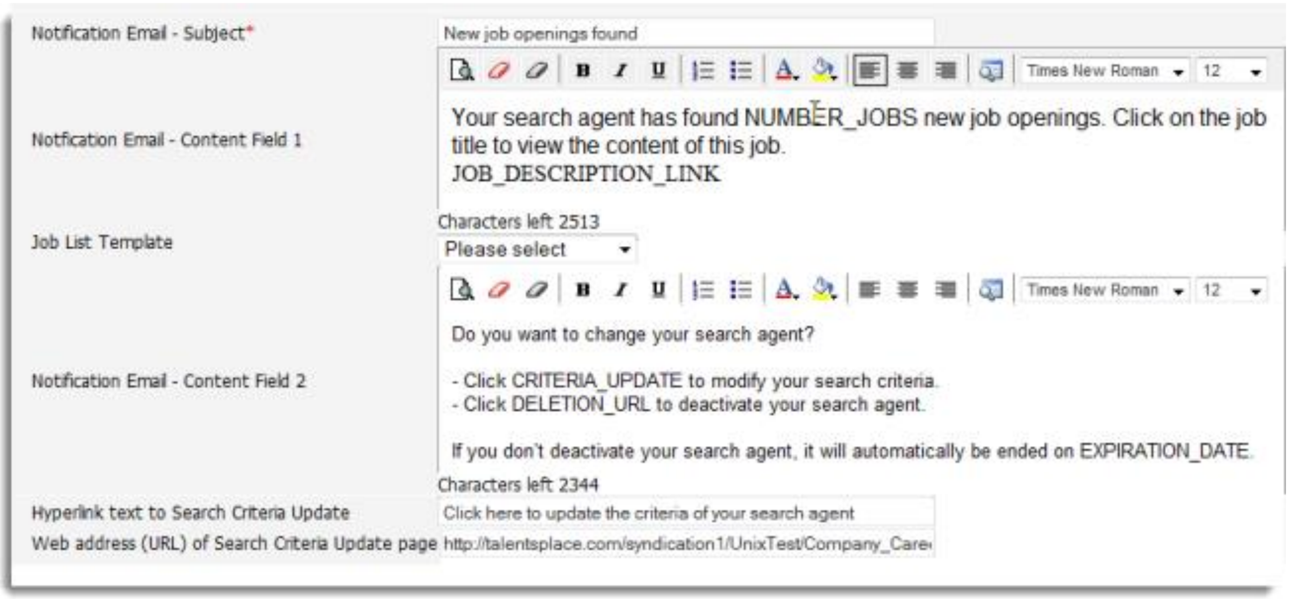


9. Type the welcoming email body text. You can integrate 3 merge fields: DELETION_URL, EXPIRATION_DATE and CRITERIA_UPDATE (to edit the Search Agent).
10. Edit the email body's visual properties (font type, size, colour, and so on).

11. Type the subject of the Notification email sent when posted jobs match a candidate’s criteria.

    In Notification Email - Content Field 1, you must provide the first part of the notification email.The following merge fields can be used: NUMBER_JOBS and JOB_DESCRIPTION_LINK.

12. Select the Requisition List Template to be used with this specific Search Agent.
13. In Notification Email - Content Field 2, you must provide the second part of the notification email. As it may be related to a search criteria update, appropriate merge fields are available: CRITERIA_UPDATE, DELETION_URL and EXPIRATION_DATE.
14. Type the hyperlink that enables candidates to update their search criteria.
15. Type the URL of the Search Criteria Update page.

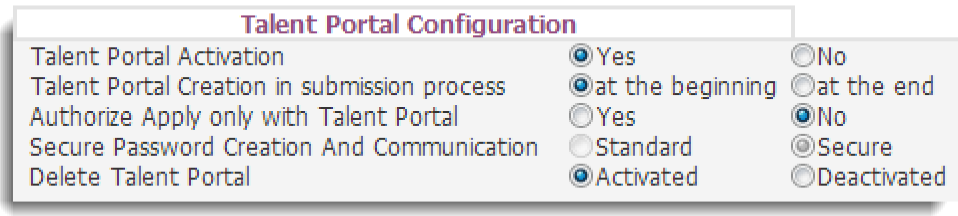


ⓘ If more languages are activated for the site, you must configure the Search Agent for all of them. The additional languages appear below the Master Language Search Agent.

Talent Portal

When configuring the Talent Portal, you must define the language of the Talent Portal page and its style sheet, which must conform to the overall client website.

1. From the bottom of the *Site Information* page (see page 121), select **Talent Portal**.
2. Select **Yes** to activate the Talent Portal.



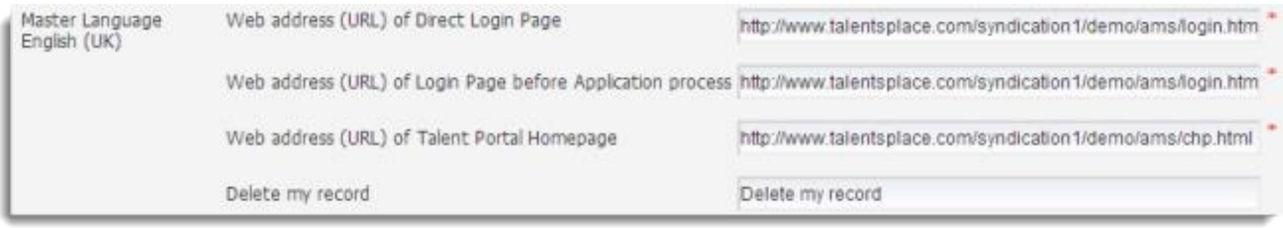
3. Define whether a candidate home page should be created at the beginning or the end of an application process. This enables candidates to save their application in their homepage and submit it later. The Talent Portal must be previously activated.

4. If **Authorize Apply only with Talent Portal** is set to **Yes**, only users logged into the Talent Portal can apply. The **Skip login to Talent Portal** option is not available in the Front Office.

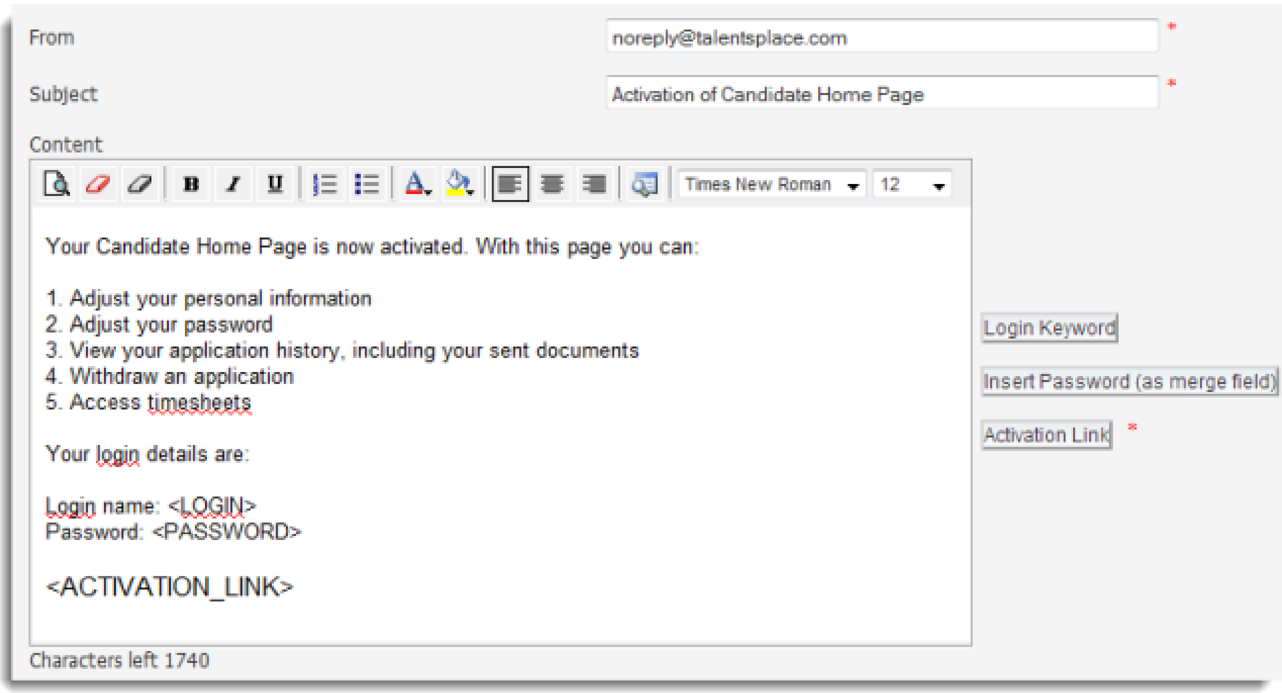
ⓘ When a candidate applies for a job in the Front Office, the application can be saved automatically during the application process.

ⓘ This feature is only available if the candidate applies for a job while logged in to their Candidate Portal, so we recommend that candidates should set up and activate their Candidate Home Page before starting an application process. To enforce this behaviour, portals can be configured so that a new Candidate Home Page can be created at the start of the application process, or it can be made impossible to apply for a job without first logging into a Talent Portal.

5. Set a rule for **Secure Password Creation And Communication**. A Standard rule allows the password to contain any characters. A **Secure** rule specifies that the password must be a minimum of eight characters, and after five incorrect attempts, the candidate must ask for the password to be sent to their email address.
6. If **Delete Talent Portal** is activated, candidates will see an option enabling them to delete their record in the portal.
7. Type the required client site URLs and other information as required.



8. Type the **Delete my record** text that will appear on a button in the candidate portal if **Delete Talent Portal** is activated.
9. Type the default sender email address used for all Talent Portal emails, and the **Subject** of the Talent Portal activation message.



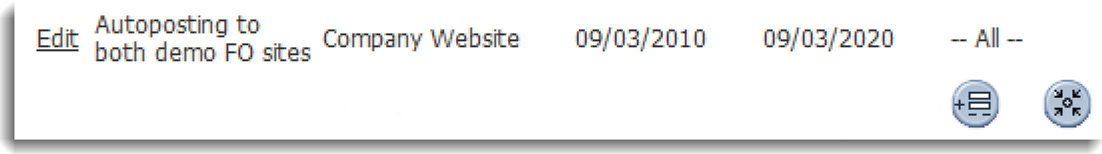
10. In the body of the email, explain how the candidate can manage the portal.
11. Click the right-side buttons to add merge fields as required.

> ⓘ The **Insert Password** button will only be available if **Secure Password Creation And Communication** is set to **Standard** (at the top of the page).
>
> ⓘ If a candidate requests the creation of a portal or homepage from an online application, the system sends the candidate an activation email that must be confirmed before the portal is created. This verification of the email address confirms the candidate has access to the email address they supplied before messages are sent to them.

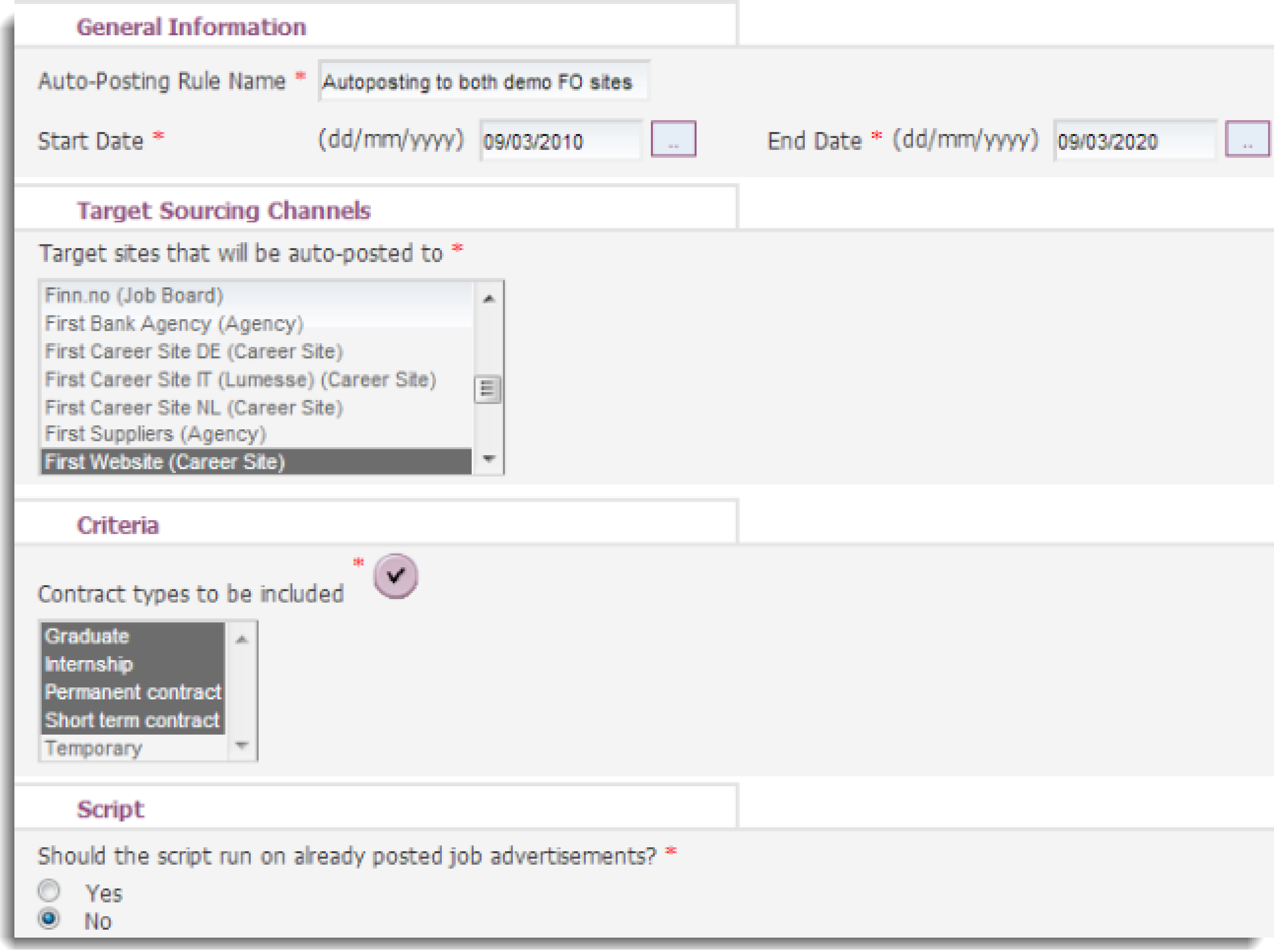
ⓘ If more languages are activated for the site, you must configure the Talent Portal for each language. The additional languages appear below the first Talent Portal.

Auto-Posting Rules

1. From the bottom of the *Site Information* page (see page 121), select **Auto-Posting Rules**.
2. Select **Edit** to edit an existing rule or click to create a new rule



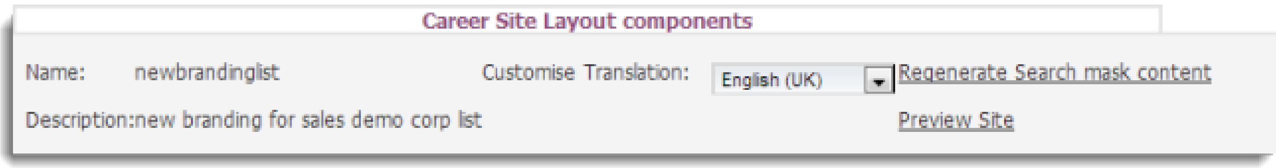
3. Enter the information as required. At the bottom of the page in the **Script** section, you can enable auto-posting of jobs that are already posted on the original site. If you select **No,** the auto-posting rule only applies to jobs posted in the future.



Career Site Layout Components

1. From the bottom of the *Site Information* page (see page 121), click **Select Career Site Layout Components**.
2. If there are changes in the Back Office configuration, select **Regenerate Search mask content** to update the site.

> ⓘ This does not have to be performed if the newly posted job advert contains the LOV values which were not present.

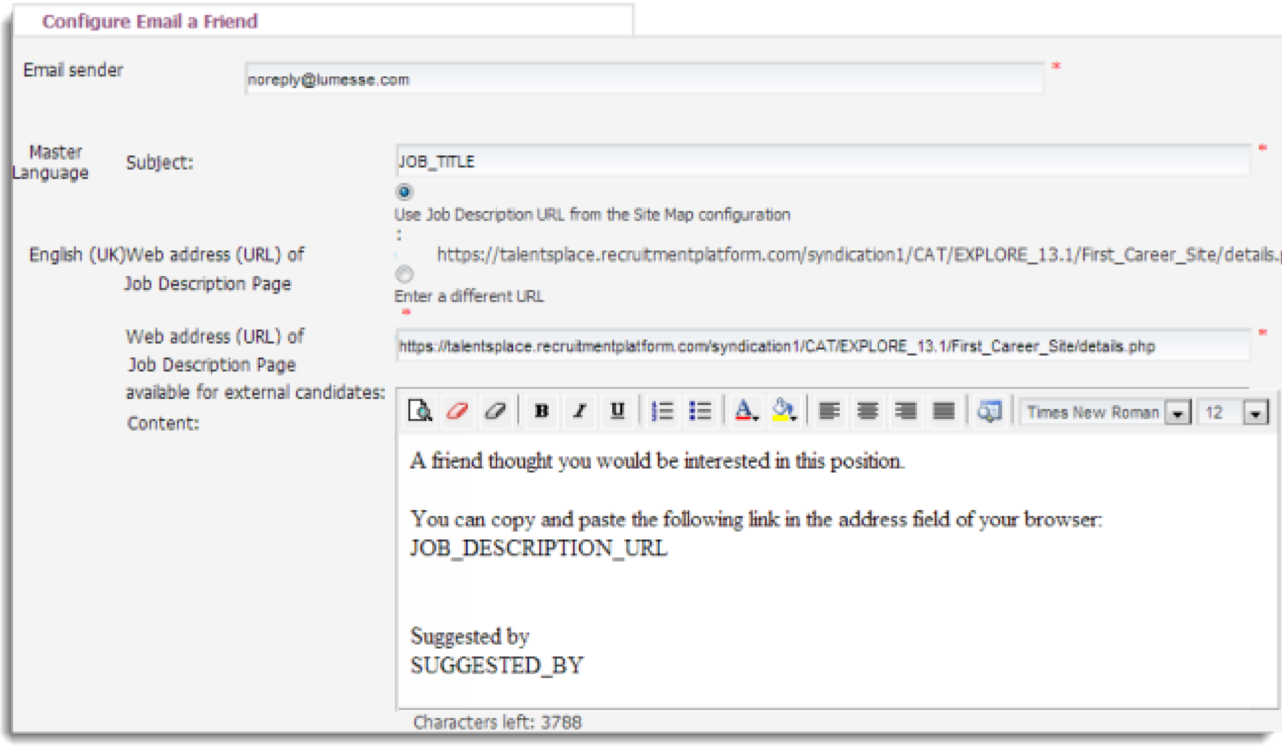


3. To preview the site and all the posted jobs select **Preview Site**.

Email a Friend

In this section, you can configure the Send Job to a Friend Feature (see page 256), which must already be activated.

1. From the bottom of the *Site Information* page (see page 121), select **Email a Friend**.



2. Type the **Email sender** and **Subject** and select which URL to use.
3. In the body of the email, click the right-side buttons to add merge fields as required.

Other Sourcing Channels

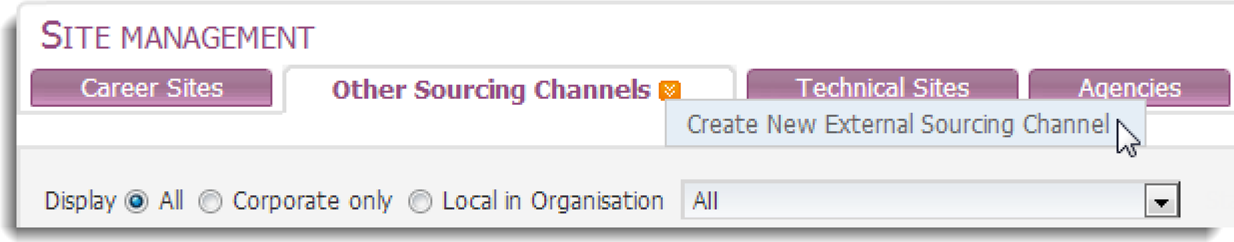
This type of site is used to create a data feed which can be sent to a person or website to create a job advertisement using the Post function in Job Postings.

Creating a New External Sourcing Channel

ⓘ You might create an external Sourcing Channel for a non-integrated job board, for example, where the posting information can be supplied by email instead of directly from your own website.

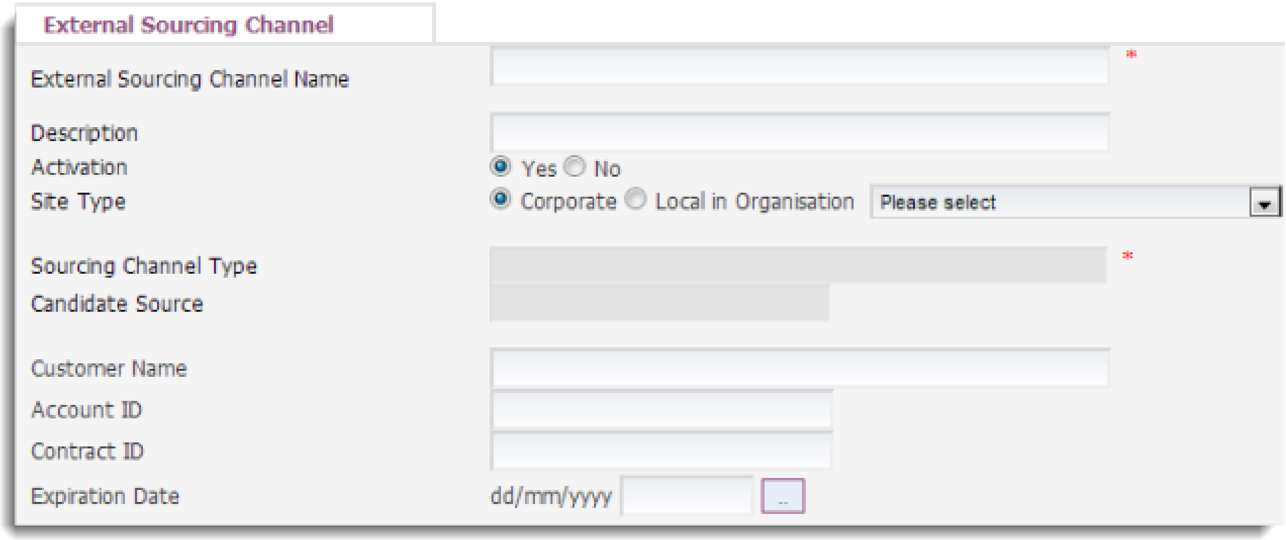
1. From the *Site Management* page, select the *Other Sourcing Channels* tab.

2. Click next to Other Sourcing Channels, then select **Create New External Sourcing Channel** from the menu.



3. Select **Corporate** as the Site Type if the Sourcing Channel is available for more than one organization, or **Local in Organization** if the Sourcing Channel is only available for a specific organization.

   The name and description are visible to the recruiter from the posting channels list in Job Posting.



4. The **Sourcing Channel Type** list is configurable using an LOV in the configurable field management part. Go to **Configuration > Configurable Field Management > List of values** and select the sourcing type. Examples include external site, internal site, job board, agency, campus site, and so on.
5. Type the **Candidate Source**. All candidates applying to a vacancy posted on this site have this source. This name is used in reports.
6. Type the **Customer Name**. This can be the one used by the hosting centre, which corresponds to the name that appears on the contract.
7. Type the **Account ID** that the client uses when they connect to the website to post jobs.
8. Type the **Contract ID** that relates to the posting site and the **Expiration Date** of the contract with the partner.

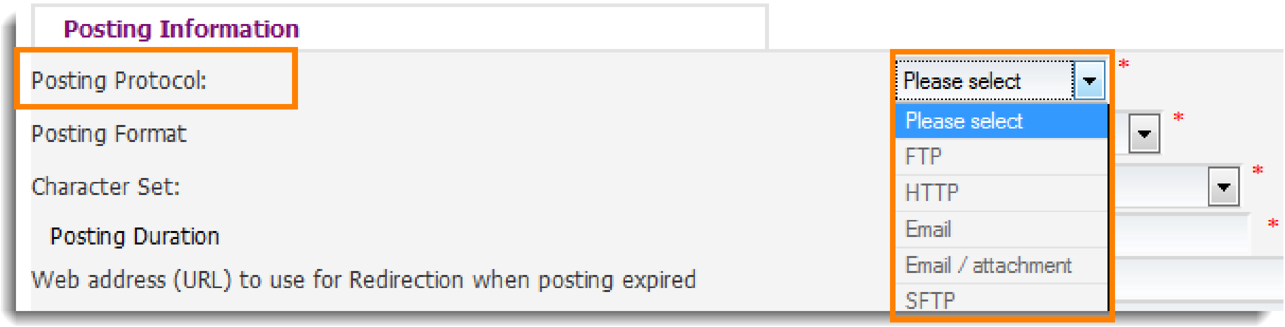
   As soon as the **Expiration Date** is reached the site is no longer available for a recruiter to post to. The LSA/GSA will however still have access to extend the date or remove the expiry altogether.

Posting Information

After the basic details of the channel have been defined, the Posting Protocol and Posting Format must be established. The Posting Protocol defines *how* the job data is sent and the Posting Format defines *what format* the job data is sent in.

ⓘ It is important to work closely with the recipient of the data feed to establish which of these formats and protocols are suitable for them to receive and use effectively.

The following Posting Protocol options are available in the channel configuration:

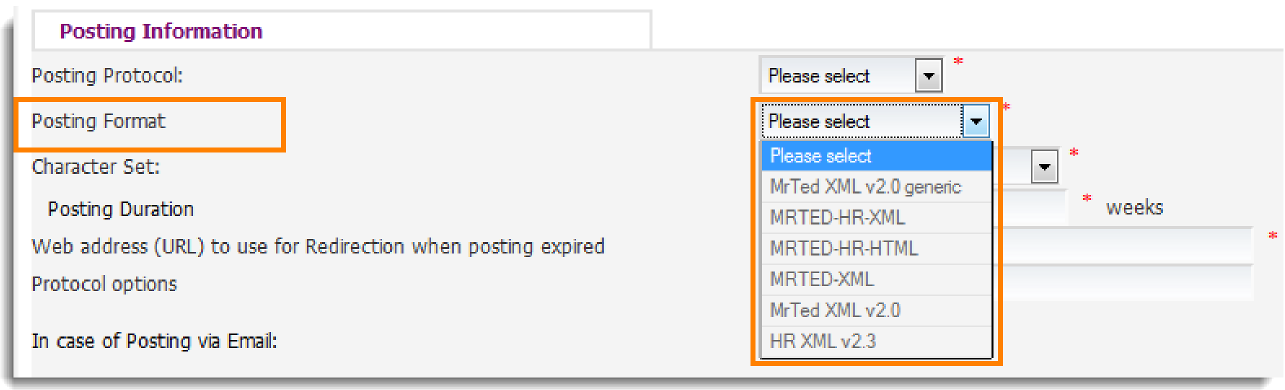


Posting by FTP and SFTP (see page 143)

Posting by HTTP (see page 144)

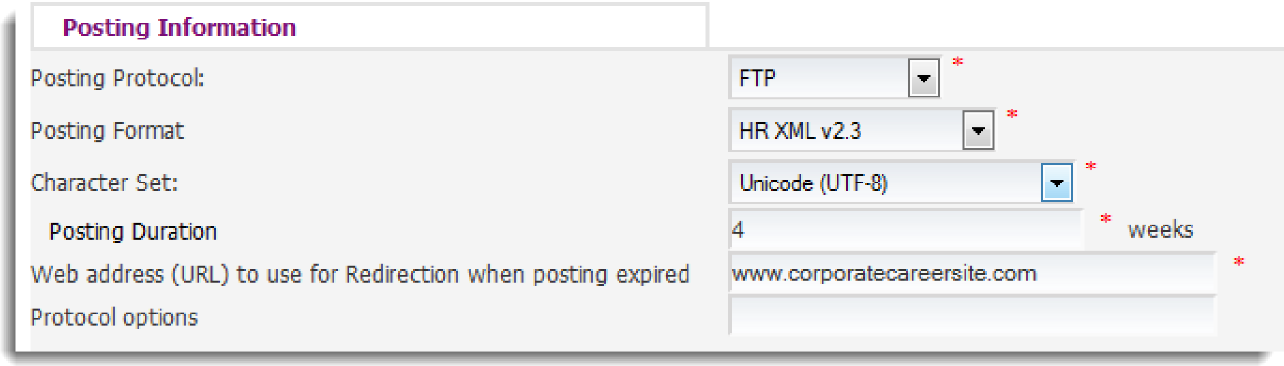
Posting by Email (see page 145)

The following Posting Format options determine what format the data is sent in - for more information please refer to Posting Formats HTML and XML (see page 145).



1. Select a **Posting Protocol** and a **Posting Format** that is acceptable on the specific job board.

If you select HTML, you can edit the URL link for the candidate application file. Each candidate using this link to apply has a Sourcing Channel name.



2. Select the **Character Set** encoding of the email sent to the job board.

   The **Character Set** is a defined list of characters recognized by the computer hardware and software where each character is represented by a number. Unicode is the industry standard.

3. Set the **Posting Duration.**

   This field is linked to the publication subject field and is used to define the default number of weeks a posting to this channel should exist for. Recruiters can change the duration at the job posting stage also. As soon as the end date is reached an email confirming the unposting status is sent (see page 145).

   When you post a job opening with a link that allows candidates to apply, you can specify the posting duration for that job opening. If the posting period expires and the link is still accessible to a candidate, when they click on the link, a message is displayed saying that the page could not be found.

4. Specify a **Web Address** URL for redirection, for example, your recruitment site URL.

   This field is used to identify where expired job posting links should re-direct to.

5. **Protocol Options** are parameters mainly used for HTTP Protocol such as HTTP_AUTH_MODE=basic; HTTP_POST_MODE=direct.

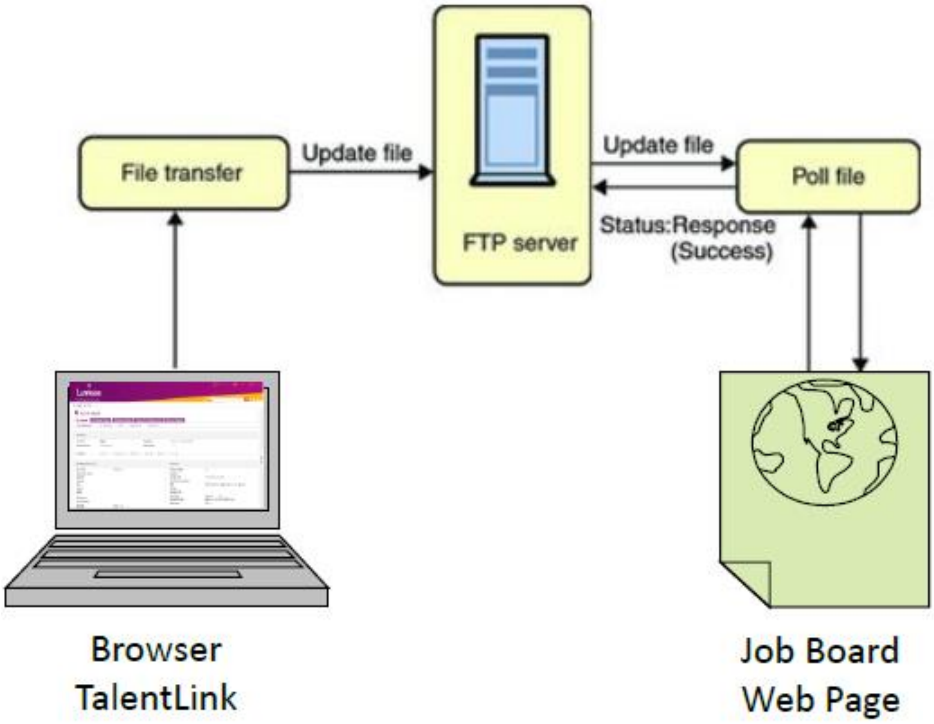
Posting by FTP and SFTP

The File Transfer Protocol (FTP) is a standard network protocol used to transfer computer files from one host to another host over a TCP-based network, such as the Internet.

FTP is built on a client-server architecture and uses separate control and data connections between the client and the server. FTP users may authenticate themselves using a clear-text sign-in protocol, normally in the form of a username and password, but can connect anonymously if the server is configured to allow it. For secure transmission that protects the username and password, and encrypts the content, FTP is often secured with SSL/TLS (FTPS). SSH File Transfer Protocol (SFTP) is sometimes also used instead, but is technologically different.

To send the data extract via FTP or SFTP an IP Address or URL must be supplied by the recipient, as well as login and password details where required.

SFTP works in a similar way to FTP but transfers files over a secure network.



1. Type the server's URL or IP Address and login details, then enter other information as required.

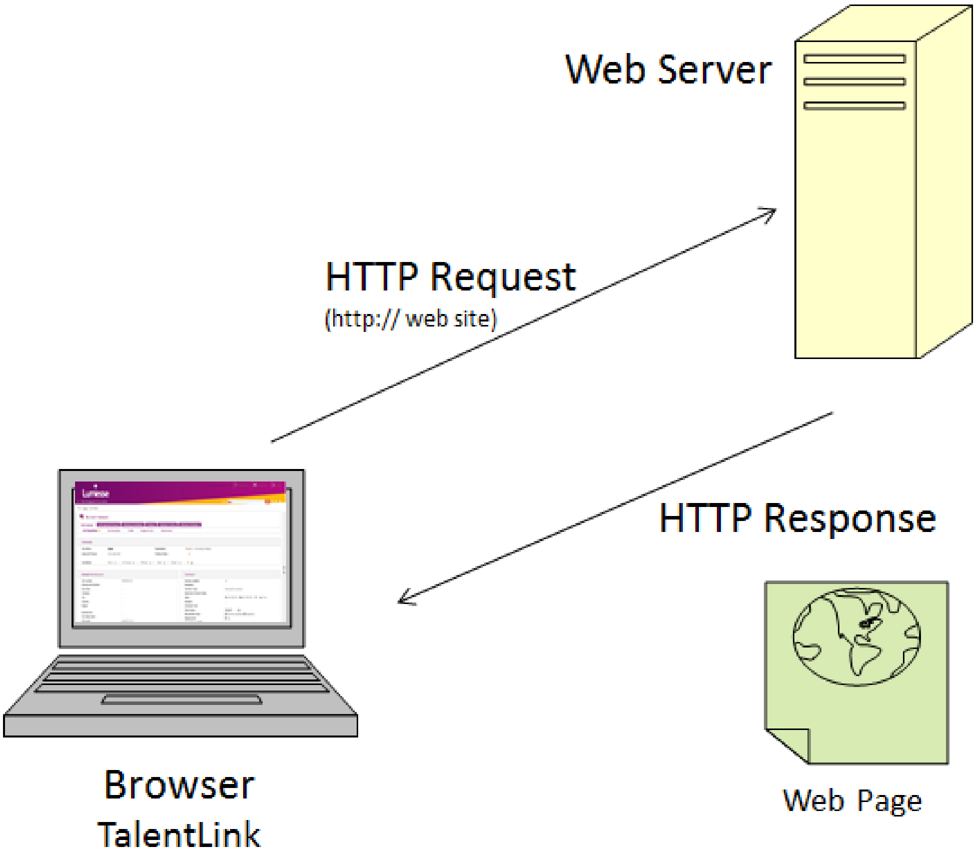
Posting by HTTP

The Hypertext Transfer Protocol (HTTP) is an application protocol for distributed, collaborative, hypermedia information systems. HTTP is the foundation of data communication for the World Wide Web.

Hypertext Transfer Protocol provides a standard for Web browsers and servers to communicate. The definition of HTTP is a technical specification of a network protocol that software must implement.

To send the data extract via HTTP an IP Address or URL must be supplied by the recipient, as well as login and password details where required.

The protocol options free text field may also need to defined when using HTTP – the values which should be entered should be provided by the technical representative at the Sourcing Channel.

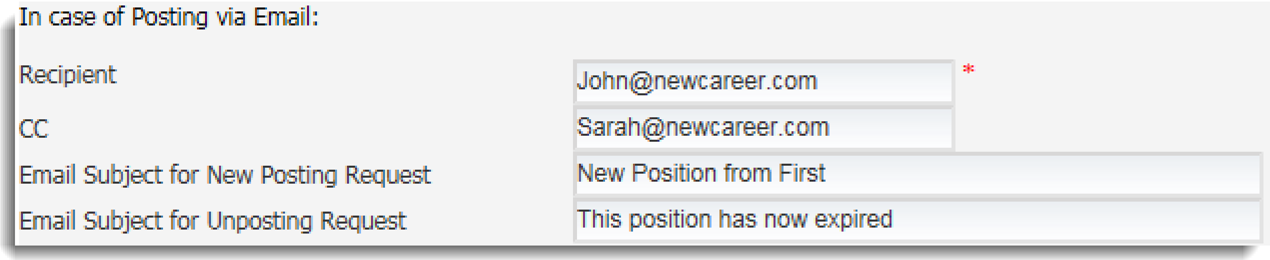


Posting by Email

The email protocol will transfer the data extract to an email, either embedded in the content (email) or as a separate attachment (email/ attachment).

For this protocol it is mandatory to supply one recipient address and it is also possible to add an additional recipient address.

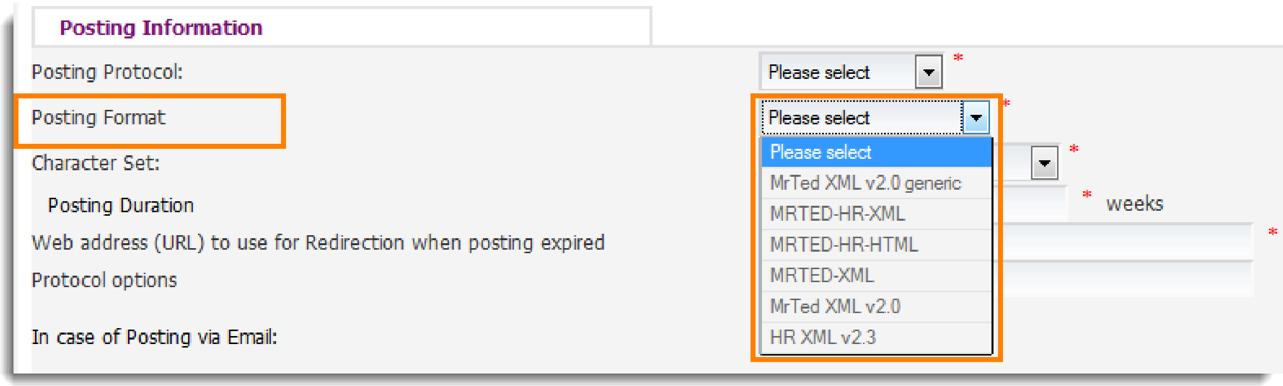
One email is sent at the point of posting the job (usually within 15 minutes) and another email is sent when the role expires or is manually un-posted.



ⓘ If you do not supply a subject heading the emails will not be sent.

Posting Formats HTML and XML

After defining the posting protocol the posting format must be also defined. This will determine what format the data will be sent in.



There are 2 available format types, xml and html, with 5 different versions of xml structure available. Each format will provide a different type of structure and data tagging to the file created during the posting process.

XML Formats

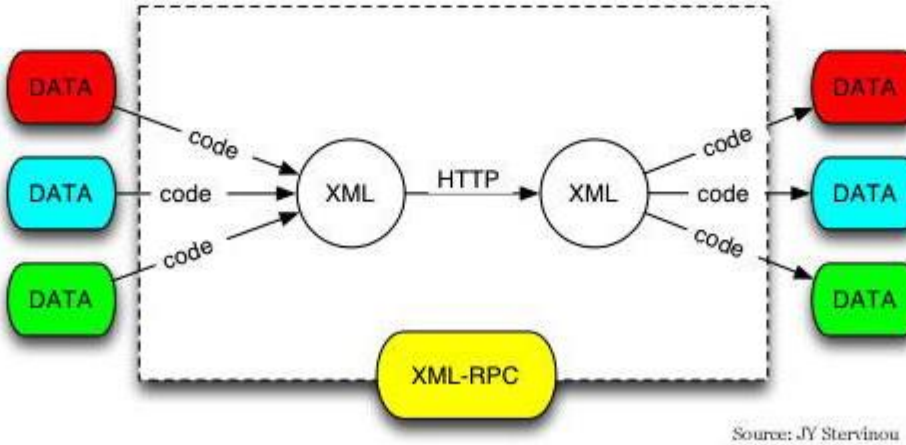
- Mr Ted XML v2.0 generic
- MRTED-HR-XML
- MRTED –XML
- HR XML v2.3

HTML Format

- MRTED-HR-HTML

What is XML?

Extensible Markup Language (XML) is a markup language that defines a set of rules for encoding documents in a format which is both human-readable and machine-readable. XML was designed to describe data.



What is HTML?

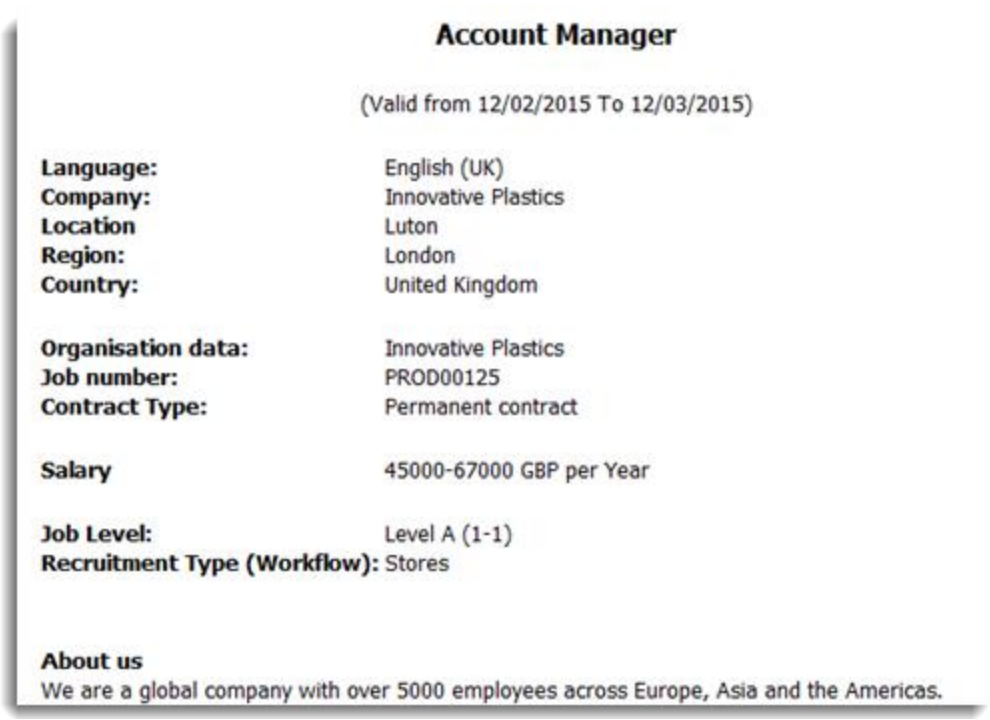
Hypertext Markup Language, a standardized system for tagging text files to achieve font, colour, graphic, and hyperlink effects on World Wide Web page.HTML was designed to display data.

When an HTML extract is sent from TalentLink it is already formatted to display the data in a ready to read format.

Example XML Extract:


```xml
<?xml version="1.0" encoding="utf-8"?>
<PositionOpening xmlns="http://ns.hr-xml.org/2004-08-02" xmlns:xsi="http://www.
http://ns.hr-xml.org/2_3/HR-XML-2_3/StandAlone/PositionOpening.xsd TalentLink Co
    <PositionRecordInfo>
        <Id validFrom="2015-02-06T14:00:24Z">
            <IdValue>17580/9057/P14FK026203F3VB8M8N79V737/2015-02-06T14:00:24Z</
        </Id>
        <Status>Active</Status>
    </PositionRecordInfo>
    <PositionPostings>
        <PositionPosting>
            <Id validFrom="2015-02-06T00:00:00Z" validTo="2015-03-06T00:00:00Z"
                <IdValue>9057</IdValue>
            </Id>
            <Title>Account Manager</Title>
        </PositionPosting>
    </PositionPostings>
    <PositionSupplier>
        <SupplierId>
            <IdValue>352</IdValue>
        </SupplierId>
        <EntityName>Job Board</EntityName>
        <ContactMethod>
            <InternetEmailAddress>__17580@first.sandbox.recruitmail.com</Interne
            <InternetWebAddress>https://global3.recruitmentplatform.com/syndicat
amp;nPostingId=9057</InternetWebAddress>
        </ContactMethod>
    </PositionSupplier>
    <PositionProfile>
        <ProfileId>
            <IdValue name="jobNumber">PROD00125</IdValue>
        </ProfileId>
```

Example HTML Extract:



Account Manager

(Valid from 12/02/2015 To 12/03/2015)

Language:	English (UK)
Company:	Innovative Plastics
Location	Luton
Region:	London
Country:	United Kingdom
Organisation data:	Innovative Plastics
Job number:	PROD00125
Contract Type:	Permanent contract
Salary	45000-67000 GBP per Year
Job Level:	Level A (1-1)
Recruitment Type (Workflow):	Stores

About us

We are a global company with over 5000 employees across Europe, Asia and the Americas.

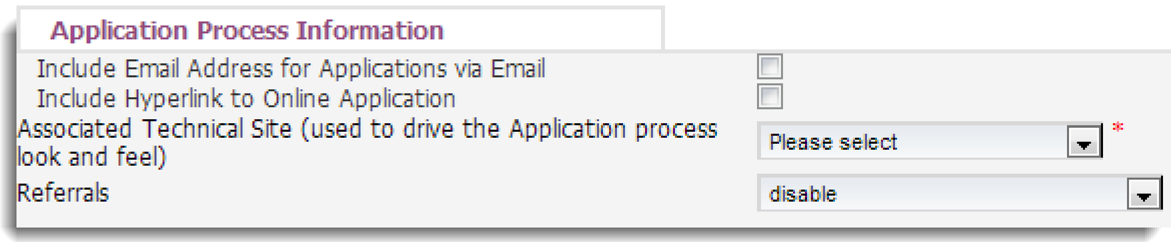
Application Process Information

After the posting information has been defined the next step is to configure the associated application process.

Here it is possible to include either an email for applications or a URL for applications, or both. This will be included in the data extract for the recipient to map to the job advert on their site.

The Technical Ste must also be assigned to the sourcing channel, this will define the look of the application pages and would usually be the standard external Technical Site. For more information on Technical Sites please refer to Technical Sites (see page 152). It is also possible to enable or disable referrals from this site, for more information on this topic refer to Managing Referral Programs (see page 245)

1. Select **Include Email Address for Applications via Email** if you want the candidate to be able to apply by sending an email (instead of submitting an online application).

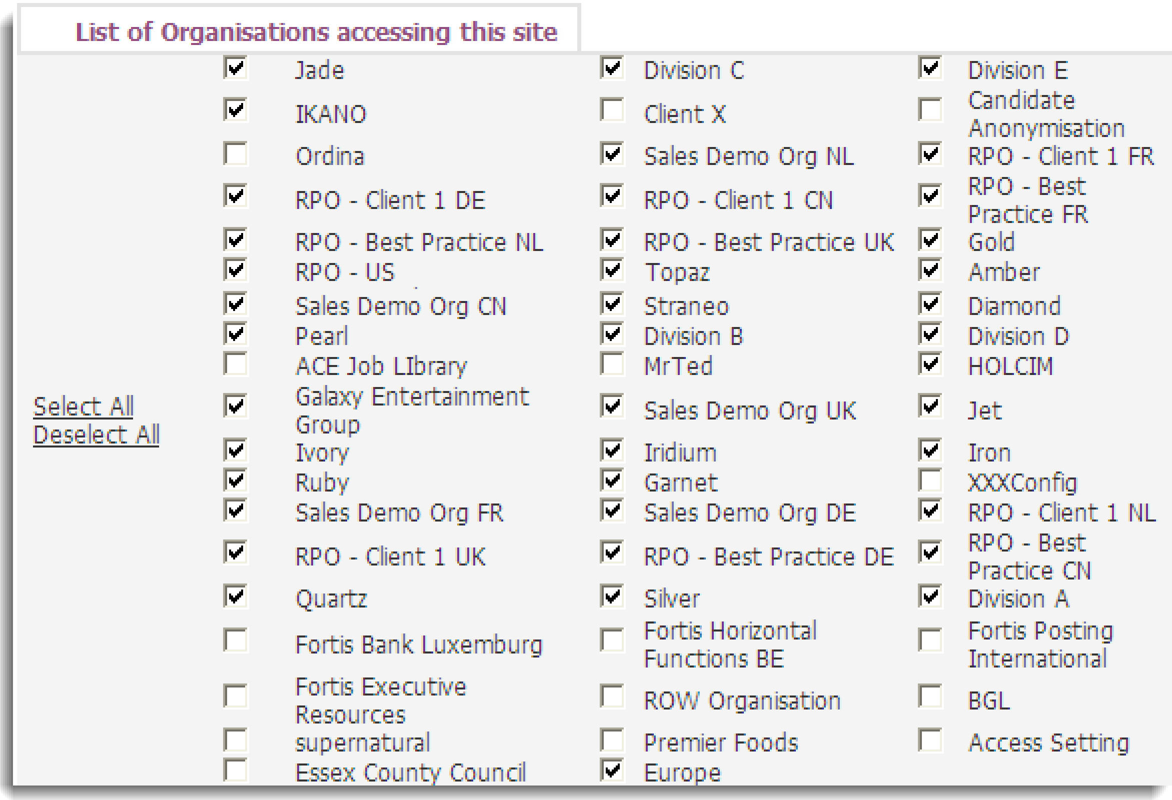


2. Select **Include Hyperlink to Online Application** if you want candidates to be able to apply online using a hyperlink that takes them to the Application Process.
3. The **Associated Technical Site** list is configurable and corresponds to the technical sites list where the languages of the sites and of the application files (look and feel) are defined.
4. Specify whether the referrals feature is enabled for this Sourcing Channel.

List of Organizations Accessing this Site

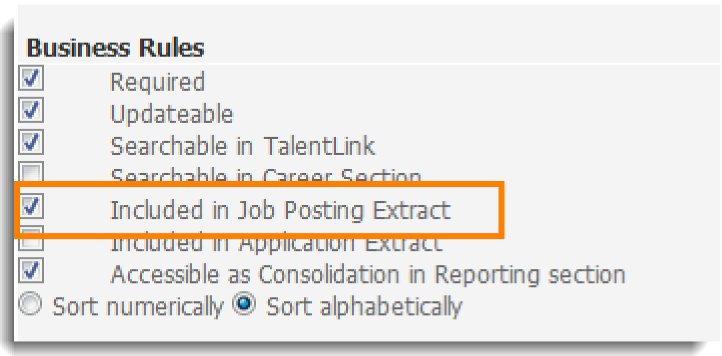
1. Select the organizations that can use this posting site then click

ⓘ The Organizations List is available only for Corporate type sites. If a Site is set to Local in a given organization, you cannot grant posting rights to another OBS.



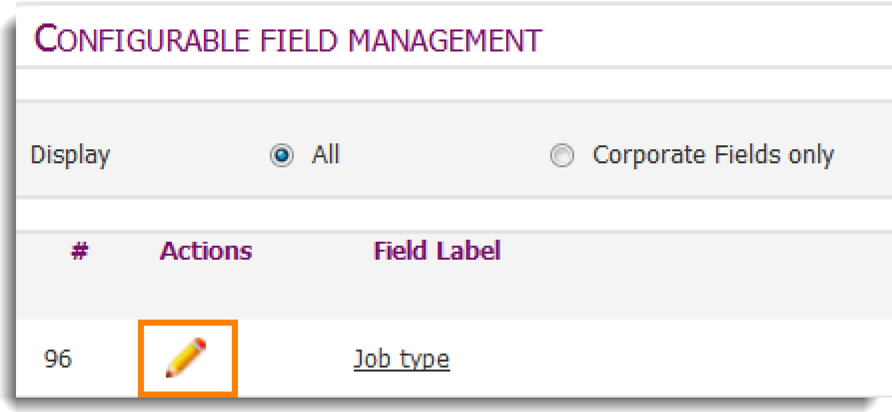
Posted Content - What Data will be Sent?

When a data extract is sent from TalentLink to the receiving sourcing channel it will include all of the requisition standard fields and any configurable fields whose properties have been defined as '**Included in the job posting extract**'.



According to the defined format the XML or HTML tags will also be included. These tags should be identified and mapped to the receiving site destination field.

In some cases, where a data gap is identified (there is no existing field in TalentLink for information that should be passed to the site in the extract), it may be necessary to create a new configurable field on the job requisition to be used to capture and extract the required information for the site.



Collaborative Testing Approach

As there are various posting formats available you will normally have to send example XML/HTML data extracts to the receiving party to enable them to evaluate and test the most appropriate format for their system and processes.

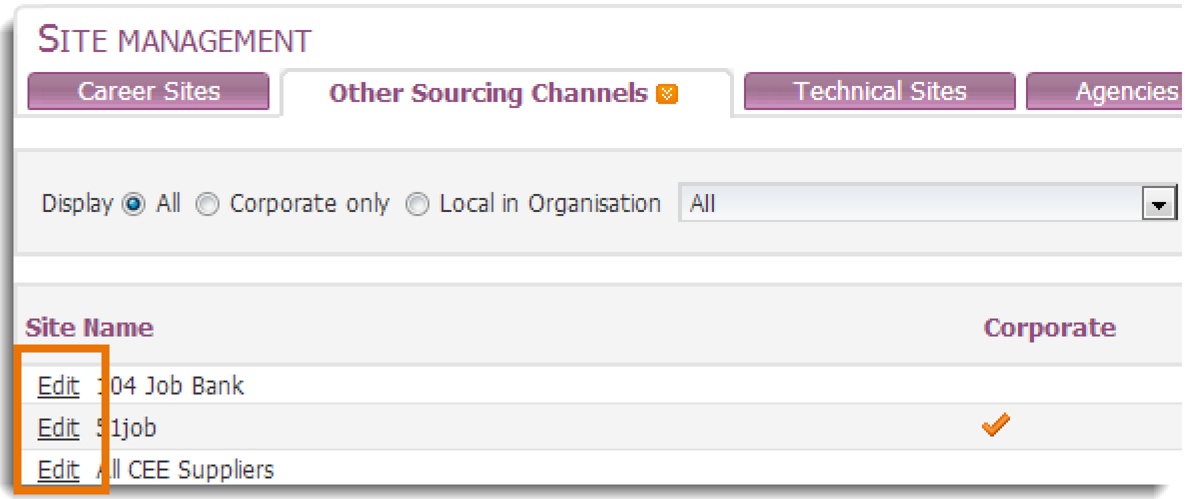
To do this:

1. Set up a test channel in the Sandbox environment linked to your own or the technical representative's email address using the Email/ Attachment protocol.
2. Activate and post a job to this channel multiple times, each time amending the format in which it should be sent until all formats have been used.
3. Ensure the test position you use contains all the data to represent a true job posting.
4. Each time you post you will receive a file extract according to the format you have defined at the point of posting.
5. Send the example file formats to the site developer to review and feedback on the most suitable.
6. Use the file extract examples to agree mapping of the data to their site and to identify any potential gaps in data, i.e. missing fields required for their site.

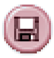
The receiving party will also be required to confirm which protocol the feed should be sent by as well as the related details, such as email address/IP address.

Editing an External Posting Site

1. Click **Edit** next to the name of the external posting site you want to edit.



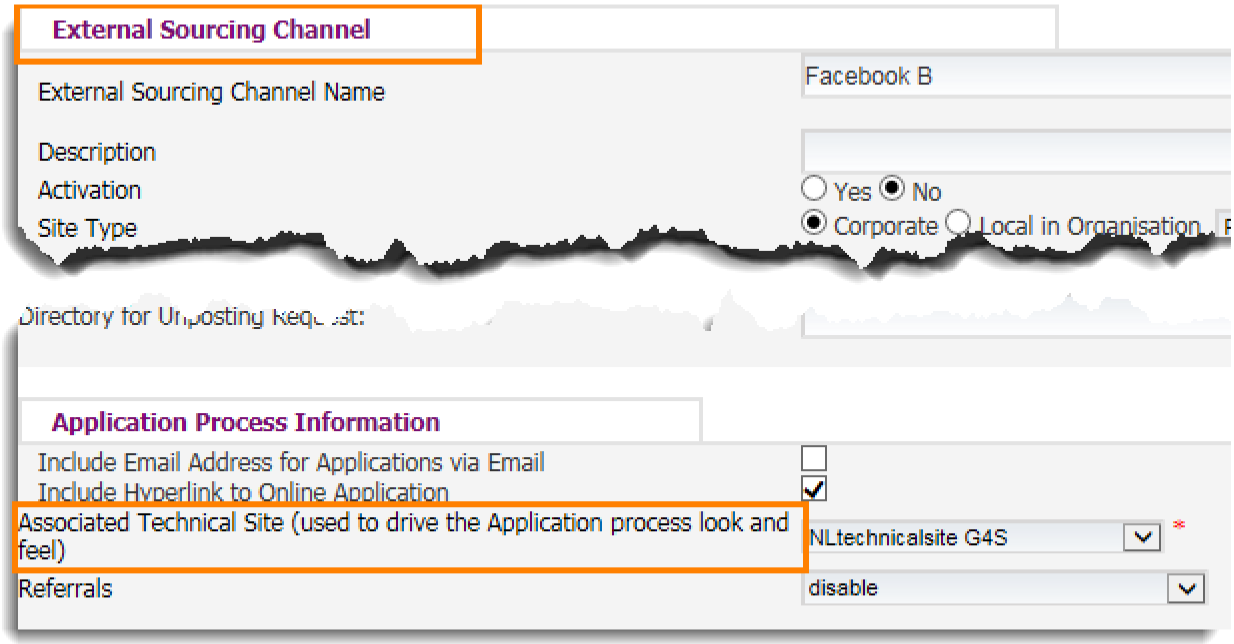
   The configuration page for the external posting site is displayed.

2. Make the required changes, then at the bottom of the page click 

Technical Sites

A Technical Site is not a stand-alone entity but is linked to one or more job boards/agencies/external sites, and is used to store the CSS. Technical Sites drive the look and feel of the Application Process on external sites, job boards and agencies.

Technical Sites define the technical IDs of the site, anchor syndication site URLs and define the language of the Application Process steps. When a candidate clicks Apply, they will see the branding and language defined in the Technical Site.

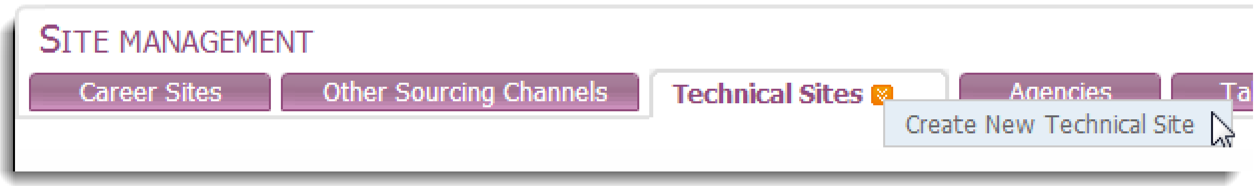


By default a Technical Site per language is already available. You can edit a Technical Site as required, such as changing the style sheet, etc.

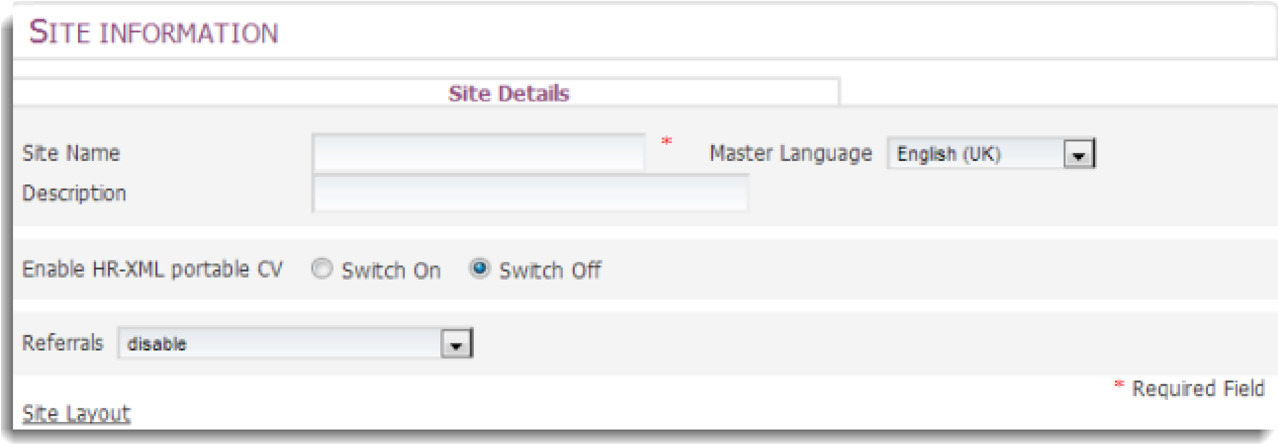
ⓘ The technical ID is a number generated automatically by the system and relates to the site delivered by the TalentLink system administrator.

Creating a new Technical Site

1. From the *Site Management* page, select the *Technical Sites* tab.
2. Click next to **Technical Sites** then select **Create New Technical Site**.



3. Enter information as required, then click



Site Name and **Description**
This is displayed during the job posting process.

Master Languages
The master language for the site.

Enable HR-XML portable CV
If this setting is enabled for a career site, candidates will be able to make multiple applications using the same CV that is saved to their hard drive in HR-XML format. When a candidate fills in the job application forms they will see an option to extract that information into HR-XML format. Later, when the candidate applies for another job they will not need to fill in the forms again, but can use the option Apply with HR-XML CV; this will automatically parse the fields correctly.

Referrals
Enable or disable referrals.

Editing a Technical Site

1. From the *Site Management* page, click **Edit** next to the name of the Technical Site you want to edit.

2. Select the links at the bottom of the page to edit the following as required:
   - Configure Cascading Style Sheet (see page 123)
   - Configure Site Layout (see page 124)
   - Activate Talent Portal (see page 135)

Agencies

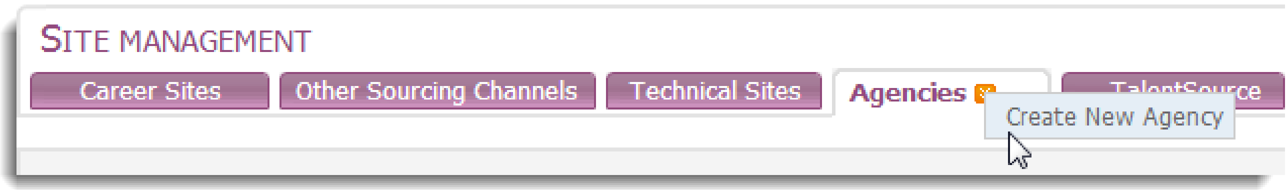
The Agency feature is used by recruitment and staffing companies that supply candidates only for selected job openings. TalentLink users may select which jobs should be posted to agencies.

If the Agency Portal is activated users can:

- Update Agency details (address, bank details, and so on)
- View and filter jobs that are currently posted to this agency
- Submit talents for the posted jobs
- View, filter and sort the submitted talents
- Track progress on submitted talents
- View and sort the pending contracts and offers
- View and sort candidate placements
- View and edit timesheets for contractors

Creating a New Agency

1. From the *Site Management* page, select the *Agencies* tab.
2. Click next to **Agencies**, then select **Create New Agency**.

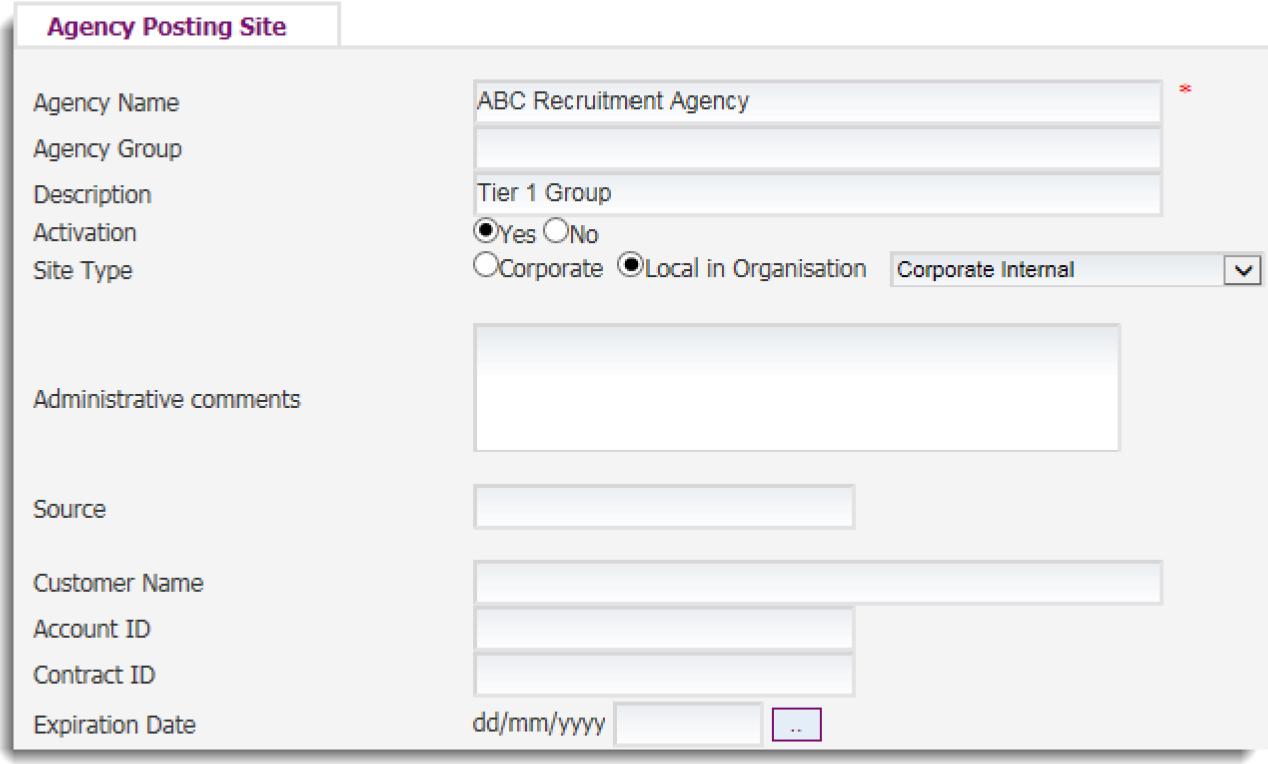


Agency Posting Site configuration is divided into the following sections:

- Agency Posting Site (see page 155)
- Agency Portal (see page 156)
- Agency Details (see page 156)
- Posting Information (see page 156)
- Candidate Ownership and Submission Blocking Rules (see page 157)
- Application Process Information (see page 159)
- List of Organizations Accessing this Site (see page 160)

Agency Posting Site

1. After typing the **Name**, **Group** and **Description**, activate the Posting Site for this Agency by selecting **Yes**. Postings cannot be made to inactive Agencies.



2. Select **Corporate** to make the Agency Portal available for all Organizations in the Company. To make the Agency Portal exclusive for one of the organizations, select its name from the list and select **Local in Organization**.
3. Type the name of the **Source** that should be used as the Sourcing Channel in the candidate file and in any reports, for example, Tempel Agency Source.
4. Type the **Customer Name**. This can be the one used by the hosting centre, which corresponds to the name that appears on the contract.
5. Type the **Account ID** that the customer uses when they connect to this website to post vacancies.
6. Type the **Contract ID** that relates to the posting site.
7. Enter the **Expiration Date** of the contract with the partner. After this date, it will no longer be possible to post jobs to this channel.

ⓘ The fields described in steps 3 to 6 are informative and are related to the Company / Agency agreement. They are not related to any TalentLink business rules.

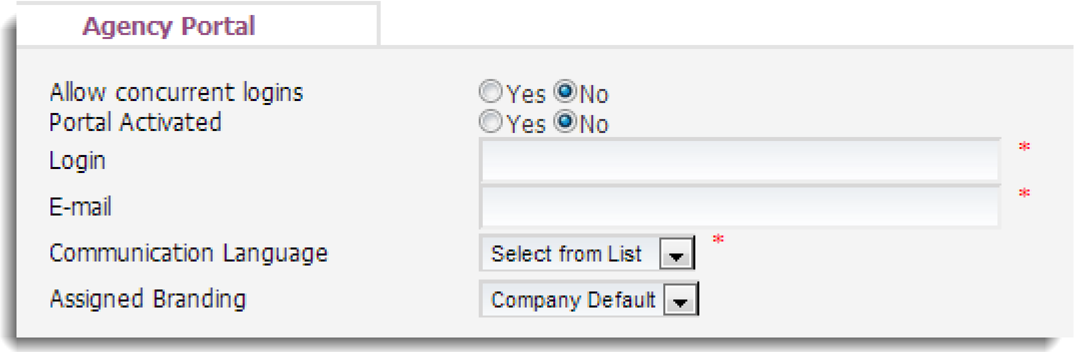
Posting is enabled for an Agency:

- In active state
- With a valid contract (which is not overdue)

Lumesse

Agency Portal

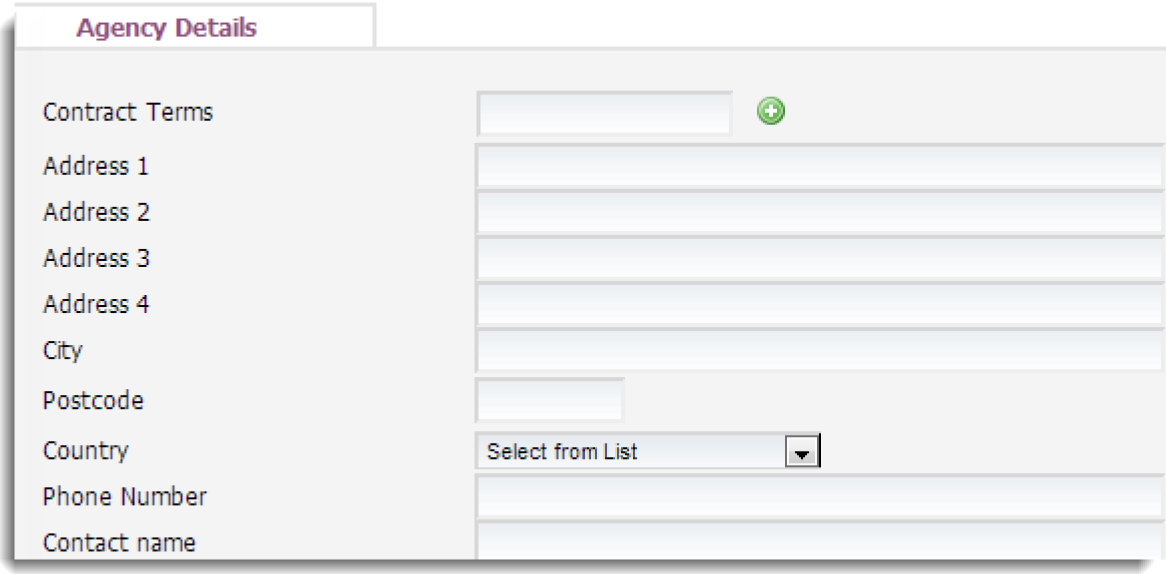
Email is the Agency address which will be used to receive messages from TalentLink (for example when a new job is posted). Login instructions will be sent to this address.



ⓘ After the settings are submitted and the Agency is created, the password must be generated for the Agency Portal. See the Agency Portal Activation Email section in Editing Agency Settings (see page 160) for more information.

Agency Details

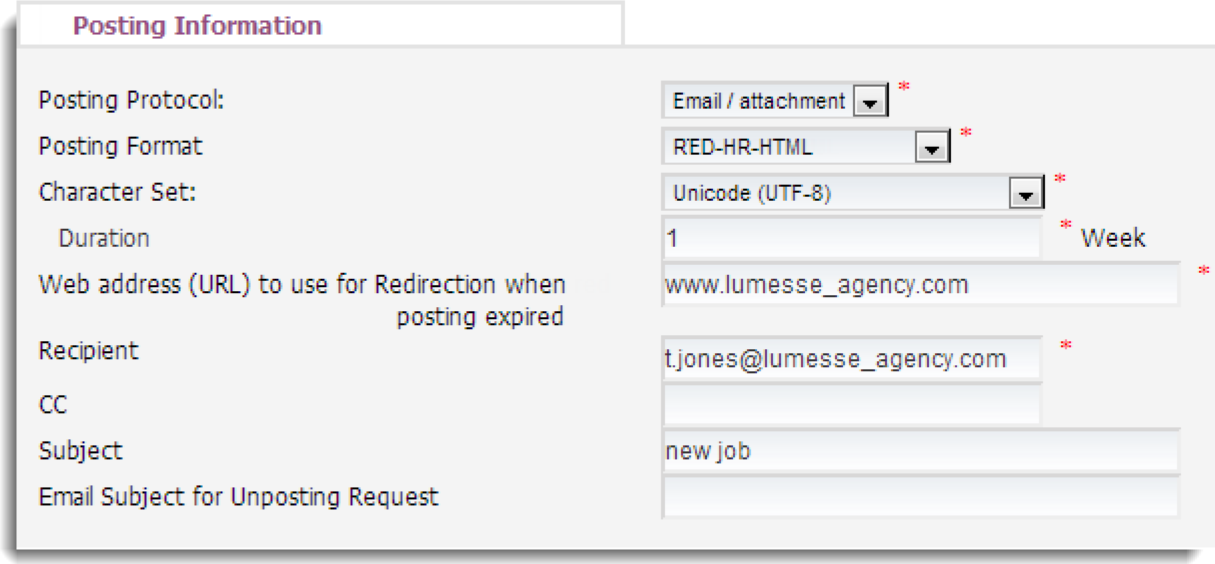
The Agency Details section is for information only. No TalentLink business rules are related to it. The information provided here may be modified by the Agency itself through the Agency Portal.



Posting Information

1. Select a **Posting Protocol**. Posting Protocol is the way the information about posting and job details is sent to the Agency via email. The options are:
   - **Email** – the job posting will be provided in the email body.

- **Email/attachment** – the job posting will be provided as the attachment to the email. In this case the Email body is empty.

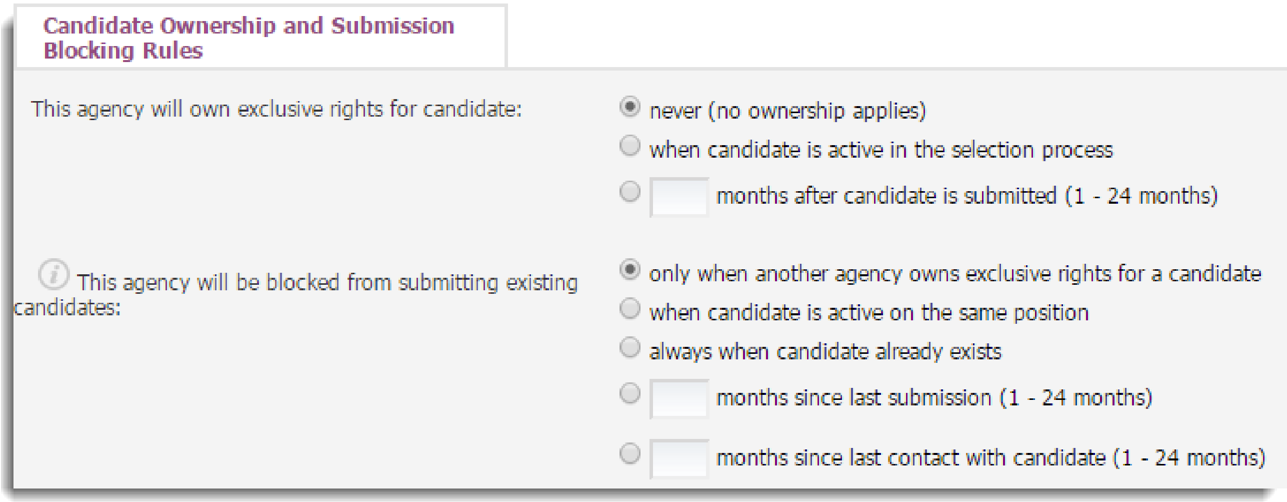


The other fields in the Posting Information section are almost identical to those used in Other Sourcing Channels. Please refer to Posting Information (see page 141) for a complete explanation.

Candidate Ownership and Submission Blocking Rules

Agency submission blocking rules enable customers to prevent duplicate submissions from other agencies and reduces the requirement to re-process these duplicate applications.

Before you can set blocking rules for each agency, the GSA must first globally set the **Duplicate Candidates per Organization** options refer to Configuring your Company Default Settings, (*Default Configuration Settings* (see page 14)).



There are two steps to configure:

- Setting the exclusivity on a candidate for a specific agency
- Setting blocking rules to prevent agencies from submitting existing candidates

Setting Candidate Exclusivity for an Agency

When an agency submits a candidate you can specify whether that agent is the only supplier that may submit candidates or whether multiple suppliers may provide candidates. This is commonly known as 'agency exclusivity' or 'candidate ownership'.

Exclusivity rules are defined in the following table.

Exclusivity	Description
Never	This agency will never have ownership rights over candidates they submit. All verification actions by other suppliers will not match against candidates this agency supplies.
When candidate is active in the Selection Process	As soon as a candidate from this agency becomes active in a Selection Process for any requisition this agency will claim ownership of that candidate until the application is closed. 'Active' is defined as the following application status: New/Open/In Process/Offered/Offer Accepted/Accepted/Pre-Hire Additional customer configured application status are NOT considered by this rule. The agency then 'owns' the candidate for the requisition.
"_" months after candidate is submitted	In this scenario the candidate is owned for a fixed period after the submission date. A numeric value of between '1' and '24' months is required. Resubmission of the candidate during this time does NOT restart the clock.

ⓘ If the GSA does not define exclusivity rules for a specific agency, the agency will still be able to submit candidates but the verification processes will not block submissions of their candidates by other agencies.

Managing candidate ownership and agency ownership disputes is discussed in detail in Managing Agency to Agency Ownership Disputes (see page 161).

Blocking Agencies from Submitting Existing Candidates

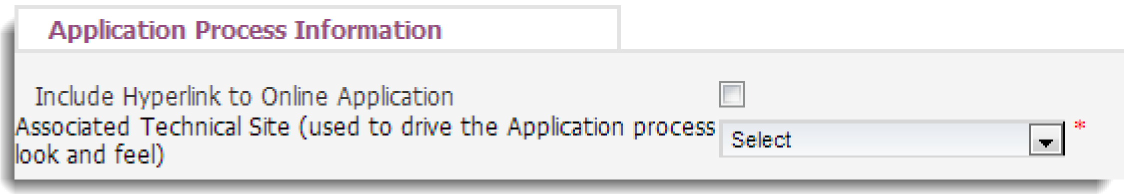
The GSA can set the reasons why an agency will be blocked from submitting a candidate to a requisition where another agency has exclusivity.

Blocking Reason	Description
Only when another agency owns exclusivity rights	There can be no ownership of a candidate when the submission criteria have been met by an existing candidate record already assigned to an agency with exclusivity rules. i.e. the agency will be blocked from submitting a candidate because another agency has exclusivity.
When candidate is active on the same position	If this agency attempts to submit a candidate who is already active on the same requisition number, i.e. connected to the Selection Process, the submission will be blocked. This ensures that agencies will not duplicate candidates that have applied directly.
Always when candidate already exists	This rule blocks the submission by this agency when the candidate simply exists as a record with the same criteria in the system.

Blocking Reason	Description
Only when another agency owns exclusivity rights	There can be no ownership of a candidate when the submission criteria have been met by an existing candidate record already assigned to an agency with exclusivity rules. i.e. the agency will be blocked from submitting a candidate because another agency has exclusivity.
Months since last submission (1-24 months)	If the last submission for the matching candidate was within the last defined period no submission will be allowed. Only dates up to and including 24 months will be permitted as a blocking rule, i.e. it is not possible to block a duplicate submission for all time.
Months since last contact (1-24 months)	'Last Contact' is defined as a status changed on any application the candidate has in TalentLink. For example, if the last contact with a candidate was within the defined period, but no greater than 24 months, then the submission will be blocked. This manages the situation where after a candidate's application is rejected the agency may still often have exclusivity for an extended period.

Application Process Information

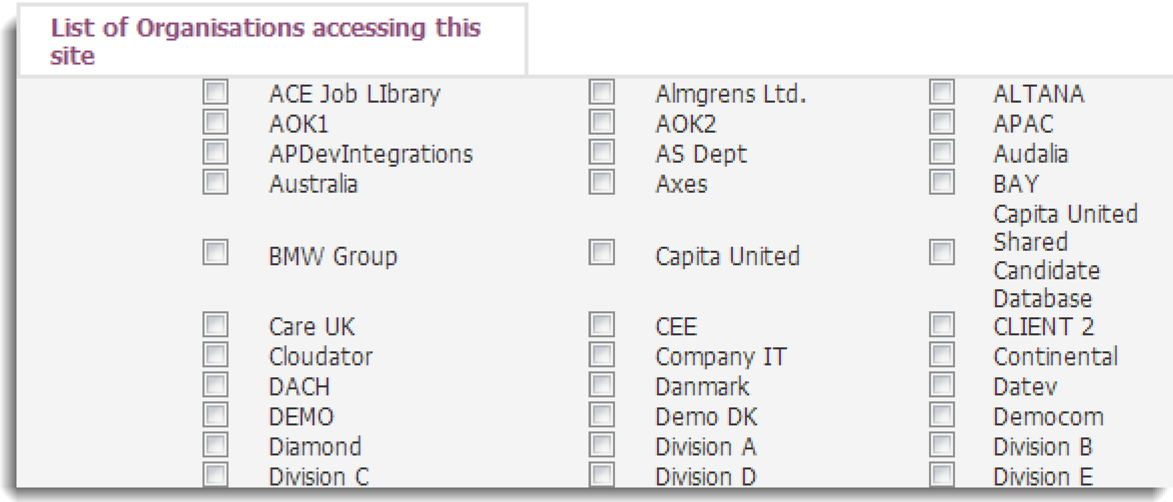
1. Select **Include Hyperlink to Online Application** if you want candidates to be able to apply online using a hyperlink that takes them to the Application Process.



2. Select the **Associated Technical Site**. This list is configurable and corresponds to the technical sites list where the languages of the sites and of the application files (look and feel) are defined.

List of Organizations Accessing this Site

1. Select the organizations that should have access to this Agency Portal then click at the bottom right of the page.



ⓘ You may make the site available in more than one OBS only if the site is **Corporate**. If the site is set as **Local in Organization** it is not possible to assign it to any other OBS. Refer to Agency Posting Site (see page 155) for more information.

Posted Content - What Data will be Sent?

The data received by an Agency is determined by which data fields are sent through. Please refer to the Other Sourcing Channels section, Posted Content - What Data will be Sent? (see page 149)

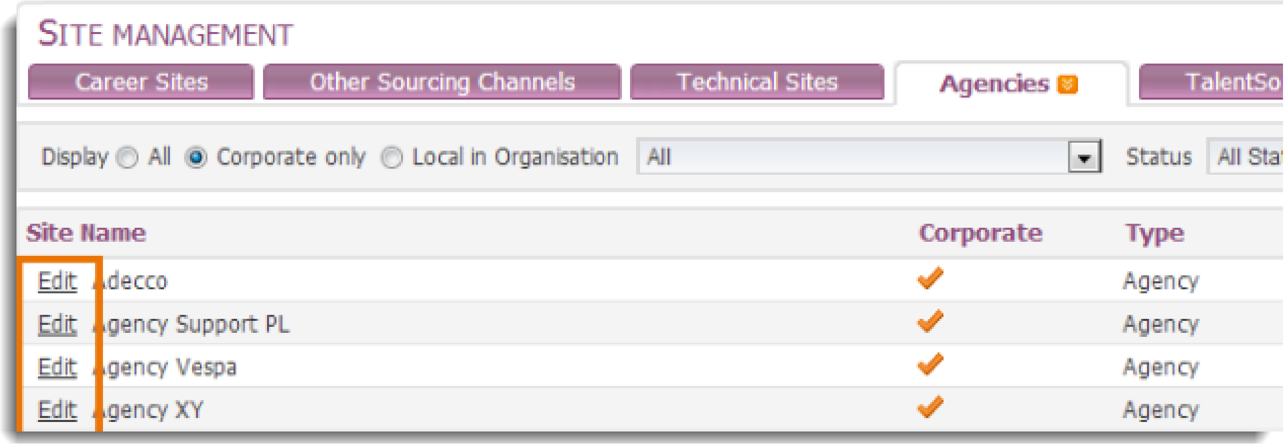
Collaborative Testing Approach

You will need to work with the receiving agency to ensure the data extraction process runs smoothly. For a best practice checklist please refer to the Other Sourcing Channels section, Collaborative Testing Approach (see page 150).

Editing Agency Settings

1. To edit an existing Agency Posting Site, from the *Site Management* page select the *Agencies* tab.

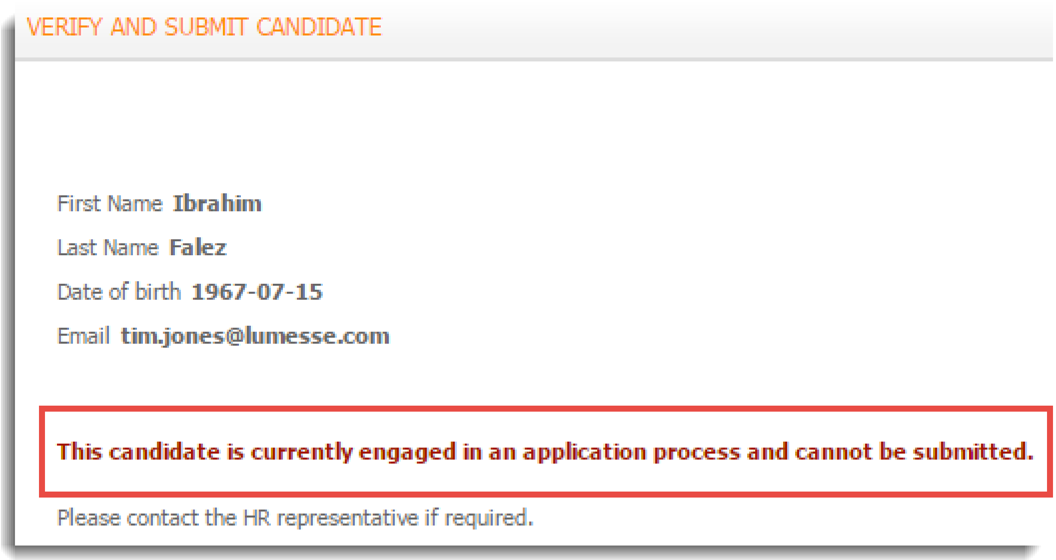
2. Click **Edit** next to the name of the Agency you want to make edit.



3. Make the required changes, then at the bottom of the page click

Managing Agency to Agency Ownership Disputes

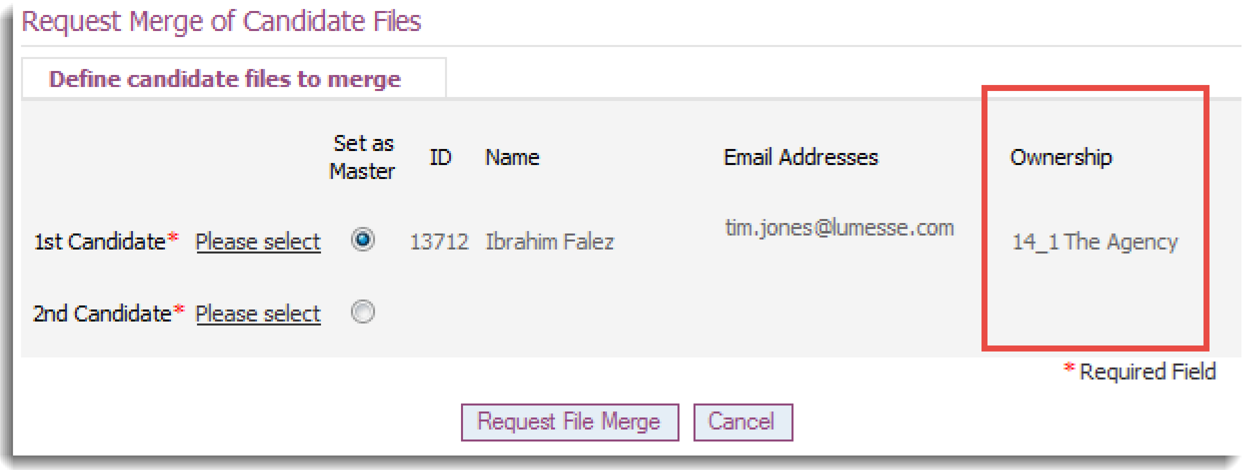
There are known situations where two agencies will claim 'ownership' of a candidate. If the GSA has set candidate ownership and submission blocking rules (see page 157), other agencies will be blocked from submitting the same candidate (a verification message will inform them that their candidate is already stored in TalentLink).



It is also known that often customers define agency ownership rules that require certain offline steps to be taken, for instance having written permission from the candidate to forward their details to the company. A combination of the verification and using online questionnaires within the submission process would give a good level of clarity on whether submission rules were being followed.

Confirming Agency Ownership

It is possible to confirm which Agency owns a candidate. The existing feature to merge two candidates together has an *Ownership* column that can confirm which supplier has exclusivity of a candidate.



Configuration Advice for GSAs

From our own usage of these features Lumesse would like to offer the following notes for your review and better understanding of how to enforce candidate ownership rules.

Supporting the Different ways to Configure Agencies

From **Settings>System Administration>Site Management** there are two ways to configure agencies:

- The Agency Portal (Portal = Active)
- Agencies that receive jobs by email only (Portal = Inactive)

There is a third way; it is also possible to use the **Send job advert by email** feature from a requisition's *Posting* tab and select an Agency Sourcing Channel Name/Type from the list.

These sources, advertised 'on the fly' often as trials for new suppliers will not benefit from the verification and blocking rules. You could still configure this via Site Management if you wanted the verifications to operate.

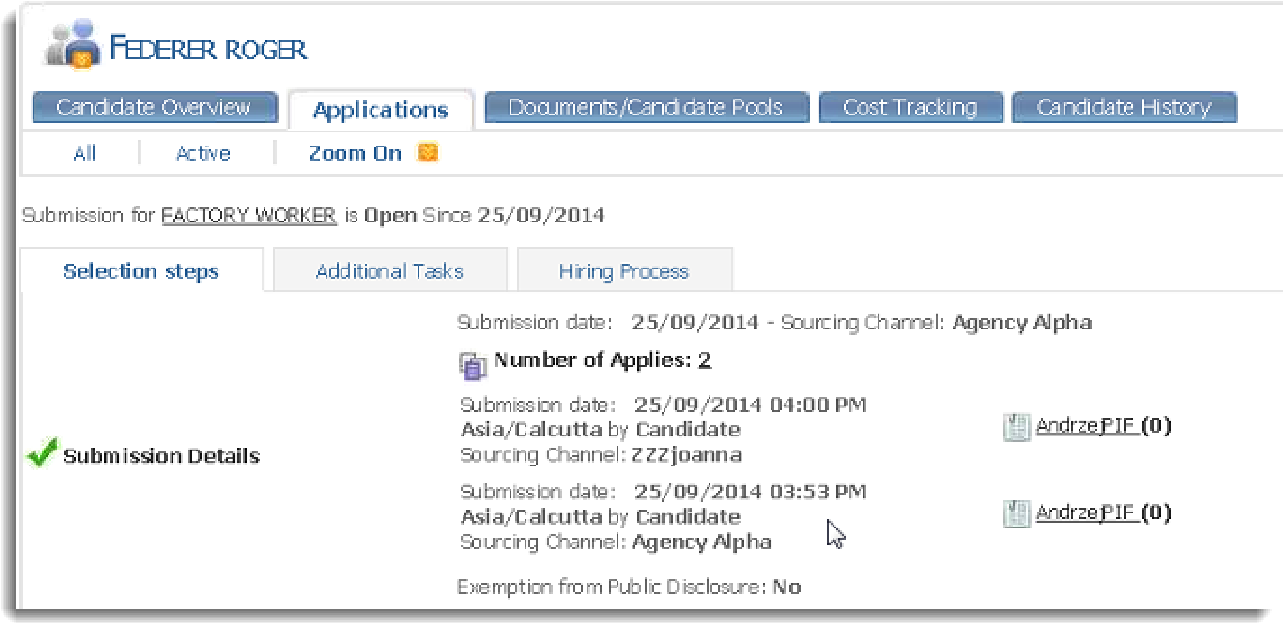
Configuring Personal Information Forms

When activating candidate ownership rules (see page 158) you are stating that these parameters, like Date of Birth, Phone Number etc. are important to you in duplicate checking. The GSA must make sure that these parameters are also available as fields to be completed in the Personal Information Form.

Implications for Candidates Applying Multiple times to a Single Requisition

Within TalentLink is an existing feature that manages the behavior of the duplicate checking and record merging when the unique identifiers are working. This feature merges two records from the same candidate into a single record. This is labeled in the Company Configuration area (**Settings>Systems Administration>Company Configuration**).

This functionality still works as expected with the ownership rules and will take the configurable duplicate checking parameters into account.



Suggested Sequence of Configuration Actions

The following sequence would maximise the configuration efficiency:

1. Confirm available parameters to internal stakeholders and gather requirements from teams.
2. Activate new parameters in Sandbox.
3. Configure Personal Information Form in Sandbox used for Agency testing.
4. Configure test Agency specific rules.
5. Test scenarios from internal teams.
6. Capture feedback and share.
7. Communicate intention to activate exclusivity and blocking rules with agency suppliers.
8. Configure changes to Live Personal Information Forms.
9. Configure agencies with new exclusivity and blocking rules.
10. Activate new parameters in your Live environment.
11. Monitor early adopters.

The main impact will be for customers with a large number of agencies/suppliers configured in Site Management. We advise these customers to secure a time period where no postings to agencies are made to ensure that no agency will claim ownership of candidates incorrectly

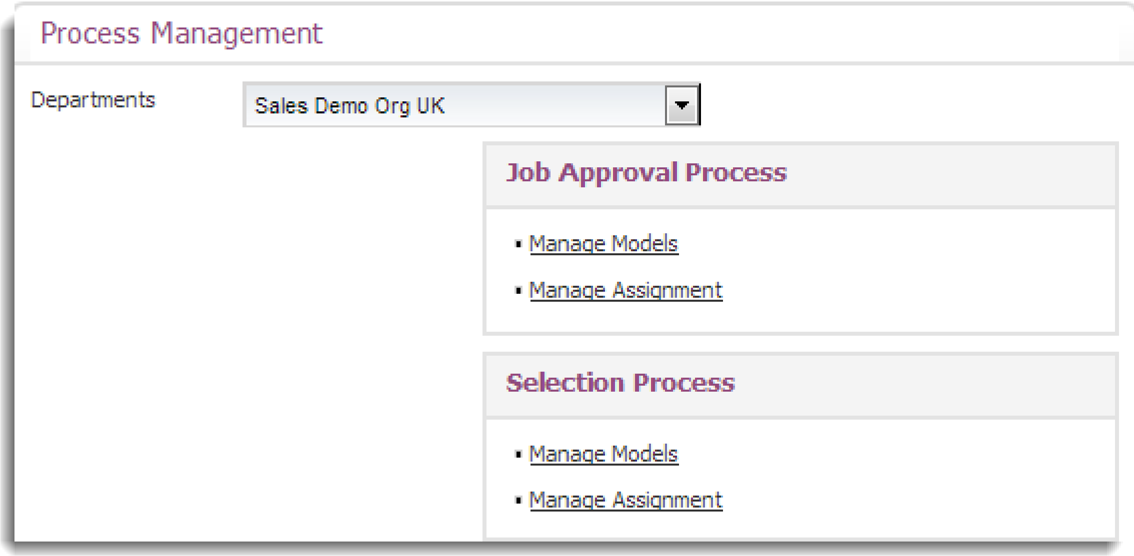
Managing Job Approval, Application and Selection Processes

This section describes how you can:

- Create or edit the Job Approval, Job Application and Selection Processes
- Assign these processes to organizations

Accessing Process Management

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the *Configuration* page, select the organization from the **Administration** dropdown list.
3. Select **Process Management** to access the process page for this specific organization.



Job Approval Process

The Job Approval Process defines all the steps that a job must go through before it is approved by the manager.

ⓘ By default, jobs are approved by the manager using the Communication Centre. It is also possible to approve jobs using email. For more information refer to User Preferences (see page 339) in the User Management chapter.

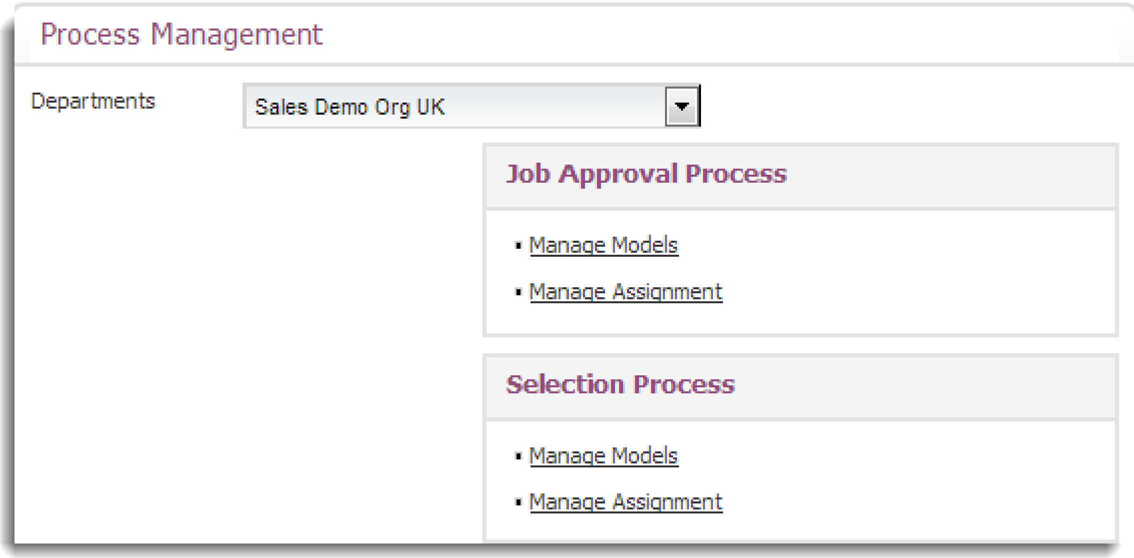
As an administrator, you define the Business Rules for each approval step here based on your company's requirements.

You can restrict or grant access to major functionality at each step.

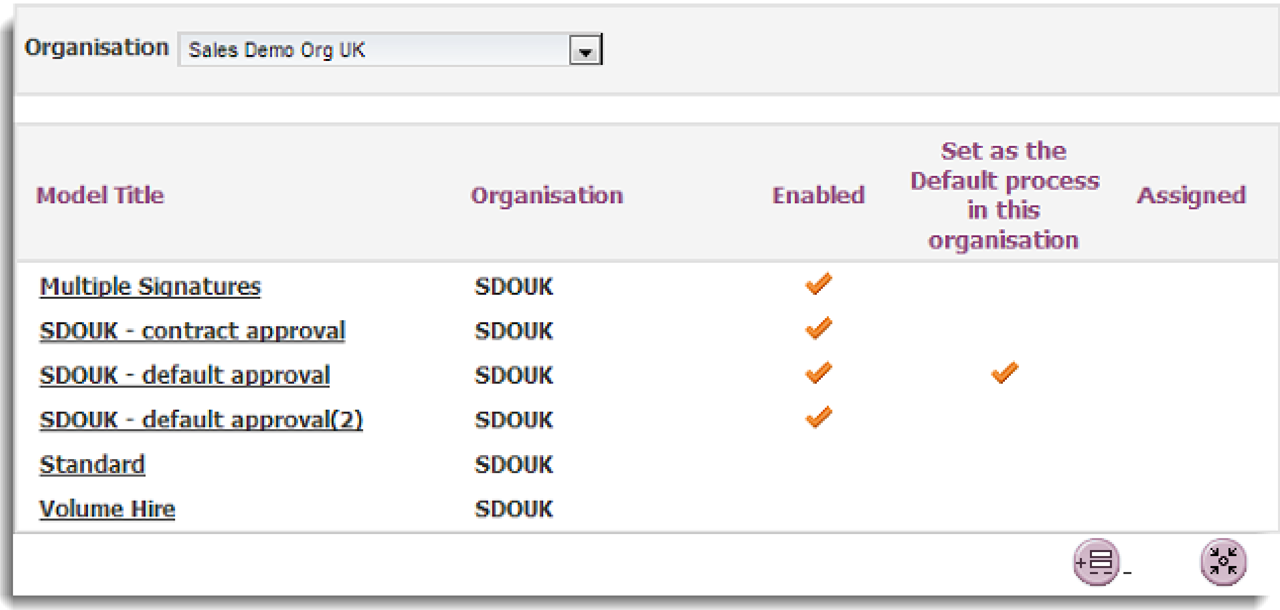
What if Some Jobs Don't Need a Process?

Even if no process is required you still need to set up an Approval process, but the rules are defined so that jobs can be published straight away.

1. From the *Process Management* page (see page 164), select **Manage Models** in the **Job Approval Process** section.

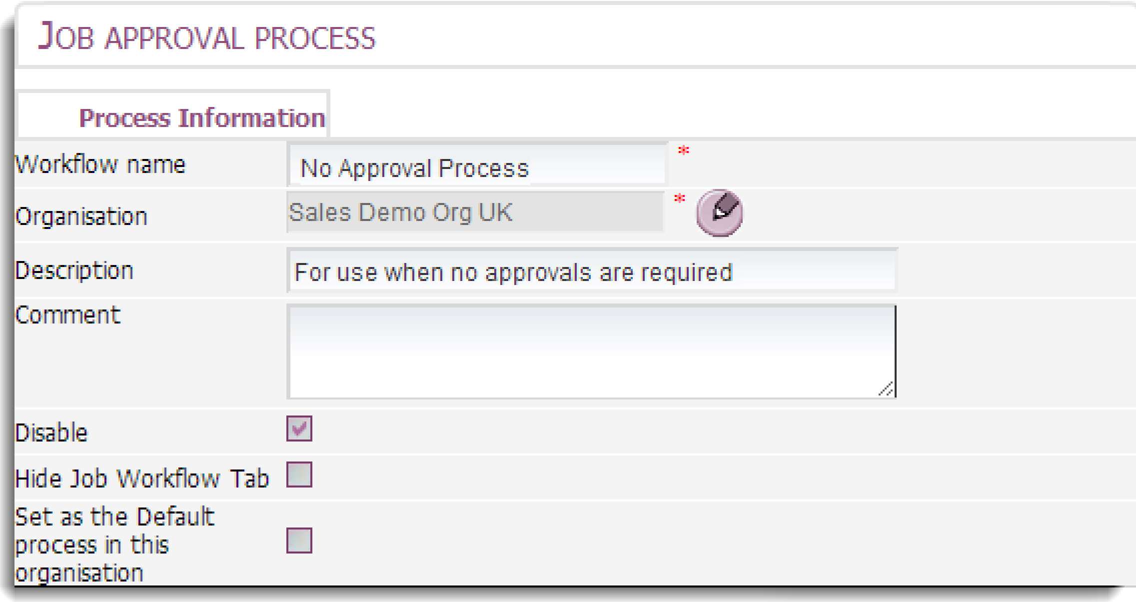


2. To create a new Job Approval Process click

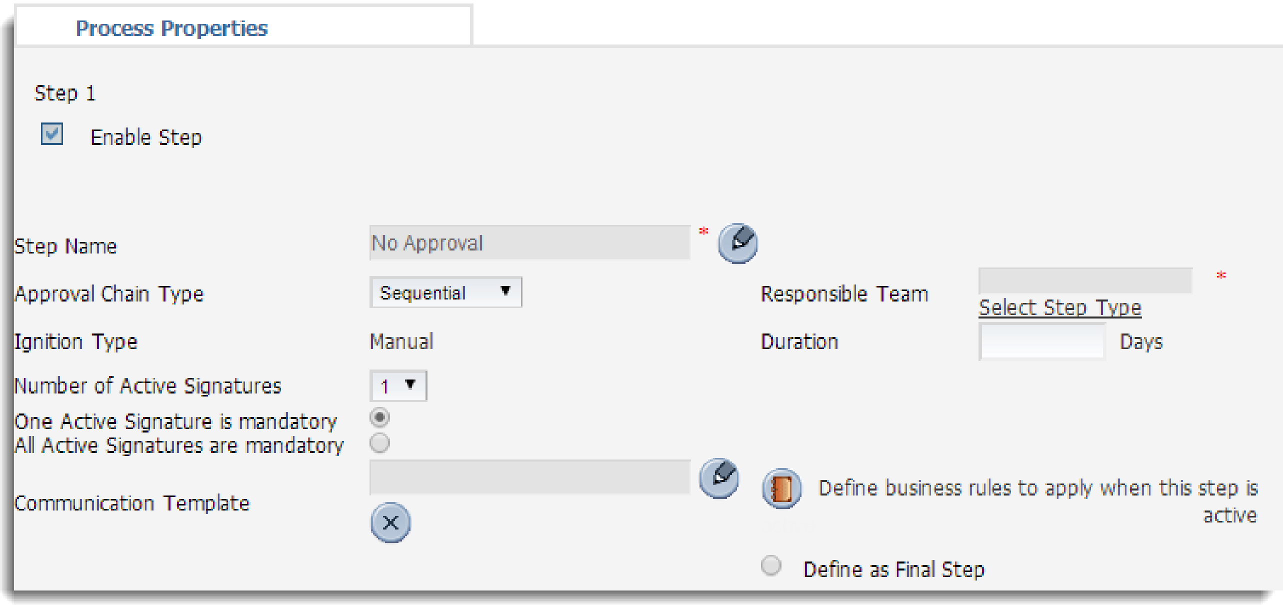


Model Title	Organisation	Enabled	Set as the Default process in this organisation	Assigned
Multiple Signatures	SDOUK	✔		
SDOUK - contract approval	SDOUK	✔		
SDOUK - default approval	SDOUK	✔	✔	
SDOUK - default approval(2)	SDOUK	✔		
Standard	SDOUK			
Volume Hire	SDOUK			

3. Enter the Workflow name and any description or comments as required, then click

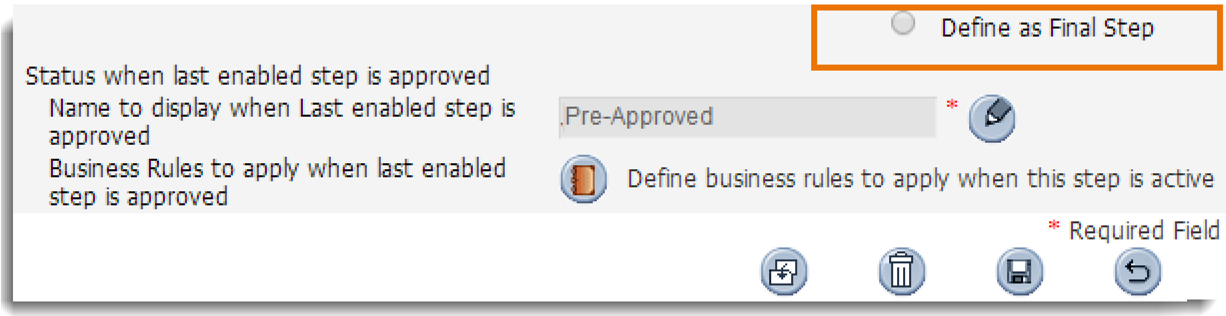


4. To specify the **Step Name** for Step 1 click then type a name, such as 'No Approval'.



5. Select a **Communication Template** and the **Responsible Team**.
6. Click to define the Business Rules.
7. Click to select all rules then click **Save**.

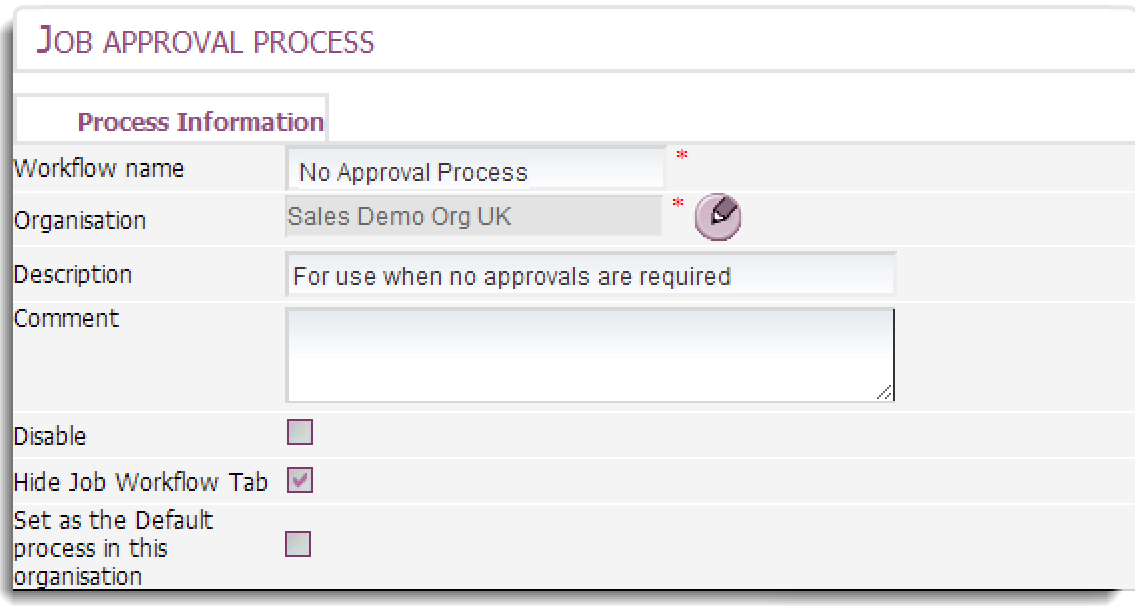
8. Select **Define as Final Step**.



9. Click and type the name that is displayed when the last step is approved; this name will appear on reports.

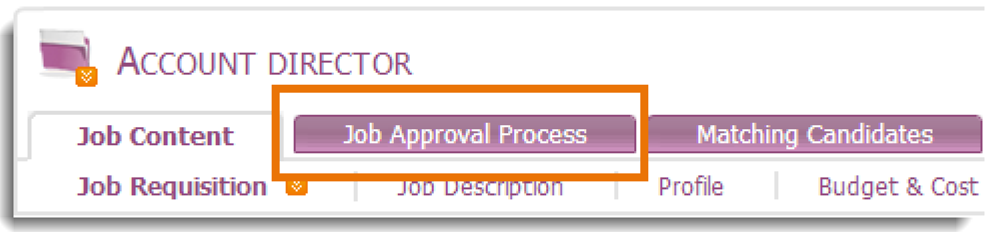
10. Click to define the Business Rules of the final step.

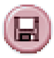
11. Click to select all rules then click **Save**.
12. Scroll to the top of the page and deselect **Disable** to activate this process.



13. Select **Hide Job Workflow Tab**.

The *Job Approval Process* tab will not appear on *Job Details* pages. Hiding this tab means that jobs in this organization will not be able to go through an Approval Process.



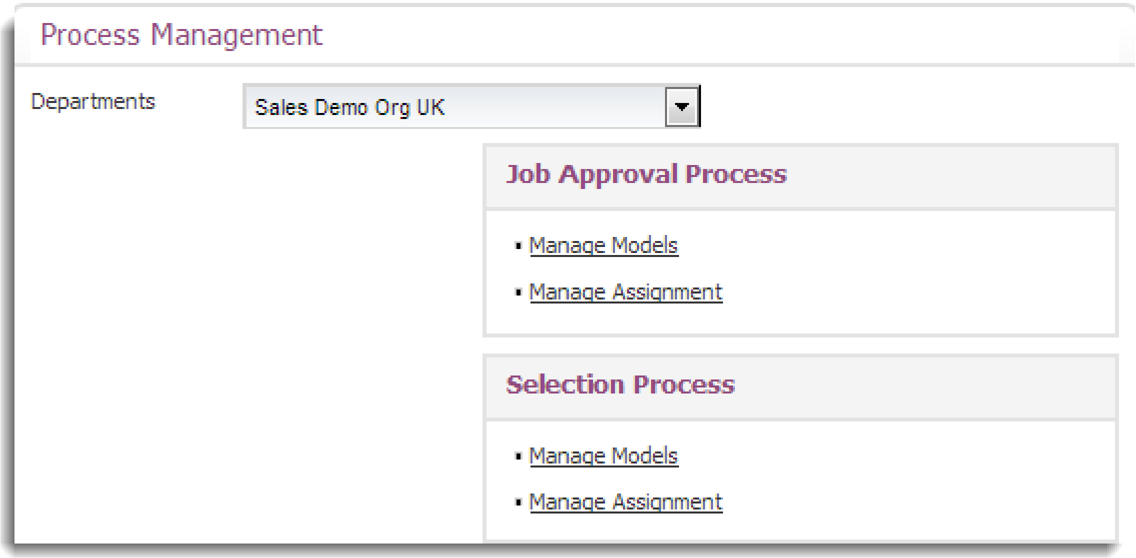
14. Click 

- To switch off the approval process only for specific job types, refer to Specific Job Approval Processes (see page 179)
- If you want none of your organization's jobs to go through an Approval Process you must set this as the default process (see page 178)

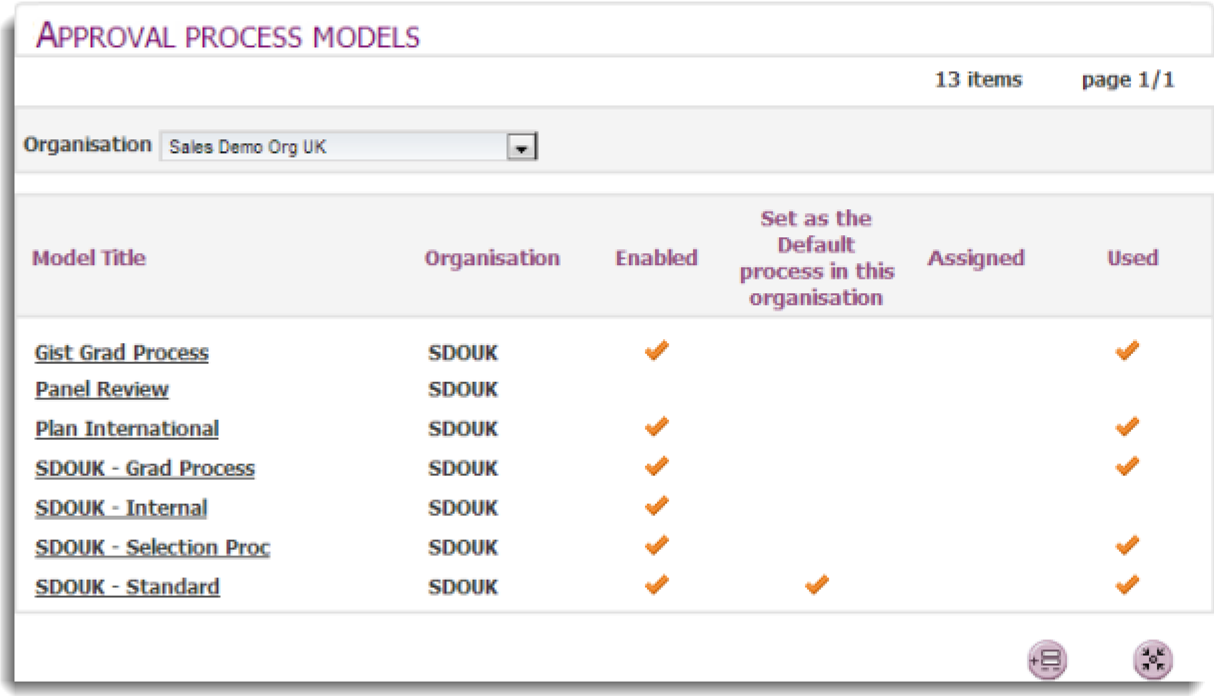
Copying a Job Approval Process

You can use existing processes as the basis for creating additional ones by copying them and editing as required.

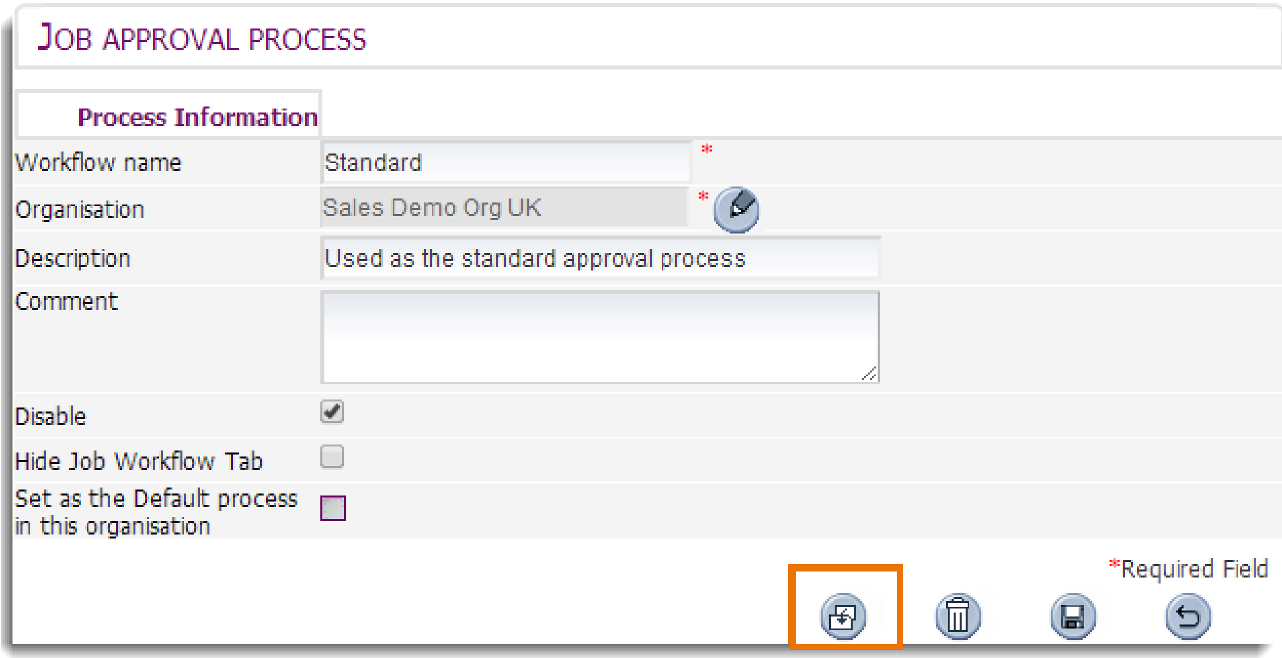
1. From the *Process Management* page (see page 164), select **Manage Models** from the **Job Approval Process** section.



2. Select the name of the process you wish to copy.



3. Click to copy this process.



4. Select the organization to copy the process to.

Select a Organisation

page 1/10 Go to page

	Name	Code	Description
Select	Accelerator APAC	EAP	
Select	Accelerator DE	ADE	
Select	Accelerator FR	EFR	
Select	Accelerator IT	EIT	
Select	Accelerator NL	ENL	
Select	Accelerator NO	ENO	
Select	Accelerator SE	ESE	
Select	Accelerator UK	AUK	
Select	ACE Job LIbrary	AHD	
Select	AOK1	AOK1	
Select	AOK2	AOK2	
Select	APAC	DEMOAPAC	APAC Demo Org

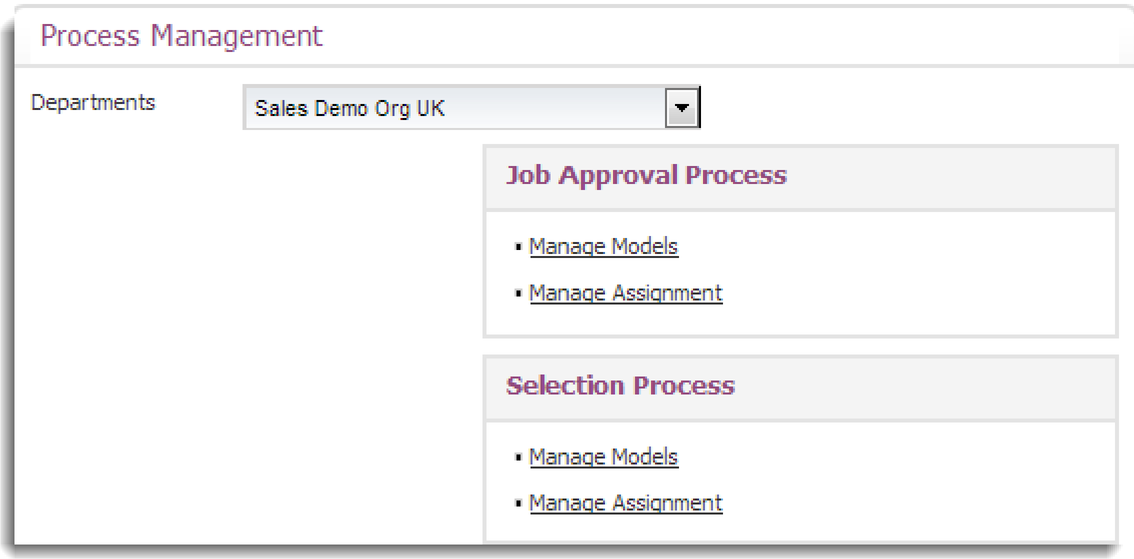
Cancel

5. The *Job Approval Process* page redisplays, showing you the newly copied process.

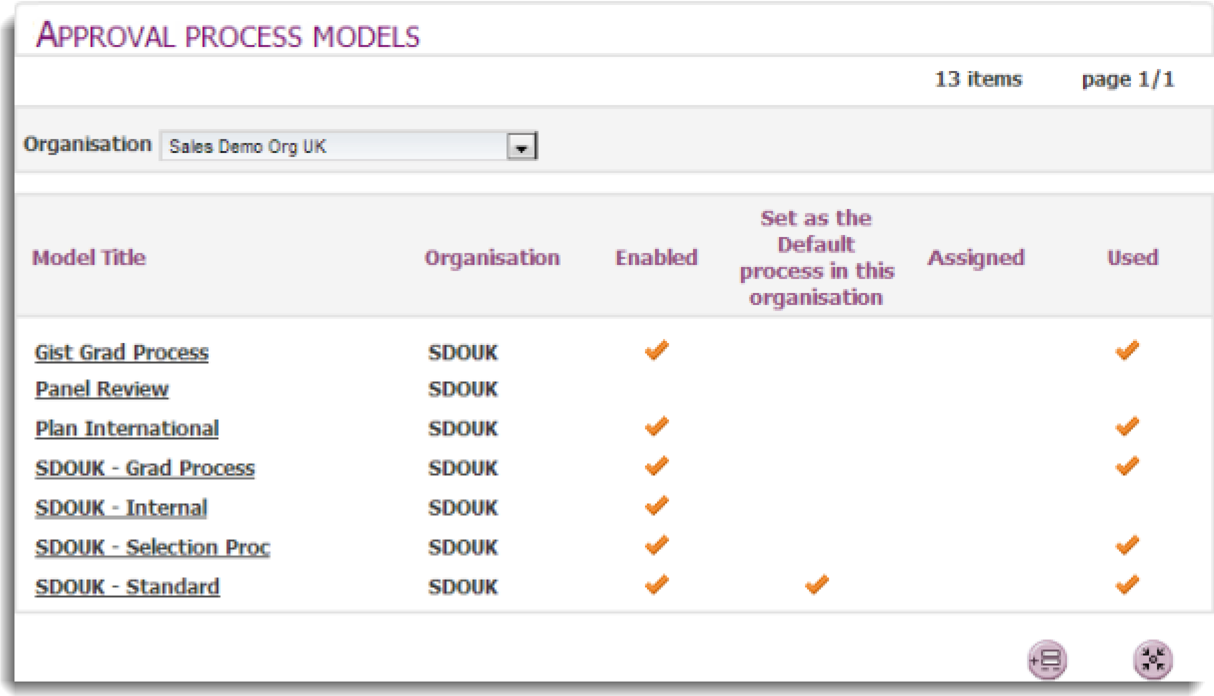
   From here you can change the name, edit the steps and attach different communication templates as required.

Creating a Job Approval Process

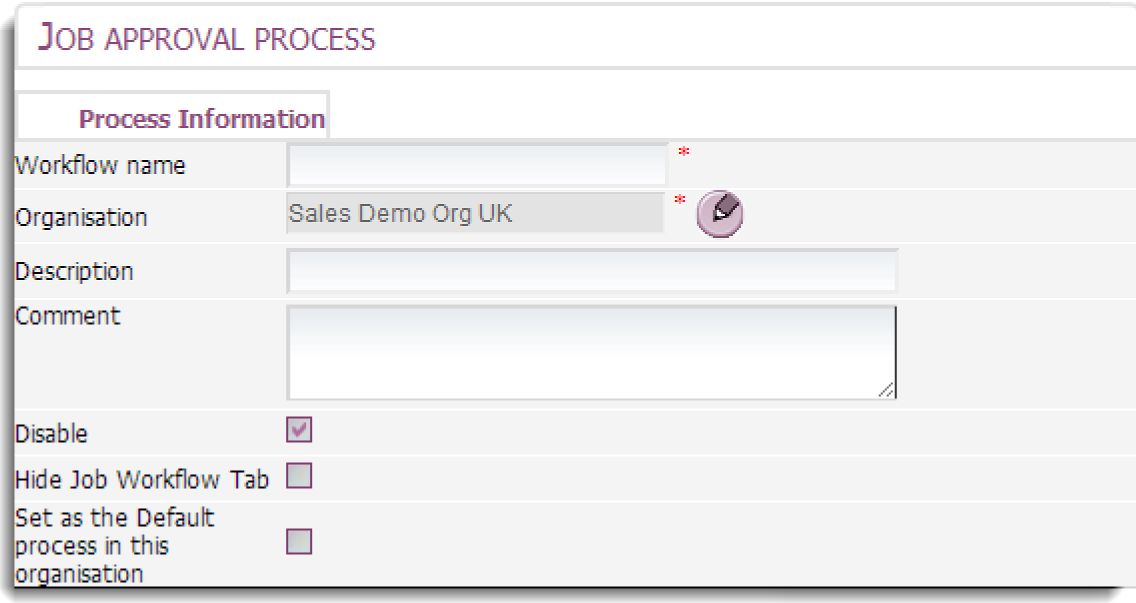
1. From the *Process Management* page (see page 164), select **Manage Models** in the **Job Approval Process** section.



2. To create a new Job Approval Process click



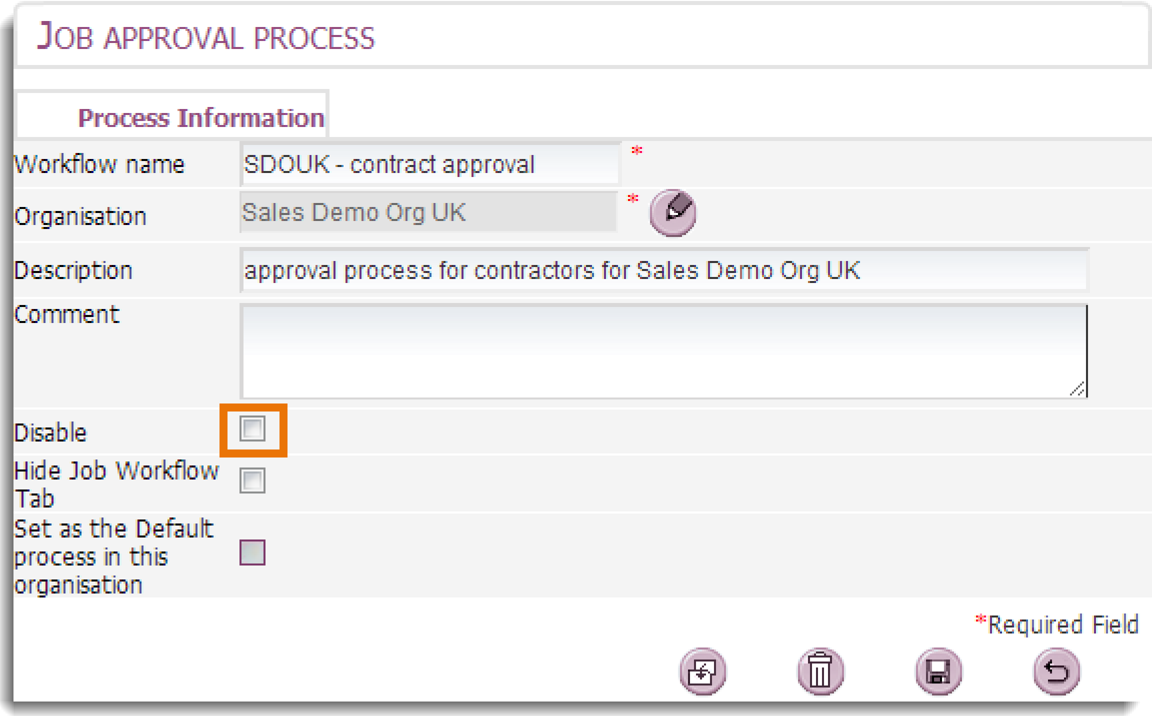
3. Enter the Workflow name and any description or comments as required, then click



Activating a Job Approval Process

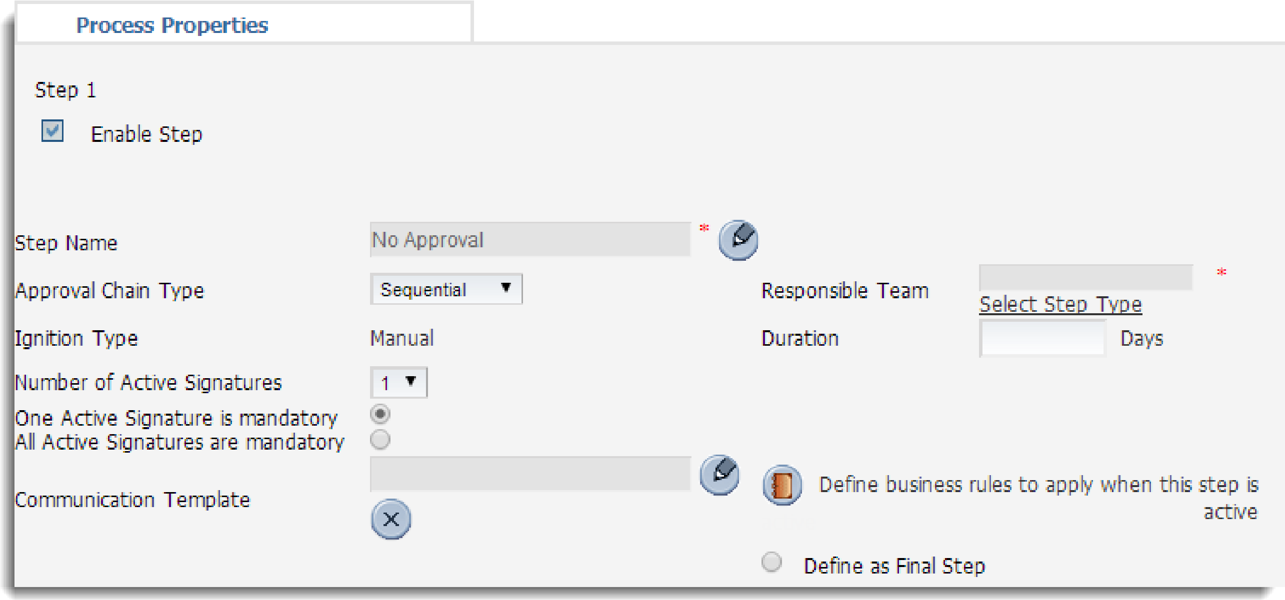
By default, the process is inactive after its creation.

1. To activate the process, deselect **Disable** then click



Job Approval Process Properties

The Approval Process is defined in the **Process Properties** section. The process is built up from a number of Steps.



1. To specify the **Step Name** for Step 1 click , enter the generic name for the step and then define the translations for any active languages.
2. Click **Save & Close**.

> ⓘ Step names are displayed in the language selected by the user when they connect to TalentLink if you specify a value for the selected language.

3. Select the **Approval Chain Type**.

   For **Sequential,** the signatures must be received in the defined order, so when the first signature is received, the request for the second signature is sent, and so on. For **Collaborative**, all signature requests are sent at the same time and it does not matter in which order they come in.

4. Select the **Ignition type**.

   For **Manual**, a user must submit the signature request manually. For step 1, the Ignition type is always **Manual**.

   For **Automatic**, once the approval chain starts, TalentLink automatically submits the next step when the signature(s) is received. Where Automatic is selected a check box **From Approver of the Preceeding Step** is displayed. The check box is selected by default and approval emails are sent from the configured email address. If this check box is not selected approval emails will be sent from the email address configured in the communication template used for the step.

5. Select the **Number of active Signatures**.

   You can select up to five active signatures for each step, which means you can have up to five approvers defined for each step.

Where **One Active Signature is Mandatory** is selected, only one approval signature is required to sign off the job. If **All Active Signatures are Mandatory** is selected, all approvers must sign off before the job can be approved.

6. Click then select a **Communication Template** to be sent to approvers.

   These templates, which are configured by the template manager, are displayed when the Approval Process starts and this step is submitted. You can delete this template later by clicking

7. To select the **Concerned team** click **Select Step type**, then define which roles are allowed to submit, assign and/or approve this step.

   For example, by selecting Type 3, users who are Manager Workspace user Hiring Managers can submit this step, and users who are Functional Managers and/or Recruiters can approve this step.

Select a Job WorkFlow step type

	Step Type	Users allowed to SUBMIT this step type	Users allowed to ASSIGN this step type	Users allowed to APPROVE this step type
Select	Type 1	Evolve, Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver All, LSA Evolve, MSS Job Creator, Specsavers - Store Manager, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured, Xchanging Manager	Evolve, Functional manager, Job Approver All, LSA Evolve, Specsavers - Store Manager	Evolve, Functional manager, Job Approver All, LSA Evolve, Specsavers - Store Manager, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured, Xchanging Manager
Select	Type 2	Evolve, Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver All, LSA Evolve, MSS Job Creator, Specsavers - Store Manager, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured, Xchanging Manager	Evolve, Functional manager, Job Approver All, LSA Evolve, Specsavers - Store Manager	Evolve, Functional manager, Job Approver 2, Job Approver All, LSA Evolve, Specsavers - Store Manager, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured, Xchanging Manager
Select	Type 3	Evolve, Functional manager, Hiring Manager MSS, Hiring Manager MSS Limited, Job Approver 2, Job Approver All, LSA Evolve, MSS Job Creator	Evolve, Functional manager, Job Approver All, LSA Evolve	Evolve, Functional manager, Job Approver 3, Job Approver All, LSA Evolve
Select	Type 4	Evolve, Functional manager, Job Approver 3, Job Approver All, LSA Evolve, Standard Hiring Manager, Standard Recruiter, Standard Recruiter Secured, Xchanging Manager	Functional manager, Job Approver All	Evolve, Functional manager, Job Approver 4, Job Approver All, LSA Evolve, Standard Hiring Manager, Standard Recruiter Secured, Xchanging Manager
Select	Type 5	Functional manager, Job Approver 4, Job Approver All	Functional manager, Job Approver All	Functional manager, Job Approver 5, Job Approver All
Select	Type 6	Functional manager, Job Approver 5, Job Approver All, Standard General Application Recruiter, Standard Hiring Manager, Standard Recruiter, Xchanging Manager	Functional manager, Job Approver All	Functional manager, Job Approver 6, Job Approver All, Standard General Application Recruiter, Standard Hiring Manager, Xchanging Manager
Select	Type 7	Functional manager, Job Approver 6, Job Approver All	Functional manager, Job Approver All	Functional manager, Job Approver 7, Job Approver All

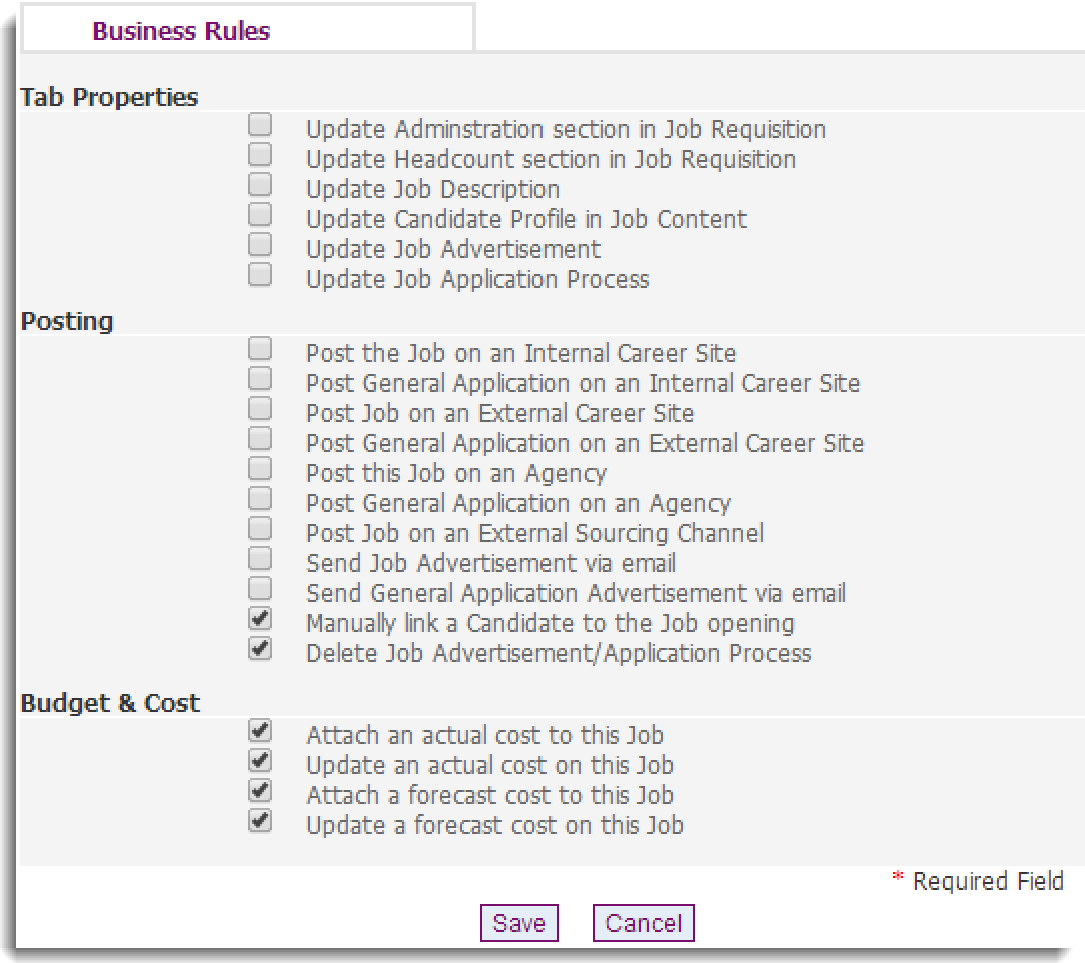
8. Specify the **Duration** of the delay that elapses before the signature is set as overdue. Both the approver and the lead recruiter linked to the job will be notified of the overdue status.

   ⓘ **Duration** days include weekends, so a value of 7 would cover Monday to Sunday.

9. Click to define the Business Rules for this step. This defines what can be done BEFORE the step has been approved.

10. In the *Edit Business Rules* window, grant access for recruiters to different functionalities to be used in this approval step by selecting the rules you require, then click **Save**.

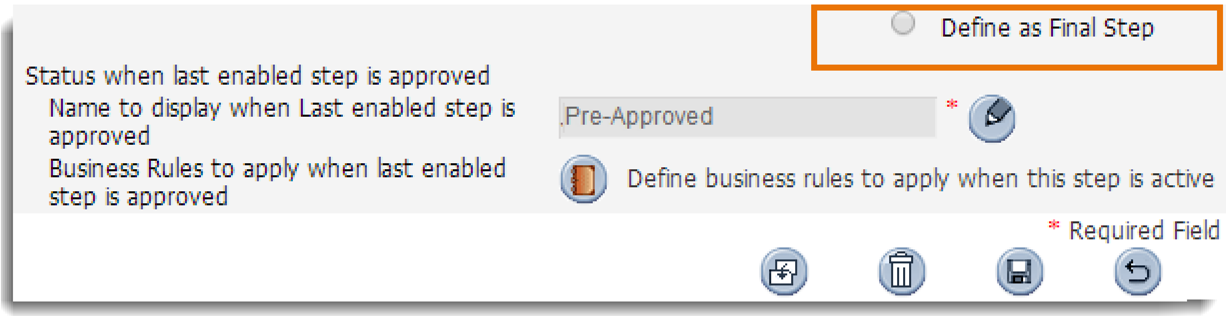
- **Tab Properties** - Defines which sections of the job can be updated before it is approved
- **Posting** - Defines whether you can post the job before it is approved
- **Budget & Cost** - Enables users to add actual and forecast costs to the job

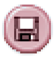


ⓘ Defining Business Rules for each step is important. These rules control the actions recruiters can and cannot perform when the job is at a particular approval step. You can, for instance, prevent a job from being published until it is approved. If you need to activate all Business Rules for a step, click 

11. Activate the other steps by selecting **Enable Step**, then repeat the previous actions described previously.

12. When you reach the last process step select **Define as Final Step**.



13. Click  and type the name that is displayed when the last step is approved; this name will appear on reports.
14. Define the Business Rules of the final step. This is essential as it defines the actions that can be performed AFTER the job is approved.
15. Click 

Job Approval Process Versions

You can edit an existing Job Approval Process based on your company's requirements. The types of changes that can be made on an Approval Process are:

Changes that do not trigger the creation of a new process version

- Step Name
- Responsible team
- Ignition Type
- Delay that applies before a signature is set to overdue
- Business Rules for the step
- Changes to/deletion of the Communication Template

Changes that do trigger the creation of a new process version

- Enabling/disabling an approval step
- Changes to the Approval Chain Type and Number of active signatures

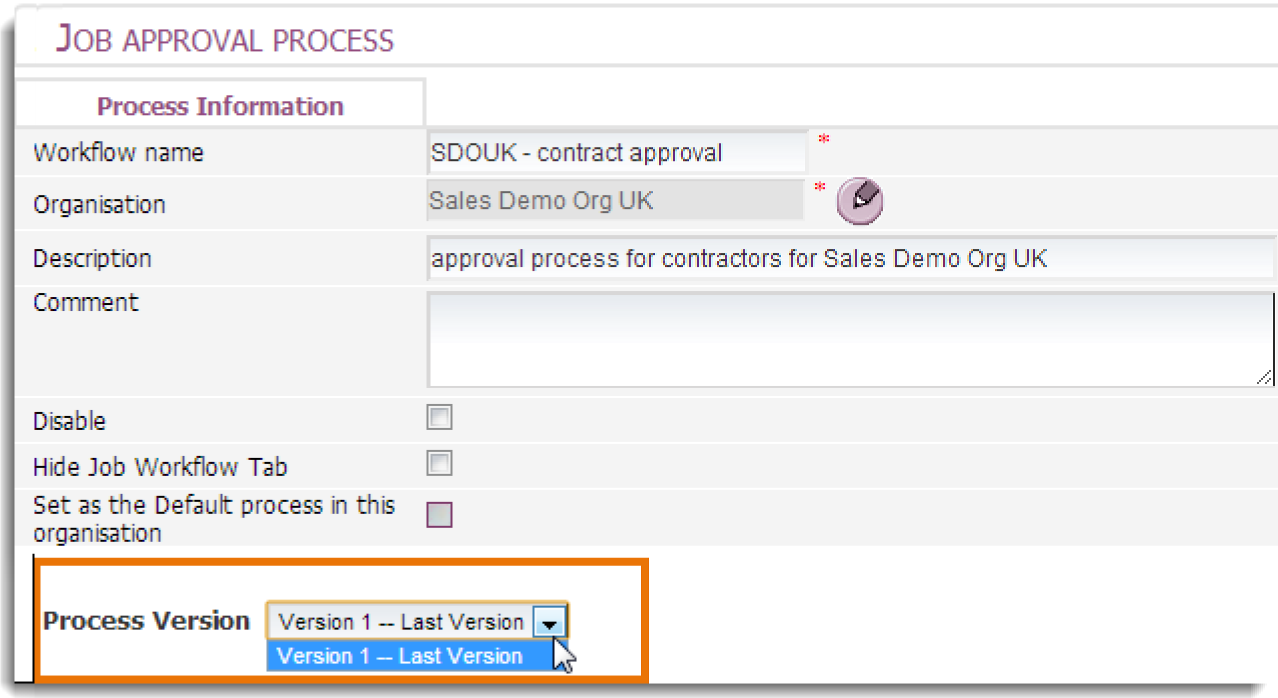
Differentiating between these changes is important, since it impacts the way that Approval Process versions are linked to jobs in a particular organization. If a new version of the Approval Process is created, it will only apply to future jobs, while existing jobs will follow the old Approval Process.

Accessing Previous Versions of the Approval Process

You can view old versions of an Approval Process using the **Process Version** dropdown list on the *Job Approval Process* page.

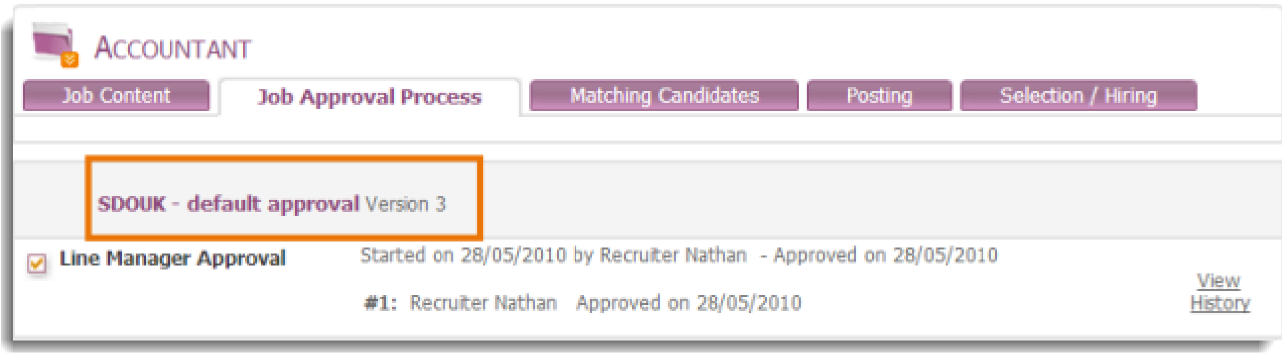
1. From the *Process Management* page (see page 164), select **Manage Models** in the **Job Approval Process** section.
2. Select the process from the list under the **Model Title** section.

3. From the *Job Approval Process* page, select the **Process Version** you want to view from the dropdown list.



The *Job Approval Process* page corresponding to the version you selected is displayed. Information on this page is in read-only format. You can also view the Business Rules which were active for each step.

You can view the Approval Process version linked to a specific job from the job's approval process page. In the following example, the job is linked to Version 3 of the process.



Managing Job Approval Process Assignment

In this section you can define which processes should be activated for your organization and assign them in accordance with your company's requirements. You can activate a default process, as well as processes for specific cases based on qualifiers.

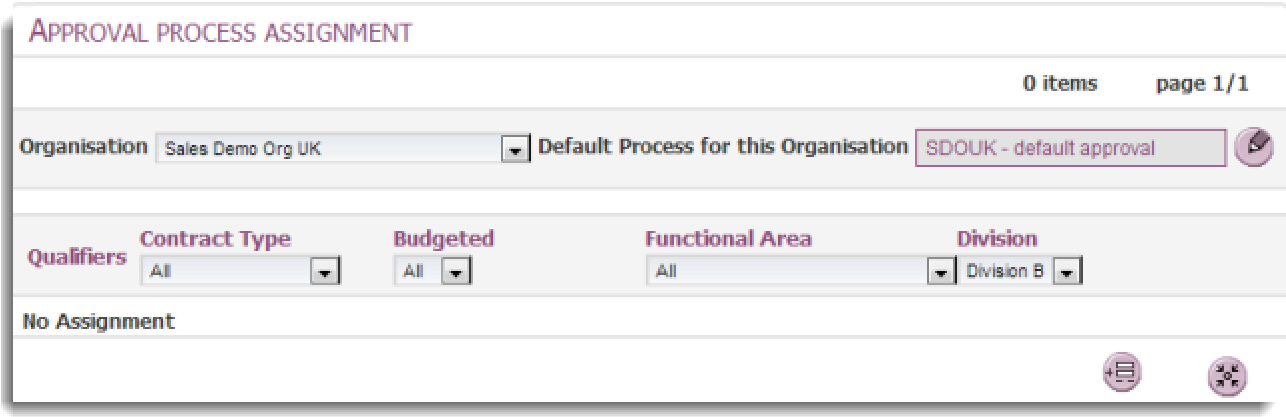
Default Job Approval Process

A default Approval Process must exist before you can create jobs in any organization.

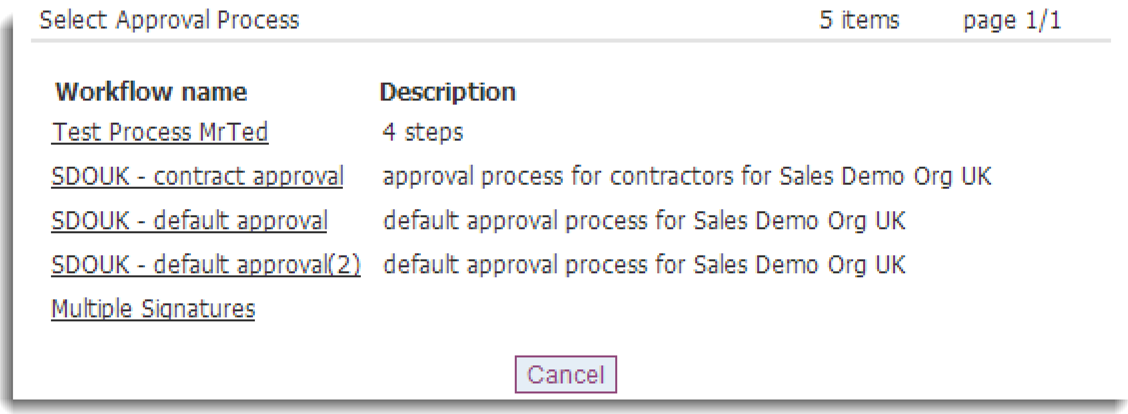
If you do not want to use an Approval Process you must still create one then assign it as the default process. Refer to What if Some Jobs Don't Need a Process? (see page 165) for full details.

To activate the default process:

1. From the *Process Management* page (see page 164), select **Manage Assignments** in the **Job Approval Process** section.



2. Click next to **Default Process for this Organization**.



3. From the *Select Approval Process* page, select the name of the process you want to set as the default.

> ⓘ All jobs in this organization will follow the default Approval Process unless you create specific Job Approval Processes and link them to jobs using Qualifiers. This is described in the next few topics.

Specific Job Approval Processes

As well as activating a default process for an organization, you can also assign specific processes based on selected Qualifiers. Qualifiers are LOVs available in the organization of your choice (to activate an LOV on the organization level refer to Configurable Field Management (see page 74) and Managing Organization Structure and Properties (see page 35)). After an LOV is set as a Qualifier it becomes a mandatory field that users must fill in during job creation. When a user selects a value from the Qualifier LOV this determines which approval process is used for the newly created job.

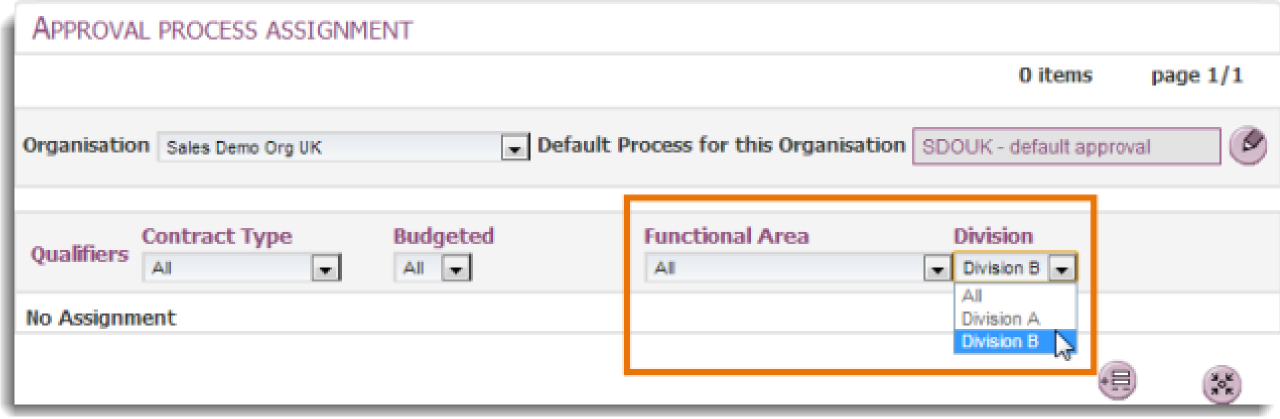
There is already a default qualifier of **Contract Type**. If the New Hires Management module is activated there will be a default qualifier of **Budgeted**. You can define additional qualifiers as needed.

Setting a Qualifier

1. On the *Process Management* page (see page 164), click in the **Information** section.

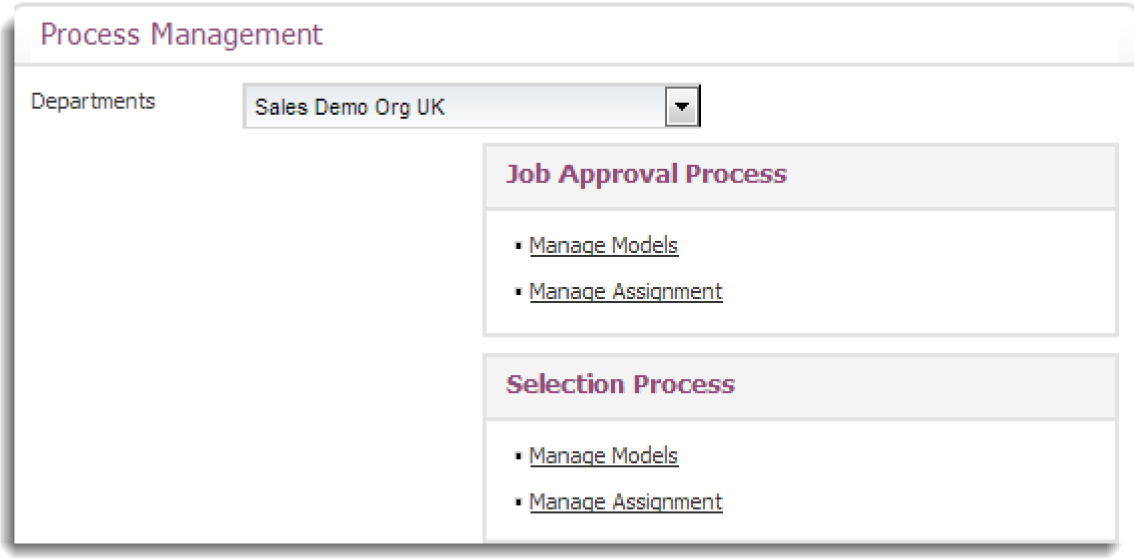
2. Select one or two LOVs as Qualifiers from the dropdown lists, then click **Save**.

The LOV is selected as a Process Qualifier and is displayed on the *Approval Process Assignment* page.

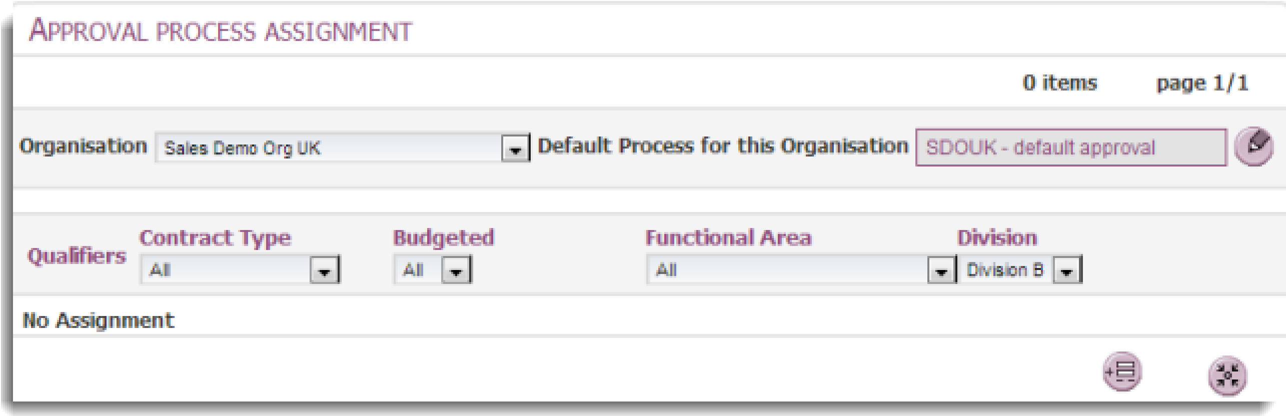


Assigning a Specific Job Approval Process

1. To link your Qualifiers to specific Approval Processes, on the *Process Management* page, select **Manage Assignment** from the **Job Approval Process** section.

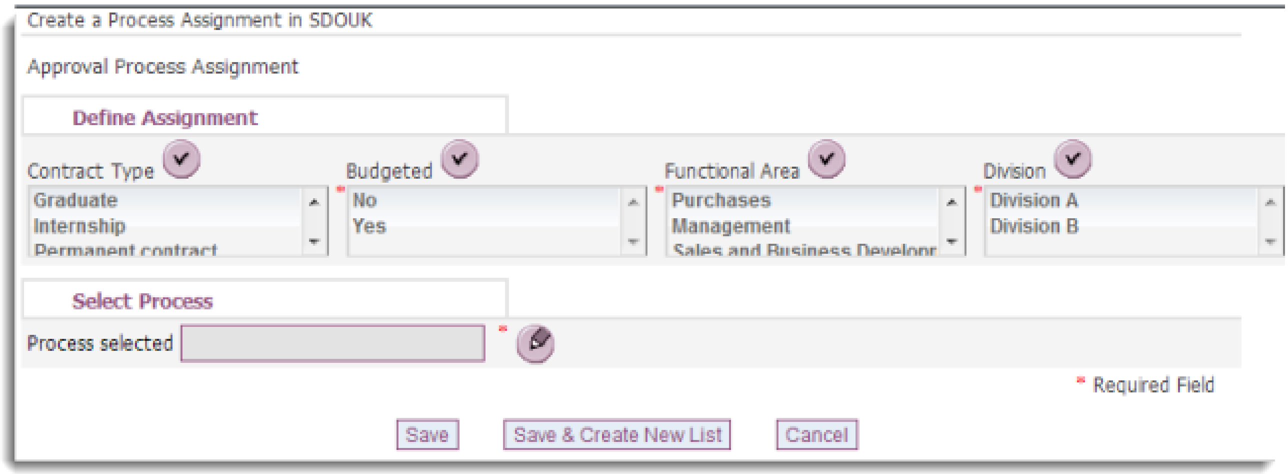


2. Click to create a new assignment.

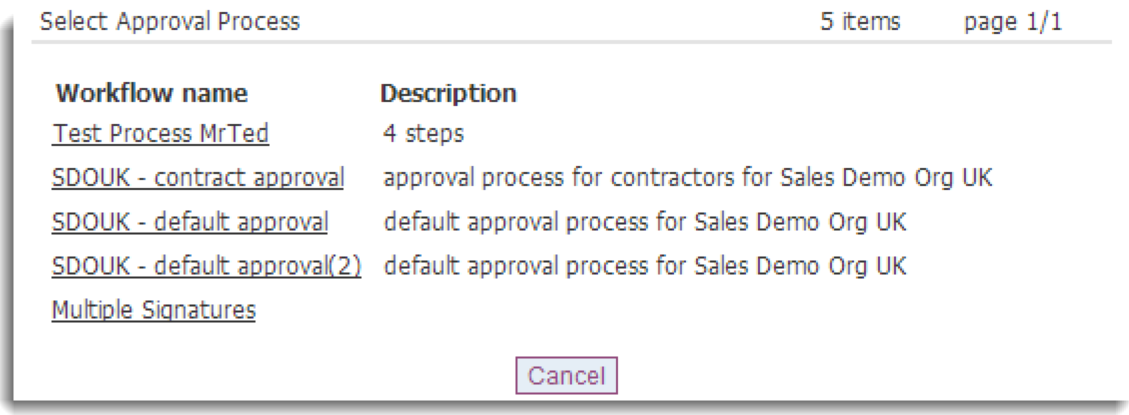


The *Create a Process Assignment* page is displayed.

3. Select the Qualifier values to link to a process. Click to select all values in a list.



4. Click to select the process



5. Click **Save & Create New List**.

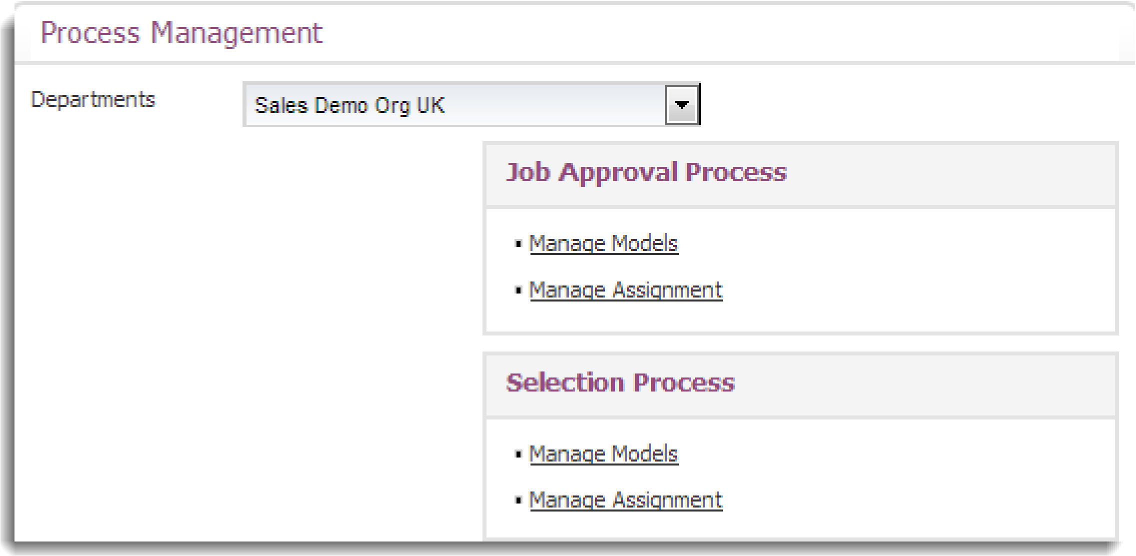
This will re-open the *Create a Process Assignment* page where you can select another Qualifier value to link to the same or a different process.

Repeat steps 3-5 until each Qualifier value is linked to a process the click **Save**.

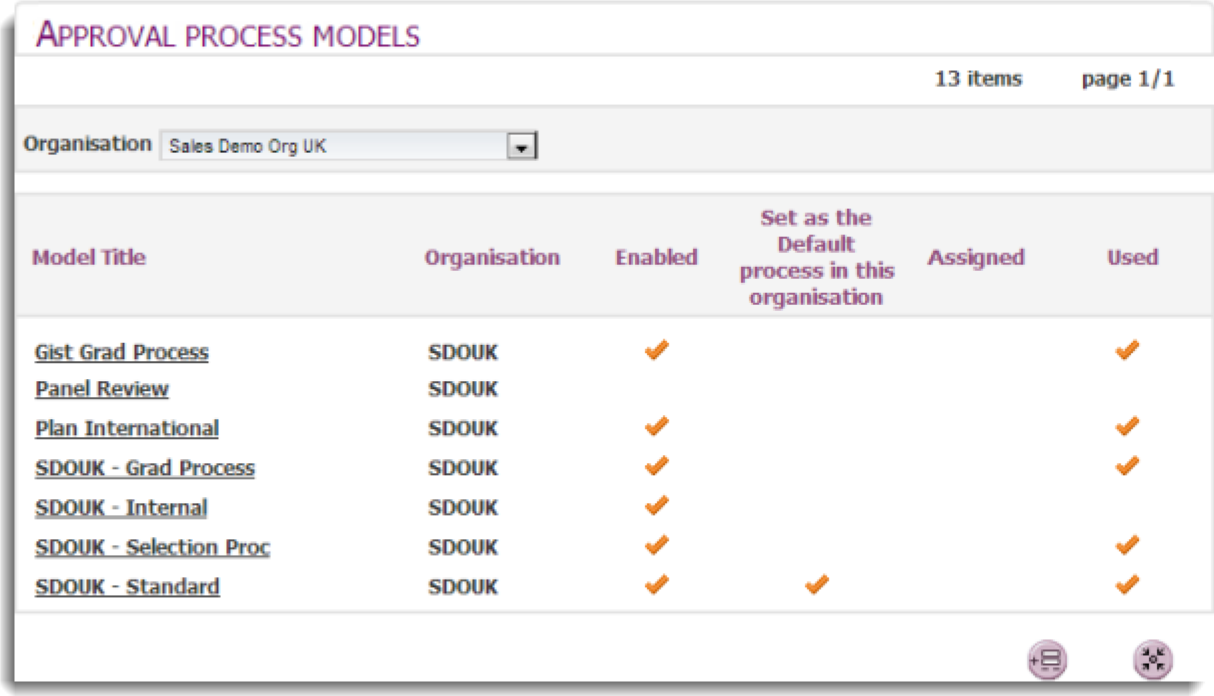
The specific process you choose is assigned to all jobs for which recruiters select the values set here. This information is displayed on the *Approval Process Assignment* page.

Deleting a Job Approval Process

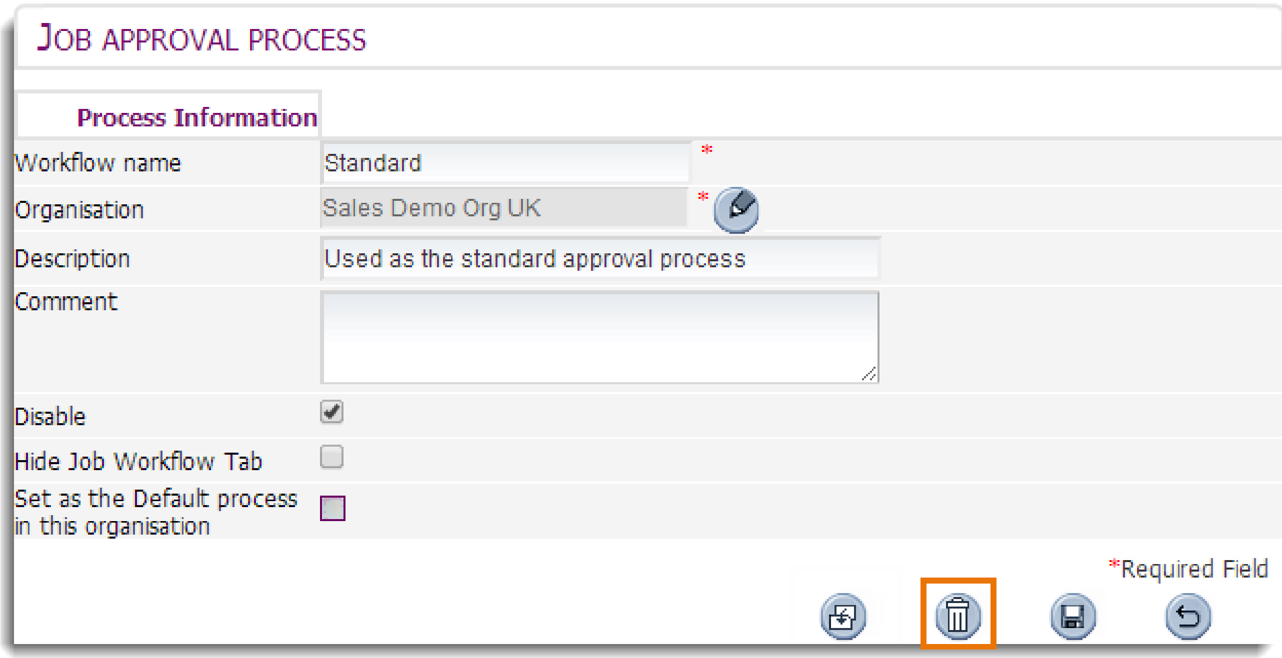
1. From the *Process Management* page (see page 164), select **Manage Models** from the **Job Approval Process** section.



2. Select the name of the process you wish to delete.



3. Click to delete this process.



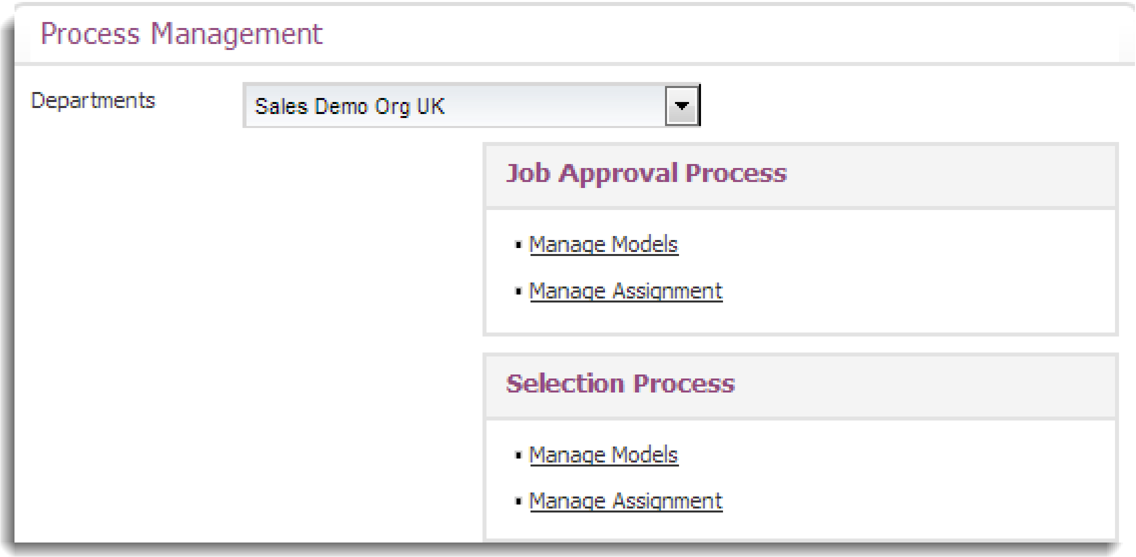
Selection Process

The Selection Process applies to candidates registered in the Back Office and defines all the steps that a candidate must go through before they receive a hiring offer. As an administrator you can define the number of steps the candidate must go through, the type of selection steps, the expected output and any templates which are to be used for communication with candidates and recruiters. You can define selection processes with up to 25 steps.

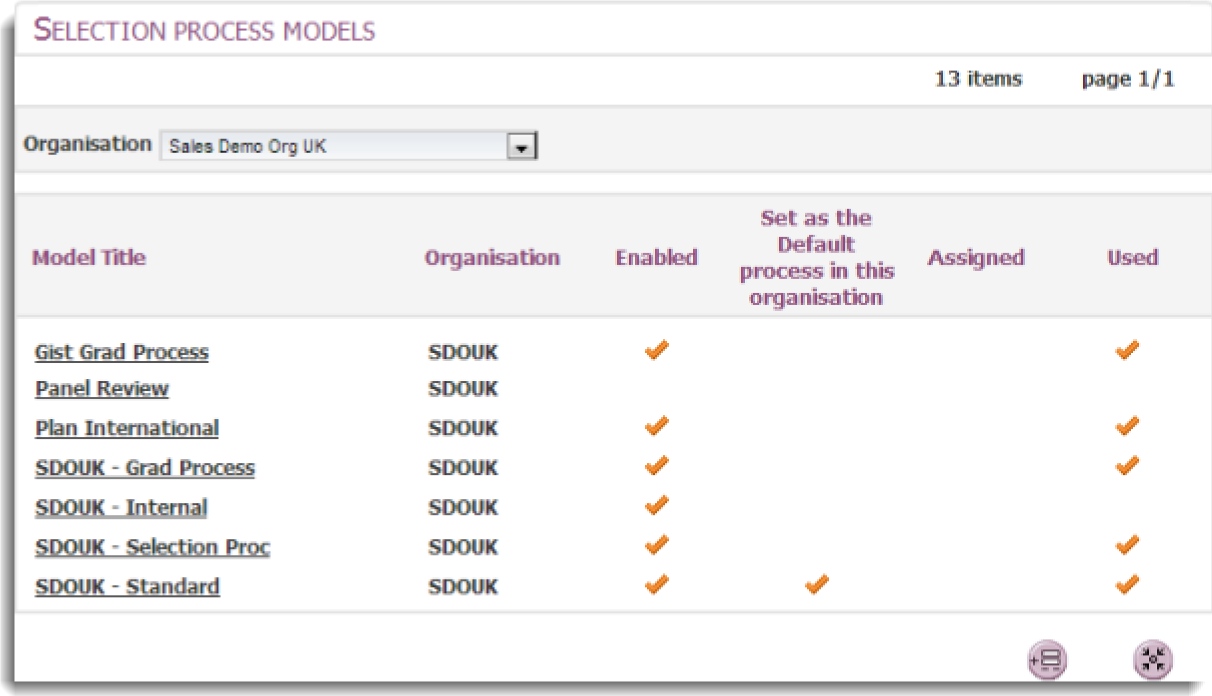
Copying a Selection Process

You can use existing processes as the basis for creating additional ones by copying them and editing as required.

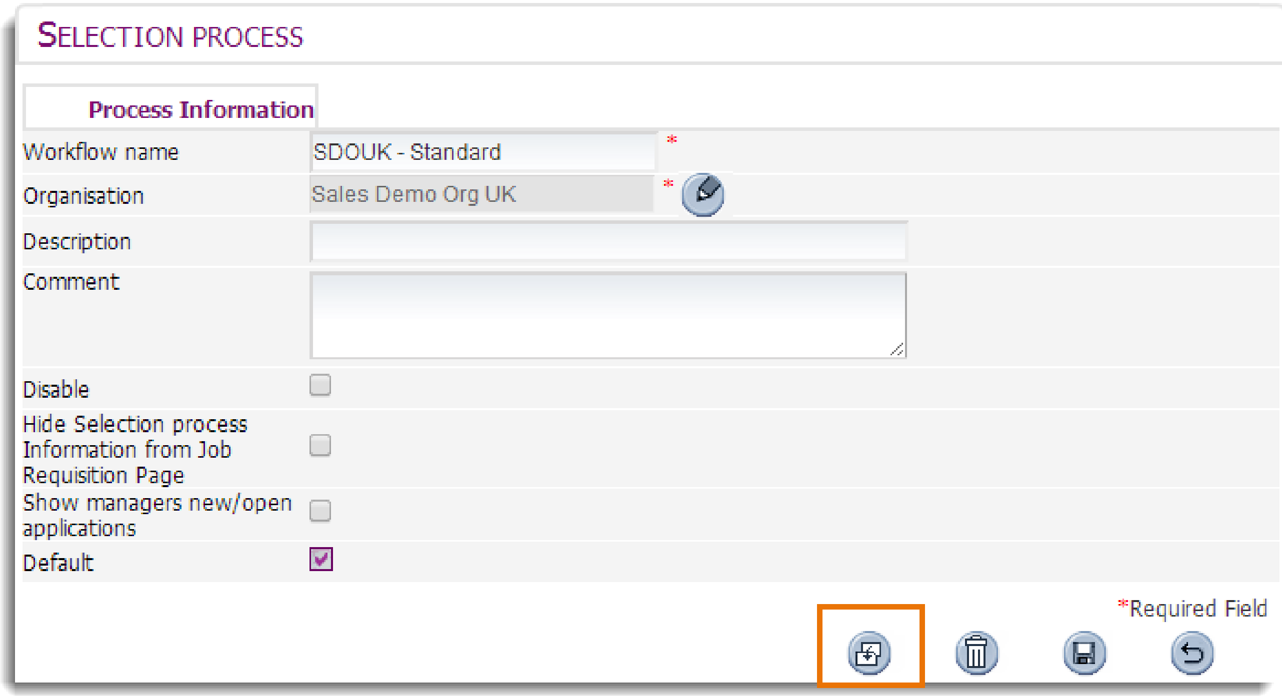
1. From the *Process Management* page (see page 164), select **Manage Models** from the **Selection Process** section.



2. Select the name of the process you wish to copy.



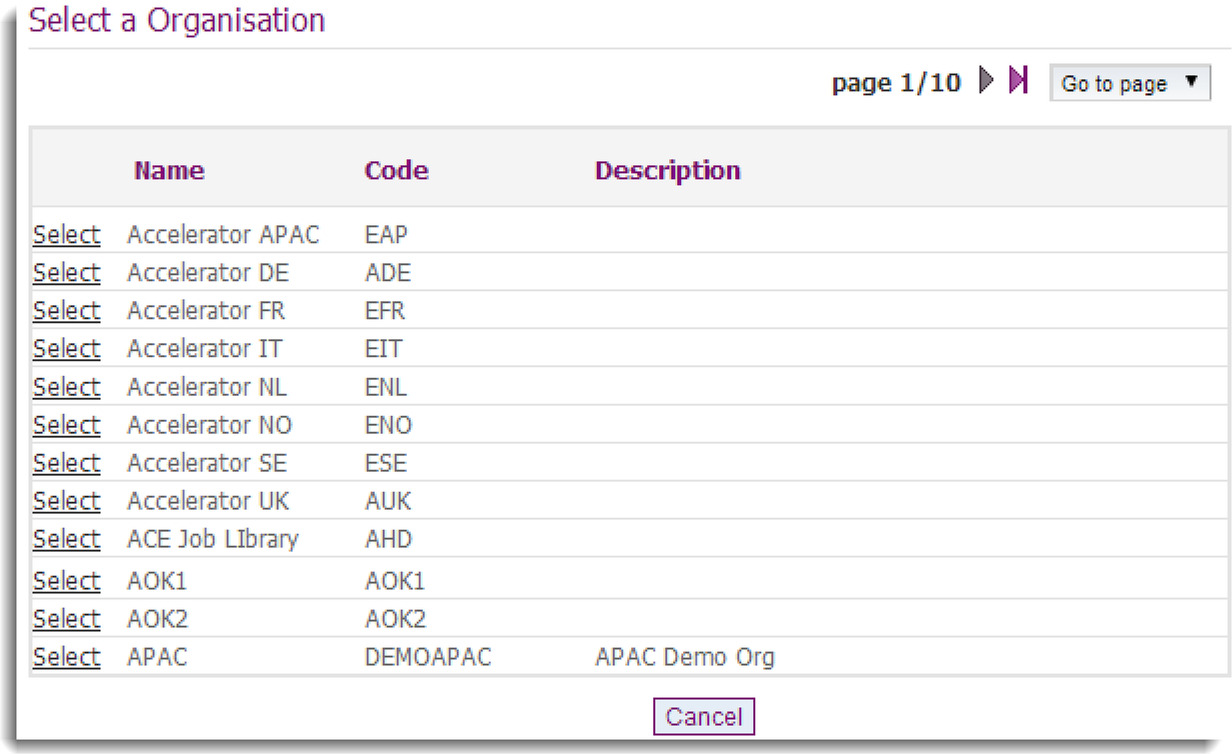
3. Click  to copy this process.



When you copy a Selection Process any step owners and step coordinators are removed and will need to be reassigned.

4. Click **OK** when prompted. The *Select an Organization* page is displayed.

5. Select the organization to copy the process to.



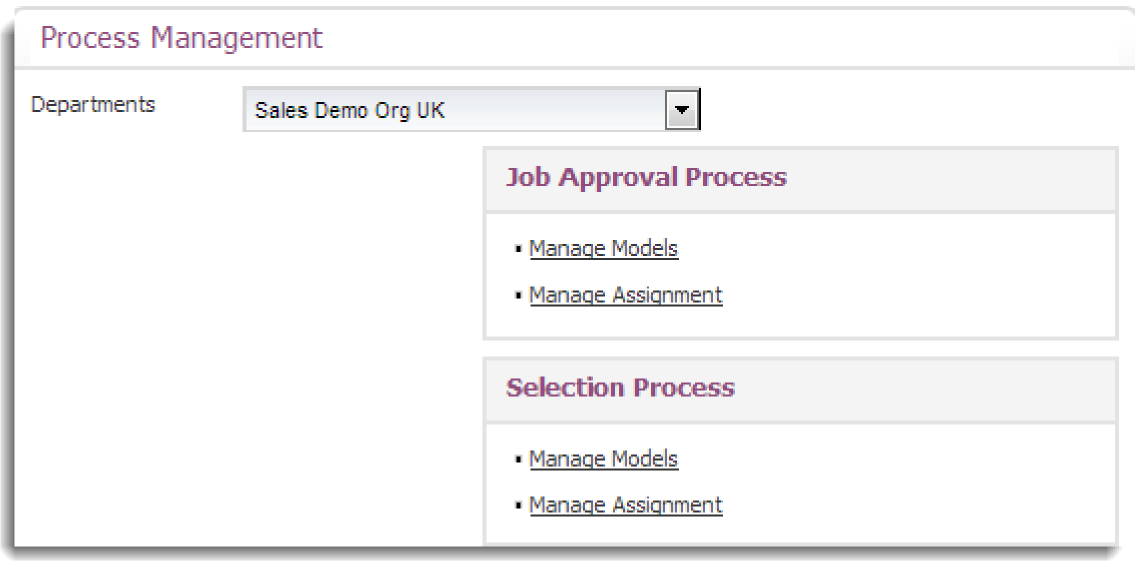
	Name	Code	Description
Select	Accelerator APAC	EAP	
Select	Accelerator DE	ADE	
Select	Accelerator FR	EFR	
Select	Accelerator IT	EIT	
Select	Accelerator NL	ENL	
Select	Accelerator NO	ENO	
Select	Accelerator SE	ESE	
Select	Accelerator UK	AUK	
Select	ACE Job LIbrary	AHD	
Select	AOK1	AOK1	
Select	AOK2	AOK2	
Select	APAC	DEMOAPAC	APAC Demo Org

6. The *Selection Process* page redisplays, showing you the newly copied process.

   From here you can change the name, reassign the step owners and step coordinators, edit the steps and attach different hiring process templates as required.

Creating a Selection Process

1. From the *Process Management* page (see page 164), select **Manage Models** from the **Selection Process** section.

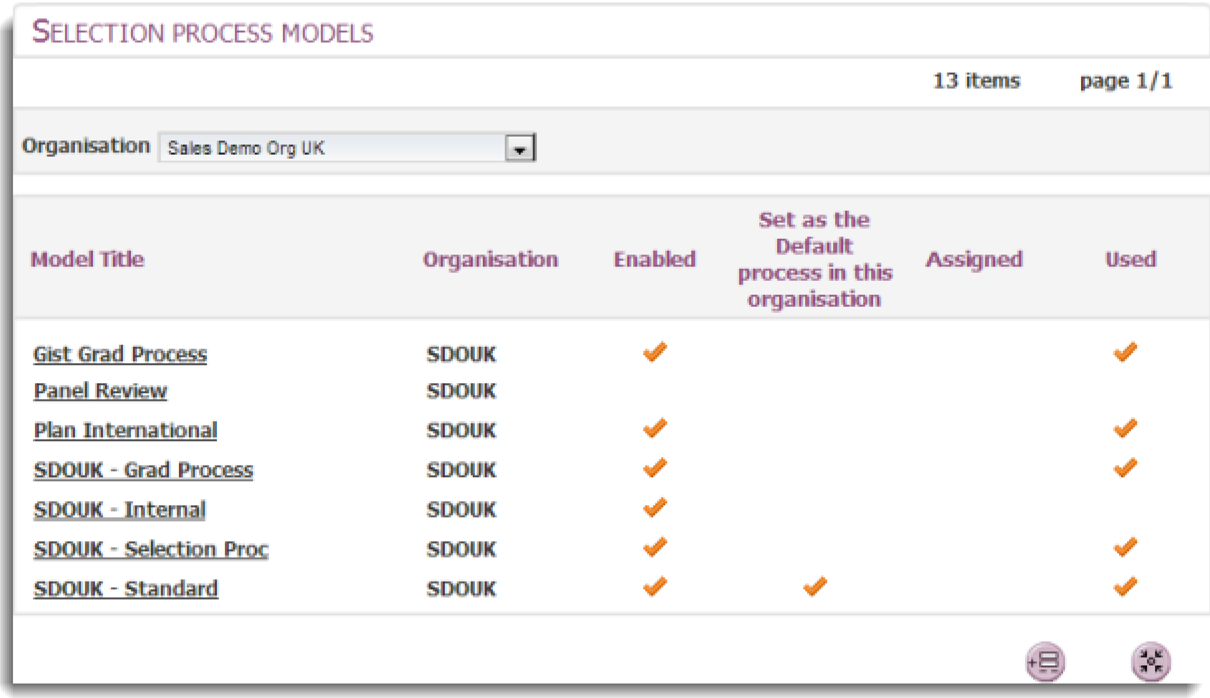


Setting up a Selection Process requires the use of templates. For more information refer to Creating Forms & Questionnaires (see page 278) and Managing Candidate Communication Templates (see page 310). Templates are used for different purposes at every step of the Selection Process.

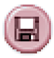
- Feedback report - A mandatory template used by recruiters for candidate evaluation (except for the step type Additional Information from candidate). Based on the feedback report score, automatic actions may be generated
- Templates for communication between recruiters (not mandatory) - For CV Review and Additional Assessment step types
- Invitation, Confirmation and Cancellation templates - Mandatory templates for Interview and Phone Screening step types
- Profile templates - For Additional Information from Candidate step type

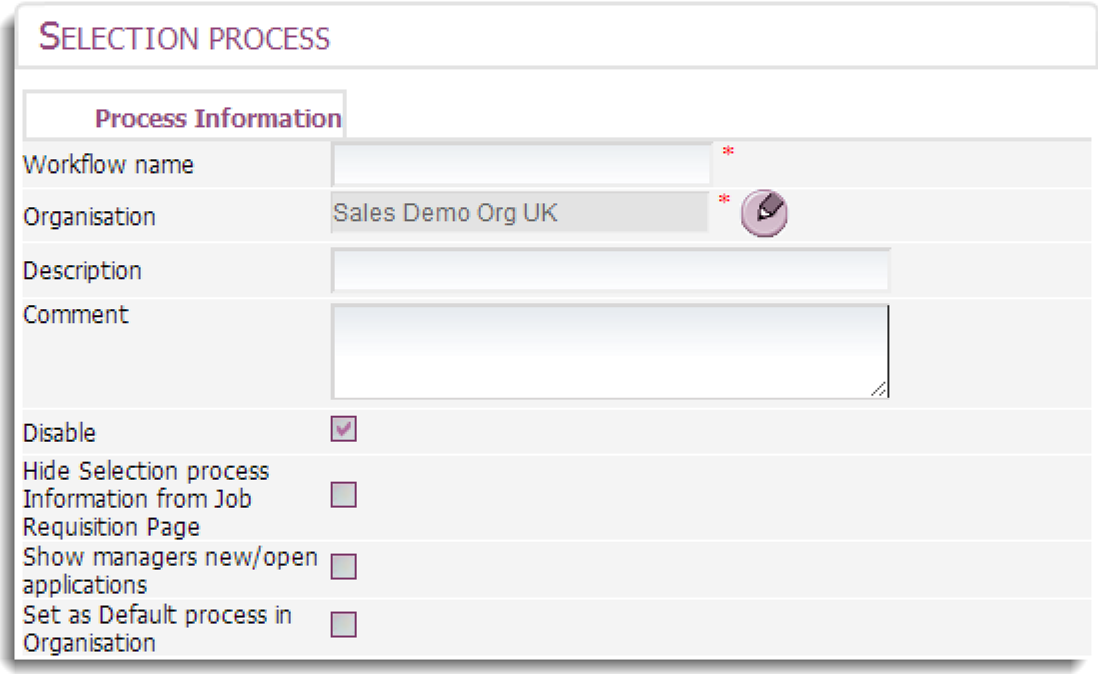
In addition, at least one session category must be defined if you wish to use the session step.

1. On the *Selection Process Models* page, click to create a new Selection Process.



Model Title	Organisation	Enabled	Set as the Default process in this organisation	Assigned	Used
Gist Grad Process	SDOUK	✓			✓
Panel Review	SDOUK				
Plan International	SDOUK	✓			✓
SDOUK - Grad Process	SDOUK	✓			✓
SDOUK - Internal	SDOUK	✓			
SDOUK - Selection Proc	SDOUK	✓			✓
SDOUK - Standard	SDOUK	✓	✓		✓

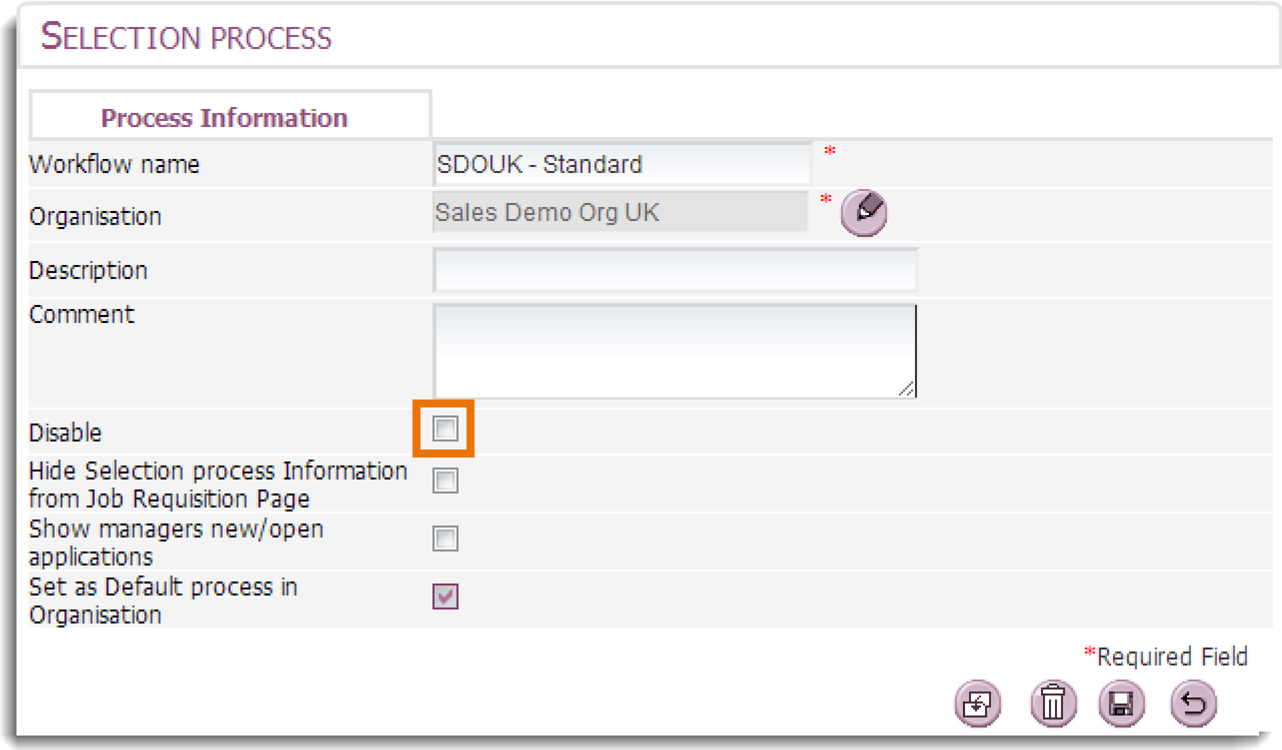
2. Enter the **Workflow name**, and if needed a **Description**, then click 



The Selection Process is created, but it is still inactive and its steps need to be defined.

Activating a Selection Process

1. By default the process is inactive when it is created. To activate it, deselect **Disable**.



- If you do not want to display information about the Selection Process on the *Job Requisition* page, select **Hide Selection process information from Job Requisition Page**.
- The option **Show Managers new/open Applications** controls the visibility of candidates for MSS users. MSS users see jobs and applications only if they are member of a job's operational team AND the application is short listed. MSS users typically cannot see new applications, because the application gets short listed later in the Selection Process. If this option is selected all applications are immediately shortlisted and as a result an MSS user will see them.

Defining Selection Steps

When you save the new Selection Process for the first time the **Process Properties** section becomes visible; this is where you define the selection steps. Each selection step consists of the following elements:

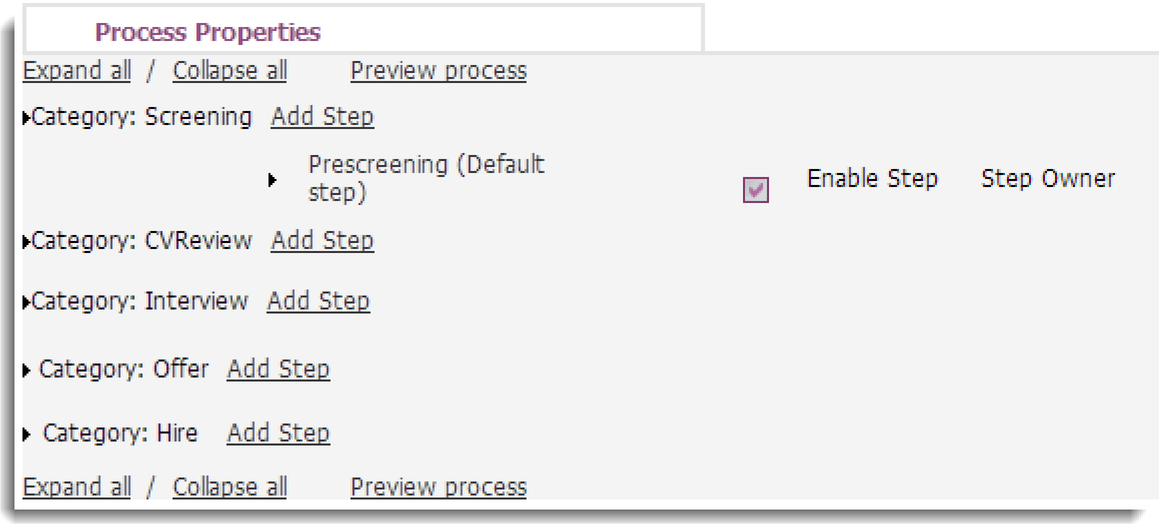
- Actors - Candidates and recruiters (step owners)
- Actions - CV review, interview, sessions, assessment tests
- Tasks - Fill in a feedback report
- Decisions - Made by users or automatic (proceed, put on hold or reject candidate)
- Communication - Carried out using templates

All these elements must already be configured by the administrators. Depending on the **Step Type**, specific fields are displayed. The following step types available:

- CV Review
- Additional Assessment
- Additional Information from Candidate
- Interview
- Session
- External System
- Quality Survey

These steps are set out in groups (Categories). With the exception of Quality Survey, which can only be created in the Hire category, all step types can be created in all groups:

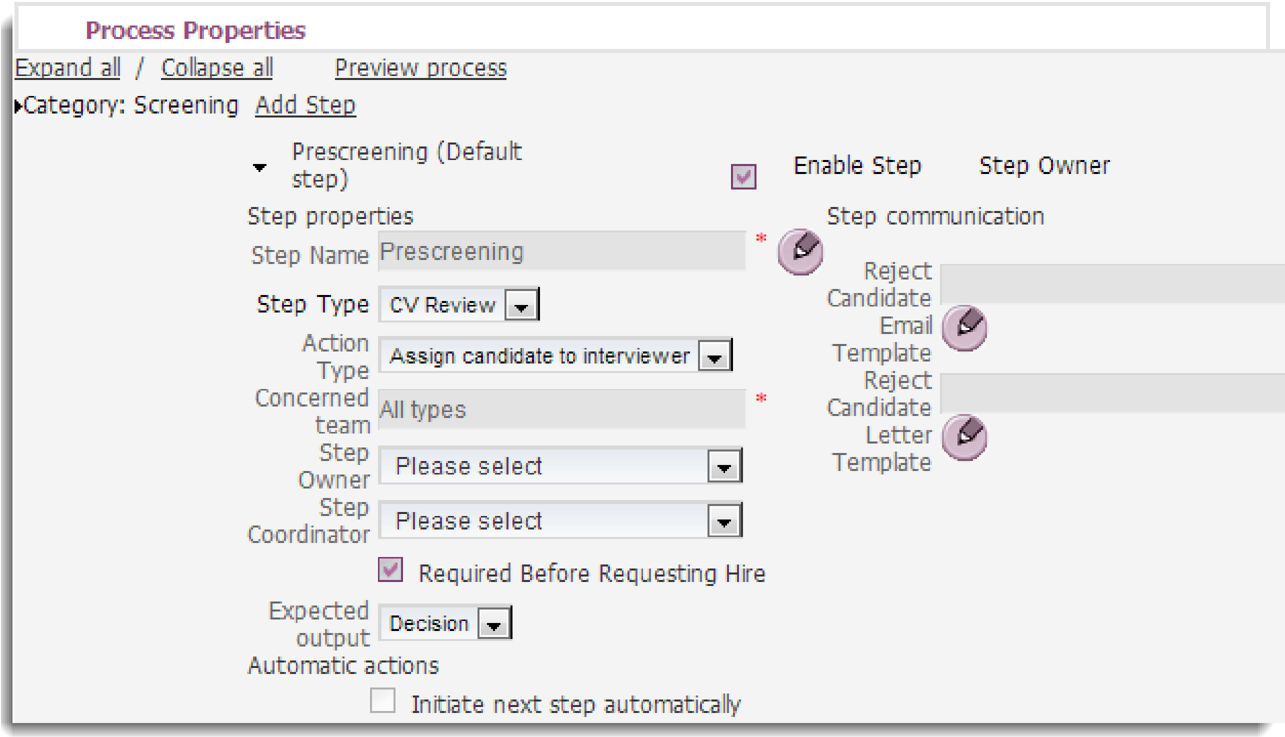
- Screening – Relating to any tasks that confirm the applicant's suitability for further processing for the requisition
- CV Review – Relating to processes where the CV and all other relevant documents are reviewed by an employee of the company to judge the candidate's fit against a requisition
- Interview – Relating to processes where an employee of the company evaluates the candidate's skills during a meeting.
- Offer
- Hire



You can create up to 25 steps for each Selection Process. For each step you must define:

- The step name
- The step type
- The action type
- The team involved
- Expected step output
- Templates to be used (depending on the step type)

- Delay before setting a task as overdue



You can also specify here whether the step is **Required Before Requesting Hire** (which means that the Hiring process cannot be started until this step is Closed).

At each step there must be some kind of output, and its nature must be defined at step definition. In general, feedback (in the form of a Feedback Report or a completed Questionnaire) must be provided from candidates or recruiters, depending on the step type. To enable workflow automation, TalentLink offers these additional options:

- Feedback Report and decision – After the Feedback Form is completed, a decision is expected from the recruiter who reviewed the candidate file. This is done by selecting one of the options available at the end of the template: Proceed, Reject, Put on Hold. Selecting one of the options determines whether the next selection step can start automatically
- Feedback Report and score decision – If a score pattern is defined for the expected Feedback Form this can trigger automatic actions (Proceed, Put on Hold, Reject) based on the overall score received by the Candidate

Steps can be triggered automatically. Refer to Automatically Start Next Step (see page 206) for more information.

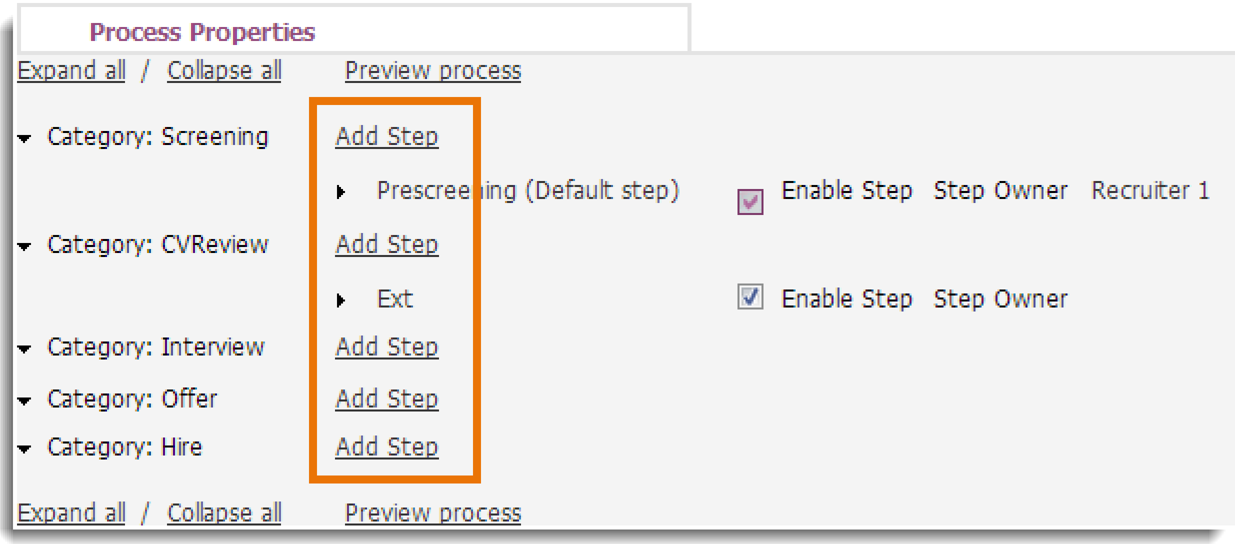
The process for creating steps is described next. The various types of steps are explained afterwards in Selection Step Types (see page 200).

Creating a Selection Step

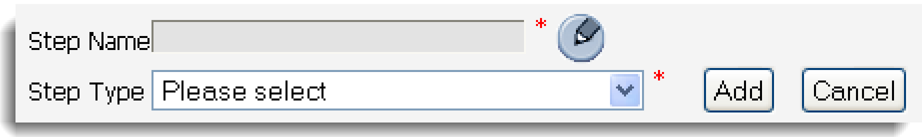
The options that are available and required may vary from one step type to another. The following example shows a list of base settings, and each step type is explained along with a description of the specific settings.

ⓘ There is a default step which is enabled whenever a new process is created: the *Prescreening* step. No additional configuration is necessary and the step is pre-configured with the required elements. This step does not have a Feedback template related to it; you cannot edit it and you cannot disable it. However, you can rename the step and you can add rejection email templates to it, which is essential if you have any pre-screening rules set up

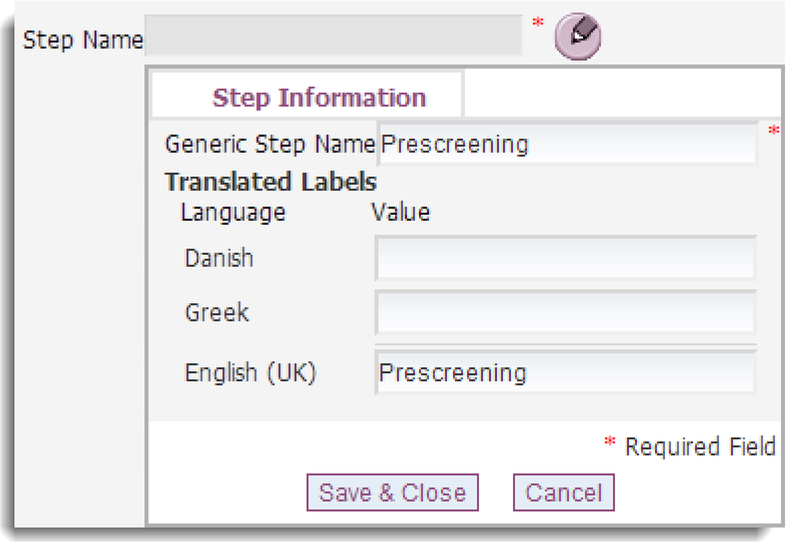
1. To create a new step, click **Add Step** next to the category name.



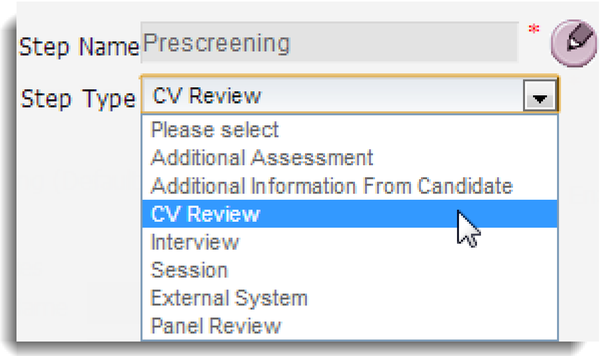
2. Click  to enter the **Step Name**.



3. Type the **Generic Step Name** and translations for any active languages, then click **Save & Close**.

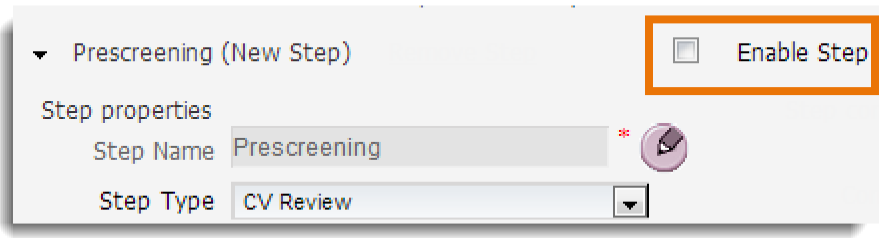


4. Select the **Step Type** from the dropdown list then click **Add** to create the step.



The step is created and the settings are displayed. Click the step name to collapse/expand the settings.

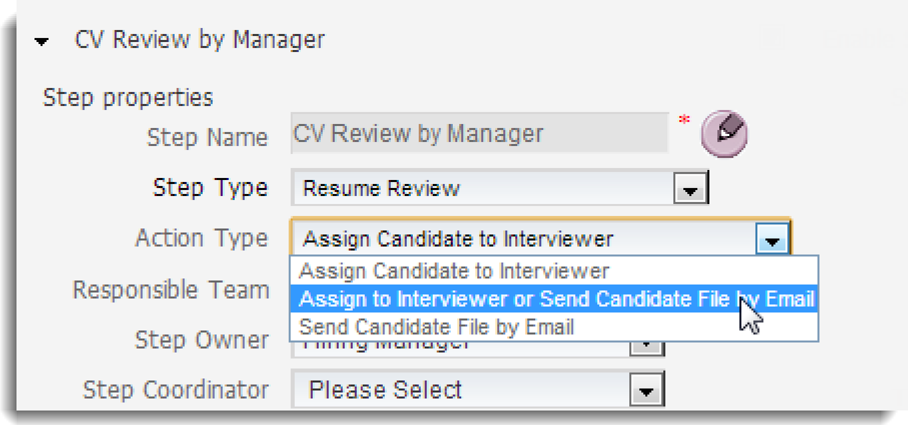
5. Select **Enable Step**.



ⓘ The above actions are identical for all step types, however the options explained in the previous topics may vary from one step type to another. Refer to the step type descriptions for configuration exemptions.

Setting Step Properties

1. Select the **Action Type** from the dropdown list.



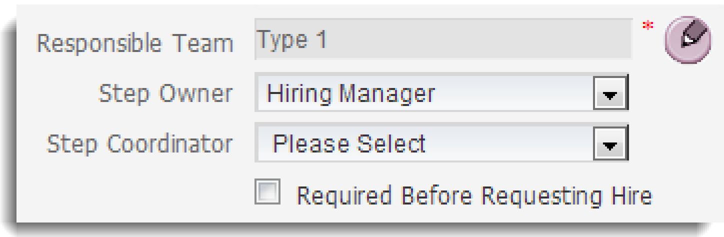
Depending on the step type you've chosen, this list will either contain one option, or three. The options define who this task is assigned to:

- *Assign Candidate to Interviewer* - Sends the task to the Communication Centre of a TalentLink user to complete their feedback within the system
- *Send Candidate File by Emai*l - Sends this task to a non-TalentLink user via email, who will provide their feedback outside the system
- *Assign to Interviewer or Send Candidate File by Email* - Provides the flexibility to use either method depending on who the recruiter chooses to send the task to

In each case the task is to fill in the Feedback Report relating to a step.

2. Click  to edit the **Responsible Team**.

The Responsible Team specifies which user types have the right to submit, perform and close the step.



3. Select the **Step Owner** and the **Step Coordinator**.

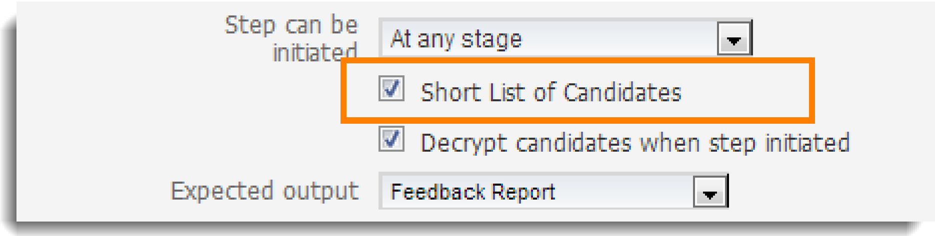
The Step Owner is the user who is automatically tasked with completing the Feedback Form for this step. These can be role users, for example Recruiting Team 1, or named users.

The Step Coordinator is the user who receives any messages regarding delays in the process completion, and notifications when the step has been completed.

4. If you select **Required Before Requesting Hire** the step becomes a milestone in the Selection Process. As the step is mandatory, recruiters must complete it before starting the Hiring Process.
5. Define when the **Step can be initiated**. This means that the availability of the step is related to the current application status.

The options are:

- *At any stage* - The step can be assigned at any stage in the process
- *At Offer stage* - The step can be assigned only when the application status is Offered
- *After offer is accepted* - The step can be assigned after the application status is Offer Accepted
- *After candidate is hired* - The step can be assigned after the application status is Hired



6. You can choose to shortlist a candidate by selecting **Short List of Candidates**. This means that the specific candidate's file will be visible to Manager Workspace users during this step.
7. If candidates come from a site with the Anonymous Candidates Feature turned on (see page 118), you must at some point opt to decrypt the information relating to candidates' personal data. To do this select **Decrypt Candidates** at a suitable step.

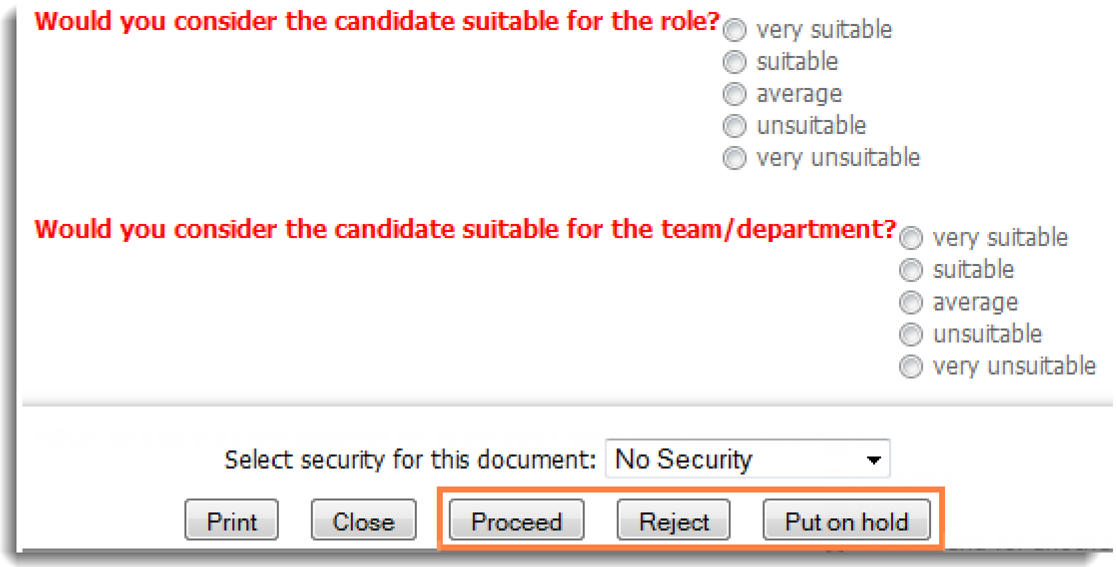
   The Anonymous Candidates feature refers to the possibility of hiding candidate's personal information for recruiters in the Back Office. This functionality is activated at site level (in case of external/internal sites).

8. The **Expected output** for a step is related to the FeedBack Template selected in the **Step Communication** section.

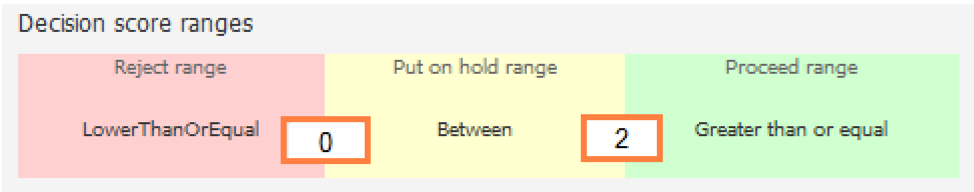
   In general there are three possible options (restricted in some of the step types):

- *Feedback Report* – Candidates or recruiters (depending on the step actor) must fill in the Feedback Report
- *Feedback Report and Decision* – After a recruiter fills in the Feedback Report they must also take a decision about the candidate (Reject, Proceed or Put on Hold). This decision is related only to the current step, not to the whole Selection Process

- *Feedback and score decision* – If a scoring pattern is defined for the Feedback Report template, the system may carry out automatic actions (Reject, Proceed or Put on Hold) on the candidate. The action is related only to the current step, not to the whole Selection Process



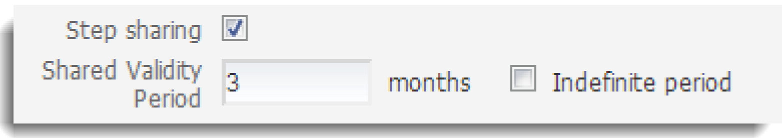
If this option is selected the **Decision score ranges** section is activated. There are three score ranges: **Reject range**, **Put on hold range** and **Proceed range**. Depending on the score received from the Feedback Report the system acts accordingly.



In the example, if a feedback score is:

- Lower than or equal to 0 the step is closed with the decision Reject
- Between 0 and 2 the step is closed with the decision Put on hold
- Greater than or equal to 2 the step is closed with the decision Proceed

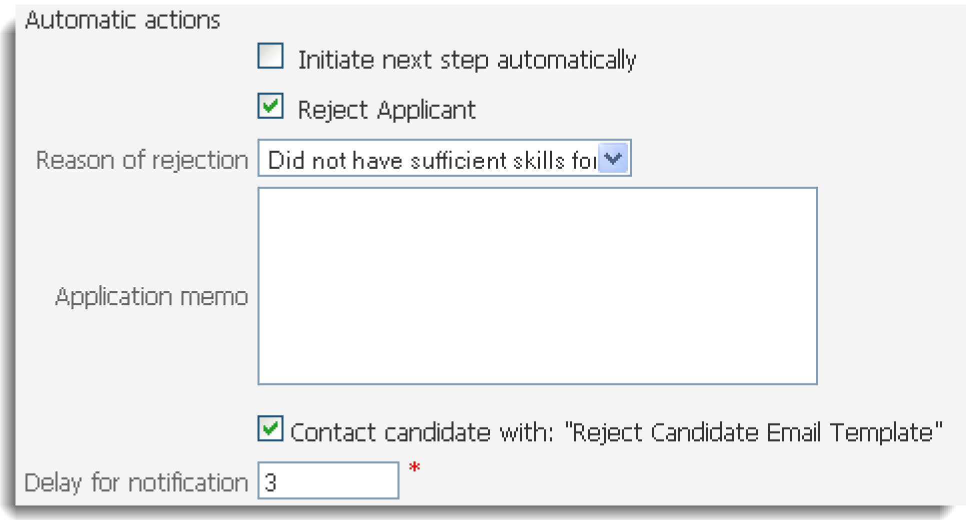
9. If you enable **Step sharing**, step feedback can be shared between all applications from the same candidate. As an example, for a language test step, the candidate does not need to take the test more than once if applying for more than one position. The step output, in this case the language test results, may be shared between different Selection Processes conducted for the same applicant.



You can also define the time period when the step output is shared. This may be for a specific time period, or indefinitely.

ⓘ The shared step must use the latest available version of the Feedback Form. If a new version of the Feedback Form is created, the Selection Process must be manually saved again. If not, the shared output functionality using this Feedback Form will not work.

10. You can push the process and choose to **Initiate next step automatically**. If this option is active, once the selection step is complete, actions relating to the following step are triggered automatically.



Initiate next step automatically is enabled only if:

- There is at least one subsequent step configured
- Either **Feedback Report and Decision** or **Feedback and score decision** is selected as the **Expected Output**.

In both cases, **Proceed** must be the output decision of the step (either user-selected or automatic). For example if a recruiter decides to put a candidate on hold, the next step will not be triggered automatically, which also happens if the feedback report score is to reject the candidate based on the score decision.

See Automatically start the next step (see page 206) for further information about this feature.

11. Select **Reject Applicant** to enable a candidate to be rejected permanently from the Selection Process.

This option may be activated only if **Feedback report and decision** or **Feedback and score decision** is selected as the expected output. In both cases Reject must be the output decision of the step.

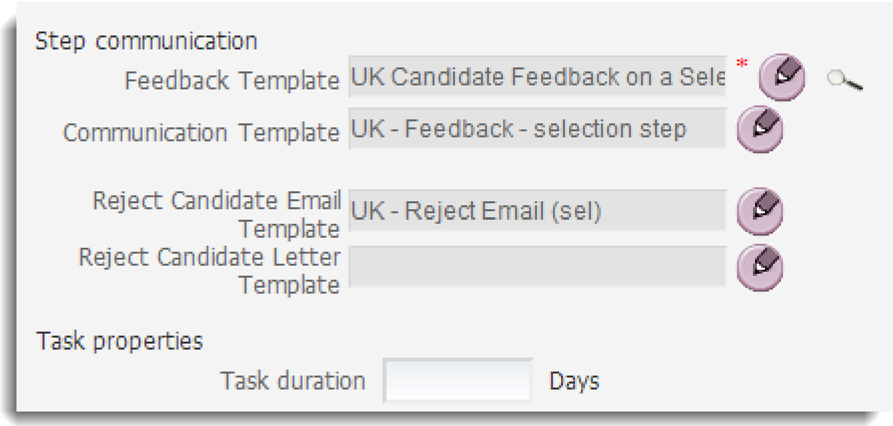
The system will reject candidates not only at the step level but from the whole Selection Process. The Application Status is *Rejected*.

If the **Reject Applicant** option is selected additional information must be provided:

- Reason of rejection – pick one from the dropdown list
- Application Comments
- Specify whether you want to contact the candidate with the appropriate rejection email
- If you want to contact the candidate you must specify the notification delay (calculated in days). If you select 0 the email is sent automatically once the candidate is rejected; 1 = one day later, and so on

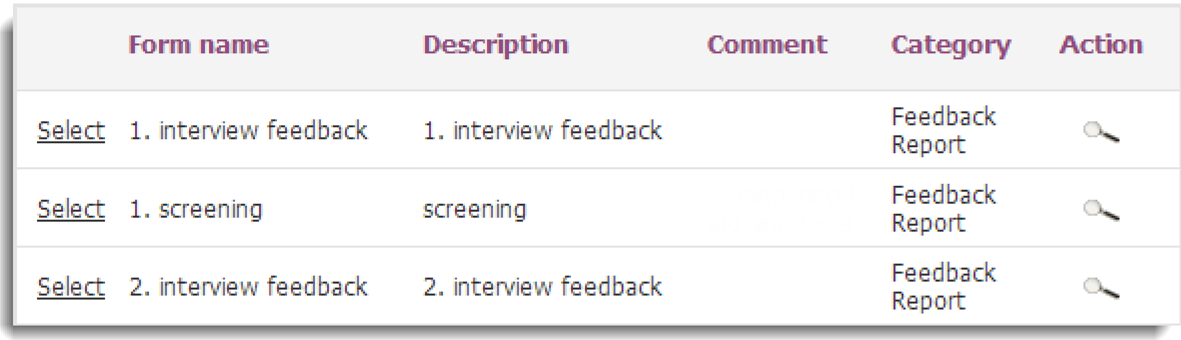
Selecting Step Communication

1. Click next to **FeedBack Template** to select the Feedback Report you require.



The list of available templates is displayed. If required you can filter them by organization.

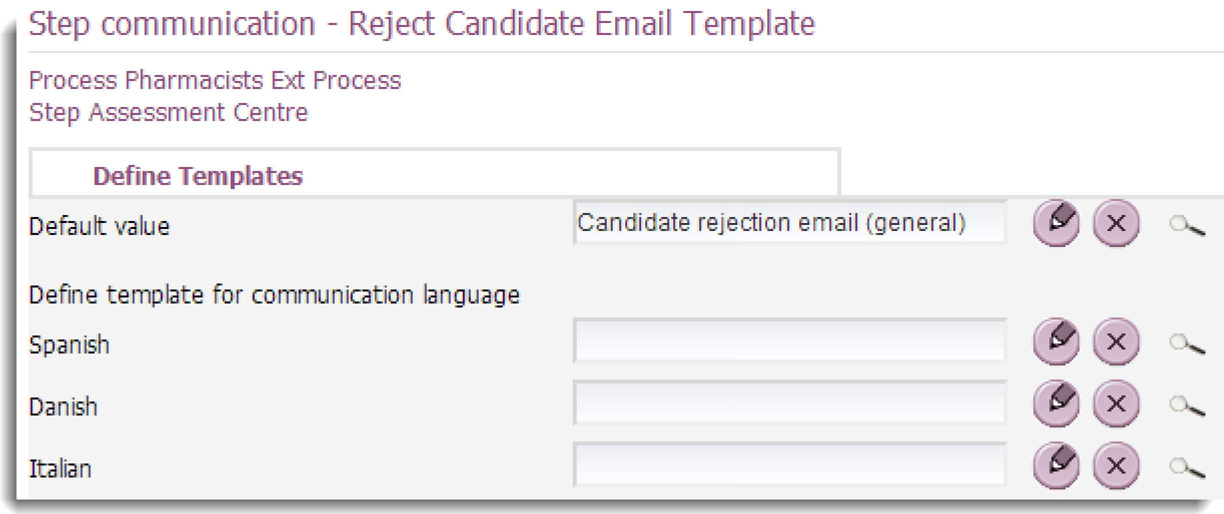
Templates are defined in Communication Templates (see page 310).



	Form name	Description	Comment	Category	Action
Select	1. interview feedback	1. interview feedback		Feedback Report	
Select	1. screening	screening		Feedback Report	
Select	2. interview feedback	2. interview feedback		Feedback Report	

2. To preview a template click .
3. Select the required template.
4. Click next to **Communication Template** to select the template you require.

The *Communication Template* page is displayed.



Depending on the step type you may select:

- Reject Candidate Email Template and Reject Candidate Letter Template
- Communication Template (CV Review, Additional Information from Candidate, Additional Assessment, External System, Quality Survey)
- Invitation to Candidate, Confirmation to Candidate and Cancellation to Candidate (Interview and Session)
- Confirmation to Interviewer and Cancellation to Interviewer (Interview)

5. Click to choose a default template and, if necessary, additional ones for any languages used in the account.
   - Click if you need to preview a template.
   - Click if you need to remove a selected template.

   When this step is submitted the recruiter must manually enter the text of the message to be sent. You can filter the list of displayed languages by organization.

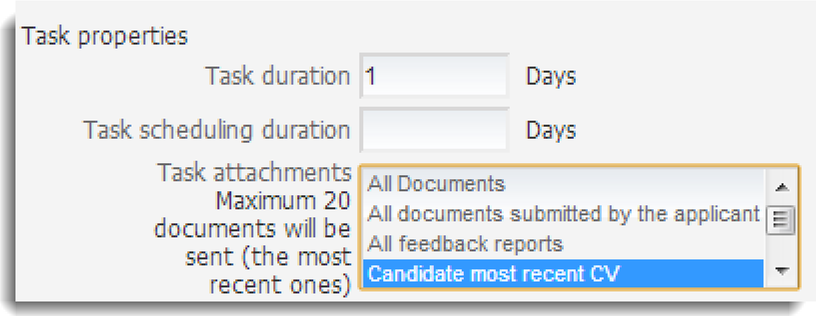
Setting Task Properties

You can define the duration of the task, and the task scheduling duration. This is a good way of informing recruiters and coordinators that tasks are taking longer than hoped.

1. Type the number of days in the **Task Duration** and **Task Scheduling Duration** fields.

   When this number is exceeded the user will see the task as overdue in their Communication Centre.

You can also specify what kind of documents will be sent to the user when they are requested to perform a task.



2. Select an option from **Task Attachments**.

Selection Step Types

Selecting a step type determines which additional fields you will need to fill out when creating the step.

Step Type: CV Review and Additional Assessment

You can add a *CV Review* step type at any point in the process, or you can group your CV Review activities under the specific group heading.

The *Additional Assessment* step type is used if you want to ask users to assess the candidate for a specific task other than a CV review. For example, if you want the office team to review the references received from a candidate, or if you want an assessment team to review a personality questionnaire the candidate has provided. You can send any of the candidate files with the request to facilitate this.

These step types do not have the Interview Scheduling feature activated. The scenario in such cases is as follows:

- The submitter of the step sends a message to the interviewer (through the Communication Centre or by email for external recruiters) containing the candidate file to review and the task of filling in the feedback report
- After reviewing the candidate file, the interviewer fills in the feedback report and the submitter of the step is notified through the Communication Centre that the step is Completed

ⓘ Please refer to To Create a Selection Step (see page 192) for instructions on how to configure this step type. There are no step type specific features in the configuration.

Step Type: Additional Information from Candidate

This step type enables recruiters to gather structured additional details from candidates by using a dedicated template (a Profile type of template). For example 'Ask candidate to answer more screening questions', or 'Have the candidate provide complete contact details before sending an offer', and so on.

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

Unique Configuration Settings

Action Type:

- Contact candidate (when using such a step type, the recruiter sends an email to the candidate)

Expected Output:

- Feedback Report (since the recipient of the task is the candidate, they cannot take a decision concerning the step)

For Candidate Feedback type the options are **Multiple** or **Unique**. A **Multiple** feedback type means that the link to the template sent to the candidate is accessible even after it is filled in once. Therefore, the candidate can update the template several times. A **Unique** feedback type means that the template can only be filled in once.

The following options regarding Communication Templates and Task properties are available:

- The Feedback Template for this type of step is a Profile type and is selected from the list of available Profiles
- In the **Task Properties** section you can only define the **Task Duration**

Step Type: Interview

An *Interview* step powers the eBooking or interview/phone screen scheduling functionality in the system. This step type has the Interview Scheduling feature activated and enables users to schedule meetings between candidates and interviewers, based on recruiters' availability.

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

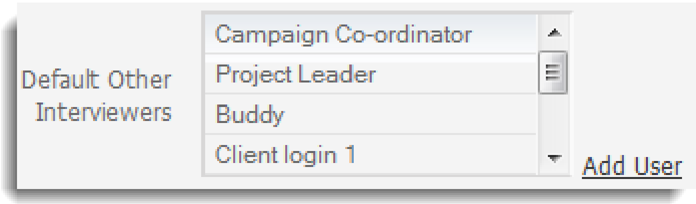
Unique Configuration Settings

Step Owner - The Step Owner is treated as the lead interviewer. All interviewers can provide feedback, but only the lead interviewer can submit decisions and close the step.

Action Type:

Action	Use When...
Assign Candidate to Interviewer	The interviewers are known to TalentLink, either as users or by email address.
Assign to Interviewer or Send Candidate File by Email	The interviewers are either known to TalentLink or external to TalentLink.
Send Candidate file by email	The interviewers are external to TalentLink.

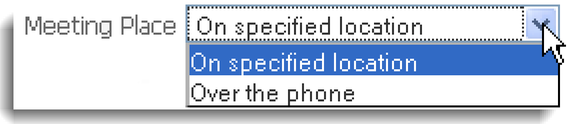
Default Other Interviewers - From the **Step properties** section you can specify multiple interviewers who can provide feedback after an interview.



Expected Output:

- Feedback Report
- Feedback Report and Decision
- Feedback and Score Decision

Meeting Place - This can be a geographical location or a phone meeting. This step can be used to book a phone interview slot with a recruiter, as well as for traditional face to face interviews.



In the **Step Communication** section you can define the following templates:

- Invitation templates – Used to automatically invite candidates to interviews
- Confirmation templates – Used to send out confirmations about the scheduled interview
- Cancellation templates - Used to send out notifications to participants about an interview being cancelled

Step Type: Session Step

This step type enables recruiters to manage interview sessions where one or more interviewers may interview one or more candidates who have booked seats to sessions themselves. This is typically used in assessment centres where several candidates may be assessed at the same time.

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

Unique Configuration Settings

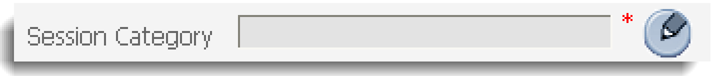
Action Type:

- Assign Candidate to Interviewer

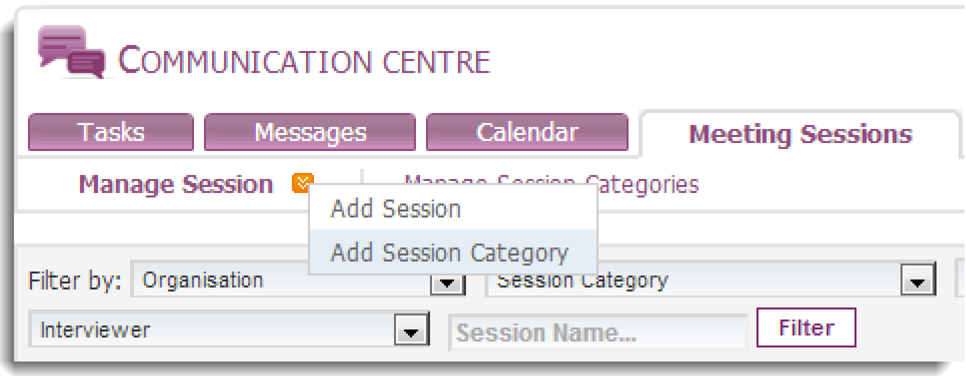
Expected Output:

- Feedback Report
- Feedback Report and Decision
- Feedback and Score Decision

The option to assign a step owner is disabled as the Session Category organizer automatically becomes the step owner. A Session Category stores the standardised information for each session type, for example, locations, seats, and so on. Only sessions assigned to this specific category are presented to users in the invitation sent in this step.



ⓘ Session Categories must already be defined. This is done in **Communication Centre > Meeting Sessions > Manage Session Categories > Add Session Category**.



ⓘ Email templates must already exist. Refer to Creating Email Templates (see page 312) for full instructions on creating these.

ⓘ Only email templates for communication with candidates can be selected here. Templates for communication with recruiters are to be defined during the creation of the session category, in the Communication Centre. For more information see *Communication Centre* in the TalentLink User's Guide.

If you select the checkbox **Send VCAL?** in the **Step Communication** section, recruiters can choose to attach a .vcal file to the outgoing message. Candidates can open this attachment and add the interview date and time to their own calendar system, such as Microsoft™ Outlook. The calendar appointment will be shown in the time zone of the interview location.

Step Type: External System

This step type enables a customer to integrate third party technology into their recruitment process. For example, this could include a background check, an online testing toolkit or an export to an HRIS/ERP platform.

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

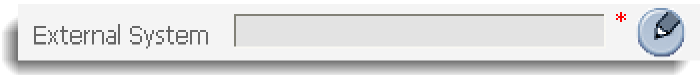
Unique Configuration Settings

Action Type:

- Send Candidate to External System

Expected Output:

- Feedback Report (it is not possible to trigger automatic decisions based on External system scoring)



When you click next to **External System**, the list of all connected third-party systems is displayed. Users with the appropriate access rights can see all third party systems configured on the platform for the relevant organization levels, selecting shared integrations or those just for individual organization levels.

ⓘ An external system must be interfaced with TalentLink. Please ask your consultant for more details about the interface.

Step Type: Panel Review

The *Panel Review* step type enables up to a maximum of 30 individuals (panel members) to review and submit feedback about a candidate using a defined feedback form. The panel members consist of a panel lead and panel members.

The panel lead can view the feedback and score per candidate, and will receive notification once all panel members have submitted their feedback. A non-TalentLink user can be appointed as a panel leader, however they will not be able to view who the other panel members are or the scoring details.

The panel members can be TalentLink users and non-TalentLink users. TalentLink users will receive notifications about candidates in the Communication Centre; non-TalentLink users will receive an email containing the candidate information and a link to the feedback form.

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

Unique Configuration Settings

Panel Configuration:

- Min Members
- Max Members upper limit: 30
- Minimum number of Feedback
- Panel Feedback

- Default Members

Once a *Panel Review* step has been defined for an organization TalentLink users will see a Panel Review column on the **Selection / Hiring** tab of the *Job Details* page. There will also be a *Panel Review* step shown on the **Applications** tab of the *Candidates Details* page.

Step Type: Quality Survey

This step type enables a customer to use the email and templates features of the system to gather information in the form of surveys. For example, this could include candidate satisfaction surveys, or quality of hire surveys.

The *Quality Survey* step is very similar to the *CV Review - Additional Assessment* or *Additional information from Candidate* step types, the difference being that it is triggered automatically when certain events happen in the system, such as:

- The offer is accepted
- The offer is rejected
- The contract starts
- The contract ends
- The application is withdrawn
- Before the contract ends

ⓘ This step type is available only on the last category of steps in the **Process Properties** section (**Category: Hire**).

ⓘ Please refer to Creating a Selection Step (see page 192) for instructions on how to configure this step type. Configuration features specific to this step type are described next.

Unique Configuration Settings

Action Type:

- Assign Candidate to Interviewer
- Assign to Interviewer or Send Candidate File by Email
- Send Candidate file by email
- Contact Candidate - This is connected to Step Communication templates. The template used for the feedback is selected from the Profile and Questionnaire template types

Expected Output:

- Feedback Report

The following options regarding communication templates and task properties are available:

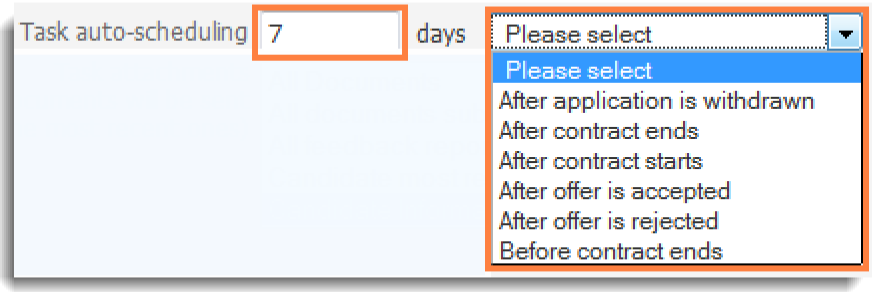
It is not possible to define Rejection templates in communication templates.

In the **Task Properties** section you can define:

- Task Duration
- Task Auto-Scheduling
- Task Attachments

Depending on the Task Auto-Scheduling configuration, the step is initiated/started/assigned as soon as a certain event occurs (select the event from the dropdown list):

- The offer is accepted
- The offer is rejected
- The contract starts
- The contract ends
- The application is withdrawn
- Before contract ends



You can also initiate the step a certain number of days after/before these events occur (through a daily Automatic Process). For this you need to enter the number of days and then select the event which triggers the step.

Automatically Start Next Step

It is possible to configure automatic steps in your Selection Process so the system starts the next step automatically if certain conditions are met. There are specific actions which trigger the automatic launch of the next step in the Selection Process. All step types can be configured to start automatically; however, you must ensure that specific actions are completed.

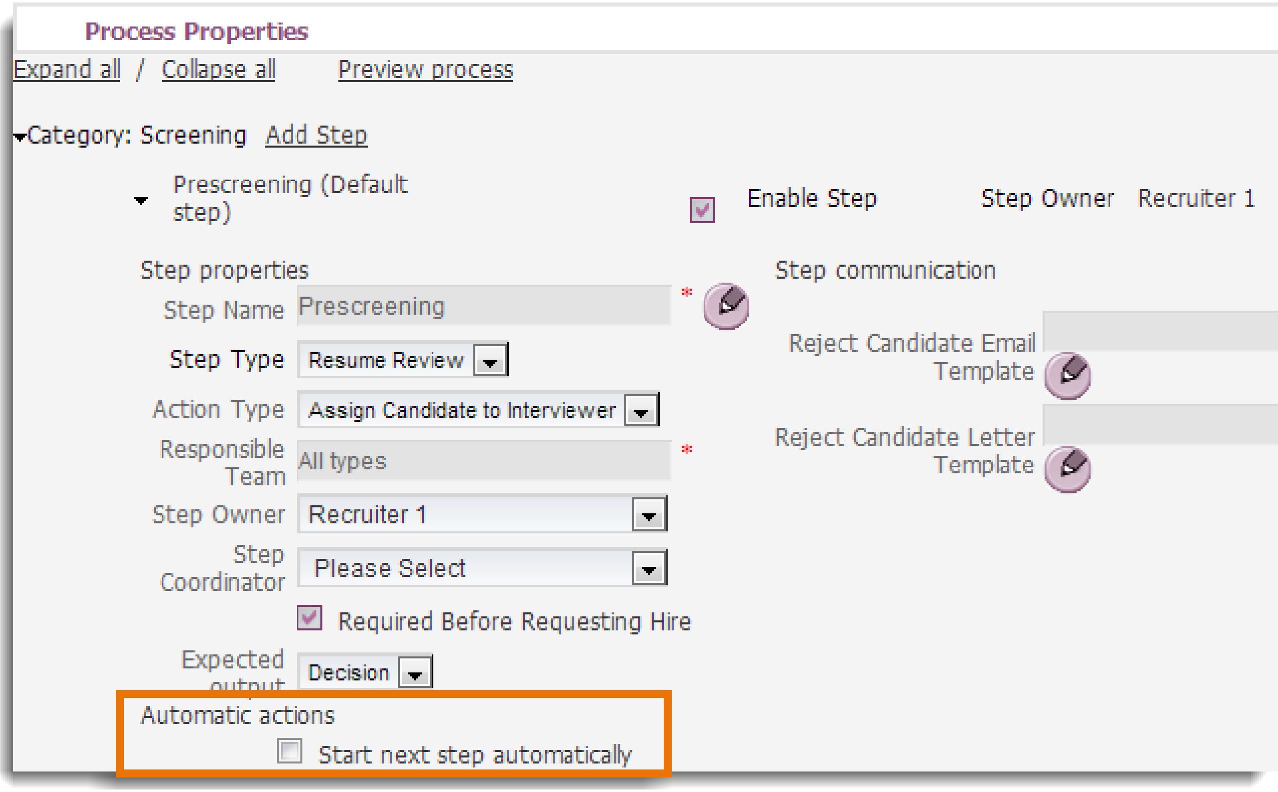
ⓘ A *Quality Survey* step cannot be automatically triggered by another step. These are automatically triggered by events in the system.

- Actions which are necessary on Configuration level:
  - Step owners must be defined (for all types of steps)
  - Expected Output – Only Feedback and Decision, Feedback and Score Decision (the step starts only if the decision taken by the interviewer during the selection process is Proceed)
  - Feedback report templates must be defined (this is mandatory for all step types)
  - Communication templates must be defined
- During the selection process of a candidate, the recruiter must decide to Proceed as the first condition for the next step to be automatically launched. Additional conditions which need to be met on a step level:
  - For all step types - The step must be submittable
  - For all step types - The step can be initiated at the current application status
  - For *Meeting Session* steps - The step owner must have availabilities defined
  - For *Session* steps - There must be sessions with available seats created for the session category of the step

- For *Additional Information from Candidate* steps - The candidate must have a valid email address
- For *External System* steps - The candidate must have a valid email address

To configure an automatic step:

1. On the *Selection Process* page go to a step which is already configured and select **Initiate next step automatically**.



For each step type there are specific conditions that need to be met for successful configuration of this feature:

a) *CV Review and Additional Assessment*

- Step Owner defined

b) *Meeting Session*

- Step Owner defined
- Step Owner needs to be a TalentLink user
- Step Owner must have availabilities defined (action to be done in their **Communication Centre > Calendar** tab)

c) *Session*

- The selected Session Category must have an available session linked to it (action to be done in the **Communication Centre > Meeting Sessions** tab)

d) *Additional Information from the Candidate*

- The candidate must have an email address defined

e) *External System*

- The candidate must have an email address defined

A new test instance needs to be initiated.

If all conditions are met (both in Configuration and at step level), the following actions are automatically launched:

- *CV Review* - The step is submitted to the Step Owner
- Additional Assessment - The step is submitted to the Step Owner
- *Meeting Session* - The candidate is invited through e-booking
- *Session* - The candidate is invited to the available sessions
- *Additional Information from Candidate* - The candidate is contacted
- *External System* - The candidate is contacted and a new instance test is sent

---

ⓘ For all automatic actions, the author is the System user (the GSA). This is visible in the application page of the candidate and in their Candidate History. If there is a Step Coordinator for the automatic step, this user is notified in their Communication Centre:

ⓘ If the step started successfully.

ⓘ If the automatic start of the step failed.

ⓘ If the next step fails to start automatically, this action is registered in the Candidate History.

Saving/Previewing the Selection Process

1. When you have completed your selection process, click to save it. You can also preview your process by clicking **Preview process**.

Selection Process Versions

You can edit an existing Selection Process according to your company's requirements. Two types of changes can be made on a Selection Process:

Changes that do not trigger the creation of a new Process version

- Changing the Step Name
- Changing the Responsible Team
- Enabling or disabling **Required before Hiring process**
- Changing the Feedback Report
- Changing the Communication Templates
- Changing the delay before setting a task to overdue
- Enabling or disabling decryption of candidate data

Changes that trigger the creation of a new Process version

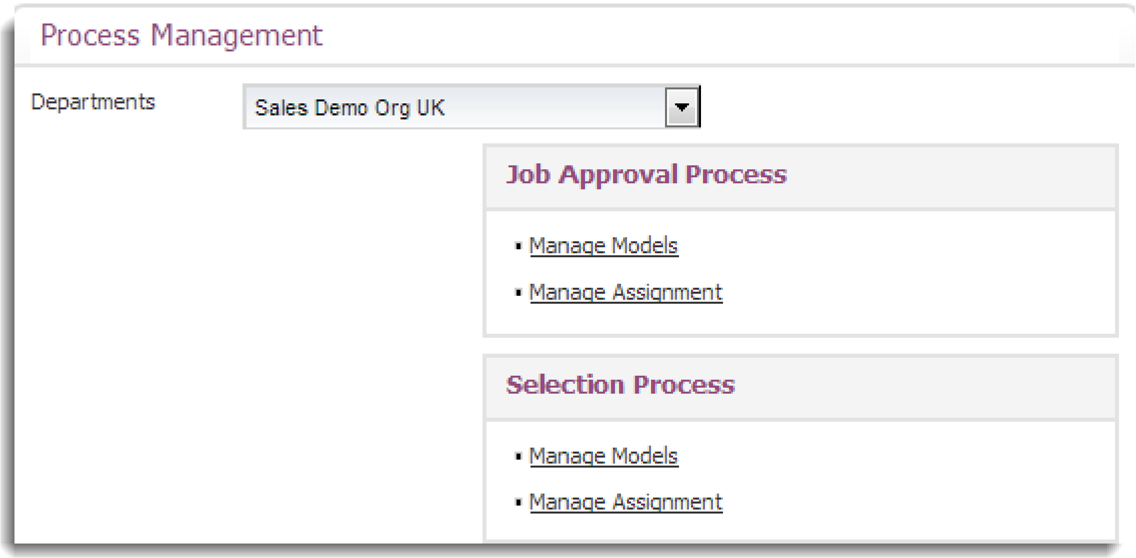
- Changing the Step Type
- Enabling or disabling a Selection Step

Differentiating between these changes is important since they impact the way that Selection Process versions are linked to candidates applying for jobs in a particular organization. If a new version of the Selection Process is created, this applies only to future candidates and jobs, while existing candidates linked to existing jobs continue to follow the old Selection Process.

Accessing Previous Versions of the Selection Process

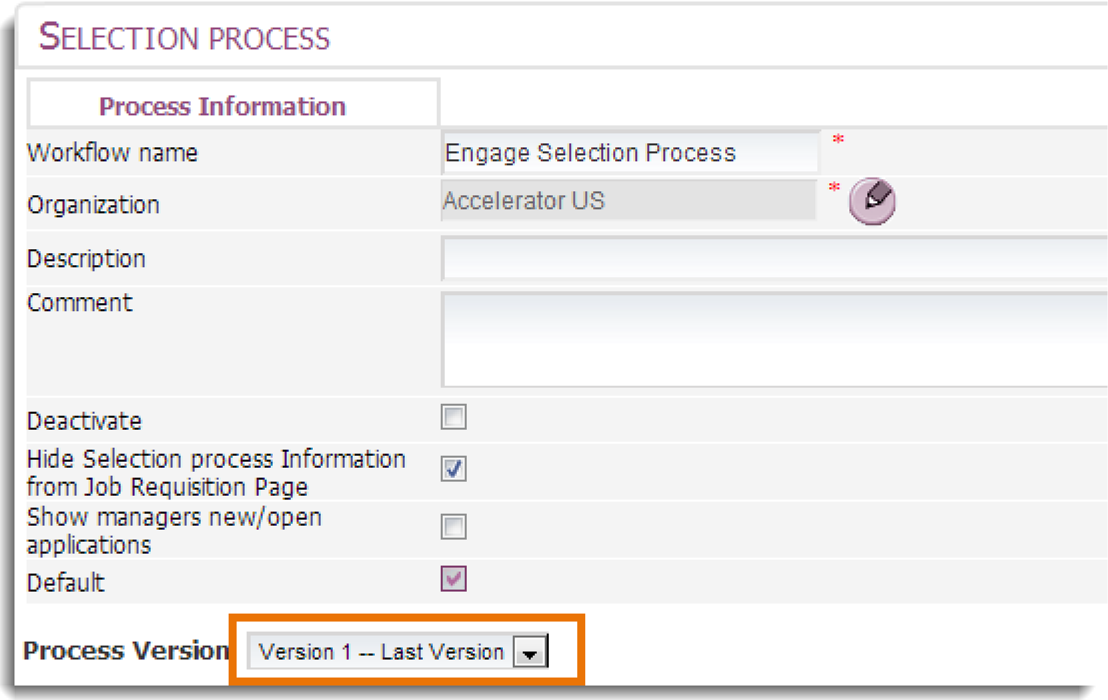
You can view old versions of a Selection Process from the *Selection Process* details page, by accessing the **Process Version** dropdown list.

1. On the *Process Management* page (see page 164), select **Manage Models** in the **Selection Process** section.



2. On the *Selection Process Models* page, select a process by clicking on it in the list.

3. Select the required Process Version from the dropdown list.

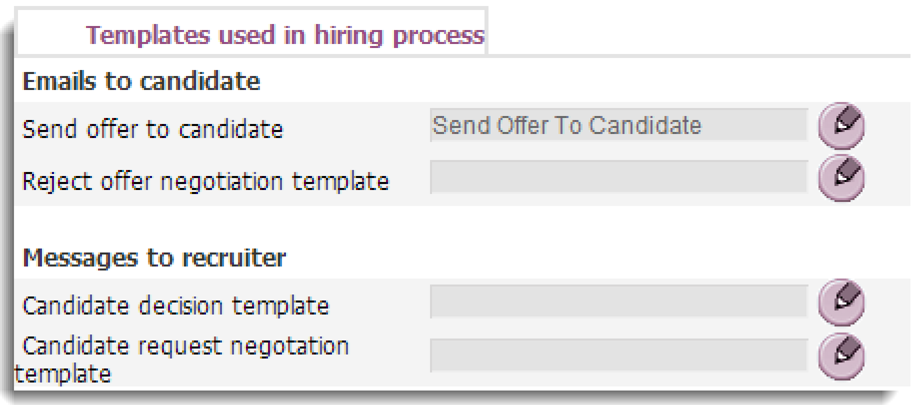


The *Selection Process* page corresponding to the chosen previous version is displayed. Information on this page is read-only.

Emails Used in the Hiring Process

At the bottom of the *Selection Process* page you can choose which email templates are used after a candidate has completed the Selection Process, and moves into the Hiring Process.

1. Click to select the required email template. Templates are defined in the Communication Templates module (see page 310).



- Send offer to candidate - Used when the recruiter selects the **Send Offer** option on the *Hiring Process* page
- Reject offer negotiation template - Used when the recruiter does not want to negotiate with the candidate
- Candidate decision template - Used when the candidate either accepts or rejects the offer

- Candidate request negotiation template - Used when the candidate does not accept the first offer, and makes a counter offer to the recruiter

ⓘ Offer negotiation is enabled in Company Configuration (see page 14).

Managing Selection Process Assignment

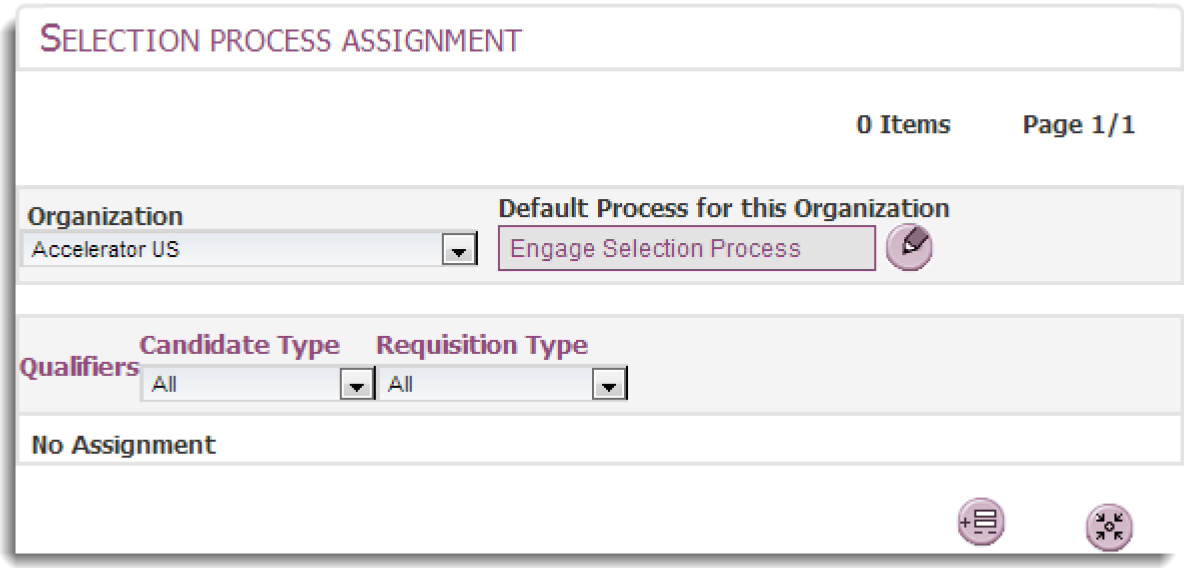
In this section you define which processes are activated for this organization and assign them in accordance with your company's requirements. You can activate a default process and also, for specific cases, processes based on qualifiers.

Default Selection Process

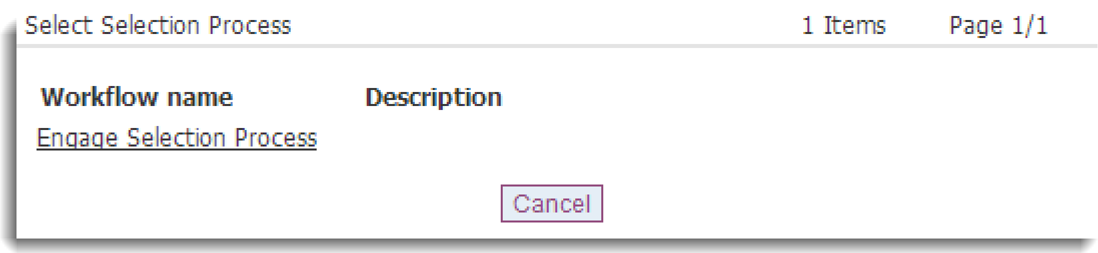
A Default Selection Process must exist before you can create jobs in any organization.

To activate a default Selection Process for an organization:

1. From the *Process Management* page (see page 164), in the **Selection Process** section, select **Manage Assignment**.
2. Click next to the **Default Process for this Organization** field.



3. From the *Select Selection Process* page, select a process by clicking on its name.



Unless there are other assignments, all candidates linked to jobs in this organization will use the default Selection Process.

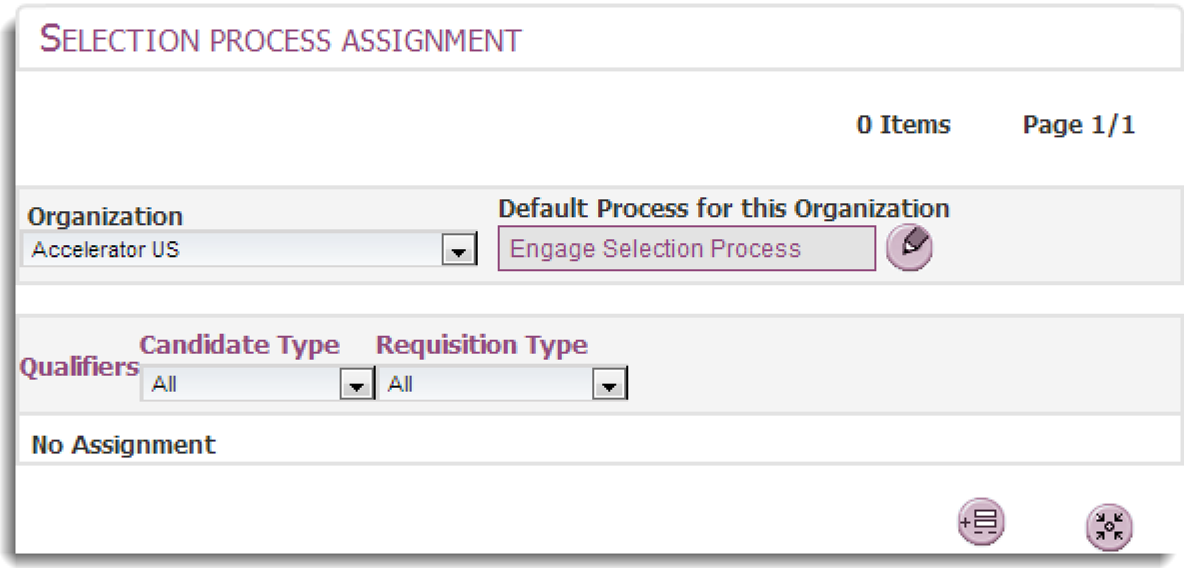
Specific Selection Processes

As well as activating a default process for an organization, you can also assign specific processes based on selected qualifiers.

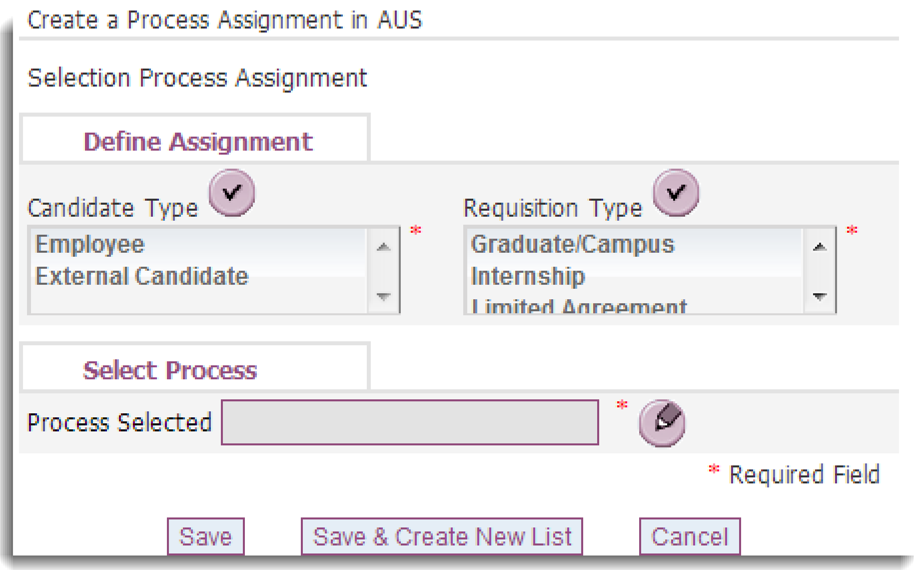
ⓘ For details of what Qualifiers are and how to set them, refer to Specific Job Approval Processes (see page 179).

You can use the default Qualifiers **Candidate Type** and **Contract Type** or define additional ones.

1. On the *Selection Process Assignment* page (see page 211), click to create a new assignment.



2. In the *Create a Process Assignment* page, select the values to which you want the specific process to apply.



3. Click to select the process, then click **Save**.

You can click **Save & Create New List** if you want to assign a different process for another value.

Default Application Process

The Application Process consists of all the steps a candidate who applies online must go through before submitting their application. Here recruiters define all the templates that must be filled in online. TalentLink users can create:

- Private Application Processes – On the job level, for each job advertisement to be posted (standard recruiters can do this – see the *Job Openings* chapter in the TalentLink User's Guide)
- Default Application Processes – On the organization level (only administrators can do this).

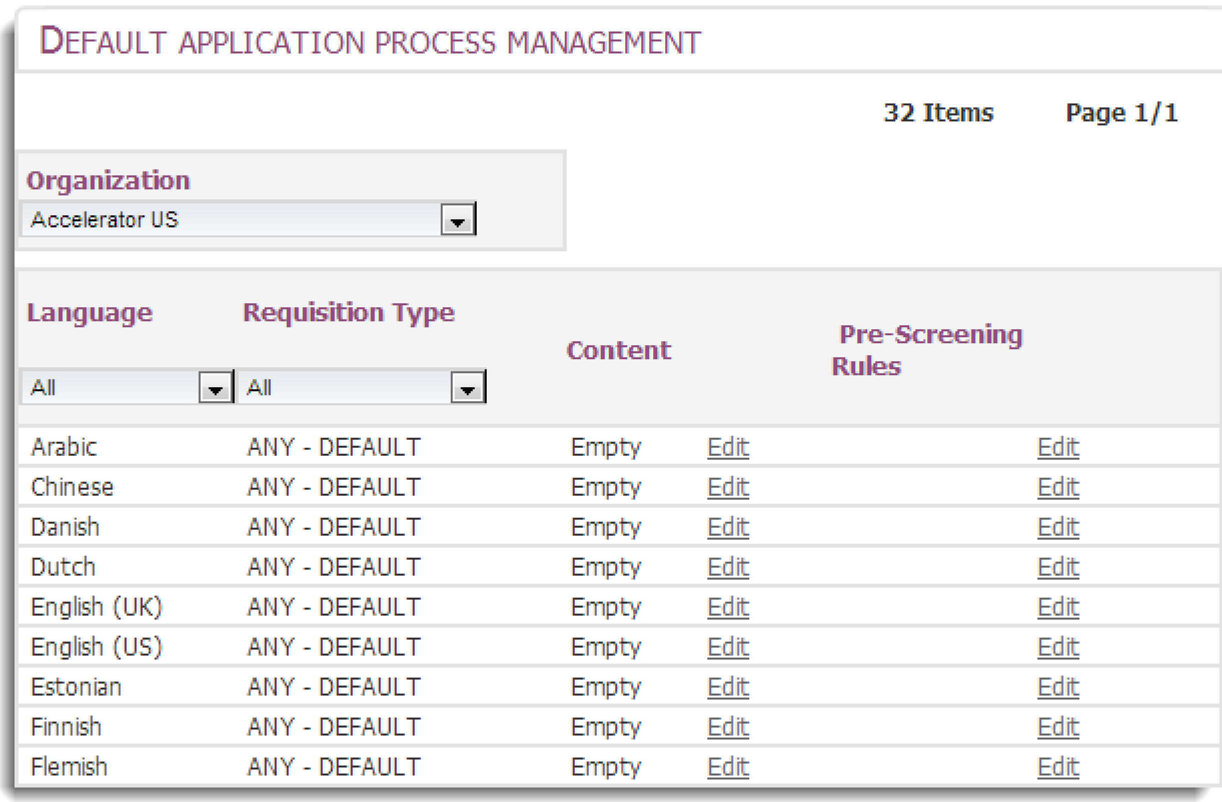
Each Default Application Process is created:

- Per organization
- Per language
- Per contract type

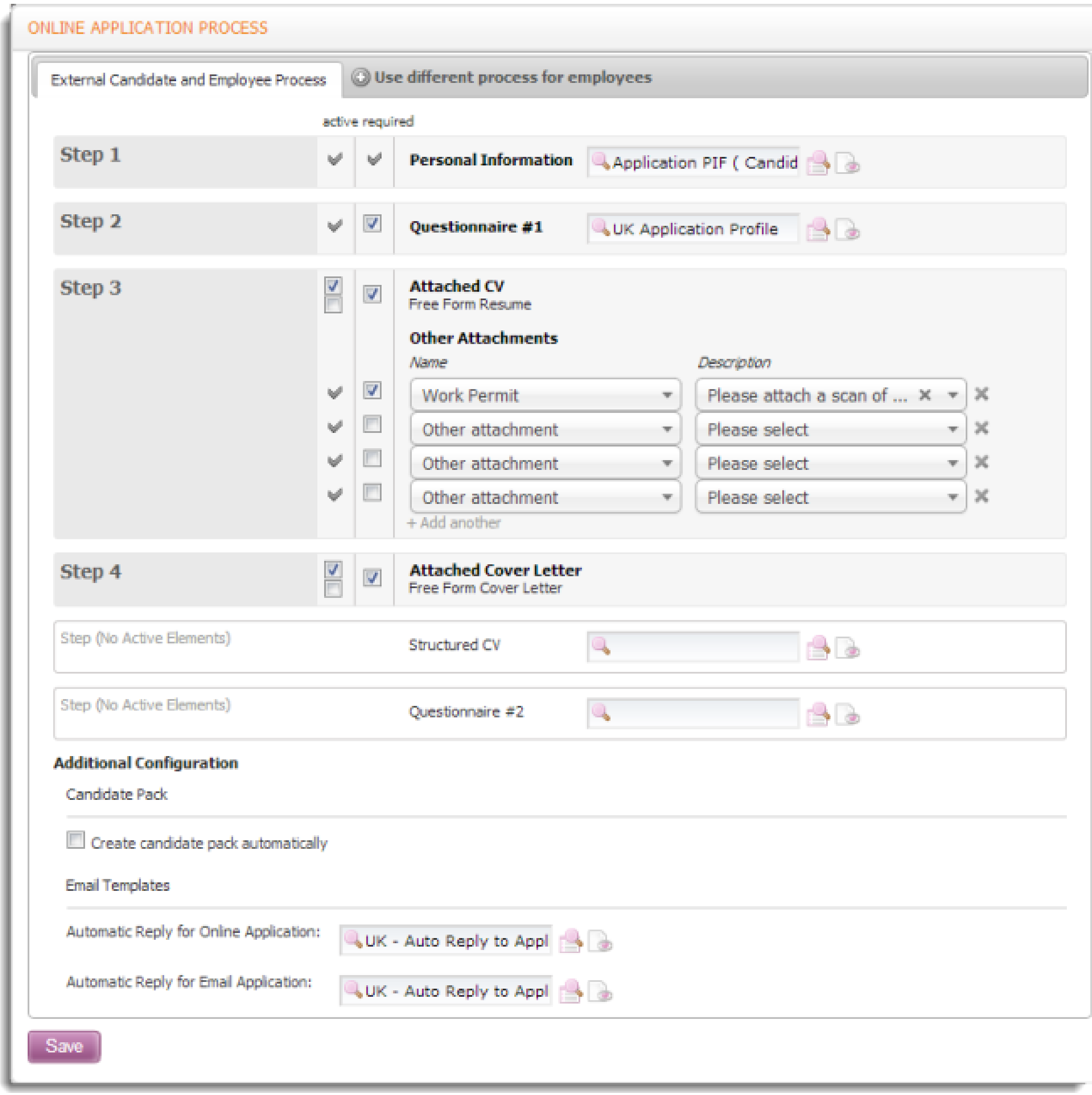
Having a default Application Process enabled means that all postings in a particular organization and created in a certain language use this Application Process. However, recruiters can still edit this process when posting the job if necessary.

Creating and Assigning a Default Application Process

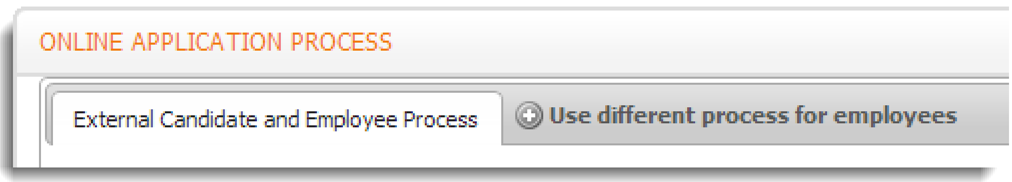
1. From the *Process Management* page (see page 164), in the **Default Application Process** section, select **Manage Assignment**.



2. On the *Default Application Process Management* page, select the first **Edit** link in the language row for which you want to set up a default Application Process.



If you need to set up the same default Application Process for both internal and external candidates, enter all the data in the *External Candidate and Employee Process* tab.



To define two separate Application Processes, select the *Use Different Process for Employees* tab. Two similar sections are displayed on the same screen, one defining the process to be used by external candidates and the other by employees.

ⓘ Administrators can require candidates to attach specific documents during the Application Process, for example, a cover letter. Users can override these settings during the assignment process.

ⓘ If attachments are marked as **Required**, a candidate cannot submit the application unless the required attachments are uploaded.

ⓘ To set documents as **Required**, select checkboxes in the **Active** column then select **Required**.

3. Select the PIF to be used by the organization. Click to search for the PIF or to preview the document.

ⓘ If the PIF is not configured at the OBS level the site PIF will be used. In either instance, the recruiter will be able to change the PIF when they are creating the job advert.

4. Select the templates to be completed by the candidate during the Application Process (if needed). You can view the templates selected by clicking :

- **Questionnaire #1 and Questionnaire #2** - Type the names of one or two questionnaires, or click to search for the questionnaire. Select the checkbox if this is a required document

The documents used during the Application Process are based on templates defined by an Administrator. For details refer to Creating Forms & Questionnaires (see page 278).

- **Structured CV** - Type the name of the structured CV, or click to search for the structured CV. Select the checkbox if this is a required document

5. Select the type of CV (if needed), then select the checkbox if this is a required document.

If **Attached CV** and **Free Form Resume** are both **Active** and **Required**, the candidate can select which one to upload.

6. Select the attachments to be uploaded during the Application Process from the **Other Attachments** dropdown list.

If **Other Attachments** is selected, you can select an appropriate **Description** from the dropdown box to help candidate understand which documents they need to upload. For details of how to configure this LOV, refer to Application Process Attachment Description (see page 79).

7. Select the type of Cover Letter (if needed), then select the checkbox if this is a required document.

If **Attached Cover Letter** and **Free Form Cover Letter** are both **Active** and **Required**, the candidate can select which one to upload.

8. Define the order of the steps by dragging and dropping them into position.
9. Select if the candidate pack is to be automatically created.
10. If applicable, select an automatic reply for online applications and/or email applications then click **Save**.

All job advertisements created for jobs in this particular organization and in the selected language follow this default Application Process, unless they are edited by recruiters during posting.

Defining Pre-Screening Rules

Pre-screening rules enable recruiters to filter large numbers of applications by defining questions to be filled in by candidates. Pre-screening also defines possible actions to be automatically taken by the system depending on the answers to these questions. Applications are filtered and candidates are dispatched in accordance with the selected criteria in templates.

ⓘ Pre-screening rules are sometimes referred to as Dispatching/Routing rules in TalentLink Back Office and in documentation.

Users can create:

- Private pre-screening rules – On the job level for each job advertisement to be posted (standard recruiters can do this – see the Job Openings Standard User guide)
- Default pre-screening rules – On the organization level (only administrators can do this)

Each default pre-screening rule is created:

- Per organization
- Per language
- Per contract type

Having a default pre-screening rule enabled means that all applications for posted jobs belonging to a particular organization and created in a certain language follow this rule. However, recruiters can still edit/add/remove pre-screening rules at job level.

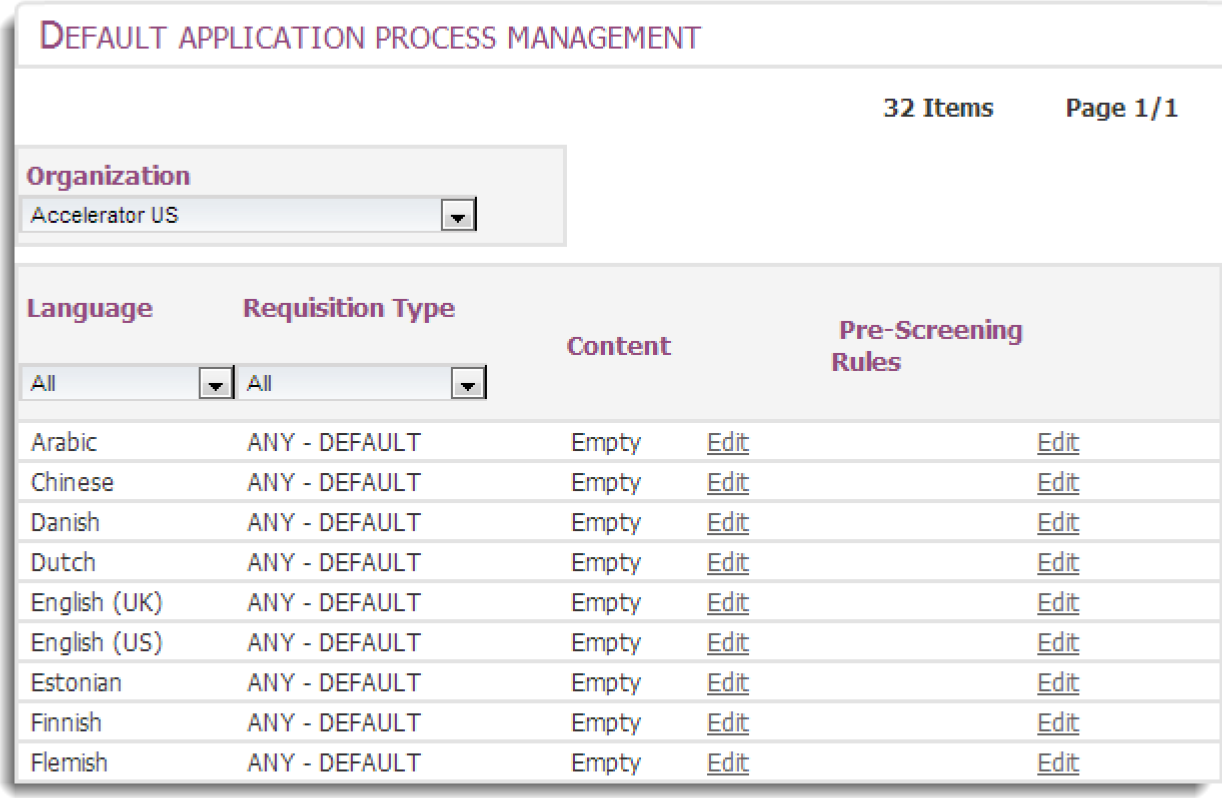
Pre-screening rules are of the following types:

- Reject applicant (see page 218)
- Link applicant to another job (see page 219)
- Automatically start the Selection Process of the candidate (see page 220)

Creating a Pre-Screening Rule

To define a default pre-screening rule a default Application Process must exist, because rules are based on templates defined in the Application Process.

1. From the *Process Management* page (see page 164), in the **Default Application Process** section select **Manage Assignment**.



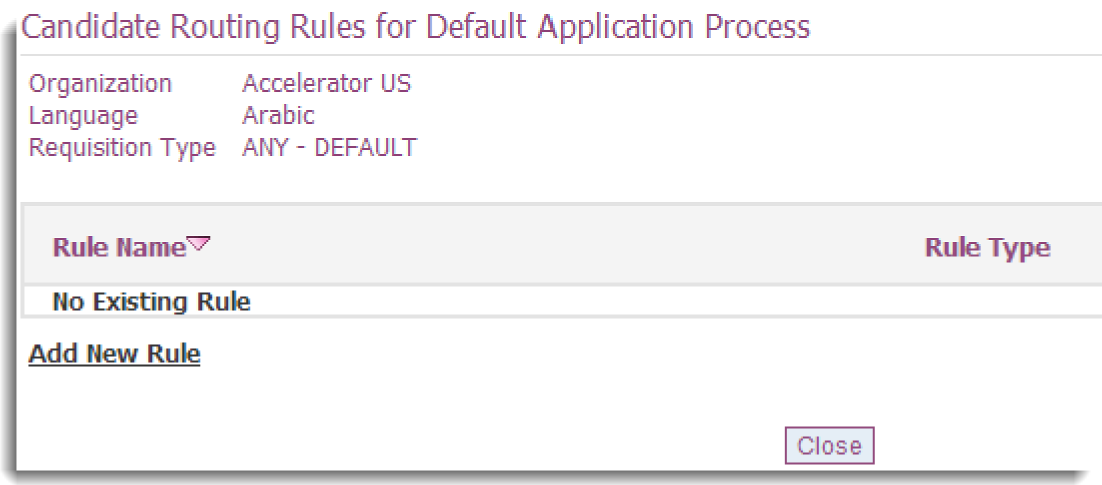
DEFAULT APPLICATION PROCESS MANAGEMENT

32 Items Page 1/1

Organization: Accelerator US

Language (All)	Requisition Type (All)	Content		Pre-Screening Rules
Arabic	ANY - DEFAULT	Empty	Edit	Edit
Chinese	ANY - DEFAULT	Empty	Edit	Edit
Danish	ANY - DEFAULT	Empty	Edit	Edit
Dutch	ANY - DEFAULT	Empty	Edit	Edit
English (UK)	ANY - DEFAULT	Empty	Edit	Edit
English (US)	ANY - DEFAULT	Empty	Edit	Edit
Estonian	ANY - DEFAULT	Empty	Edit	Edit
Finnish	ANY - DEFAULT	Empty	Edit	Edit
Flemish	ANY - DEFAULT	Empty	Edit	Edit

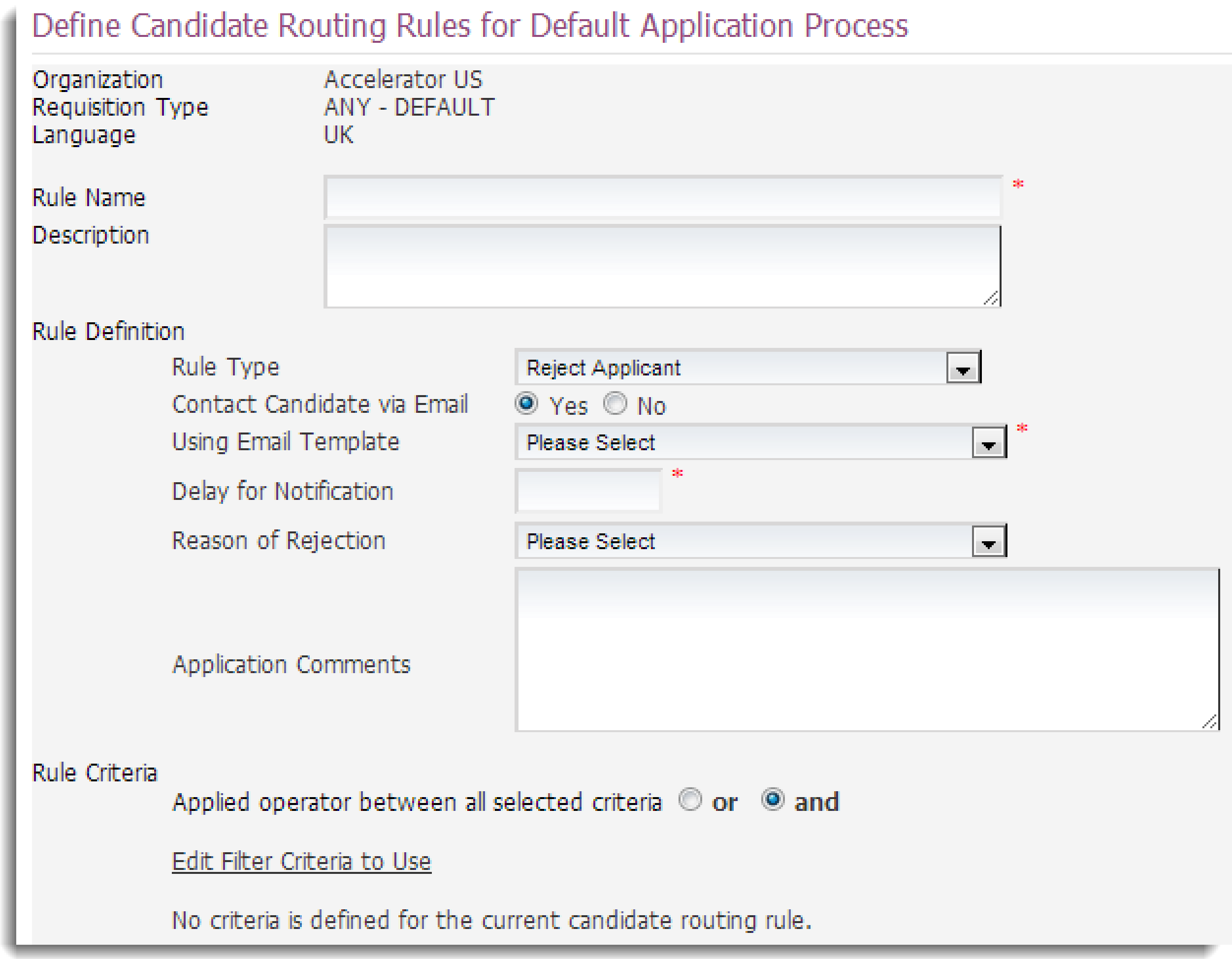
2. Select the second **Edit** link in the language row for which you want to set up a pre-screening rule.



3. Click **Add New Rule** to define a pre-screening rule for this Application Process. If you set up different processes for each contract type, you can also set up different pre-screening rules for each contract type.

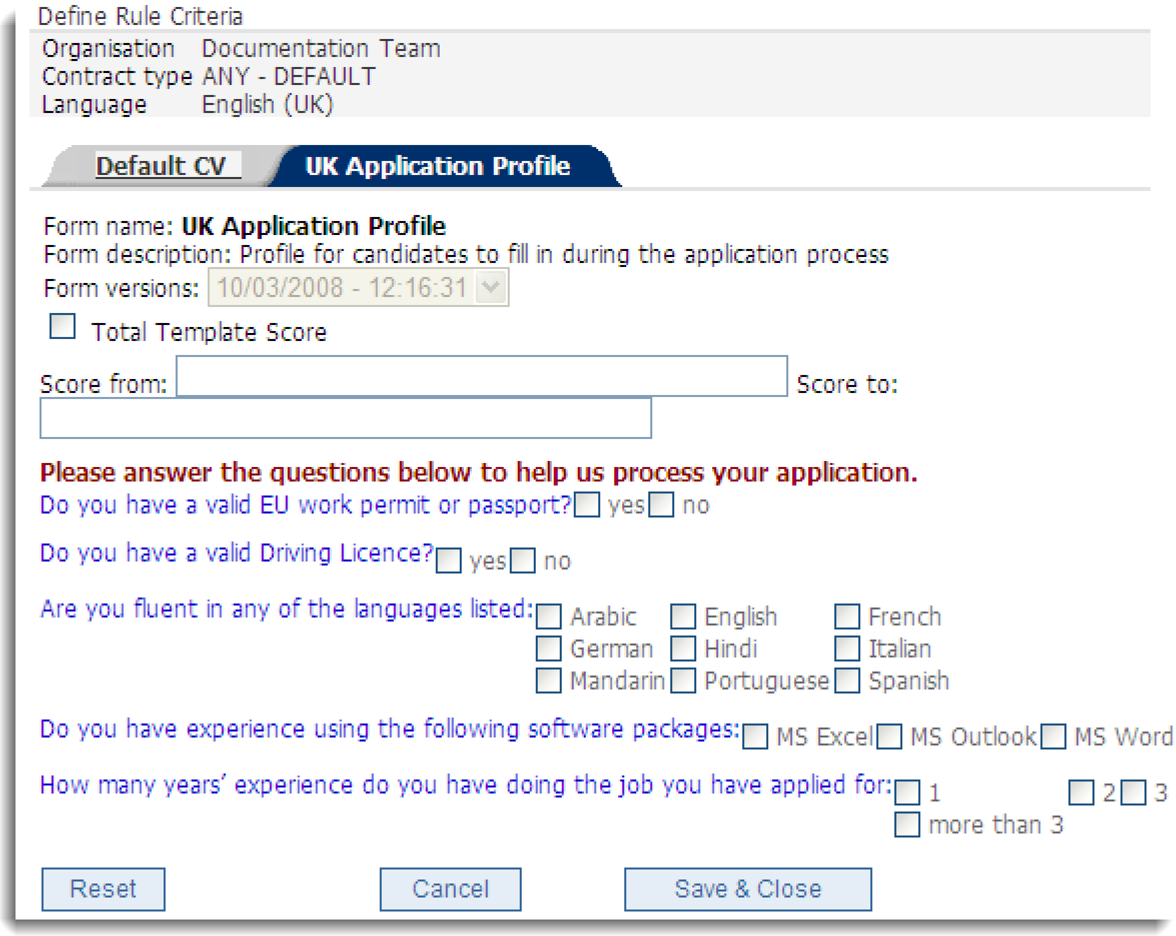
Reject Applicant

1. From the *Define Candidate Routing Rules for Default Application Process* page (see page 217), type the **Rule Name** and an optional **Description**.
2. Select **Reject Applicant** as the **Rule Type** and select if the candidate will be notified by email.



3. Enter other information as required. **Delay for Notification** is the number of days to wait before sending the rejection email.
4. To set your rule criteria, define if the operator is **or** or **and** then select **Edit Filter Criteria to Use**.

5. Select the criteria that will disqualify the candidate - they will be rejected if their selections match yours. You can either define the prompts which the candidate must fill in or you can set a score range if you have a scored template.

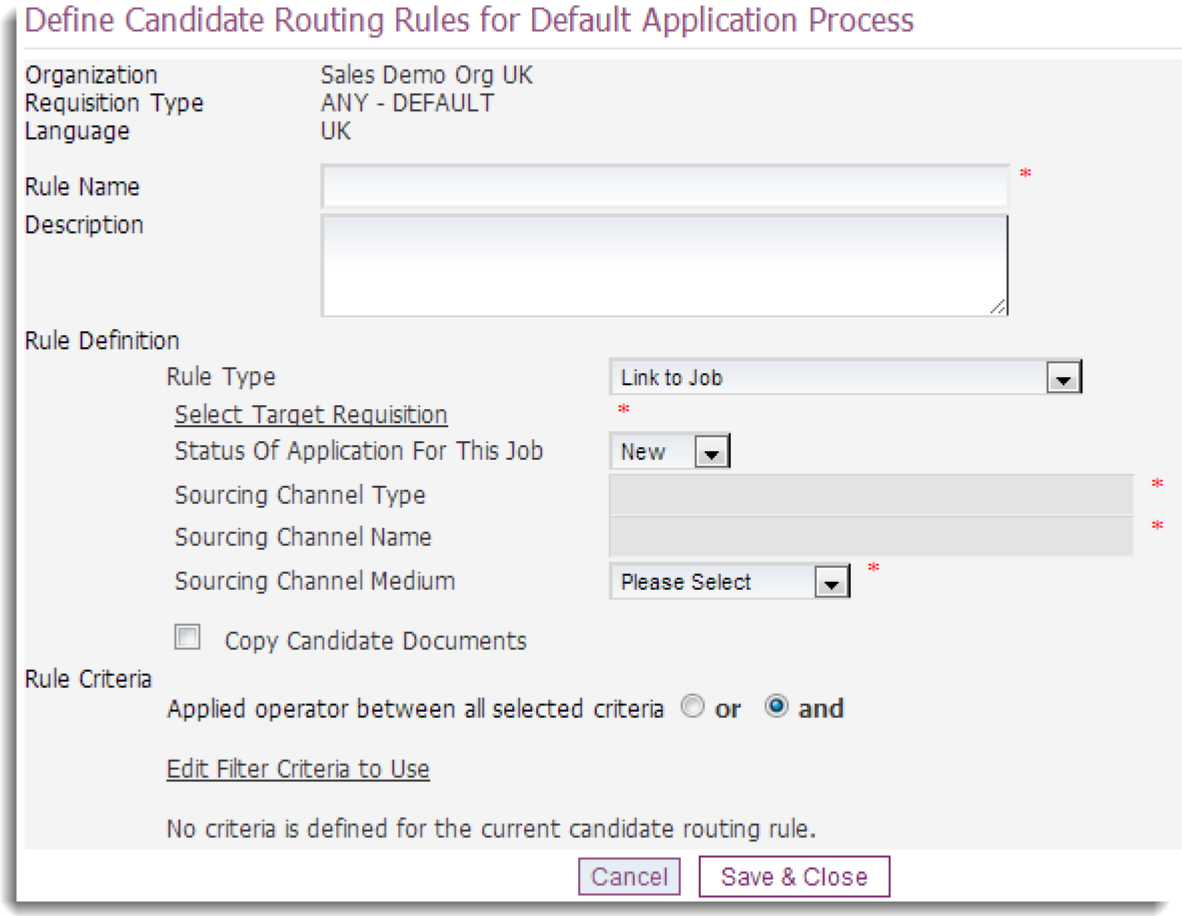


6. Click **Save & Close**.

Link to Job

1. From the *Define Candidate Routing Rules for Default Application Process* page (see page 217), type the **Rule Name** and an optional **Description**.

2. Select **Link to Job** as the **Rule Type** and select the job to which the candidate will be linked by clicking **Select Target job opening**.

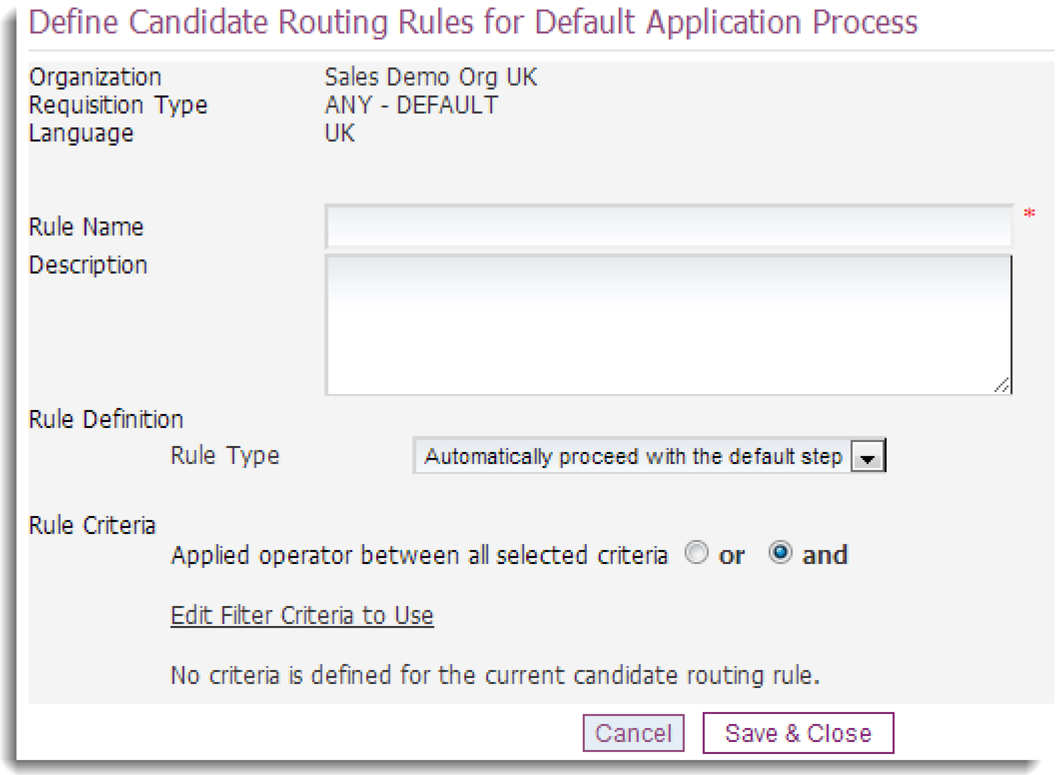


3. Enter other information as required.
4. To set your rule criteria, define if the operator is **or** or **and** then select **Edit Filter Criteria to Use**.
5. Click **Save & Close**.

Automatically Proceed With The Default Step (Default Application Process)

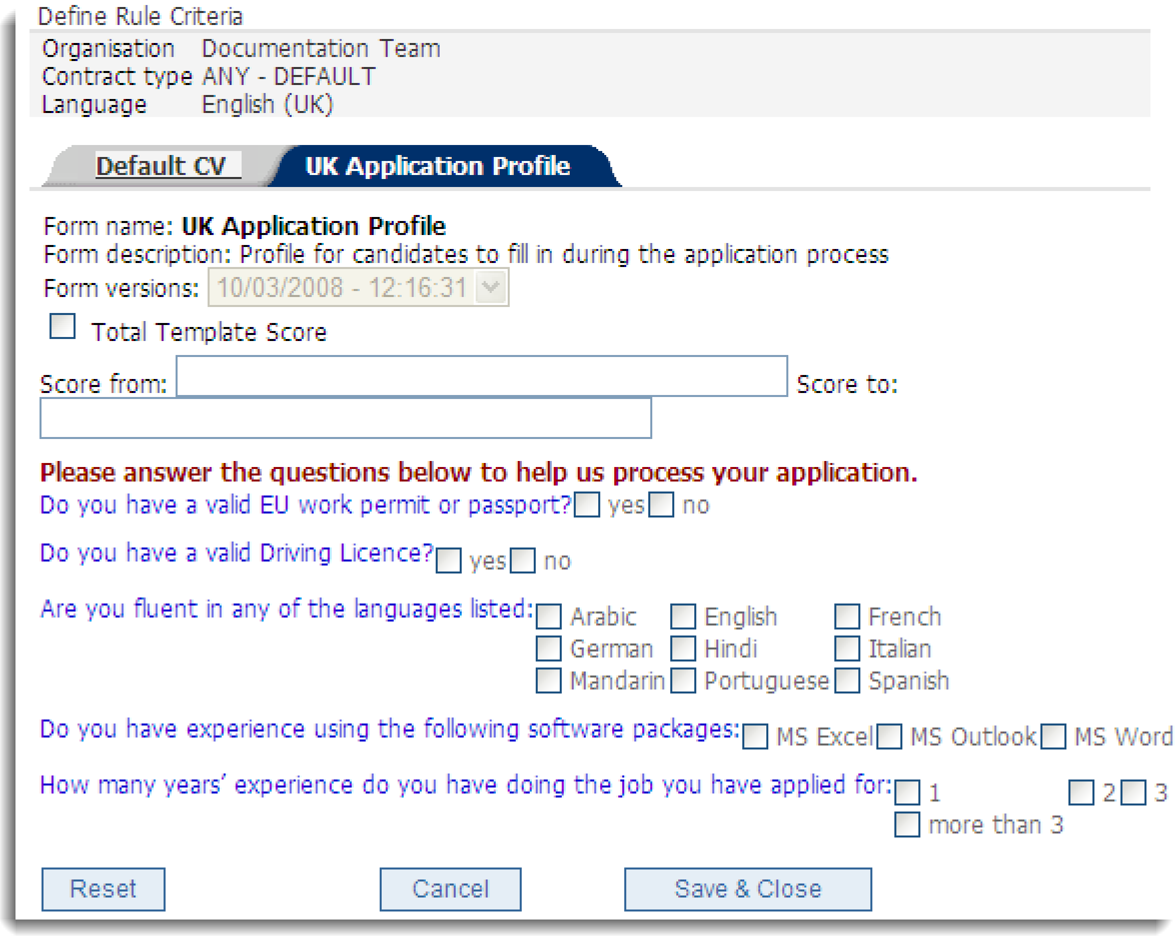
1. From the *Define Candidate Routing Rules for Default Application Process* page (see page 217), type the **Rule Name** and an optional **Description**.

2. Select **Automatically proceed with the default step** as the **Rule Type**.



3. To set your rule criteria, define if the operator is **or** or **and** then select **Edit Filter Criteria to Use**.

4. Select the criteria in the profile or questionnaire of the Application Process. You can either define the prompts which the candidate must fill in or you can set a score range if you have a scored template.

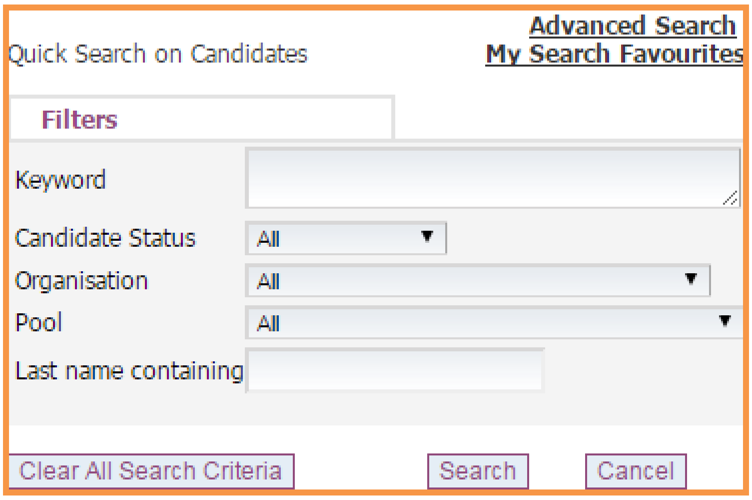


5. Click **Save & Close**.

Creating Candidate Pools

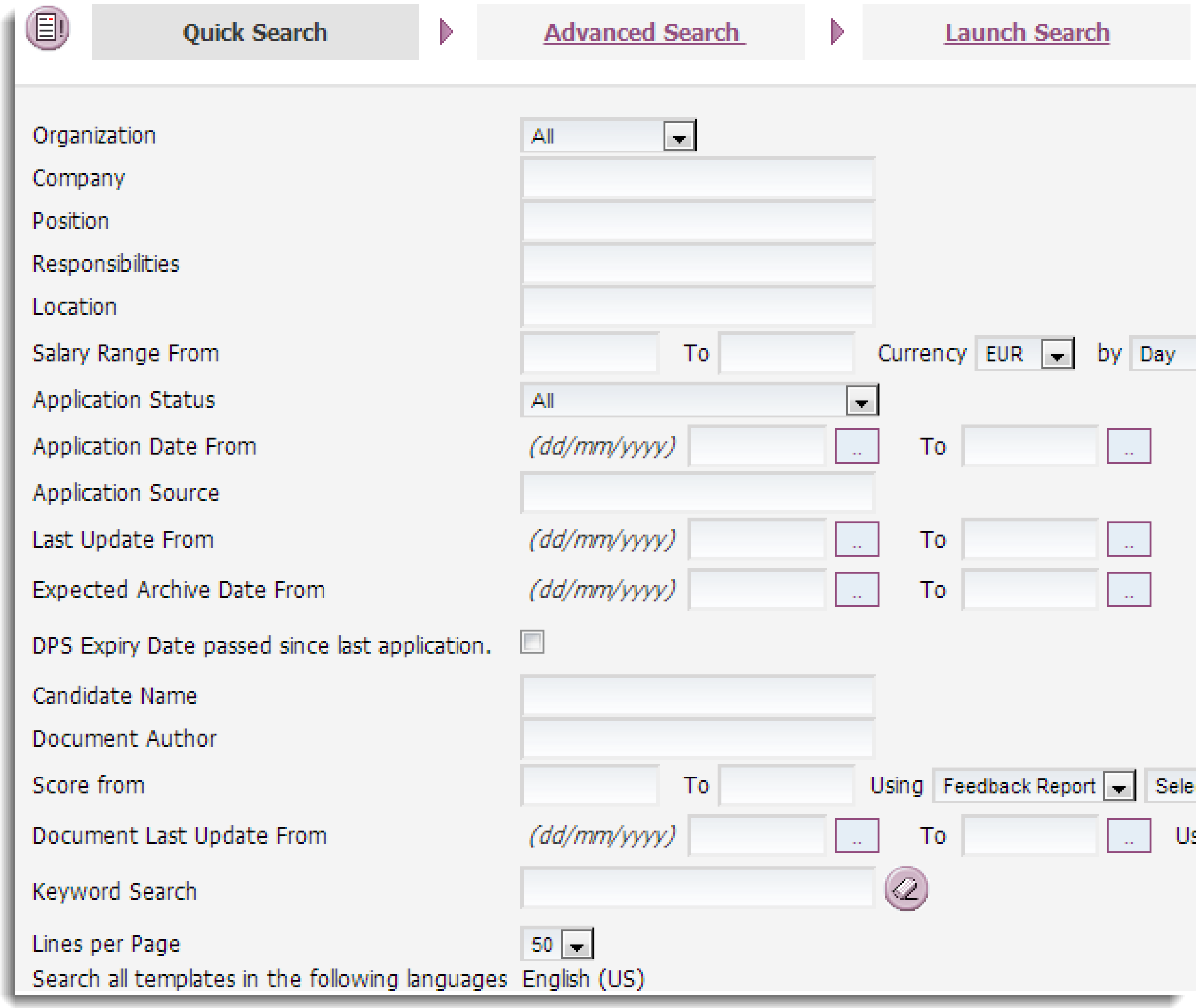
Pool Management enables you to create pools that can be linked to candidate files. Pools can be used as search criteria in:

- Quick Search on Candidates - From the left dynamic menu select **Candidates**, click then select **Search**.



Lumesse

- Advanced Search - From the **Quick actions** section of the left dynamic menu select **Advanced Search** then **Candidates**. Alternatively, from the *Candidates* page click then select **Advanced Search**.



Examples of pools: High Potentials, International Applications, Newsletter, Marketing Profiles, MBA Talents, Engineers, Graduates.

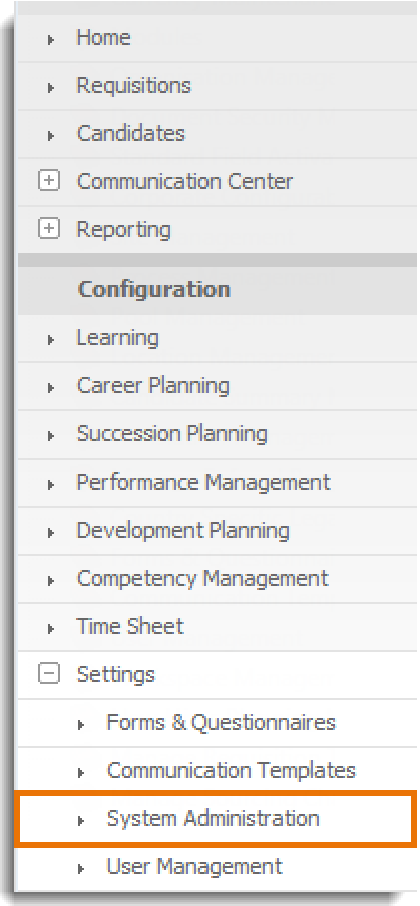
One candidate can have links to different pools; for example, to High Potentials and International Applications.

ⓘ A pool is always created and shared at Organization Level 0.

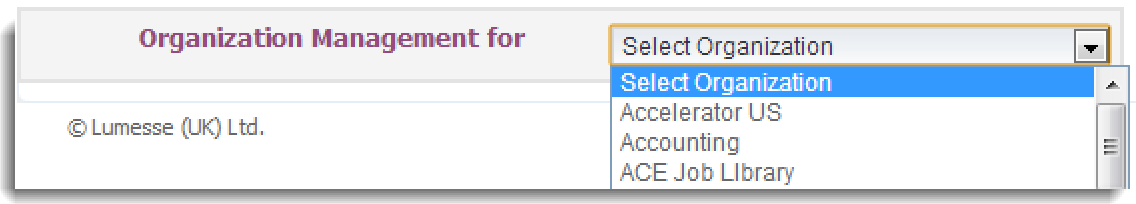
Creating Pools

Pools are created at an organization level by administrators.

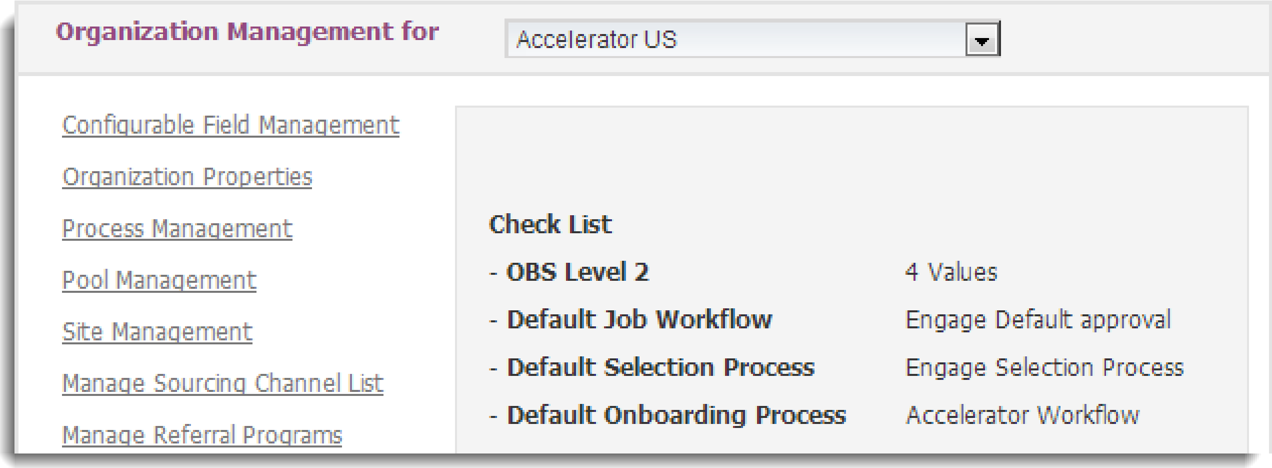
1. From the **Settings** section of the left dynamic menu, select **System Administration**.



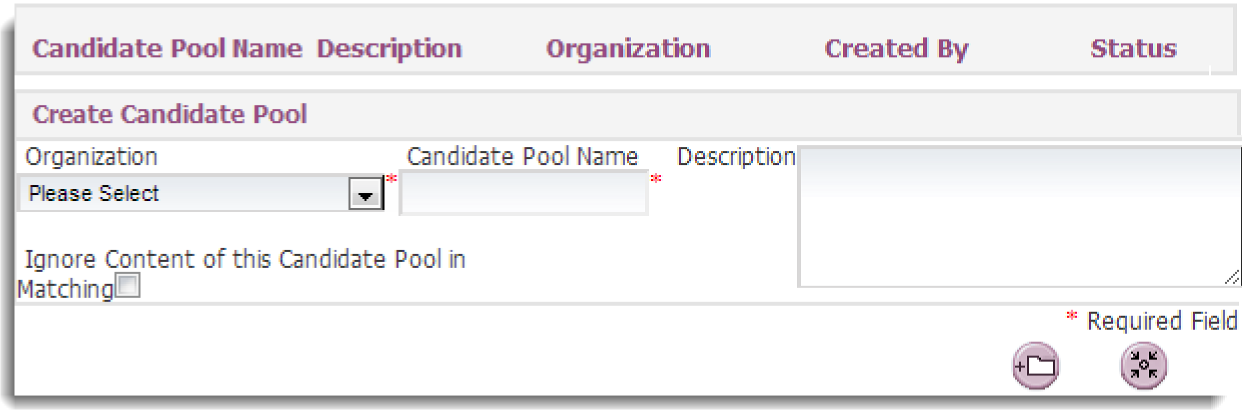
2. Select the Organization from the **Administration** dropdown list.



3. Select **Pool Management** to open the *Pool Management* page.



4. In the **Create Candidate Pool** section, select the organization for which you want to create a pool.



5. Type the **Candidate Pool Name** and **Description**.

   If you do not want candidates linked to this specific pool to appear in the results list when performing a matching on a job, select **Ignore Content of this Candidate Pool in Matching**. You will still be able to find candidates linked to this pool by a search on filters or an advanced search.

   ⓘ You can only create one pool with this function.

6. Click to create the pool.

Specifying Interview Locations

Location Management enables you to create a list of standard, corporate or local locations that can be used in Selection Steps where Interview Scheduling is activated. For further information, refer to Session Step (see page 202).

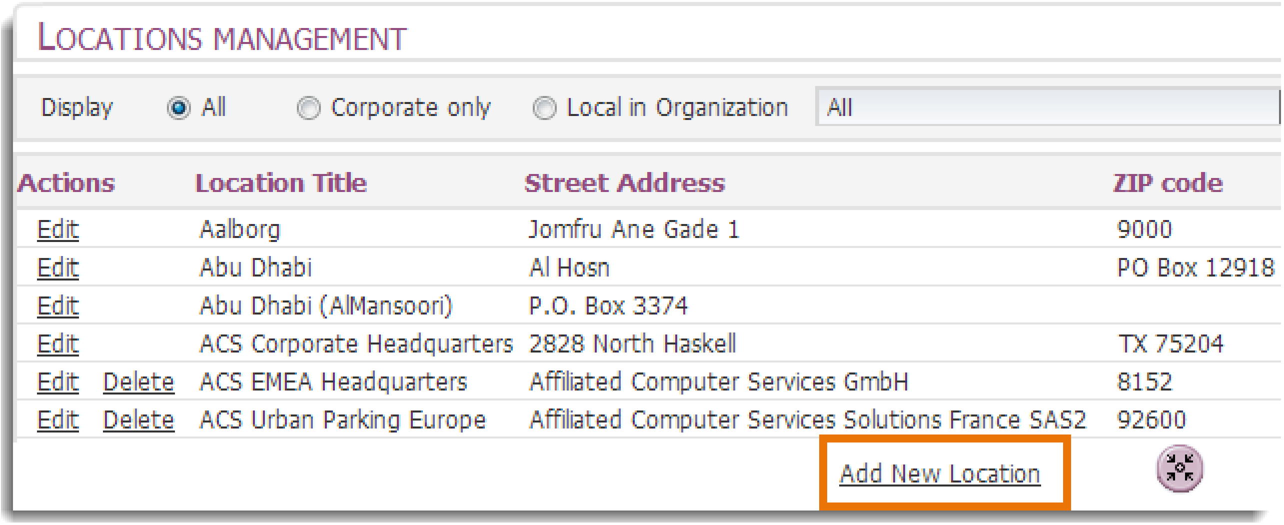
ⓘ Before activating Meeting Scheduling, you must create the necessary email templates.

Location information can be used as merge fields in email templates when you invite a candidate and/or other participants to an interview, or in the confirmation templates.

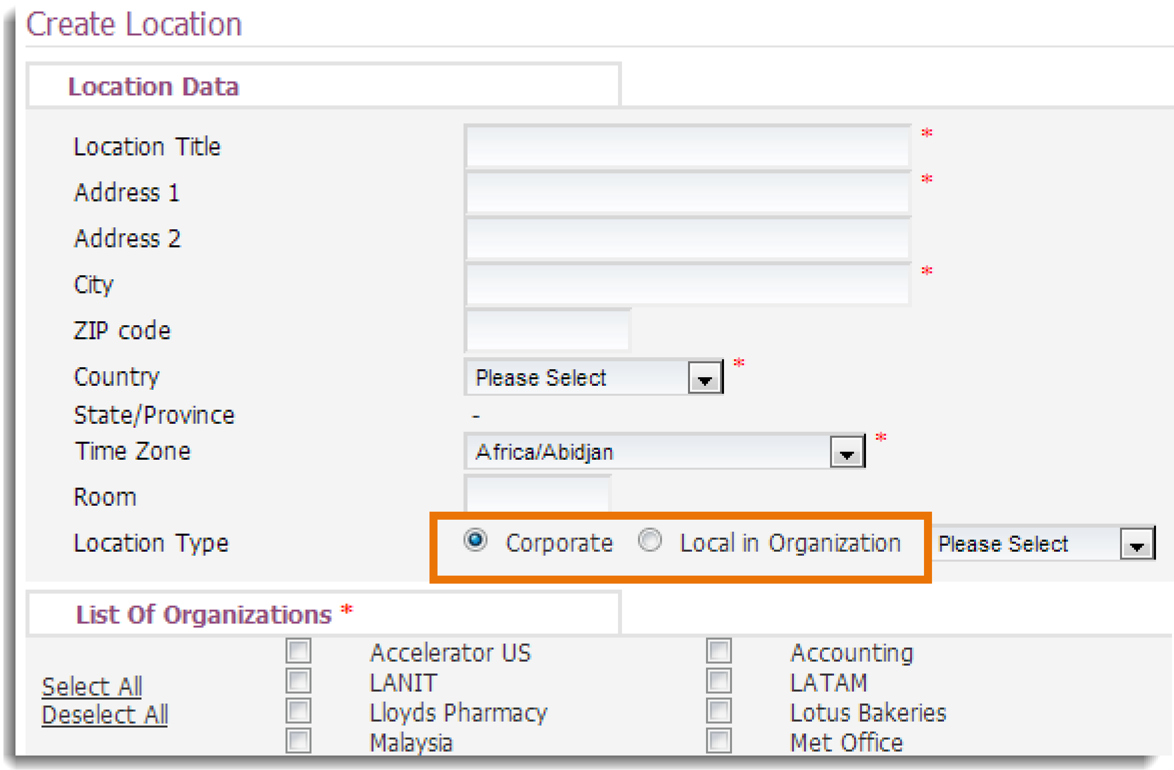
We recommend that you create at least one default corporate location or, if several organizations are configured, one default local location for each organization.

Creating Locations

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Corporate Location Management**.
2. Select **Add New Location**.



3. Enter the required information.



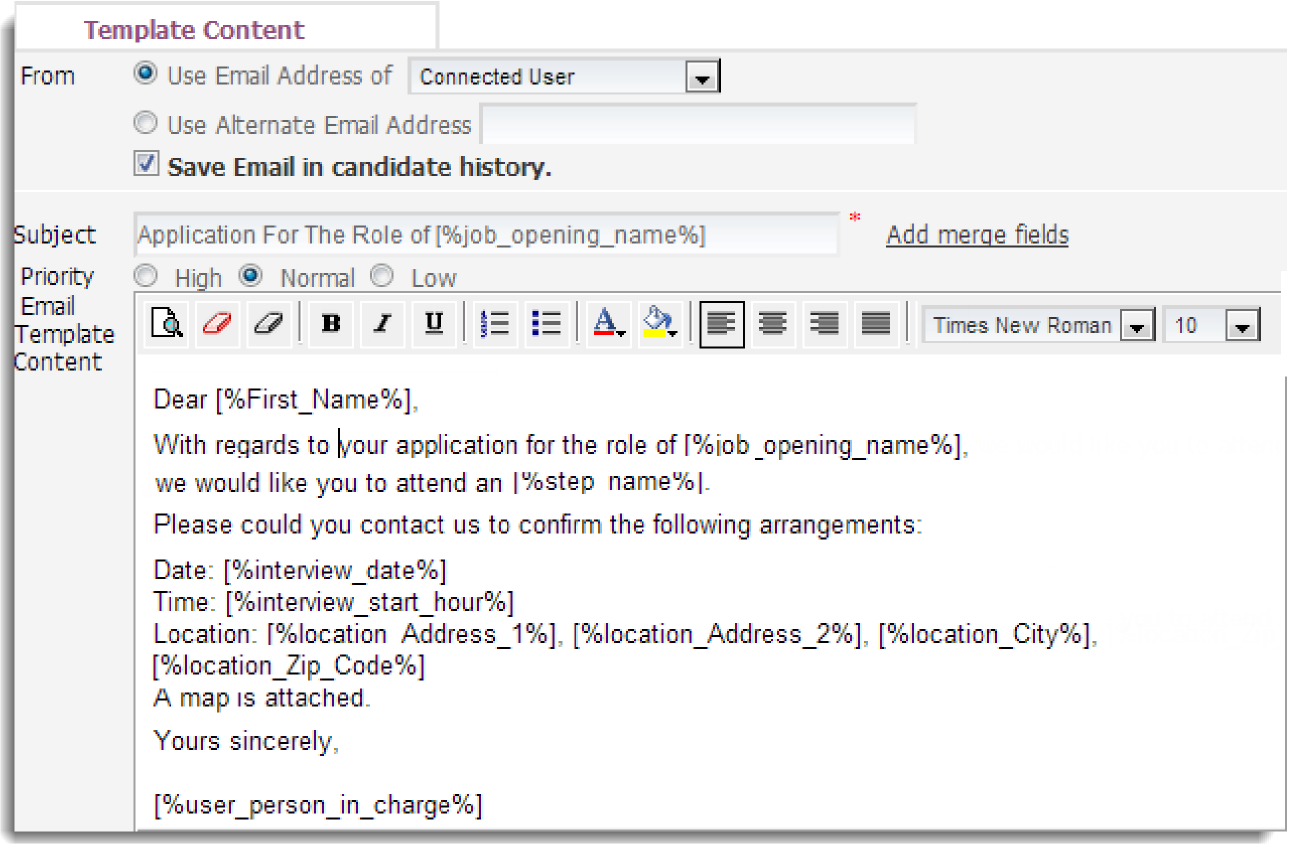
4. Select the **Location Type** by choosing from:
   - **Corporate** – A corporate location can be used in the organizations selected in the **List of Organizations** section
   - **Local in Organization** – The location you are about to create can only be used in the single organization you select from the dropdown list
5. Select the organizations, then click **Save**.

Location Merge Fields in Templates

Location Merge fields are available in email templates and Word® templates.

You can define templates in Template Management to be used for communication with candidates and recruiters.

- Email template example:



- Word® template example:

Ref: Your application from «Application_date»

Dear «First_Name» «Last_Name»,

Thank you for your interest in our company.

We received your application and are interested in your profile.

We would like to invite you to an interview at the following location:

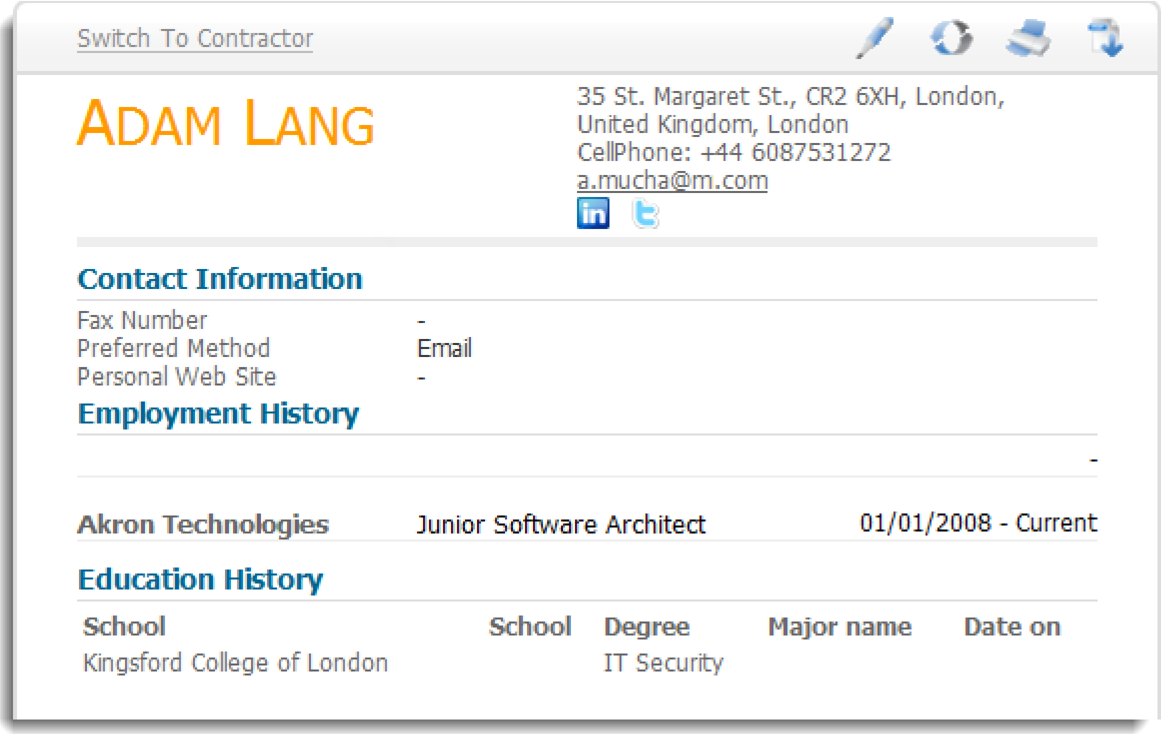
«Address_1»
«Address_2»
«Room»
«Zip_Code»
«City»
«Country»

We are looking forward to meeting you,

Sincerely,

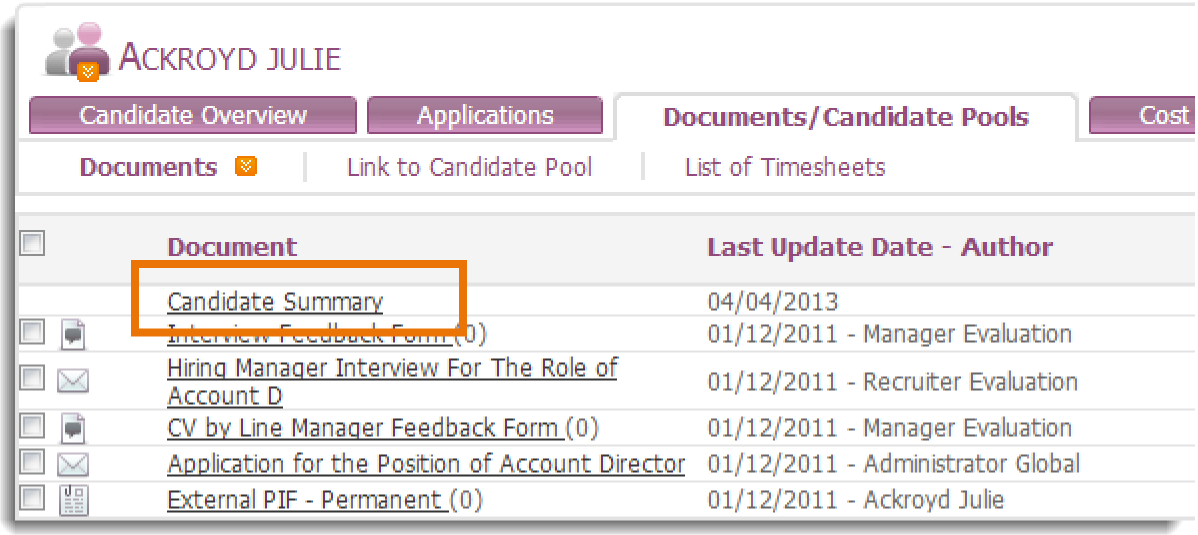
Configuring a Candidate Summary Form

A Candidate Summary is an overview of the information available about a candidate in TalentLink. It gathers the information from all the forms dedicated to the candidate, such as the PIF and questionnaires, in one place so that the Candidate Summary becomes the most comprehensive synthesis of the candidate's data gathered throughout the course of the Selection Process.



The Candidate Summary speeds up the recruitment process by gathering all crucial information in one place. A recruiter or hiring manager can take a quick decision on a candidate by reviewing one comprehensive document rather than having to look in several places. Recruiters of RPO organizations may also use the form as a candidate marketing tool, and can propagate complete candidate information to clients.

The Candidate Summary is available in a Candidate's record, in the **Candidate Overview** or the **Documents/Candidate Pools** sections. It can be printed out or downloaded as a PDF file.



The system provides default Candidate Summary forms. These are configurable and you may adjust them to match your business needs.

Configuration Principles

As the form used for a given candidate depends on the candidate type (External or Internal) and recruitment context (Permanent or Contractor) the following Candidate Summary templates are available for each company:

- Candidate Summary (External)
- Candidate Summary (Internal)
- Candidate Summary (External Contractor)
- Candidate Summary (Internal Contractor)

> ⓘ You cannot create new forms, but you can edit the default forms as required.

A Candidate Summary is a form (similar to the Questionnaire, Resume, Feedback Report, Profile and Diversity Questionnaire forms) that can be edited in the TalentLink template builder. The questions included in the form are organized into sections. GSAs may decide what type of questions are available, how they are organized and displayed and whether they are mandatory or optional. We recommend you have no more than 150 questions in the form.

Some restrictions apply. The following questions are mandatory for each Candidate Summary:

- First Name
- Last Name
- Sourcing Medium

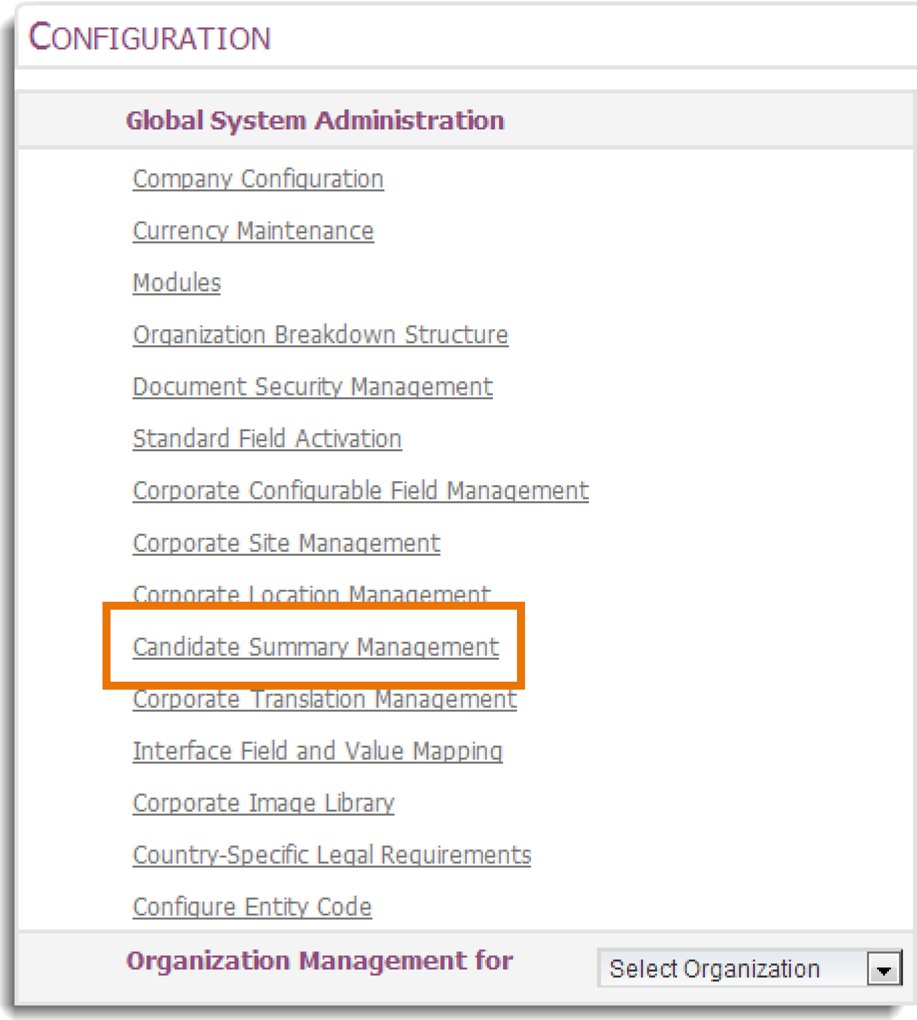
- Data Privacy Statement

There is also an obligatory dedicated question in each form – Link candidate to a job or pool.

Sections may be created or removed according to user preferences.

Previewing a Candidate Summary Form

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Candidate Summary Management**.

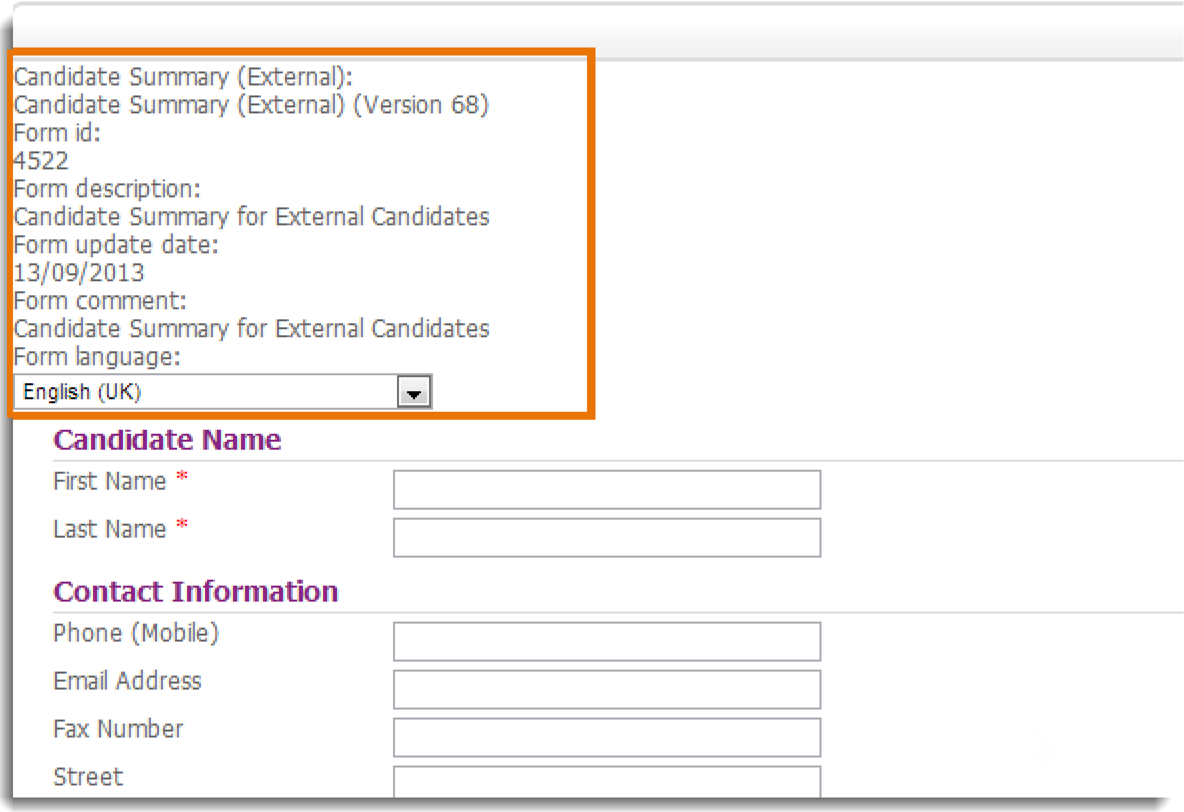


2. To preview the form click next to the required **Candidate Summary** type.

CANDIDATE SUMMARY MANAGEMENT

Profile Name	Candidate Type	Description
Candidate Summary (External)	External candidate	Candidate Summary for External Candidates
Candidate Summary (Internal)	Internal Candidate	Candidate Summary for Employees
Candidate Summary (External Contractor)	External contractor	Candidate Summary for External Candidates (Contractors)
Candidate Summary (Internal Contractor)	Internal contractor	Candidate Summary for Employees (Contractors)

The preview of the selected Candidate Summary is displayed along with form information (for example Form ID, current version, language, and so on).



ⓘ Print the form by clicking **Print** at the bottom of the form.

Editing a Candidate Summary Form

1. Select the appropriate Candidate Summary form by clicking on its Profile Name.

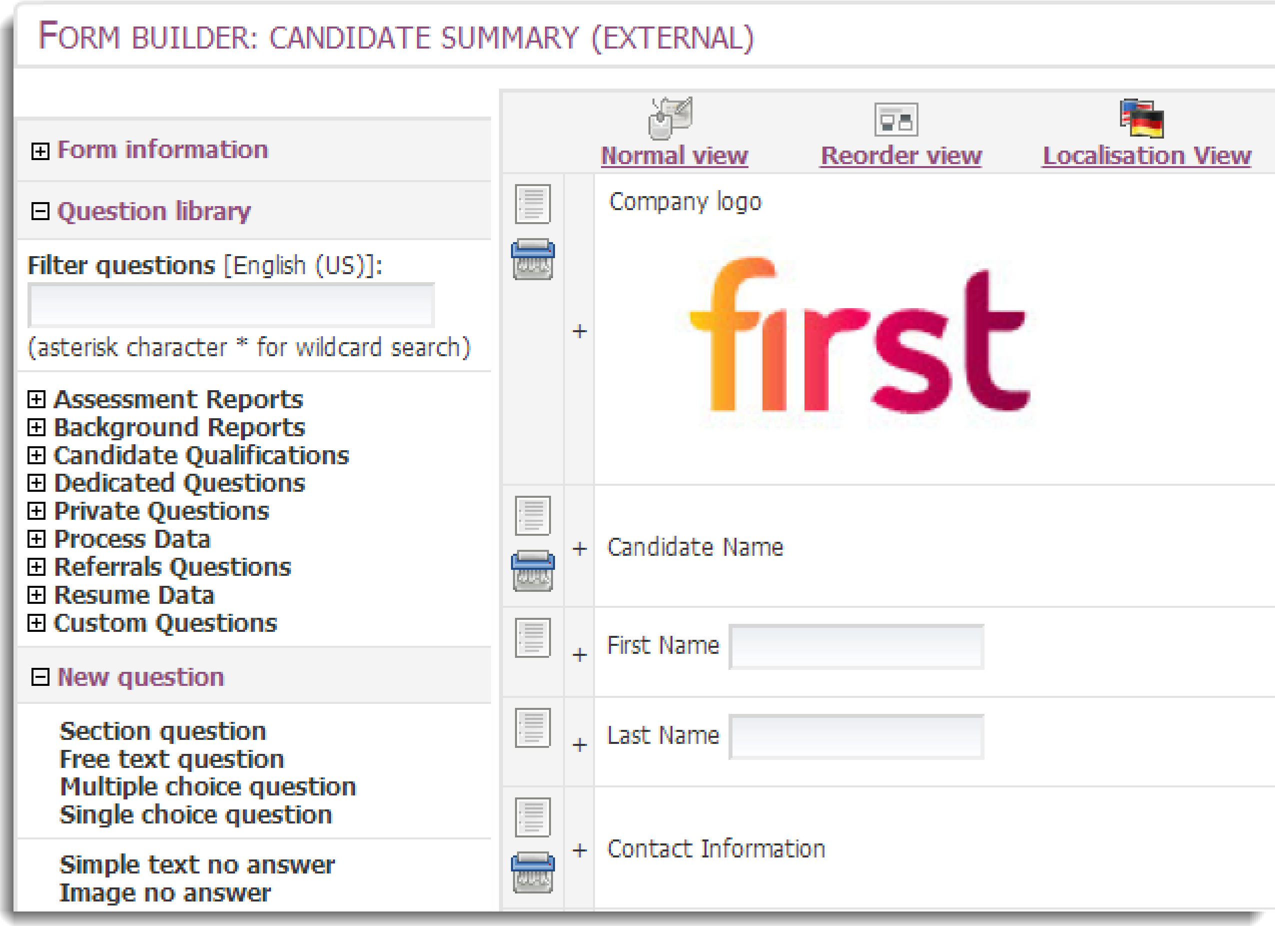
CANDIDATE SUMMARY MANAGEMENT

Profile Name	Candidate Type	Description
Candidate Summary (External)	External candidate	Candidate Summary for External Candidates
Candidate Summary (Internal)	Internal Candidate	Candidate Summary for Employees
Candidate Summary (External Contractor)	External contractor	Candidate Summary for External Candidates (Contractors)
Candidate Summary (Internal Contractor)	Internal contractor	Candidate Summary for Employees (Contractors)

The selected form opens in the *Form Builder* page.

ⓘ Only one Candidate Summary form can be configured for each candidate type and context combination (a total of four forms). You cannot create a new form, but you can edit the default forms as required.

2. To view the **Form Information** click ⊞ in the top left of the page.



ⓘ The Candidate Summary form is created using the *Form Builder* page in the same way as other form types. For a detailed description of how to use the Form Builder refer to Creating Forms and Questionnaires (see page 278).

3. Drag and drop questions from the **Question Library** to build your form (see page 282).
4. Click **New Question** to create your own question (see page 283).
5. Click on the selected view to:

- Change the order of the questions using **Reorder View** (see page 294)
- Provide translations of the questions using **Localisation View** (see page 299)

6. Click on one of the icons to:

 Preview the form

 Refresh the form builder

 Return to the list of forms

Save the form

In the *Form Builder* page you can perform the actions relating to the selected view (for example translate the questions if the Localisation View is active).

ⓘ The **Form Information, Question Library** and **New Question** sections are available only in Normal View mode. Otherwise they are read-only and appear greyed out.

Displaying Other Languages

The **Corporate Translation Management** section contains various Translation Sets used as a replacement for the original labels used in the Application Process. This enables you to adjust the Application Process to best suit your company needs, but also serves additional purposes such as candidate registration for career fairs, special events or newsletter mailing lists.

The Translation Set provides new labels that are used:

- Throughout the Application Process (header section, navigation buttons, CV parsing, attachments and cover letter, *Submission* page)
- In Talent Portal creation
- On the *Job Description* page (**Apply for job** button)

Additionally it is possible to translate the 'Welcome Text', which is often used as the Data Privacy Statement.

Translation Set management and assignment rights is granted only to GSA and LSA users. This gives them the right to:

- Create a new Translation Set
- Edit existing Translation Sets
- Import/export Translation Sets
- Assign Translation Sets to External/Internal Site
- Assign Translation Sets to job advertisements

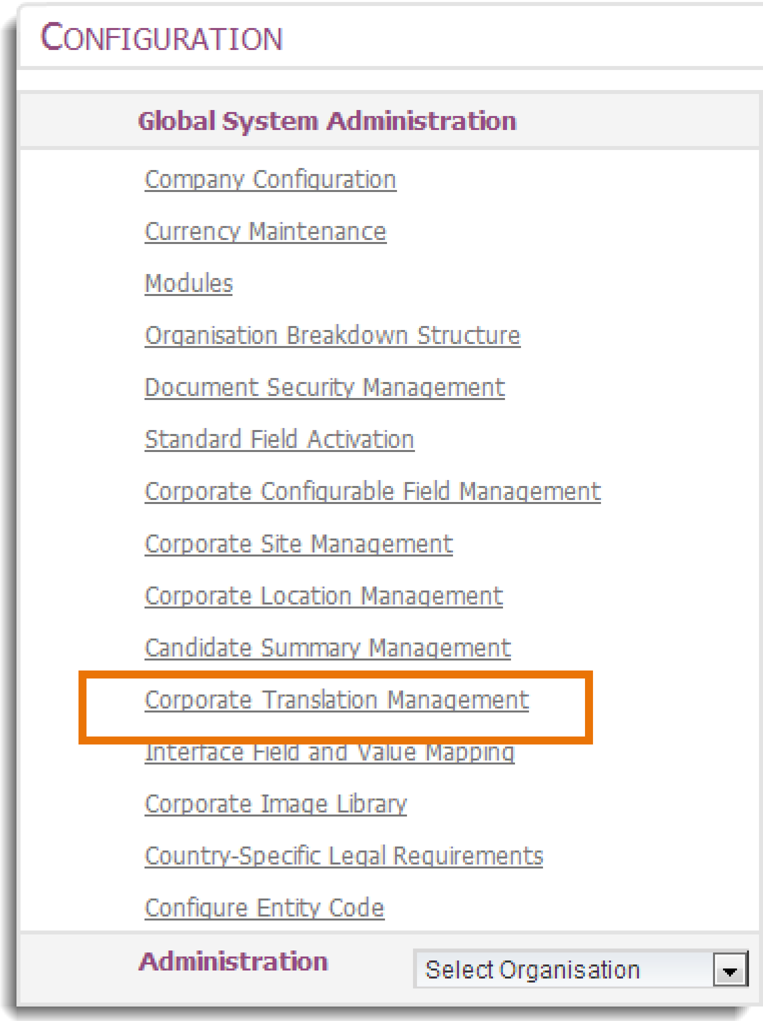
Translation Sets are created for the whole slice or for a selected organization, therefore the access link is available in Global System Administration (Corporate Translation Management) for GSA users, and in Organization Administration (Translation Management) for LSA users.

More than one Translation Set may be created for any of the Front Office enabled languages. Each set may be later assigned to a selected site/job advertisement to serve various purposes (for example, one set used in the Application Process, one set used for the Referral Programs Portal, yet another set used for career fair registration or newsletter request). If the label translations are not edited, the system default values are displayed.

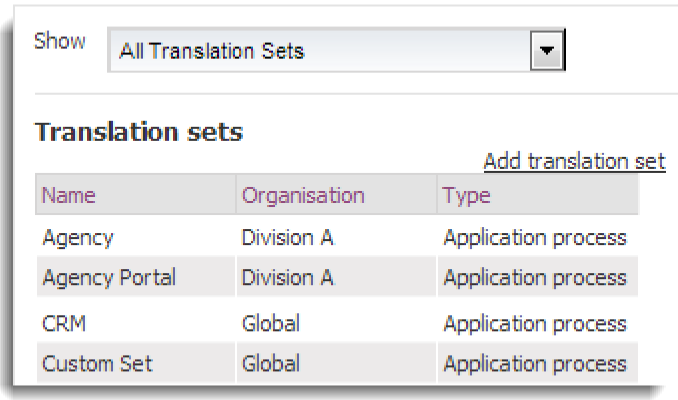
Accessing the Translation Sets List

1. From the **Settings** section of the left dynamic menu, select **System Administration**.

2. Select **Corporate Translation Management** from the Global System Administration section (if you are a GSA) or **Translation Management** from the Organization Administration section (if you are an LSA).

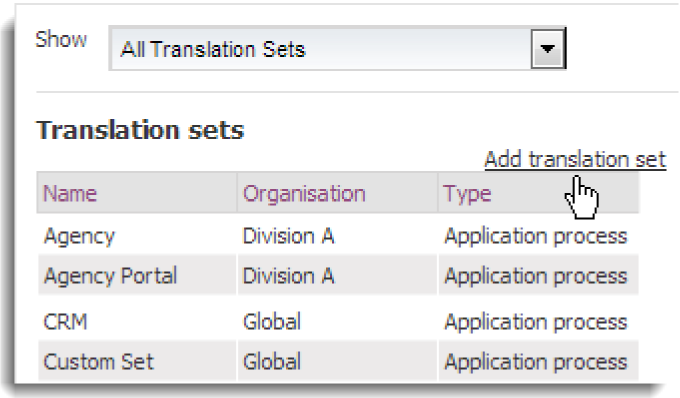


3. Click the selected Translation Set to preview or edit it.

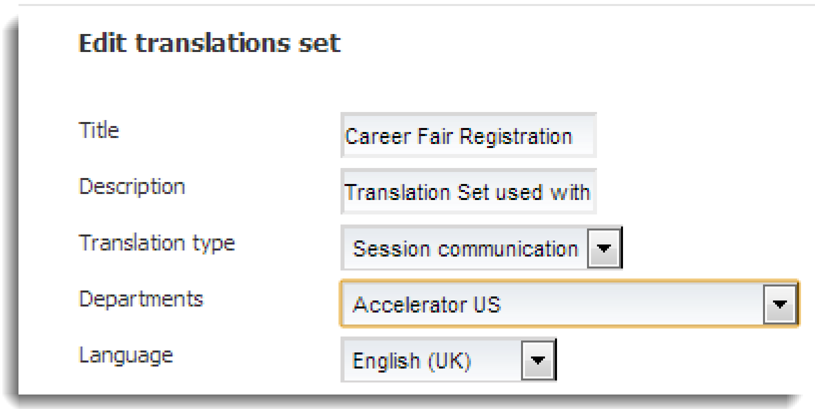


Creating a new Translation Set

1. Open the **Translation Management** section (see page 238) then click **Add translation set**.



2. Type the **Name** and **Description**.
3. Select a **Translation Type**.
   - Application Process lets you edit the step names and text shown in the candidate portal, etc.
   - Session Communication lets you manage the text a candidate sees as part of the online interview booking section of the candidate portal.
4. Select the **Department**. This lets you use different translations sets per website for each OBS level.



5. To change labels, select the language from the **Language** dropdown list, then translate the text. You can provide a separate set of translations for all languages used in the Front Office.

   Labels are grouped according to the Application Process area they appear in. Click on the group name to expand it and edit the label translations. If the labels are not translated, default system values are displayed.

   If a label has been translated, its background colour is changed.

   If you need to restore the current translation to the default value, click **Reset**.

   If you need to restore all translations in the set to their default values, click **Reset translations** in the header section.

6. Click **Save** to save the Translation Set.

Editing Translation Sets

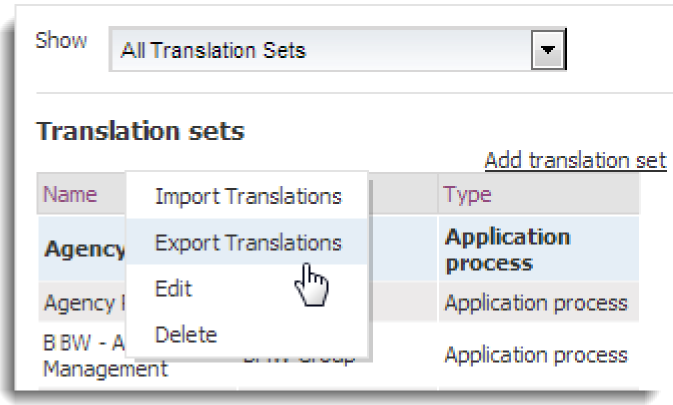
1. Open the **Translation Management** section (see page 238) then select the Translation Set you need to edit.
2. Type new text into the fields as required then click **Save**.

   This will change the text on the website.

Exporting a Translation Set

You can download a translation set as a .CSV file so that the content is available to translate into other languages.

1. Open the **Translation Management** section (see page 238) then right-click the Translation Set you want to export.
2. Select **Export Translations** from pop-up menu.

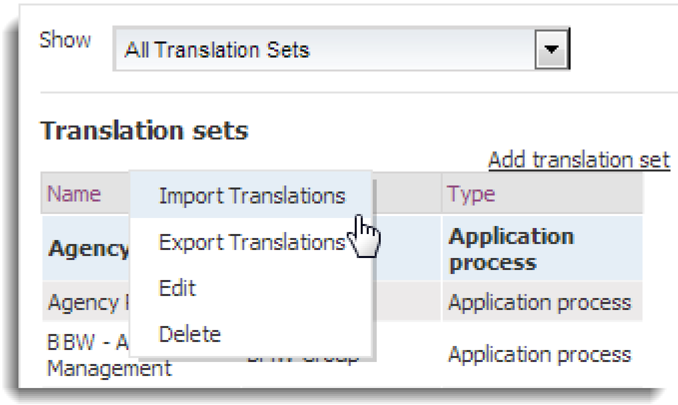


3. Save the CSV file on your hard drive.
4. After the required translations have been carried out you can import the translation set for other OBS levels or languages.

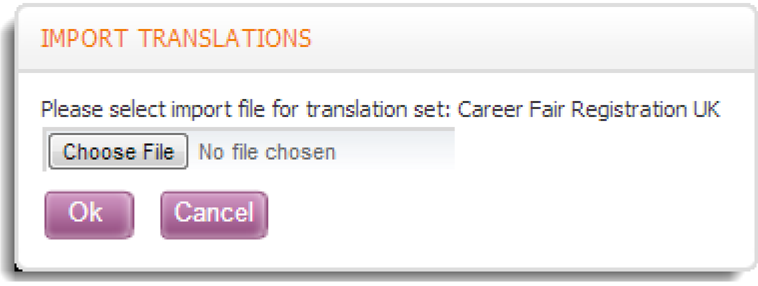
Importing a Translation Set

1. Open the **Translation Management** section (see page 238) then right-click the Translation Set for which you want to import translations.

2. Select **Import Translations** from the pop-up menu.



3. Navigate to the appropriate file on your computer the click **OK** to confirm your selection.



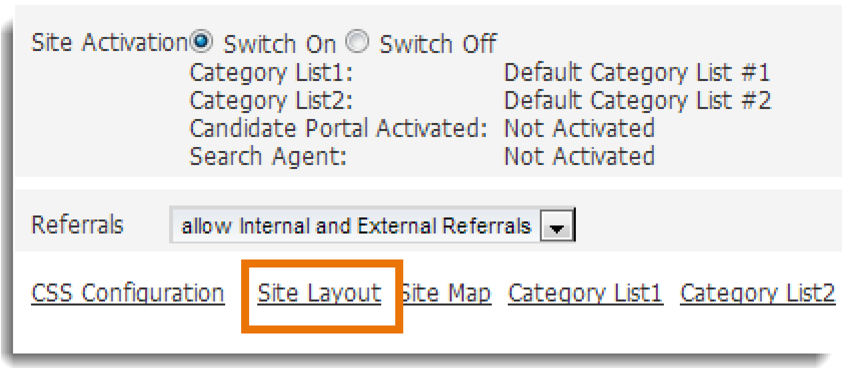
The file is parsed into the Translation Set and the imported labels are displayed.

Assigning Translation Sets

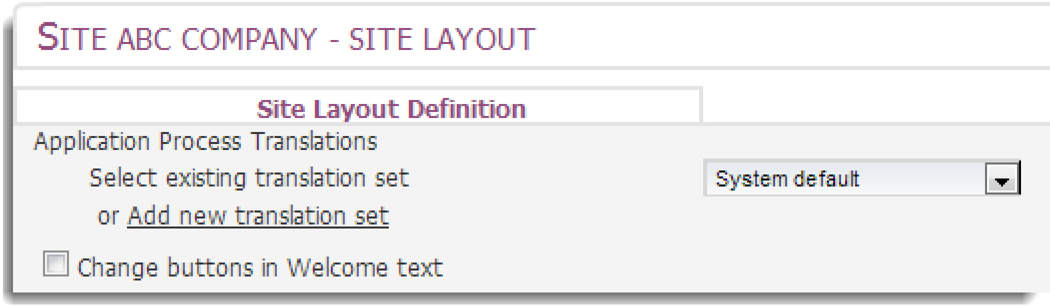
Translation sets may be assigned at site and job advertisement level. The second option is treated as the superior one, thus job ad settings overwrite site configuration.

To Assign a Translation Set at Site Level:

1. From the **Settings** section of the left dynamic menu, select **System Administration,** then **Site Management**.
2. Select **Edit** next to the site to which you want to assign the custom Translation Set.
3. At the bottom of the page click **Site Layout**.



The Application Process Translations section is located at the top of the *Site Layout* page.

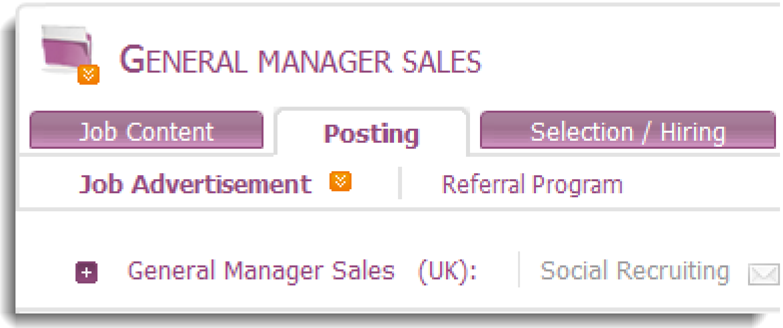


4. Select the Translation set which is to be used for the edited site.

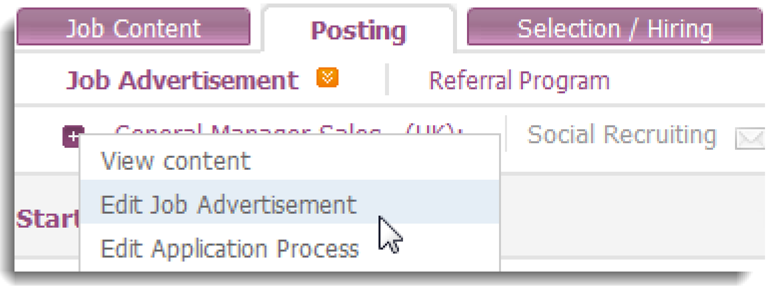
   You may edit the selected Translation Set or create a new one if necessary.

To Assign a Translation set at Job Advertisement Level:

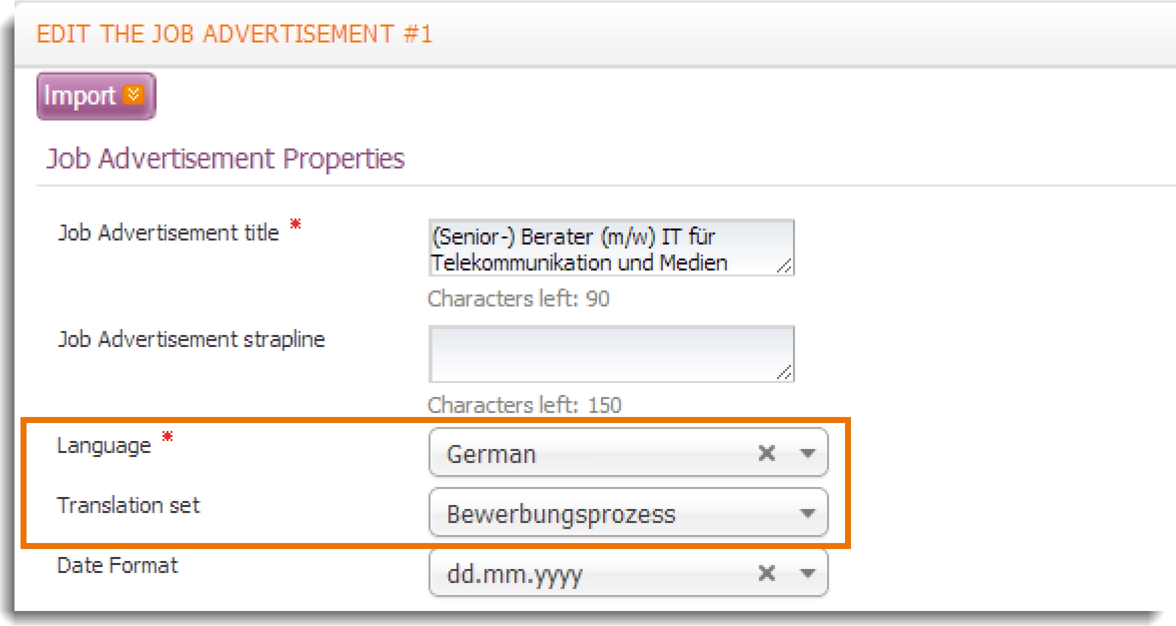
1. On the *Job Details* page, select the *Posting* tab.



2. Edit the existing job advertisement or create a new one.



3. Select the language of the job advertisement, and select the Translation Set.



4. Click **Save**.

ⓘ If you edited an existing job advertisement, and it has been previously posted, the Application Process labels are changed for those postings as well as for the new ones. Click **Preview** to verify the changes.

ⓘ If you created a new job advertisement, all new postings will pick up updated Application Process labels.

ⓘ If no Translation Set is selected on the job advertisement, the one selected in site configuration is used.

Managing Referral Programs

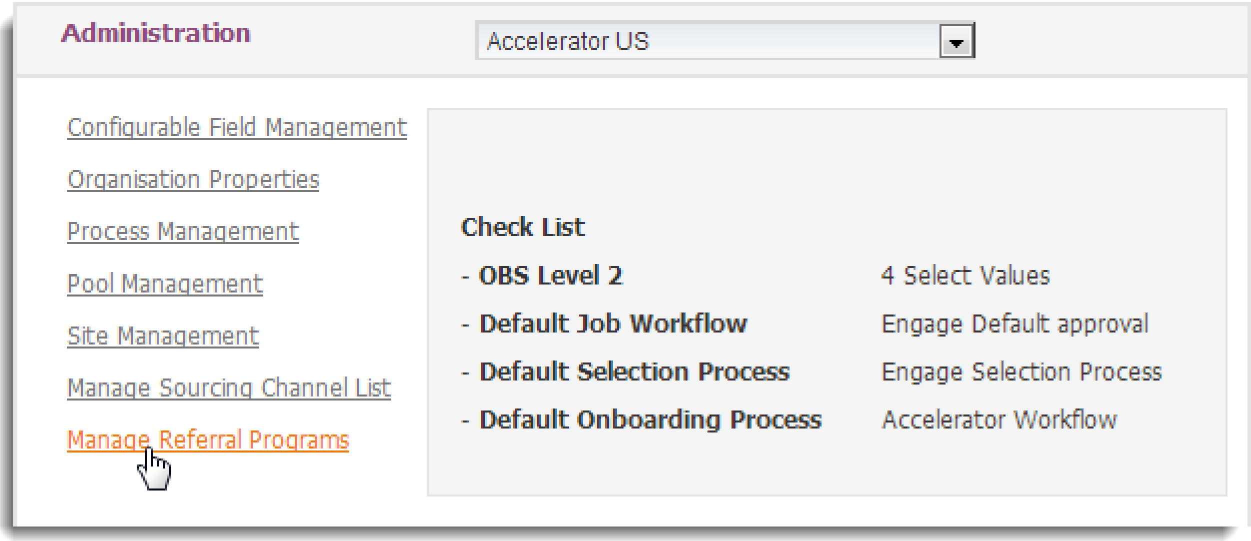
In the Referral Program Management module you can:

- Create and manage Referral Programs at organization level, Internal and external referrals, referral fee, referral validity, communication with referrers, and so on
- Assign Referral Programs inside the selected organization
- Create referrals from the Front Office and the Back Office
- Keep track of referrals (in the Cost tracking section of a job/candidate)
- Report on referrals

Accessing Referral Programs

You can create, configure and assign Referral Programs at organization level. These actions can be performed by Global System Administrators or Local System Administrators with rights to access Organization Management and Manage Referral Programs.

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the **Administration** dropdown list, select an organization then select **Manage Referral Programs**.



The *Referral Program Management* page has two main sections:

- Referral Program general configuration (the section containing Activate, Referral Validity, and Qualifiers)

- List of active Referral Programs

REFERRAL PROGRAM MANAGEMENT

2 items page 1/1

Organisation: Sales Demo Org UK

Activate: internal and external referrals
Referral Validity: Candidate specific
Qualifier # 1: -
Qualifier # 2: -

Program Name	Referral fee	Trial period	Internal Referrals	External Referrals	Set as Default	Assignment
SDOUK - Employee Referral Scheme	500.00 GBP	3 months	✓	✓	✓	-
Employee Referral Scheme - EUR	1000.00 EUR	3 months	✓	-	-	-

Manage Assignments

From this page you can also create new Referral Programs (see page 247) and manage the assignment of Referral Programs.

Configuring Referral Programs

To define Referral Program settings for the selected organization:

1. On the *Referral Program Management* page click

Define Referral Program Settings for Organisation: Sales Demo Org UK

Activate	internal and external referrals
Referral Validity	Candidate specific
Qualifier # 1	-----
Qualifier # 2	-----

2. Define the type of Referral Programs for this organization (it is only possible to define ONE Referral Program type per organization):
   - Internal Referrals only
   - Internal and External Referrals
3. Define the Referral Validity for this organization (it is only possible to define ONE Referral Validity type per organization):
   - Candidate specific – Referrals are valid for all applications of a candidate in the selected organization
   - Job specific – Referrals are valid only in case of a specific job

4. Define qualifiers for assignments (a maximum of two configurable LOVs used in the selected organization).

List of Referral Programs

This section lists all active Referral Programs in the currently selected organization.

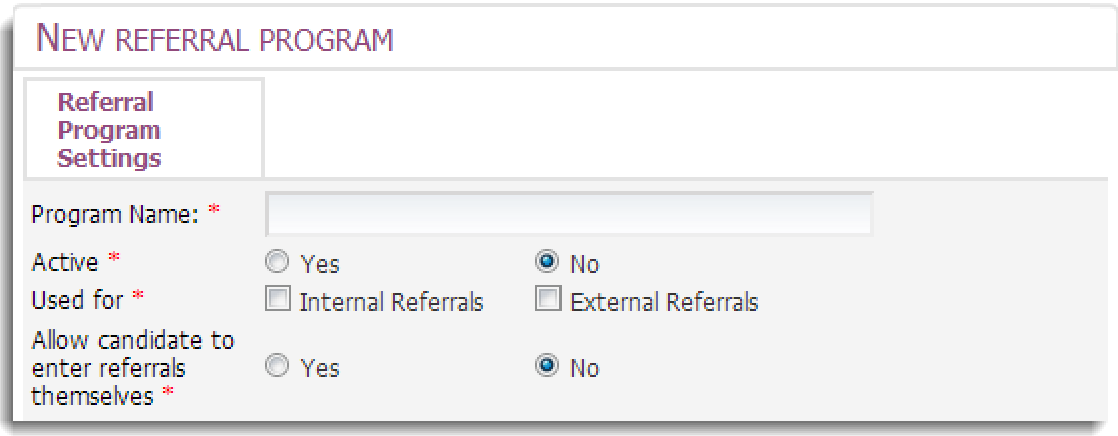
1. Select a Program Name to display the *Edit Referral Program* page.

   From here you can view the **Referral Fee**, the **Trial Period** of the referred employee and other details.

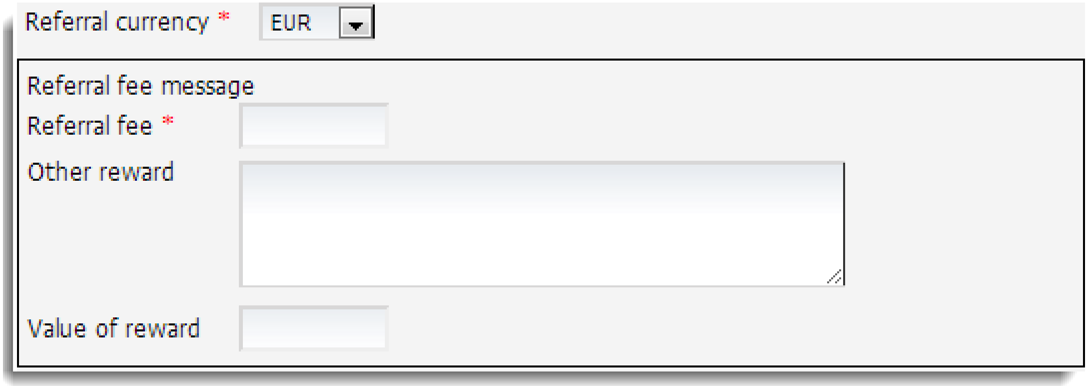
Program Name	Referral fee	Trial period	Internal Referrals	External Referrals	Set as Default	Assignment
SDOUK - Employee Referral Scheme	500.00 GBP	3 months	✓	✓	✓	-
Employee Referral Scheme - EUR	1000.00 EUR	3 months	✓	-	-	-

Creating a Referral Program

1. On the *Referral Program Management* page (see page 245), click
2. In the **Referral Program Settings** section type the **Program Name** and select other options as required.

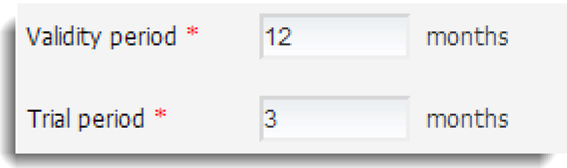


3. Set the **Referral Fee** fields including **Other Reward** if there is an additional bonus.



4. Type the **Validity Period**.

   This is how long a referral will be valid after its creation.

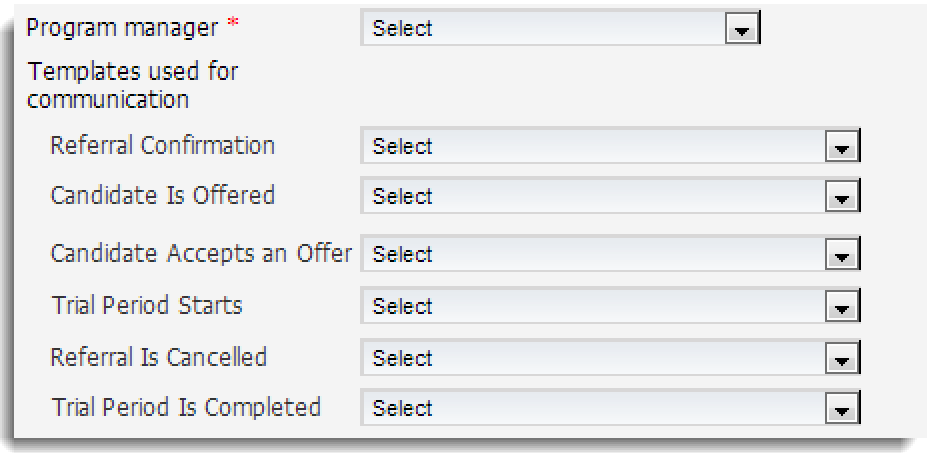


5. Enter the **Trial Period** for referred employees.

   Generally, the referral fee is only paid after the referred employee has successfully completed the trial period.

6. Select the **Program Manager**.

   This is the user in charge of coordinating the Referral Program and who will receive tasks related to referrals. See Communications with the Referral Program Manager (see page 262).



7. If Communication Templates are available, select the templates for:
   - **Referral Confirmation** – Used to send automatic confirmation requests to the referrers. In this email referrers will be able to confirm or reject the allegedly referred candidate (and thus, avoid cheating by candidates)

- **Candidate is Offered** – Used to send automatic notifications when the referred candidate successfully passes the Selection Process and receives an offer (application status: OFFERED)
- **Candidate Accepts an Offer** – Used to send automatic notifications when the referred candidate accepts the offer from the employer (application status: OFFER ACCEPTED)
- Trial Period Starts – Used to send automatic notification when the contract of the referred candidate becomes valid and the trial period begins (application status: HIRED)
- Referral is Cancelled – Used to send automatic notifications when the contract of the referred candidate is ended (application status: CANCELLED)
- Trial Period is Completed – Used to send automatic notifications when the trial period of the referred candidate is over

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ⓘ These communication templates are grouped as a template type called **Email used in Referral Program Communication**, and are maintained by an Administrator.

ⓘ These templates contain merged fields related to referrals:

ⓘ Referrer First Name

ⓘ Referrer Last Name

ⓘ Referrer Email

ⓘ Referral Fee

ⓘ Referral Reward

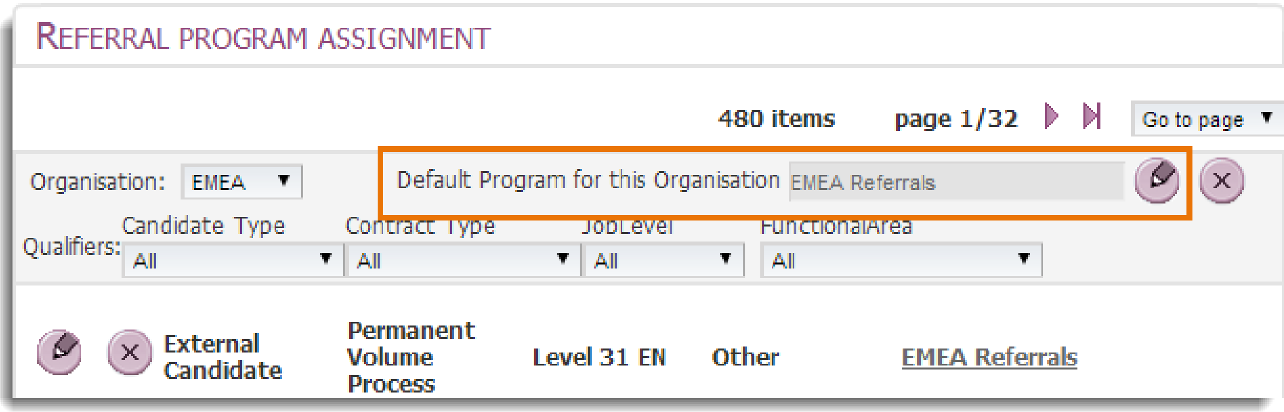
ⓘ Referral Fee Currency

ⓘ Referral Trial Period

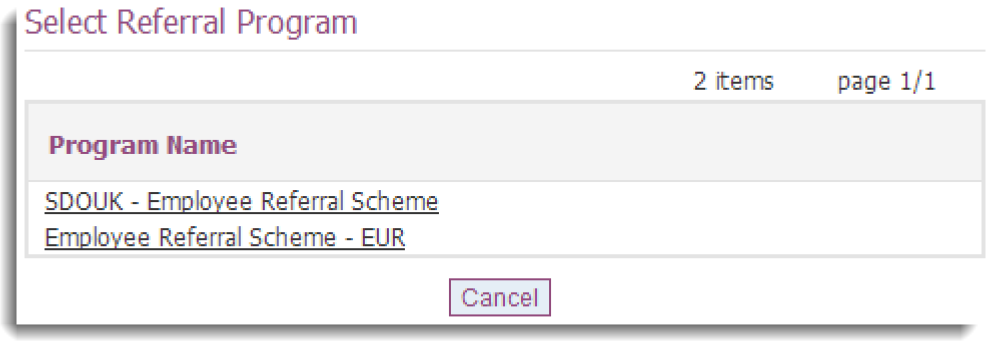
ⓘ Refer to Managing Candidate Communication Templates (see page 310) for more information.

Setting a Default Referral Program

1. On the *Referral Program Management* page (see page 245), click **Manage Assignments**.
2. Click  to the right of the **Default Program for this Organization** field.



3. In the *Select Referral Program* page, select the required Referral Program.



Assigning Referral Programs

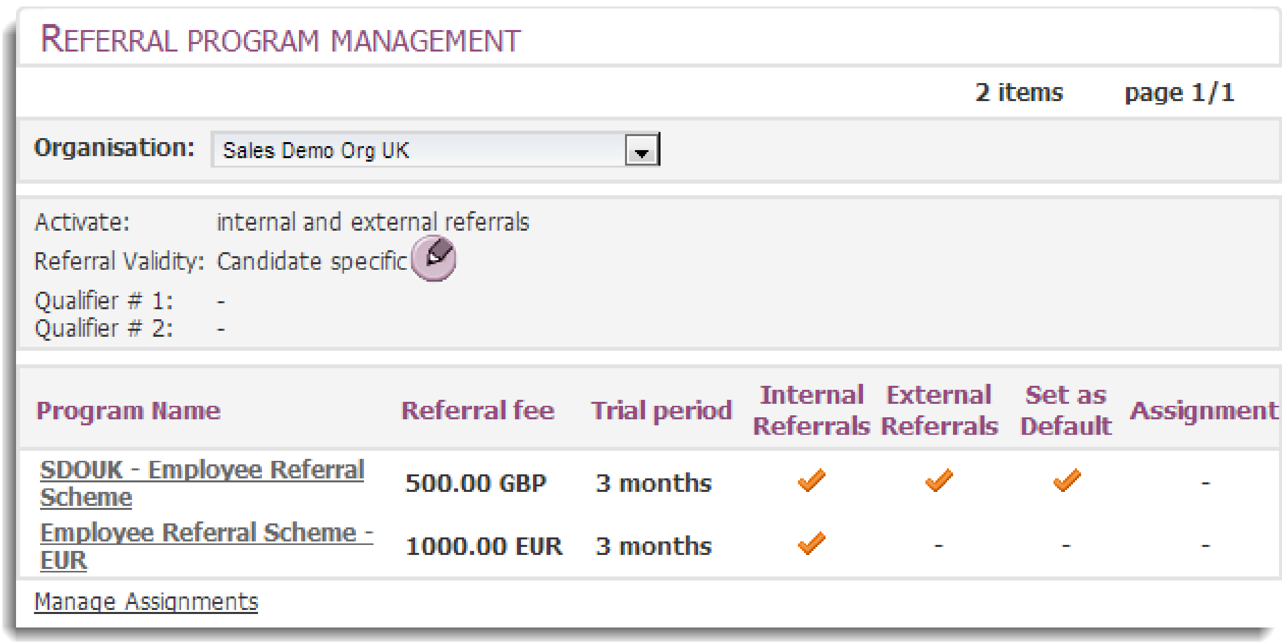
If several Referral Programs have been defined, they need to be assigned according to the configured Qualifiers.

Qualifiers are of the following types:

- System qualifiers – System LOVs which are displayed by default
- Customised qualifiers – Configurable LOVs active in the selected organization. These qualifiers are optional and they are defined in the **Referral Program Configuration** section (see page 246)

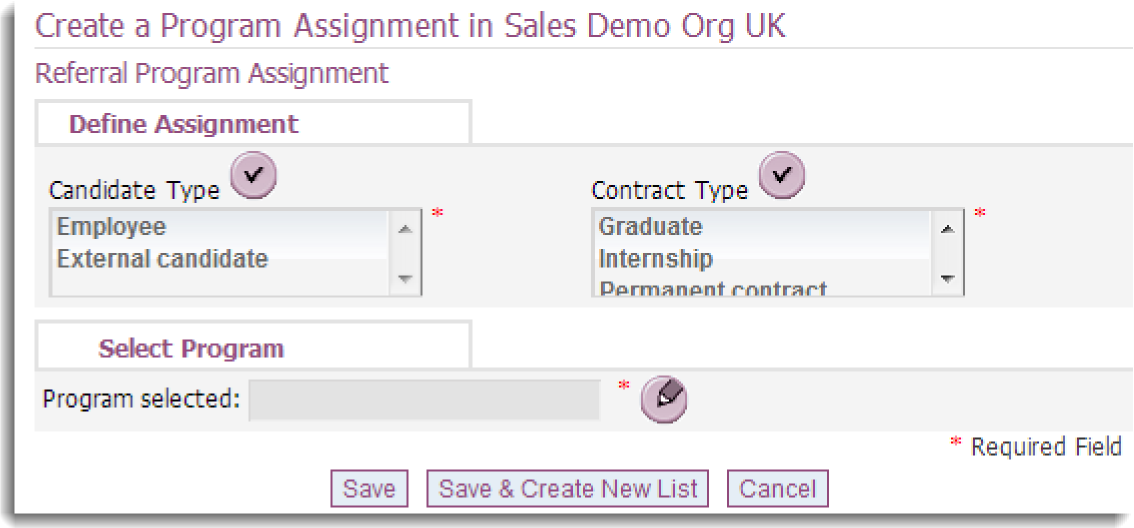
To assign Referral Programs:

1. On the *Referral Program Management* page (see page 245), click **Manage Assignments**.



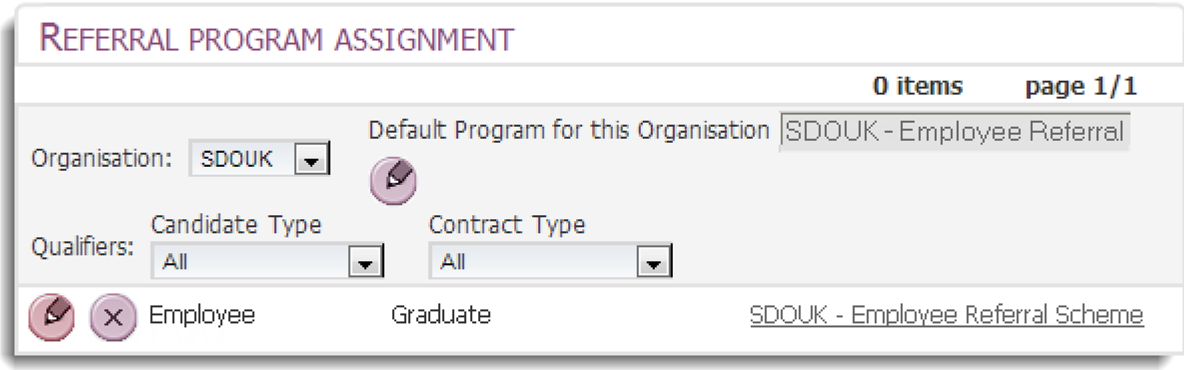
2. On the *Referral Program Assignment* page click

3. In the pop-up window, select the required values for each Qualifier, then click to select the Referral Program which needs to be assigned.



The list of assignments is displayed in the *Referral Program Assignment* page.

In the example image below, this assignment will trigger the following behaviour: when a job is created, for a new **Employee**, if the contract type is **Graduate** the Referral Program assigned to the job will be **SDOUK Employee Referral Scheme**.



Activating Referral Program Management at Site Level

For each Posting Site you must define the type of referrals which are allowed at site level. If a particular type of referral is not active for the site, it will not be possible to create a referral of that type during the online Application Process, even if an appropriate Referral Program is defined for the job.

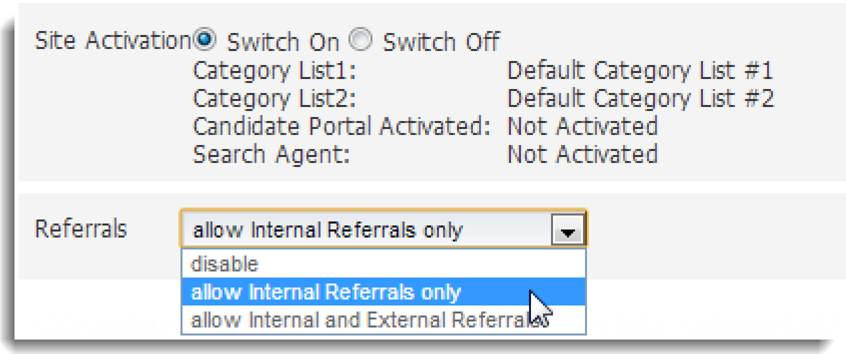
You must define the rules for both Career Sites (see page 251) and Job Boards (see page 252).

Career Sites

1. To define the type of referrals, open the *Site Management* page.
   - If you are a Global System Administrator, on the *Configuration* page click **Corporate Site Management**

- If you are a Local System Administrator, on the *Configuration* page, select your organization then click **Site Management**

2. Click **Edit** next to the name of the site.
3. On the *Site Information* page, select the required value from the **Referrals** dropdown list.

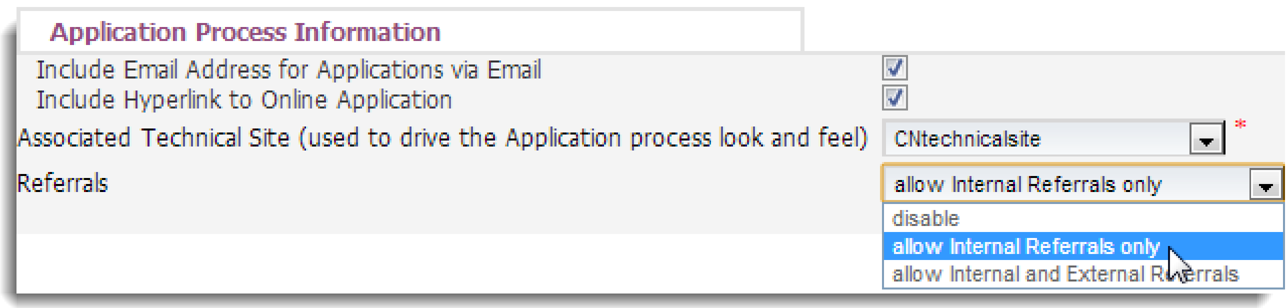


If a type of Referral has been activated on a Corporate Site, when candidates fill in the PIF during the online Application Process they will be able to enter details about the person who referred them. Refer to Create Referral in the Front Office (see page 254) for more information.

Job Boards

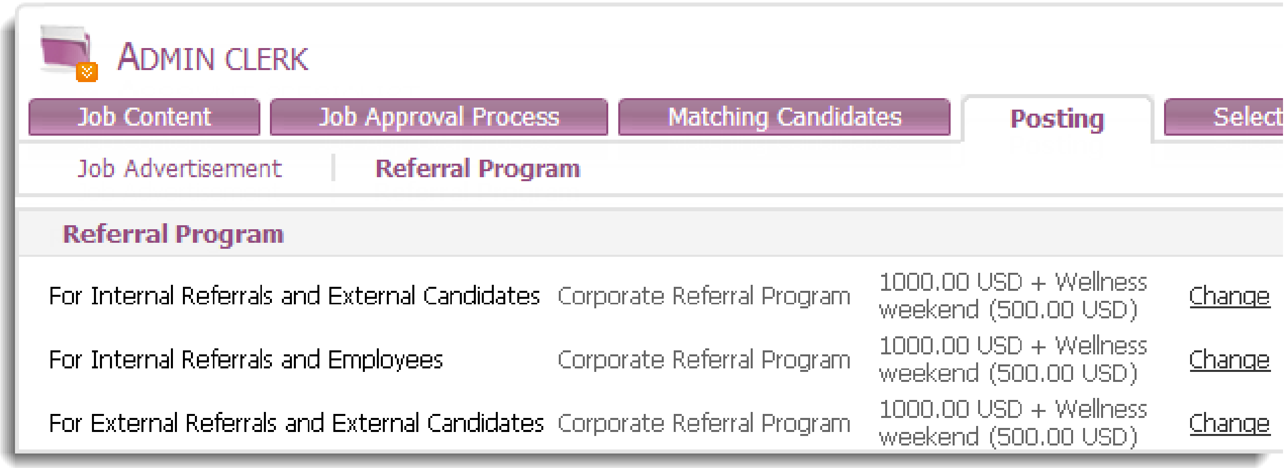
1. To define the type of referrals, open the *Site Management* page.
   - If you are a Global System Administrator, on the *Configuration* page click **Corporate Site Management**
   - If you are a Local System Administrator, on the *Configuration* page, select your organization then click **Site Management**
2. Click the *Other Sourcing Channels* tab.
3. Click **Edit** next to the name of the Job Board.
4. Near the bottom of the page in the **Application Process Information** section, select the required value from the **Referrals** dropdown list.

   The same rules apply as for the corporate sites.



Accessing and Changing a Referral Program at Job Level

When a job is created in an organization where Referral is active and Referral Program Assignments have been configured, a Referral Program is automatically assigned to the job. You can access this assigned program from the *Referral Program* tab on the *Posting* page of the job.



The Referral Program page lists information about:

- The type of Referral Program
- The name of the assigned Referral Program
- The fee of the Referral Program

1. To change the assigned Referral Program, click **Change** and then select another Referral Program.

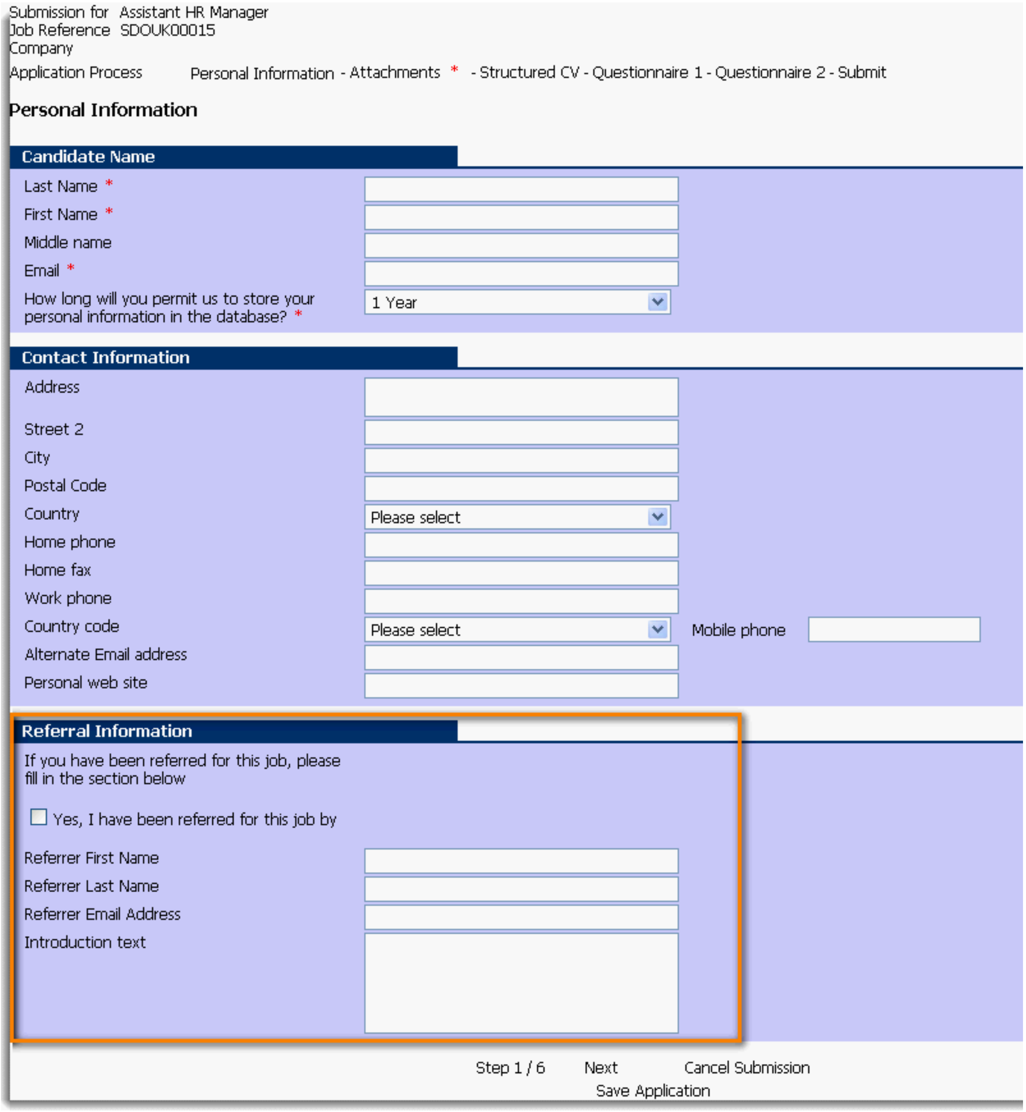
   You can also choose not to assign a Referral Program to a job by clicking **Change** and then selecting **None**.

If Referral Programs are assigned in an organization, candidates or employees can be referred in the following ways:

- Create Referral in the Front Office – If the job is posted on a site for which Referral Programs are active
  - If **Allow candidates to enter referrals themselves** is activated in the Referral Program configuration (see page 247) candidates can enter data related to the referees
  - If **Send job to a friend** is enabled for a site where Referral Programs are active
- Create Referral in the Back Office – Manually entered in the Back Office by TalentLink users during:
  - Candidate creation
  - Personal Information Form update
  - Application Source update

Creating a Referral in the Front Office

One of the steps during the online Application Process is to complete the Candidate Personal Information Form. In the PIF, the **Referral Information** section is used to collect details about the person who referred the candidate. This enables TalentLink users and Referral Program Managers to keep track of the referrers and the referees.



Submission for Assistant HR Manager
Job Reference SDOUK00015
Company
Application Process Personal Information - Attachments * - Structured CV - Questionnaire 1 - Questionnaire 2 - Submit

Personal Information

Candidate Name
Last Name *
First Name *
Middle name
Email *
How long will you permit us to store your personal information in the database? * 1 Year

Contact Information
Address
Street 2
City
Postal Code
Country Please select
Home phone
Home fax
Work phone
Country code Please select Mobile phone
Alternate Email address
Personal web site

Referral Information
If you have been referred for this job, please fill in the section below
Yes, I have been referred for this job by
Referrer First Name
Referrer Last Name
Referrer Email Address
Introduction text

Step 1 / 6 Next Cancel Submission
Save Application

The Referral Information section is only displayed when:

- Referral Programs are activated for the current job, current site, and for the type of candidate (Employee for Internal Sites and External candidate for External Sites or Job boards)
- The option **Allow candidates to enter referrals themselves** is activated in the Referral Program configuration (see page 247)

OR

- The candidate followed a referral link sent to him by a referrer (the option **Send job to a friend** is active on the current site)

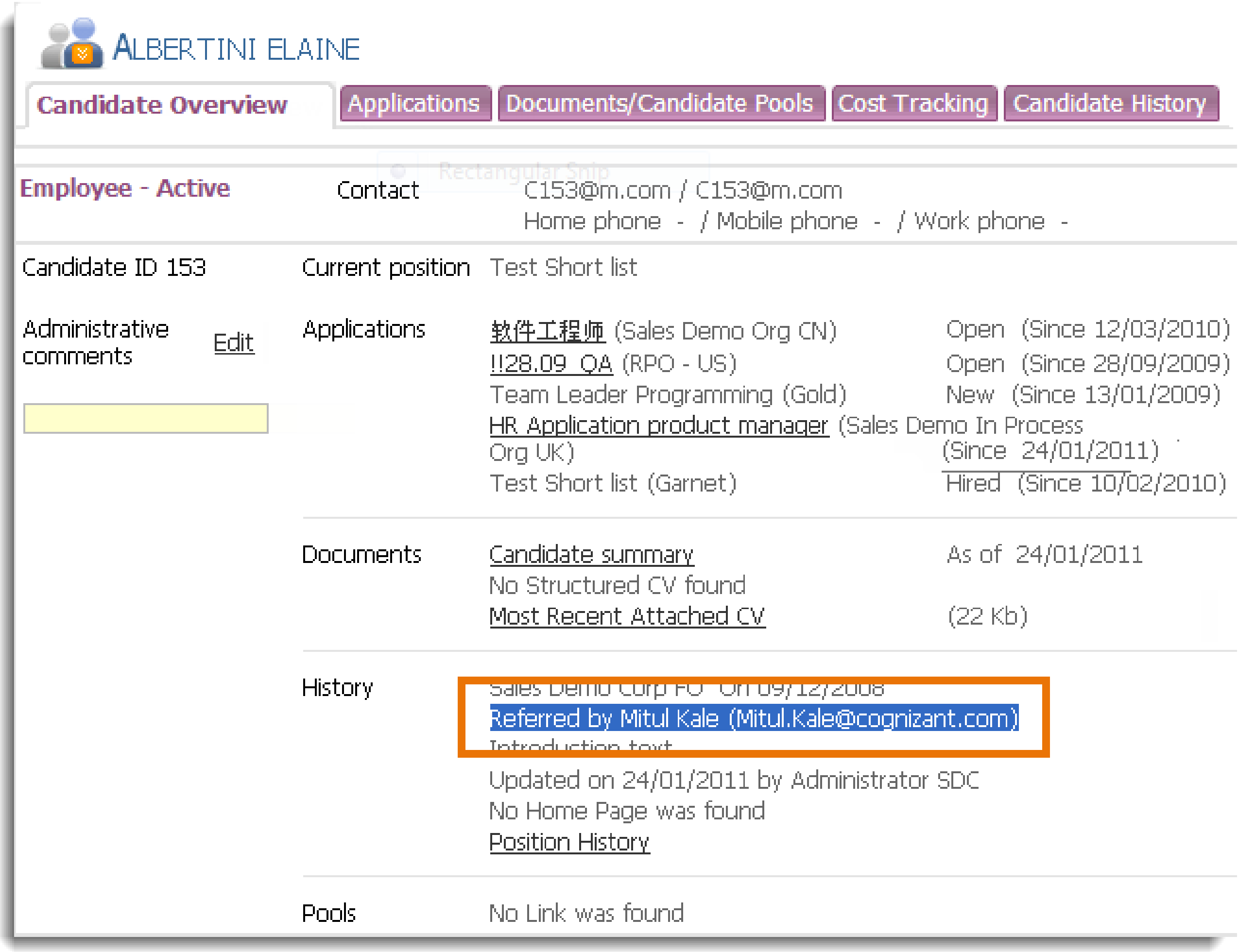
Allowing Candidates to Enter Referrals

If the **Allow candidates to enter referrals themselves** option is activated in the Referral Program assigned to the current job, candidates will be able to enter details about the person who referred them into the **Referral Information** section of the Personal Information Form. When an application that contains referral data is submitted, a referral link is created for this candidate associated with the selected Referral Program.

If the Referral Program has Communication Templates defined (see page 247) a confirmation email is automatically sent to the referrer. The email contains two links that enable the referrer to either confirm or reject the referral. Refer to Communications with the Referrer (see page 261) for more information.

The referral information can be viewed in two places in the Back Office:

- On the *Candidate Overview* page



- In the Candidate Summary

Administrative Information

Sourcing Channel Type	InternalReferral
Candidate Source	Sales Demo Corp FO
Referrer First Name	Kale
Referrer Last Name	Mitul
Referrer Email Address	Mitul.Kale@cognizant.com
Referrer Employee Id	-
Referrer Employee Company	-
Sourcing Medium	Online
Data Privacy Statement	1 Year

- **Sourcing Channel Type -** External or Internal Referral (depending on the site type)
- **Candidate Source** - The name of the site where the job was posted
- **Sourcing Medium** - Online (the candidate applied online)

Send Job to a Friend

The **Send job to a friend** option is displayed at the bottom of the job description in the Front Office. This enables candidates to inform people they think might be interested in a position. When clicked, a page similar to the following example is displayed:

When the candidate has completed all the required fields and clicked **Send to friend** an email will be sent to the friend that contains a link to the online application for the job. When the receiver of the email clicks on the link they will be able to start the online Application Process.

The section related to the Referral Information is displayed on the Personal Information Form for the candidate, and is pre-filled with details filled in by the referrer before they sent the job link via email.

All details related to how the candidate was referred can be viewed on the *Candidate Overview* page and in the Candidate Summary in the Back Office.

Creating a Referral Link in the Back Office

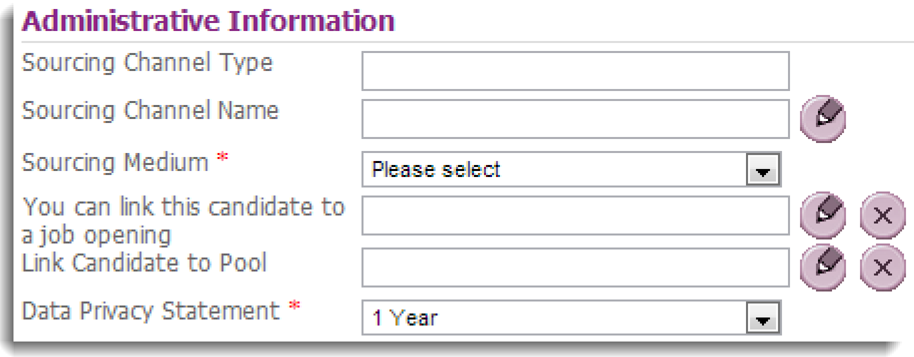
TalentLink users can refer candidates directly in the Back Office. They can do this when they:

- Create a new candidate (see page 257)

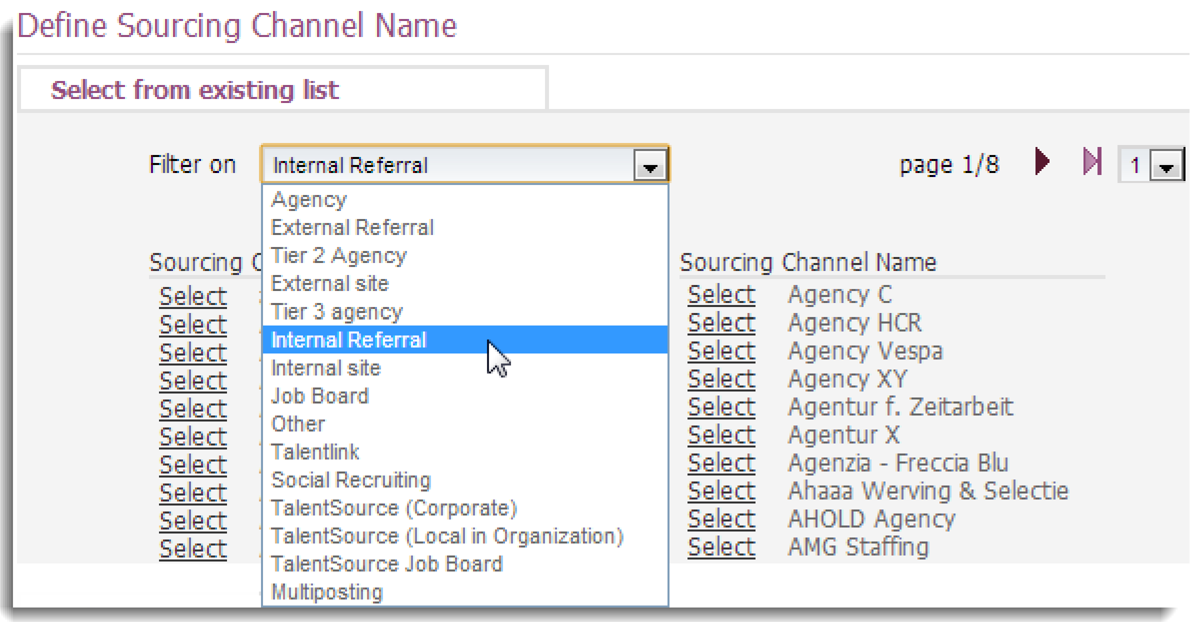
- Update the Candidate's Personal Information Form (see page 258)
- Update the Application Source of a candidate (see page 259)

Creating a new Candidate

1. From the **Quick Actions** section of the left dynamic menu select **New**, then **Candidate**.
2. In the **Administrative Information** section, select the **Sourcing Channel Type** then click to select the **Sourcing Channel Name**.



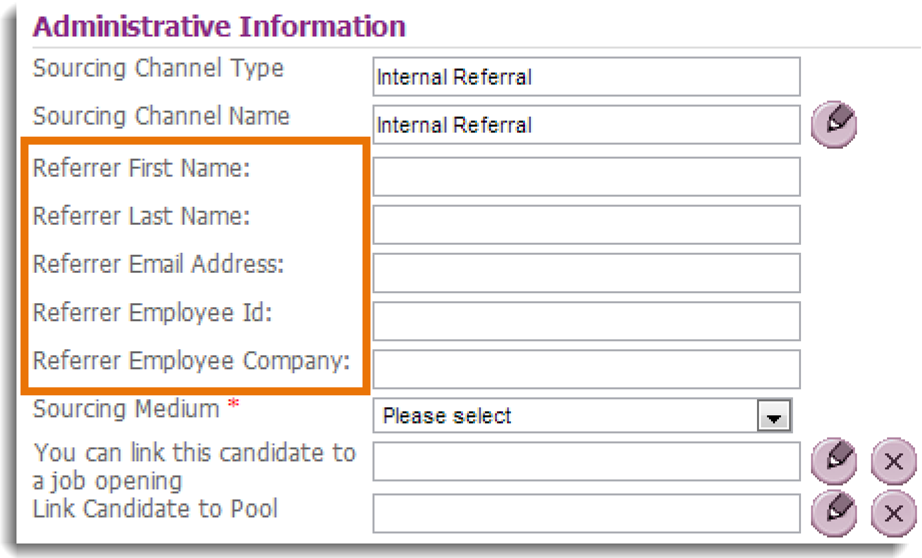
3. In the *Define Sourcing Channel Name* page, select either **Internal Referral** or **External Referral** in the **Filter on** dropdown list.



When you choose Internal Referral or External Referral, additional fields are added to the new Candidate Form:

- Referrer First Name
- Referrer Last Name
- Referrer Email Address
- Referrer Employee ID (Internal Referral only)

- Referrer Employee Company (Internal Referral only)



Updating the PIF of an Existing Candidate

You can create a referral link by changing the source of an existing candidate. This is a special case, since the result of such an action would be creating a referral that is not linked to any application or Referral Program. By default, such a new referral should be valid for a period of 12 months.

This referral could be assimilated by a Referral Program if:

- At organization level the referral validity is configured as being *Candidate specific*
  - From the *Configuration* page, select an organization then select **Manage Referral Programs**.
  - Click then select **Candidate Specific**.
- During this period the candidate is linked to some job (either directly in the Back Office or by applying online)
- This new job has a Referral Program defined

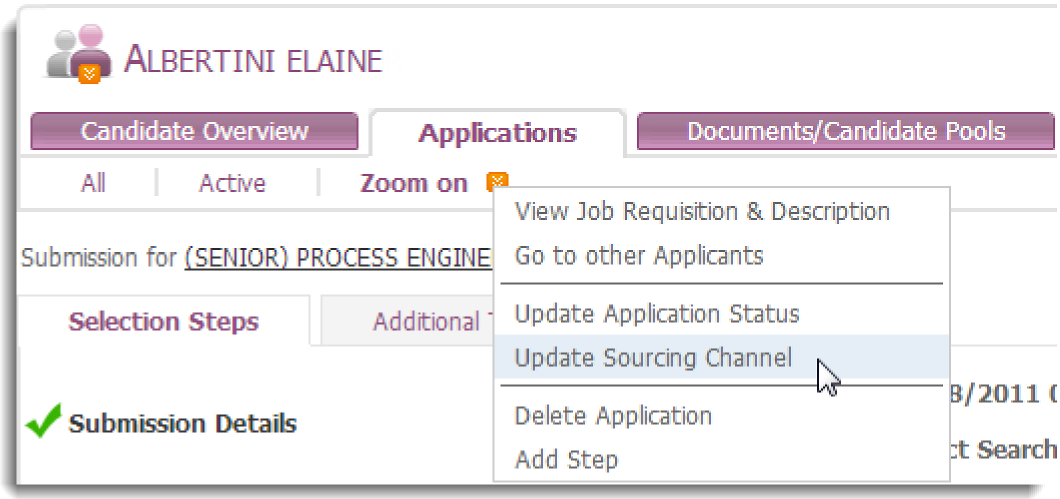
There are some rules in place when updating the Personal Information Form of a candidate who already has a referral as a source (either external or internal):

- If the referral is already consolidated in cost tracking, users are not allowed to change the source of the candidate
- If the referral is not yet consolidated in cost tracking two cases might occur:
  - The new sourcing channel is not a referral = the existing referral will be removed
  - The new sourcing channel is a referral, but of another type (internal referral changed to external referral or vice versa). In the case the type of referral will change and be transferred to another Referral Program (the referral fee, trial and validity period may change)

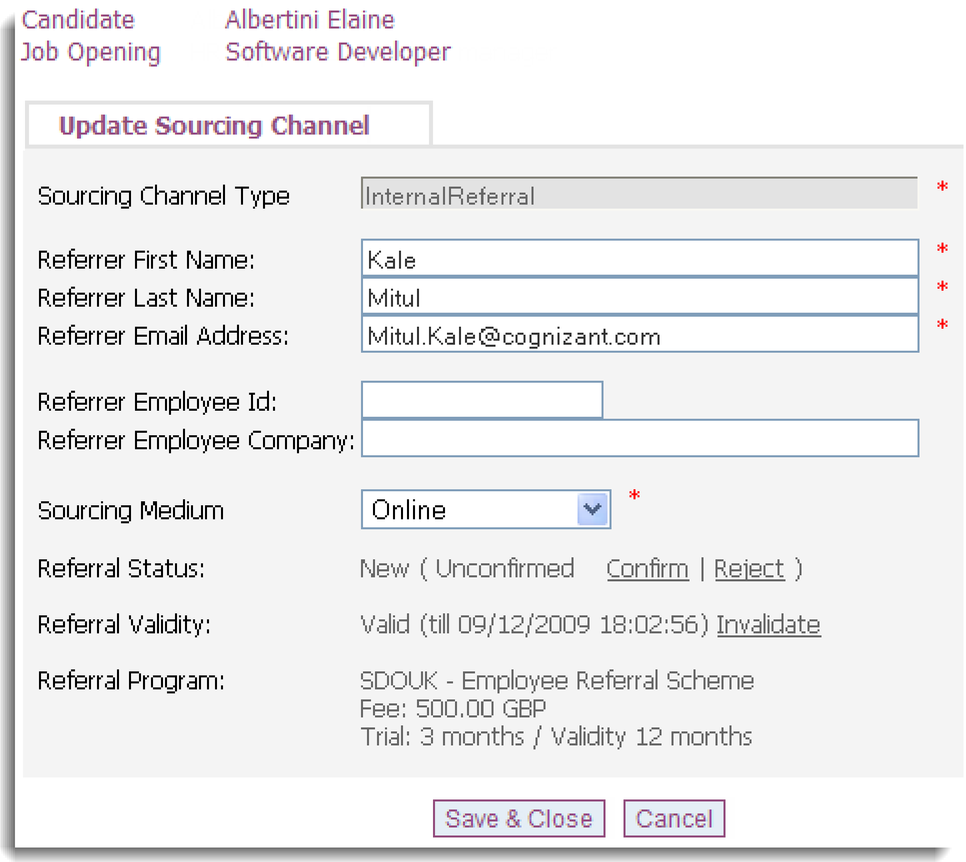
Updating a Sourcing Channel

You can manually update the application source of a candidate from the *Applications* tab on the *Candidate Details* page.

1. From within a requisition select a candidate name to display the *Candidate Details* page.
2. Click then select **Update Sourcing Channel**.



If the application source is a referral (Internal or External), the *Update Sourcing Channel* pop-up window will contain information related to the referrer and the Referral Program.



- If the original **Sourcing Channel Type** of the application is neither Internal nor External Referral, a referral is created following standard rules explained above.
- If the original **Sourcing Channel Type** of the application is a referral, two situations might occur:
  - If the referral is already consolidated in cost tracking, users are not allowed to change the source of the application
  - If the referral is not yet consolidated in cost tracking

a. The new sourcing channel is not a referral = the existing referral will be removed

b. The new sourcing channel is a referral, but of another type (internal referral changed to external referral or vice versa) = the type of referral will change and be transferred to another Referral Program (the referral fee, trial and validity period may change)

Referral Status

All referral links are created with a Status, which changes as the referred candidate goes through the Application Process.

Referral Status:	New (Unconfirmed Confirm | Reject)
Referral Validity:	Valid (till 09/12/2009 18:02:56) Invalidate
Referral Program:	SDOUK - Employee Referral Scheme Fee: 500.00 GBP Trial: 3 months / Validity 12 months

The available Statuses are:

- Confirmed – The referral is confirmed by the referrer. This may be in the Back Office or in the confirmation email sent to the referrer, if previously configured
- Unconfirmed – The referral is waiting for the confirmation of the referrer. The referral can be confirmed or rejected in the Back Office using the Confirm and Reject options
- Rejected – The referral is rejected, for example if the candidate tried to cheat
- Pending – From when the candidate accepted the offer until the end of the trial period
- Cancelled – When the trial period is unsuccessful
- Due – When the trial period is completed
- Paid – When the referral fee is paid

Referral Validity

A referral link is valid for the time specified in the **Referral Validity** period (taken from the configuration of the Referral Program with which it was associated).

A referral can be manually invalidated by clicking **Invalidate** in the *Update Sourcing Channel* pop-up window (see page 259). You may need to invalidate a referral if, for example, one of the company's rules is that referrals of former employees are not eligible for referral fees.

Notifications Inside the Referral Program

There are several people who participate in the Referral Program:

- The referrer is the person who refers a candidate or an employee (from the Front Office or Back Office)
- The referee is the candidate or employee who is being referred (from the Front Office or Back Office)
- The Referral Program Manager is the TalentLink user in charge of coordinating the program (set during the configuration of the Referral Program (see page 247))

In certain cases, automatic notifications are sent to the referrer (if previously configured) or to the project manager (if special conditions are met).

Communications with the Referrer

Automatic notifications are sent to the referrer when a candidate or employee is referred from the Front Office (see page 254). This may be when the referee has followed a referral link (using the **Send job to a friend** feature), or when the referee has manually entered the referrer's details in the **Referral information** section in the online Personal Information Form.

ⓘ Emails can only be sent to the referrer if Communication Templates have been configured for the Referral Program (see page 254).

The email that is sent automatically to the referrer contains the confirmation request of the referral. It contains two links:

- One link which enables the referrer to confirm the referral: by clicking on it the referral status will become Confirmed
- One link which enables the referrer to reject the referral (in case of candidate cheating): by clicking on it the referral status will become Rejected

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ⓘ Referrals that are directly in the Back Office have a default status of Confirmed, and no email notification will be sent to the TalentLink user.

A Confirmed referral means that the candidate or employee was indeed referred, and the Selection Process can start.

Depending on the application status of the referred candidate or employee, and on the status of the trial period, notifications will also be sent to the referrer (if previously configured):

- When the candidate is offered – The referred candidate successfully passed the Selection Process and received an offer (application status: OFFERED)
- When the candidate accepts the offer – The referred candidate accepted the offer from the employer (application status: OFFER ACCEPTED)
- When the trial period starts – The contract of the referred candidate becomes valid and the trial period begins (application status: HIRED)
- When the referral is cancelled – When the contract of the referred candidate is ended (application status: CANCELLED)
- When the trial period is completed – When the trial period of the referred candidate is over

Communications with the Referral Program Manager

The Referral Program Manager is a TalentLink user in charge of coordinating the Referral Program, and is able to perform actions related to this program.

There are two occasions when the Referral Program Manager needs to take action:

- Referral conflict task (see page 262)
- Paying the referral fee (see page 263)

Referral Conflict Task

If there is a conflict between two referrals for a candidate, a task is sent to the Communication Centre of the Referral Program Manager. The Referral Program Manager must select the active referral by clicking either **First referral** or **Second referral** in the Task. Once this is done, the Referral Validity and fee values used will be taken from the Referral Program of the selected referral.

Paying the Referral Fee

When the referee’s trial period has been completed successfully, the referral fee needs to be paid. When this occurs a message is sent to the Communication Centre of the Referral Program Manager.

Cost Tracking

Each Referral Program has a referral fee which is defined when it is configured. When the status of a referred candidate is updated to Offer Accepted (meaning that the Selection Process was successful and the offer details were negotiated), the referral fee is automatically consolidated in the Cost Tracking area.

When the candidate accepts an offer, a cost entry is created: FORECAST type.

When the contract starts, the cost entry becomes an ACTUAL cost.

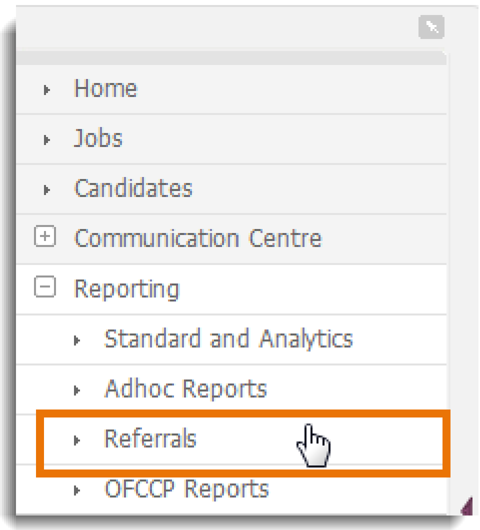
Reporting

The *Referrals* tab in the Reporting module contains a consolidated view of all referrals in the system. Referral information is also available in Standard Reports, and in the Recruiting Channels Effectiveness Analytical Report.

Referrals Overview Page

The *Referrals* tab in the Reporting module gives a consolidated view of all existing referrals.

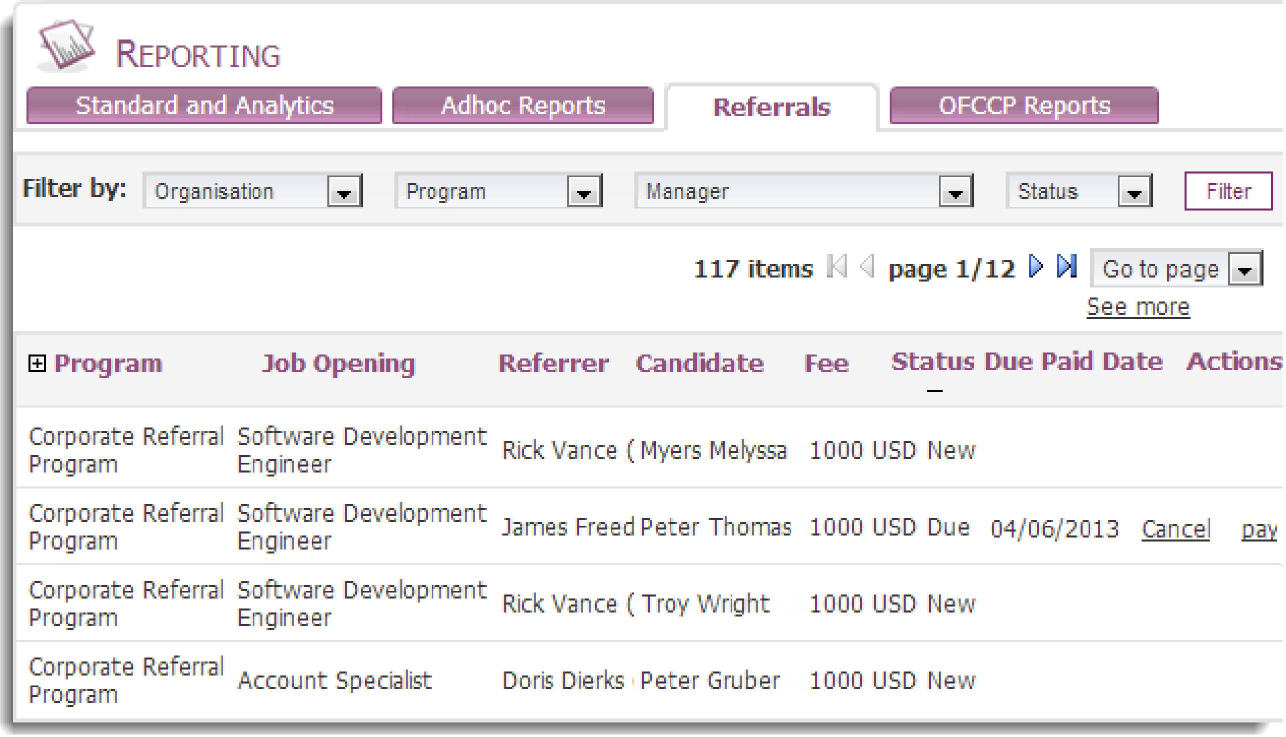
1. From the Reporting section of the left dynamic menu select **Referrals**, then select the *Referrals* tab.



You can:

- Filter referrals by Organization, Program name, Manager and Status
- Customise the page layout by moving the columns or by hiding details on the page
- Click **Pay** in the Actions column to pay the referral fee if the referral status is Due (the action is tracked)

- Click **Cancel** in the Actions column if the referral status is Due or Pending



Standard Reports and Analytical Reports

There are no specific Standard Reports for Referrals, however, the Sourcing Channel Type information (Internal Referral and External Referral) is available in the existing reports:

- Standard Reports and Analytical Reports take into account the new My/Our Applications (consolidated by Sourcing Channel Type)
- My/Our Hires - Consolidated by Sourcing Channel Type
- Analytical Report - Recruiting channels effectiveness (consolidated by Sourcing Channel Type)

Creating Rating Scales

Rating scales provide an OBS level with the ability to set scoring or rating criteria for candidates when they are being reviewed against a position. A column displays on the job's *Selection/Hiring* page where users can rate each candidate based on their defined criteria. They can then sort candidates by these ratings.

Accessing Rating Scales

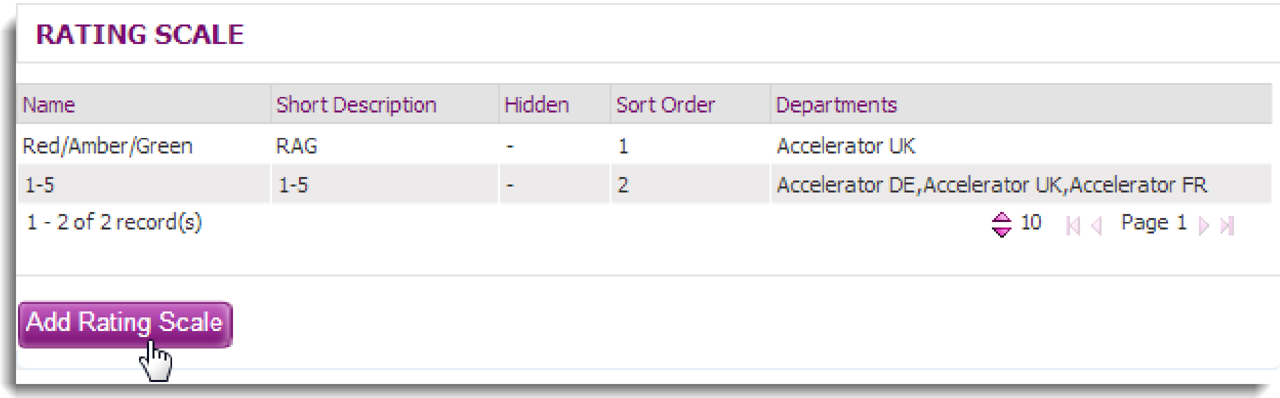
1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the **Administration** dropdown list, select an organization then select **Rating Scales**.

Defining the Ratings

To create a rating scale you must:

- Define and name your rating scale
- Add the rating scale scores
- Link the rating scale to an OBS

1. Click **Add Rating Scale**.


RATING SCALE

Name	Short Description	Hidden	Sort Order	Departments
Red/Amber/Green	RAG	-	1	Accelerator UK
1-5	1-5	-	2	Accelerator DE,Accelerator UK,Accelerator FR

1 - 2 of 2 record(s) 10 Page 1

Add Rating Scale

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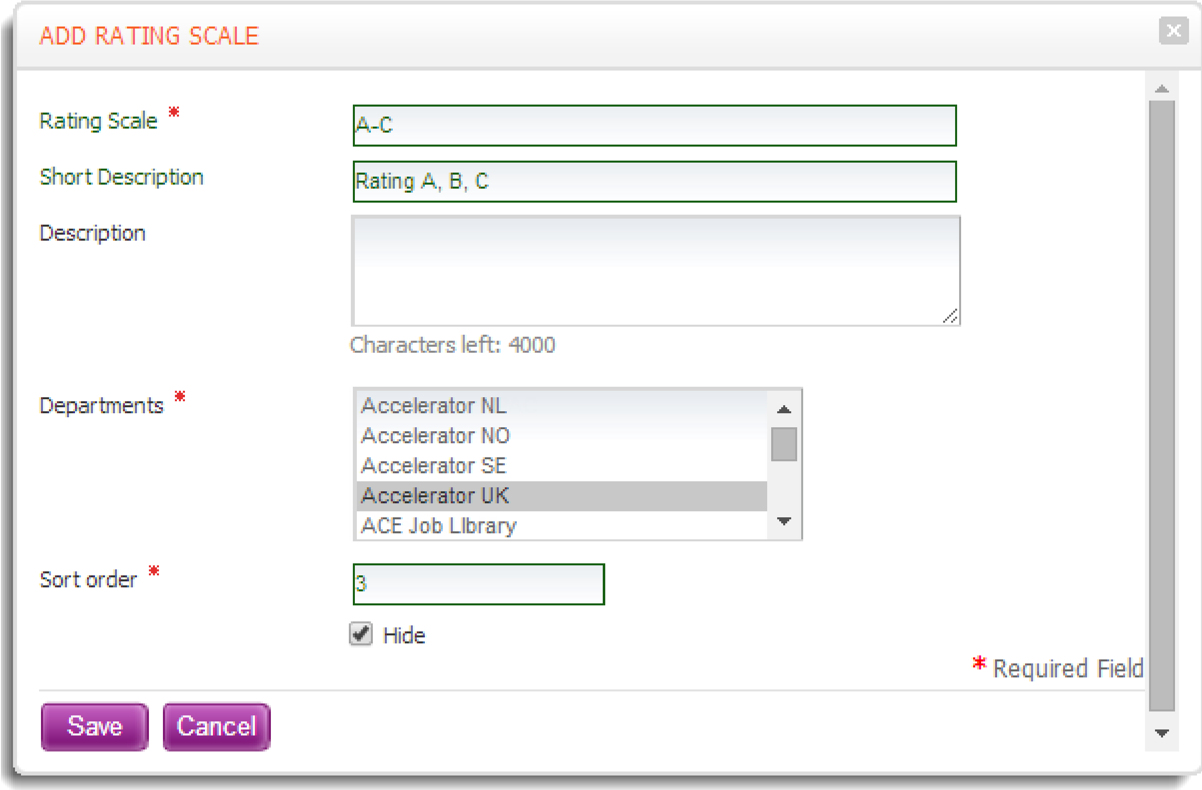
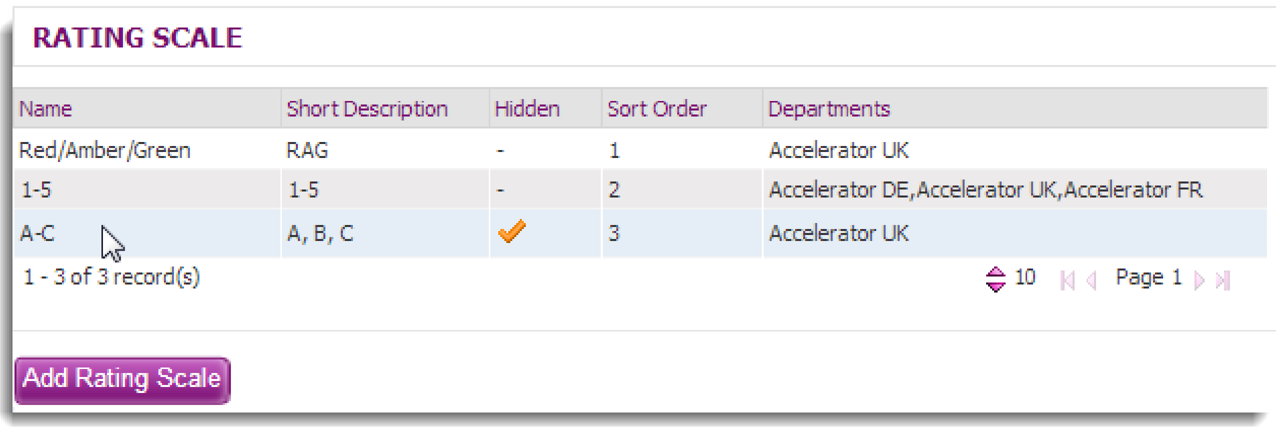
2. Type a **Rating Scale** name and also a **Short Description** if required.



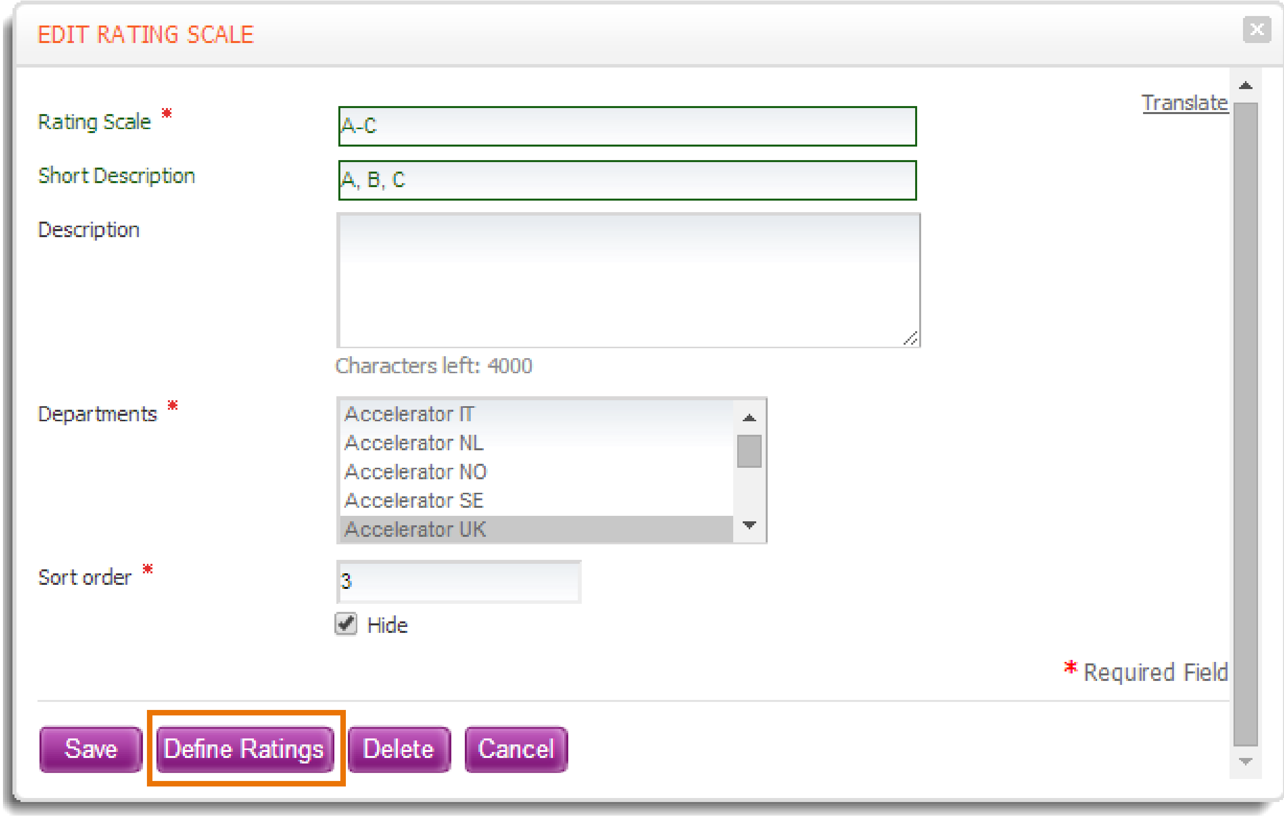
3. From the **Departments** dropdown list select the OBS levels this rating scale will appear in.
4. Type a **Sort Order** value, which is the order that the new scale will appear in within the list in relation to any other scales that are set up.
5. Click **Hide** if you want to keep the rating scale hidden until you've added the rating options and are ready to display the new scale.
6. Click **Save**.

Adding the Scores

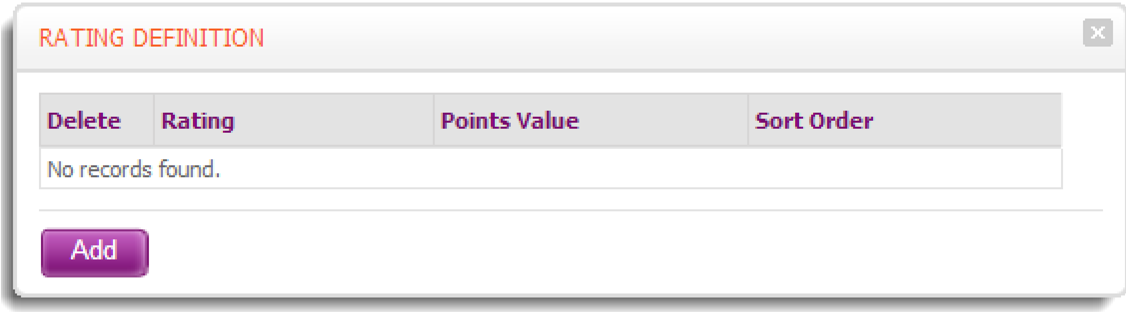
1. To re-open the scale and add scores, click your new scale in the list.



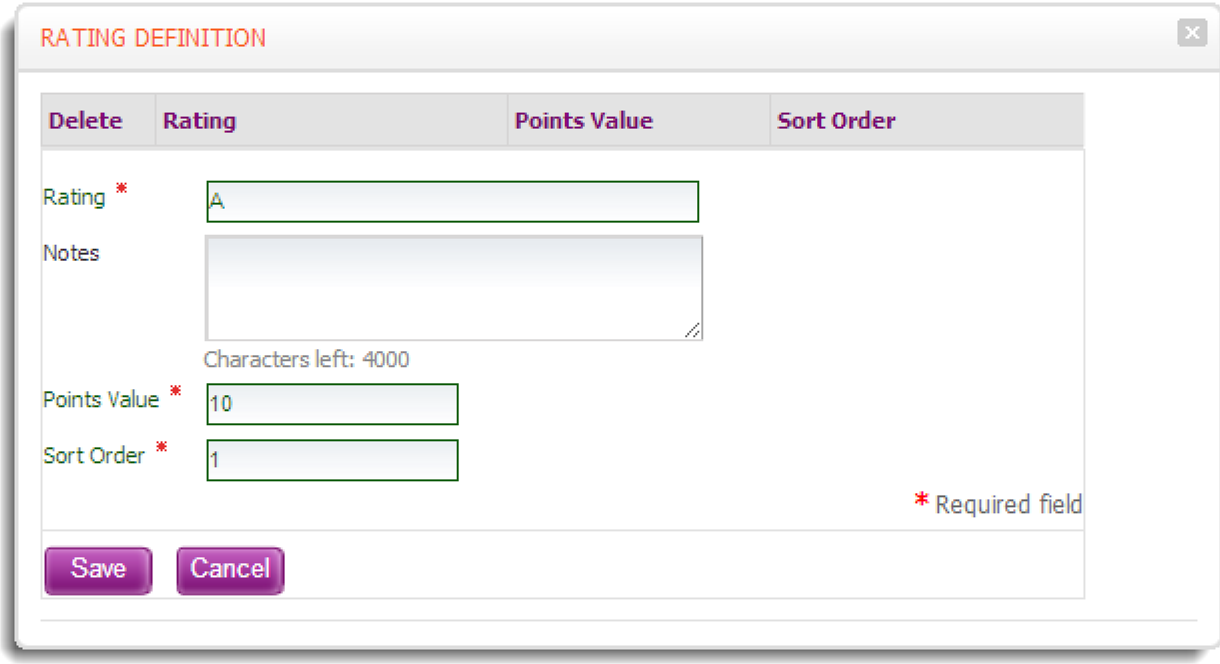
2. Click **Define Ratings**.



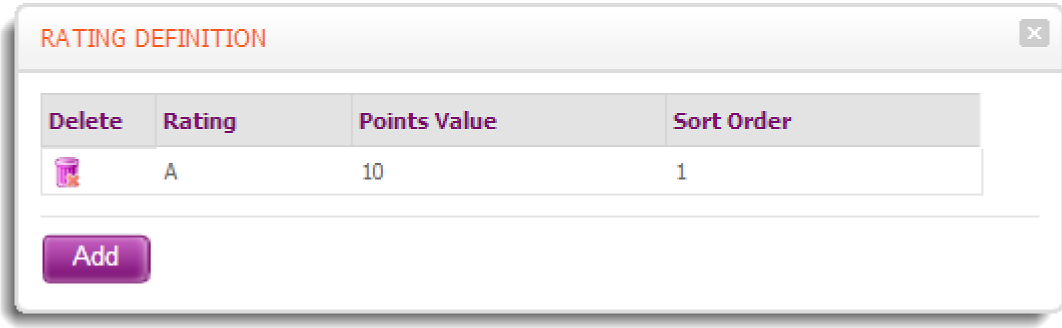
3. Click **Add** to add the scores for your rating scale.



4. Type the label that will appear in the **Rating** column on the *Selection/Hiring* page of job requisitions.



5. Type a **Points Value** numerical score which will be used to compare candidates.
6. Type the **Sort Order** which can be used on the *Selection/Hiring* page to sort candidates based on their score.
7. Click **Save**.



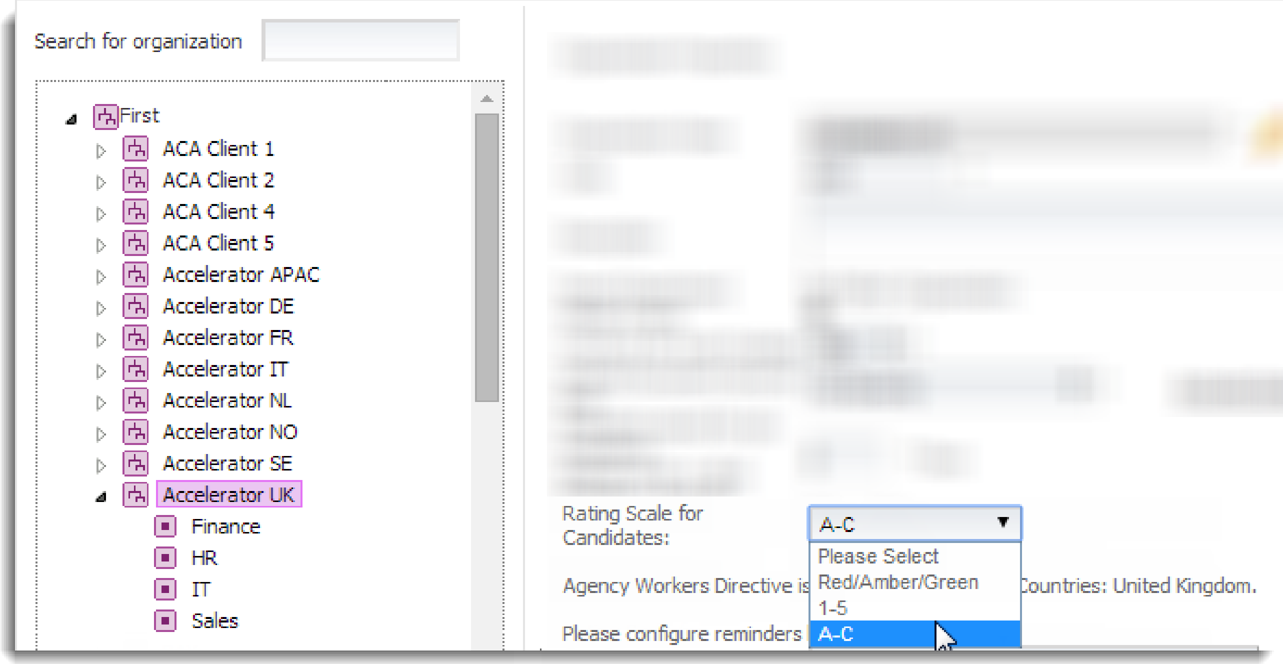
8. To add the other rating score options click **Add** and repeat the previous steps.

Linking the Rating Scale to an OBS

With the ratings added and scores associated with them you can now link the rating scale to an OBS level.

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the **Administration** dropdown list, select an organization then select **Organization Properties**.

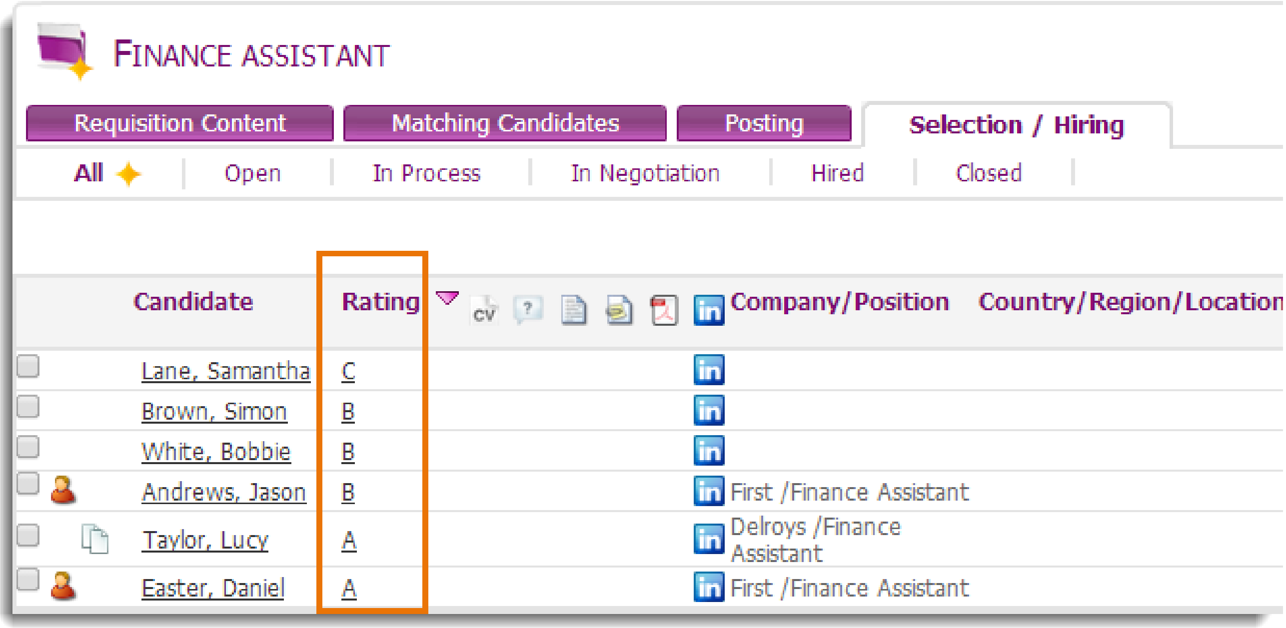
3. From **Rating Scale for Candidates** select the required option.



A warning prompt will display informing you that changing the rating scale will erase any ratings that have already been allocated to candidates.

4. Click **OK** to apply your selected rating scale.
5. Scroll down to the bottom of the page and click **Save**.

If you have unhidden the rating scale (see page 265) it will now be available to use on requisitions.



Country-Specific Legal Requirements

Candidate data can only be stored for the time period defined by law in that region/country.

To ensure compliance with the law, the data privacy and data retention settings in TalentLink can be configured as required.

You can use corporate default values to ensure that privacy settings are aligned with the country in which the job is located, and also define the data privacy settings in the organization properties.

Alternatively you can use the country-specific legal requirements settings here to define data retention values for each country.

Once a candidate record is created in TalentLink:

- If no application is being made the candidate is linked to a TalentPool and the data storage period runs until the end date and the Candidate Status = Inactive and the data storage period clock starts to run.
- If an application is being made then the candidate's record is linked to the job requisition and the Candidate Status = ACTIVE

As soon as the Application Status = Rejected OR Withdrawn OR Auto-Closed the Candidate Status = Inactive and data storage period clock starts to run.

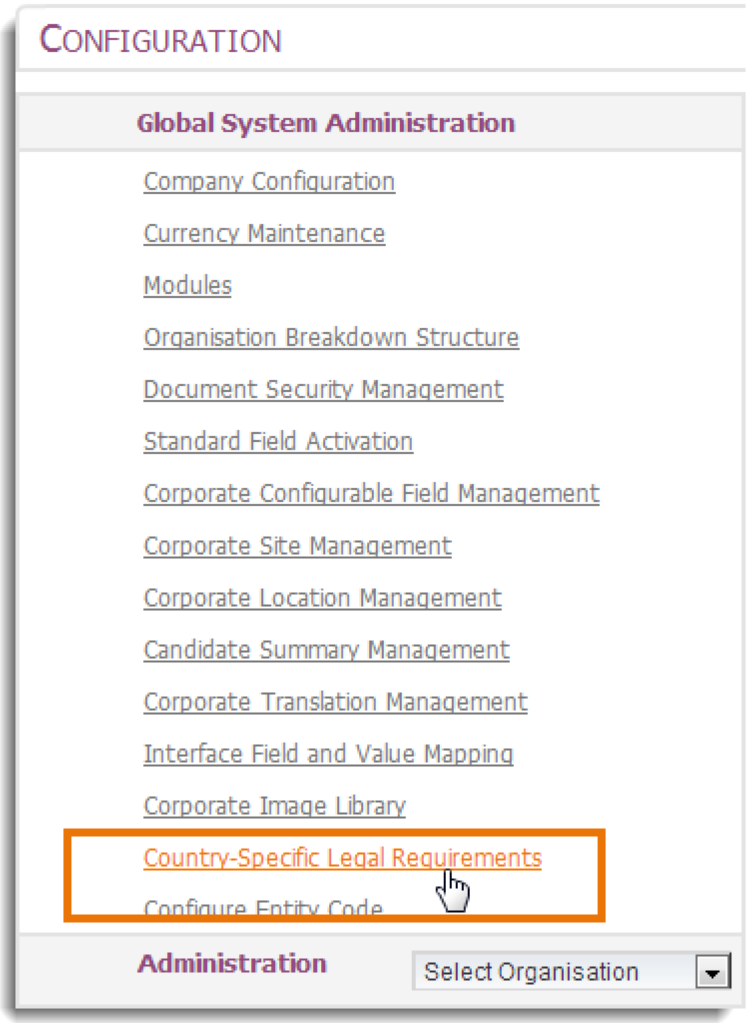
At the end of the data storage period listed against the Candidate record the archiving process is run and data deleted. The batch process archiving data runs each day at 1400 hrs CET.

When the data storage period ends the only information that is retained is:

- Candidate application information such as source and application date
- History of application status changes for the record
- List of the application Selection Process tasks (recruitment tasks)
- History of candidate record status changes (active/inactive)

Accessing Country-Specific Legal Requirements

1. From the **Settings** section of the left dynamic menu, select **System Administration**, then **Country-Specific Legal Requirements**.

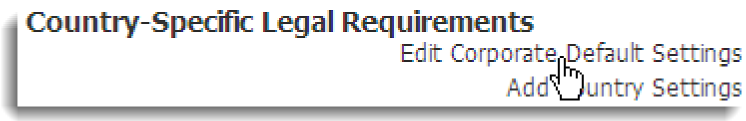


When you access the Country Specific Legal Requirements page for the first time it will not contain any data.

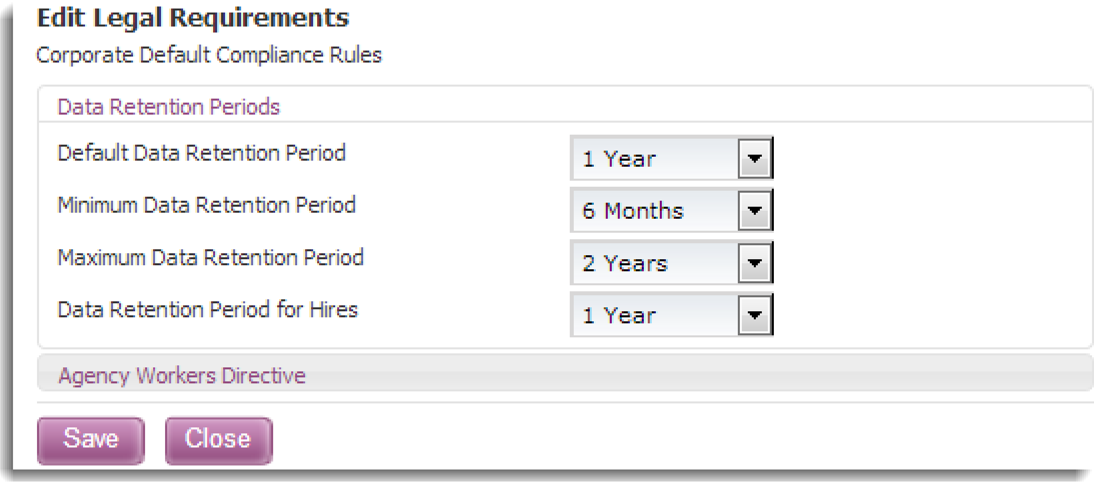
Corporate Default Settings

To edit the default corporate settings:

1. Click **Edit Corporate Default Settings**.



2. In the **Edit Legal Requirements** section, edit the Data Retention Periods as required then click **Save**.



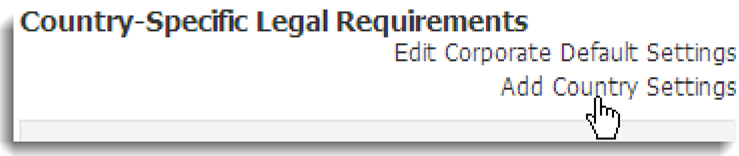
ⓘ The **Default Data Retention Period** must be in the range between the **Minimum Data Retention Period** and the **Maximum Data Retention Period**.

Country Settings

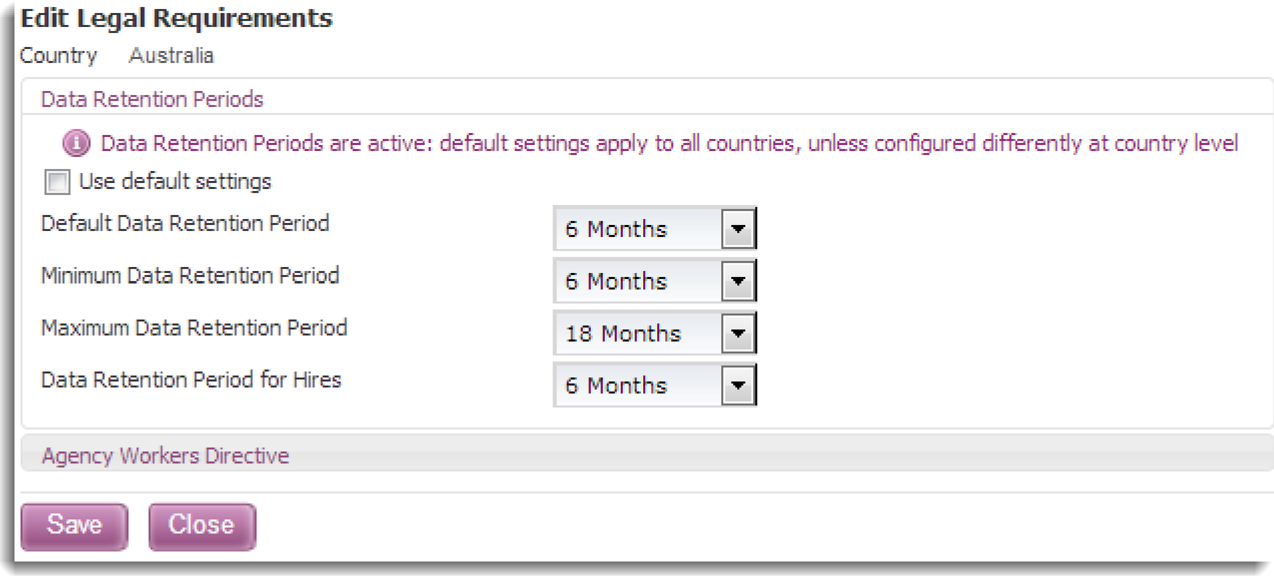
You must define the Data Retention Periods for all countries used in your organization. If you do not, the Corporate Default Settings will be used when a candidate applies for a job in a country whose legal requirements have not been defined.

Adding Settings for a Country

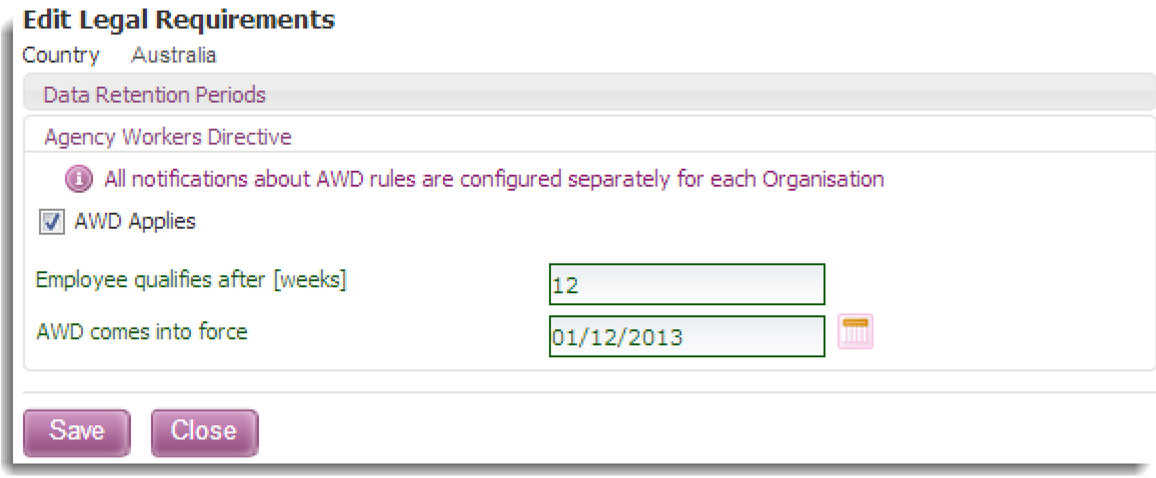
1. Click **Add Country Settings**.



2. In the **Edit Legal Requirements** section, set the Data Retention Period options as required.



3. If required, select the **Agency Workers Directive** and specify whether it applies (see paragraph following the next image).



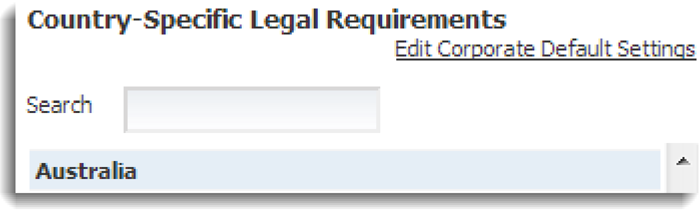
The Agency Workers Directive (AWD) is a legal requirement that is applied to employees working for a company via an agency. The EU Temporary and Agency Workers Directive (2008/104/EC), seeks to guarantee those working through employment agencies equal pay and conditions of employment with employees in the same business who do the same work.

This regulation became applicable in the UK in October 2011, and specifies in particular that they will become eligible for equal pay and benefits after working for a total of 12 weeks. Enhancements are to be provided in TalentLink to:

- Ascertain whether the rule is applicable to an employee or not
- Remind employers when an employee is about to become eligible for equal pay
- Update merge fields and reporting fields accordingly

4. Click **Save**.

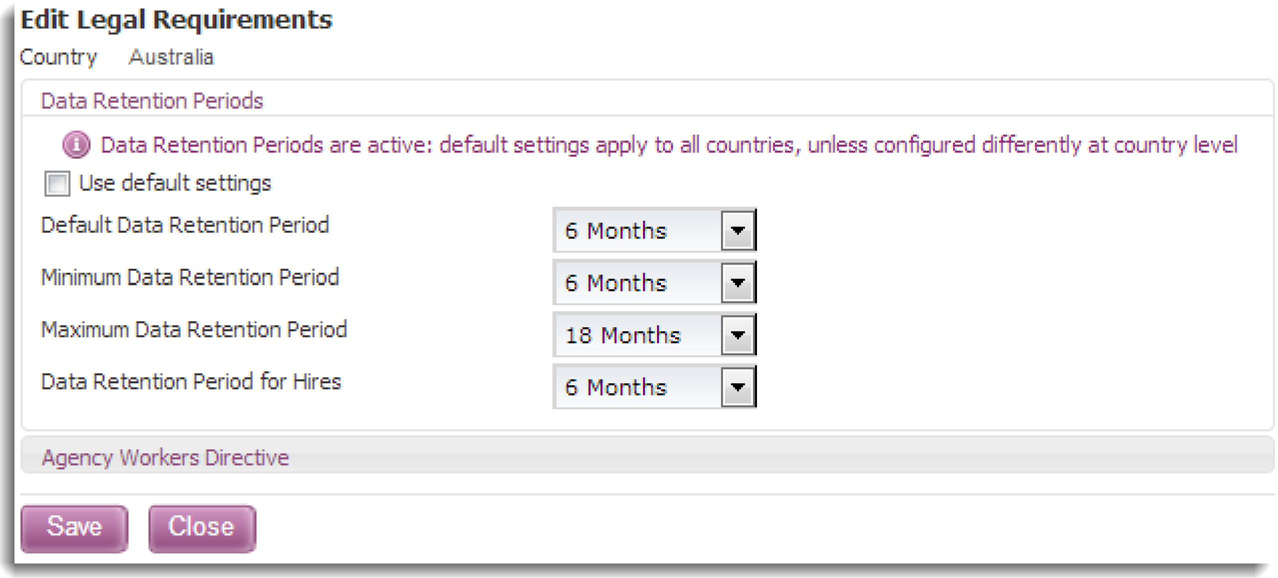
The new country is added to the **Country** list in the left panel.



Editing Settings for a Country

1. Select the appropriate country from the **Country** list.

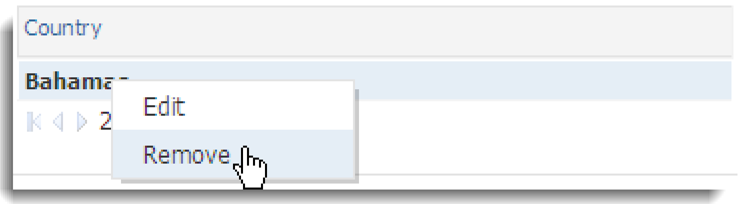
   The **Edit Legal Requirements** section is displayed.



2. Edit the options as required then click **Save**.

Deleting the Settings for a Country

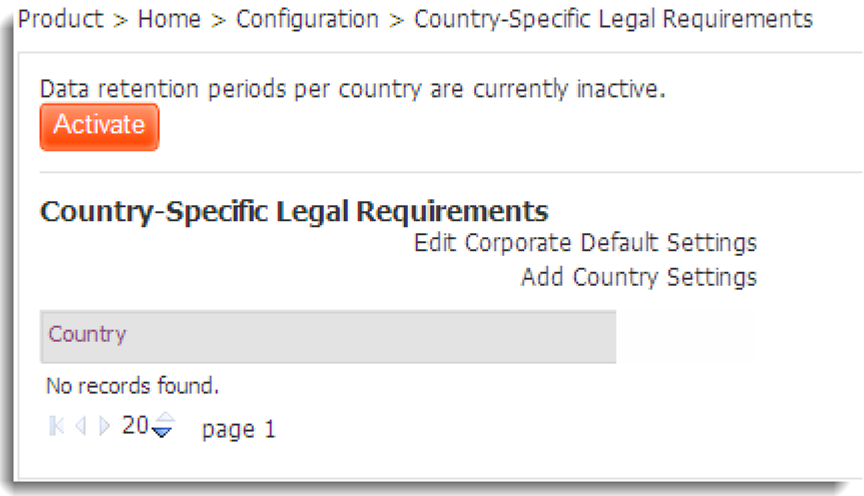
1. Right-click the country in the **Country** list.
2. Select **Remove** from the pop-up menu.



Activating Country-Specific Legal Requirements

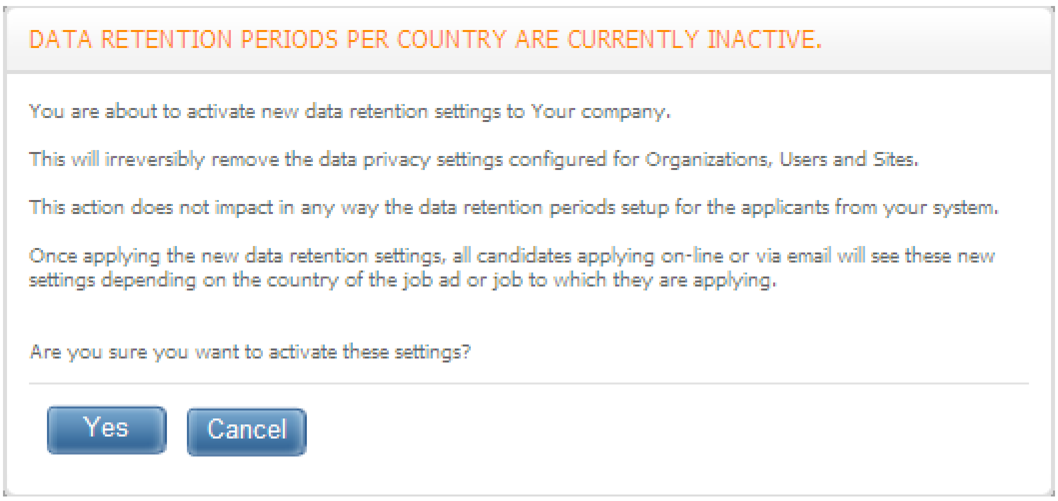
You must activate this functionality before you can use it.

1. Ensure that the corporate data retention values (see page 271) and the country-specific data retention values (see page 272) are set as required.
2. In the Data retention periods per country section, click **Activate**.



ⓘ Activation of Country-Specific Legal Requirements is irreversible. You cannot use your previous data privacy settings when this functionality has been activated.

3. If you are sure you want to proceed, click **Yes** in the warning dialogue box.



When country-specific data retention periods are active, they replace related default settings in a number of TalentLink modules:

- Company Configuration
  In the Default Configuration (see page 14) section, the **Default Data Privacy Statement for Hires Value** and the **Default Data Privacy Statement Value** are hidden

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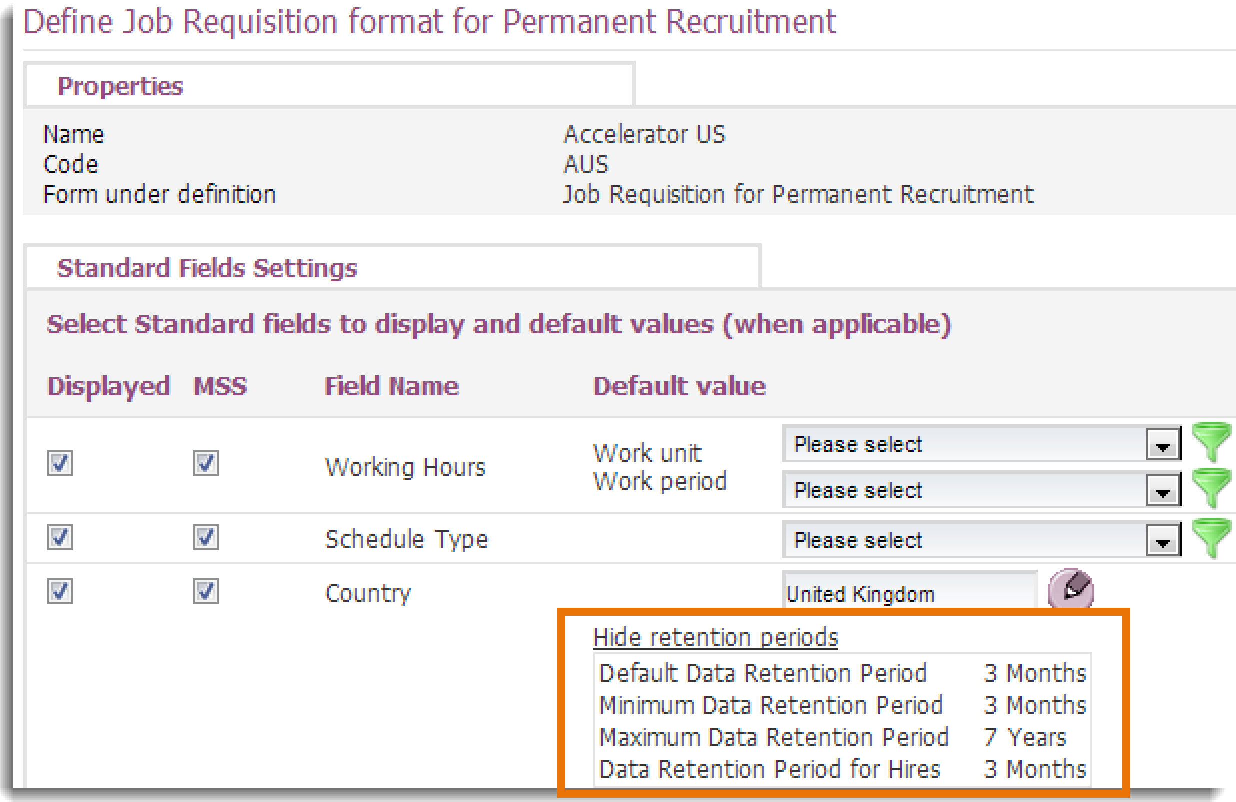
- Organization Management
  In the Organization Properties (see page 38), the **Data Privacy Statement for Hires** and the **Default Data Privacy Statement value** are hidden
- Site Management
  On the Career Sites page, the **Data Privacy Statement** column is hidden

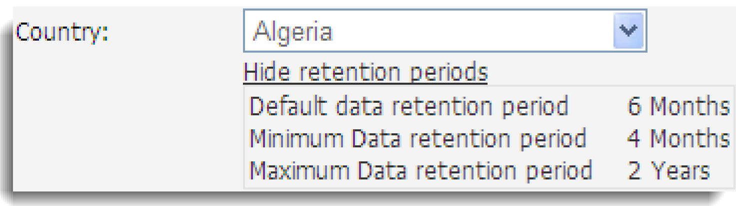
  In Site Layout (see page 124), the **Data Privacy Statement** section is hidden
- Email Gateway
  On the Email Gateway Configuration page, **Default Data Privacy Statement** is hidden. For details see the *Email Gateway* chapter in the TalentLink User's Guide

Additionally, the country-specific data retention periods are displayed in a number of modules to inform the user about the values currently in use in TalentLink:

- When defining the Job Requisition Format (see page 43), the data retention periods are displayed next to the country name in the **Standard Fields Settings** section



- When creating a job advertisement, the data retention periods are displayed next to the Country field.



For details see the *Job Openings* chapter in the TalentLink User's Guide.

Organization Properties

There are a number of settings available at local organization level, these include:

- Data Privacy Statement for Hires - Inherited. All candidates who are hired take this value as their data privacy statement. If country-specific data retention periods have been activated this setting is not available.
- Default Data Privacy Statement - Inherited default data privacy statement. This value is used as the default data privacy statement at the local Career Site. If a candidate applies through the Career Site that is local to this organization the default data privacy statement value is displayed. Candidates can overwrite this setting. If country-specific data retention periods have been activated this setting is not available.

Within Company Configuration you can stipulate the Default Data Privacy Statement for Hires Value and Default Data Privacy Statement value from a range of 1 month up to 7 years.

Creating Forms and Questionnaires

In TalentLink you can create document templates that can be used to create common documents such as questionnaires, feedback reports, or resumes. This enables you to standardize the information you receive from candidates, and in some cases, attach scores to candidate answers. When scores are attached, candidates can be sorted according to the document scores to simplify the screening process.

In the **Forms & Questionnaires** section, the following templates (Form Types) are available:

- Diversity Questionnaire (see page 302)
- Profile (see page 304)
- Questionnaire (see page 305)
- CV (see page 306)
- Feedback Report (see page 307)
- Candidate PIF (Personal Information Form) (see page 307)

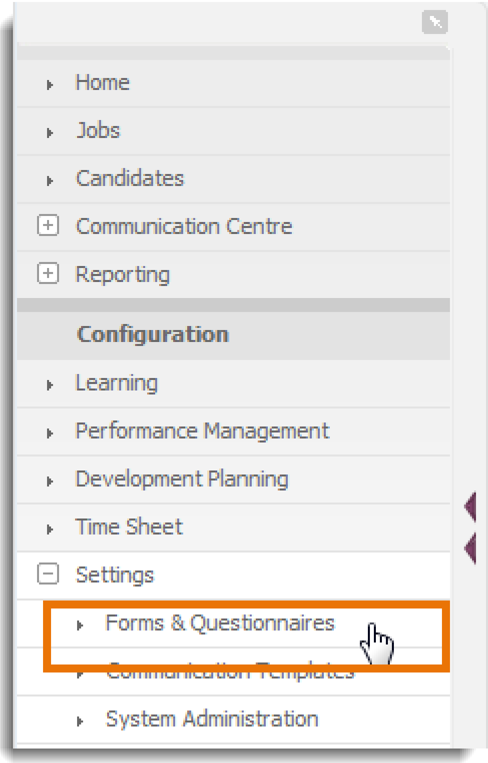
ⓘ Other template types are available in the Communication Templates module (see page 310).

You can create new templates and update existing templates. Templates can be attached or copied, as needed, to different organizations, jobs, and candidates.

Accessing and Previewing Forms

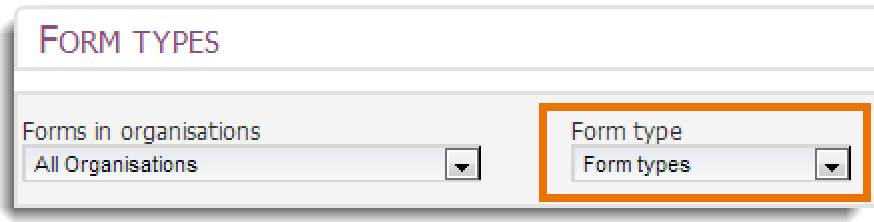
To preview forms, you must have either the Global System Administrator, Local System Administrator, or Functional Manager role assigned to you in the current organization. Refer to User Management (see page 327) for instructions on assigning roles.

1. From the **Settings** section of the left dynamic menu, select **Forms & Questionnaires**.

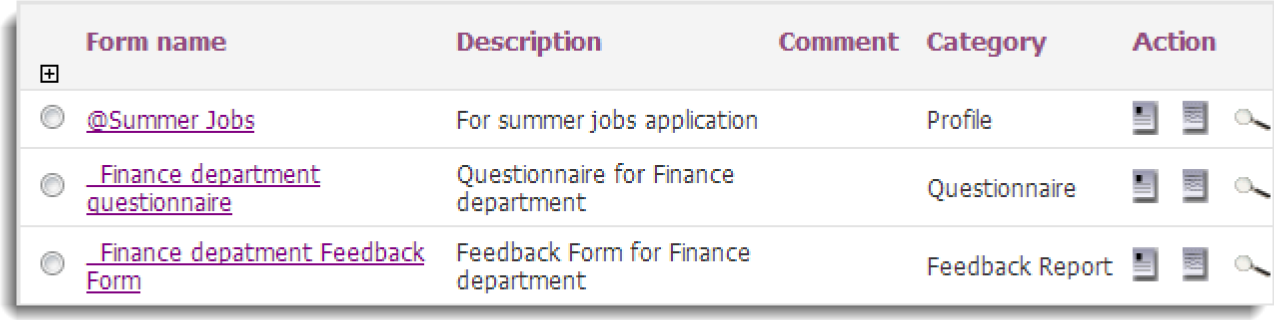


The *Form Types* page is displayed.

2. Select the required form in the **Form type** dropdown list.

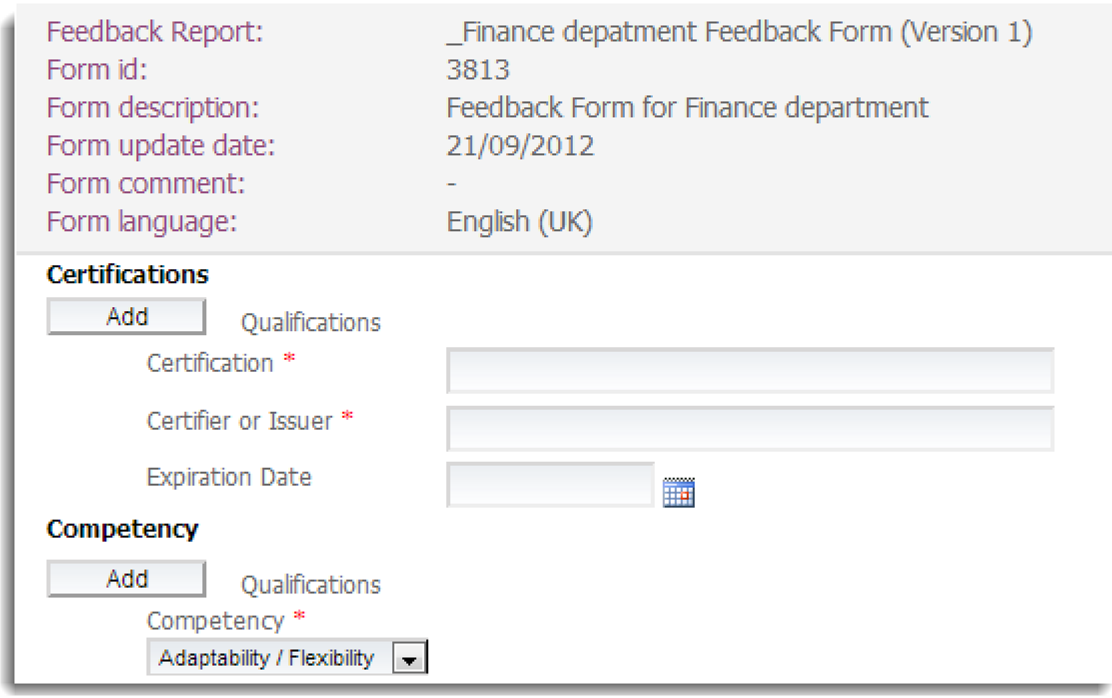


3. To preview a form, at the far right of the page click .



	Form name	Description	Comment	Category	Action
	@Summer Jobs	For summer jobs application		Profile	
	_Finance department questionnaire	Questionnaire for Finance department		Questionnaire	
	_Finance depatment Feedback Form	Feedback Form for Finance department		Feedback Report	

The preview of the selected form is displayed along with form information (for example Form id, Form description, Form language, and so on).



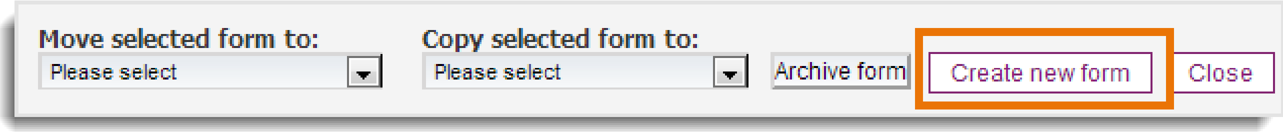
ⓘ You can fill in the form in preview mode, but this information will not be saved in the database. This feature is available only for demonstration purposes.

ⓘ Print out the form by clicking **Print** at the bottom of the form.

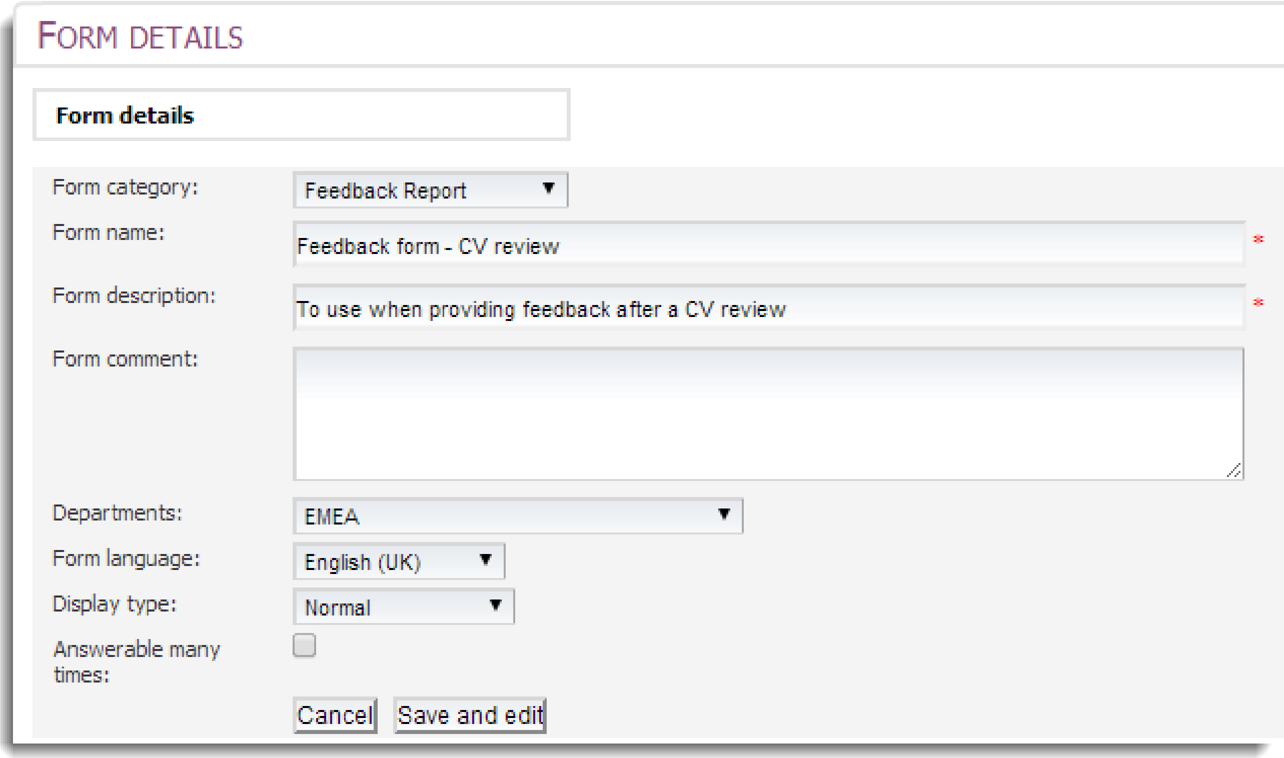
Creating Forms

1. Access the *Form Types* page (see page 279).

2. At the bottom-right of the page click **Create new form**.



3. Select the type of form that you would like to create from the **Form Category** dropdown list and type other details as required.



4. Forms are created in an OBS level so select a **Department** to link this form to.

   Additional options will be available depending on the form type you selected.

   Display Type

   - Next Answerable - Questions will appear one at a time. This is useful when you have a lot of branching questions, or if your questionnaire is an assessment of some kind.
   - Normal - All question appear on the form and can be answered in any order.

   Answerable Many Times

   - Select this option if you want to enable the candidate to edit the content of the questionnaire after it is saved. This is useful if the form is a PIF or application form, but should be left unselected if it's a test, assessment or feedback form.

5. Click **Save and edit**.

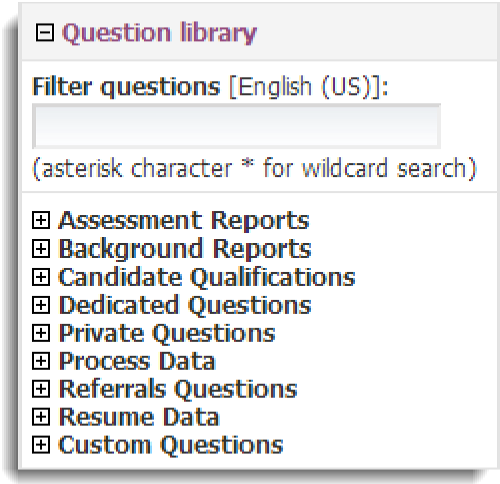
The Form Builder window is displayed. Here you can:

- Add, remove and edit questions
- Reorder the questions

- Preview the form
- View form information
- Create custom questions
- Define dependencies
- Translate the form
- Assign scores to questions

Adding Questions from the Question Library

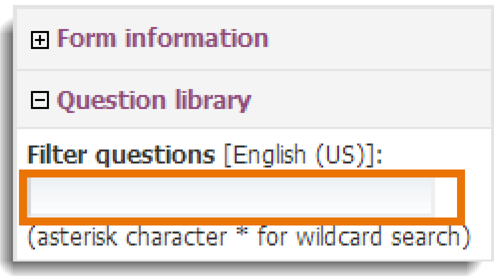
The **Question Library** section contains predefined questions ready to be used in the form.



Questions are grouped into various categories including:

- Candidate Qualifications – Questions relating to Candidate Qualifications
- Dedicated Questions – Questions with additional business rules attached
- Process Data – Questions relating to the Selection Process of a candidate
- Resume Data – Questions relating to previous professional experience and to the personal data of the candidate
- Custom Questions - Manually defined by users and, once created, automatically added to the Question Library to be shared with others (it is necessary to use **Filter Question** functionality to display the available results - see next paragraph)

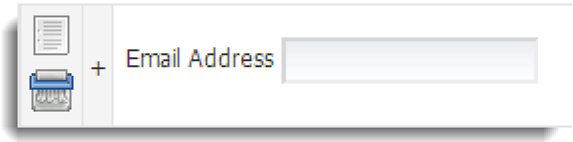
1. Filter questions to find the ones you need in the Question library.



2. Click ⊞ to expand the category, or ⊟ to collapse the category.

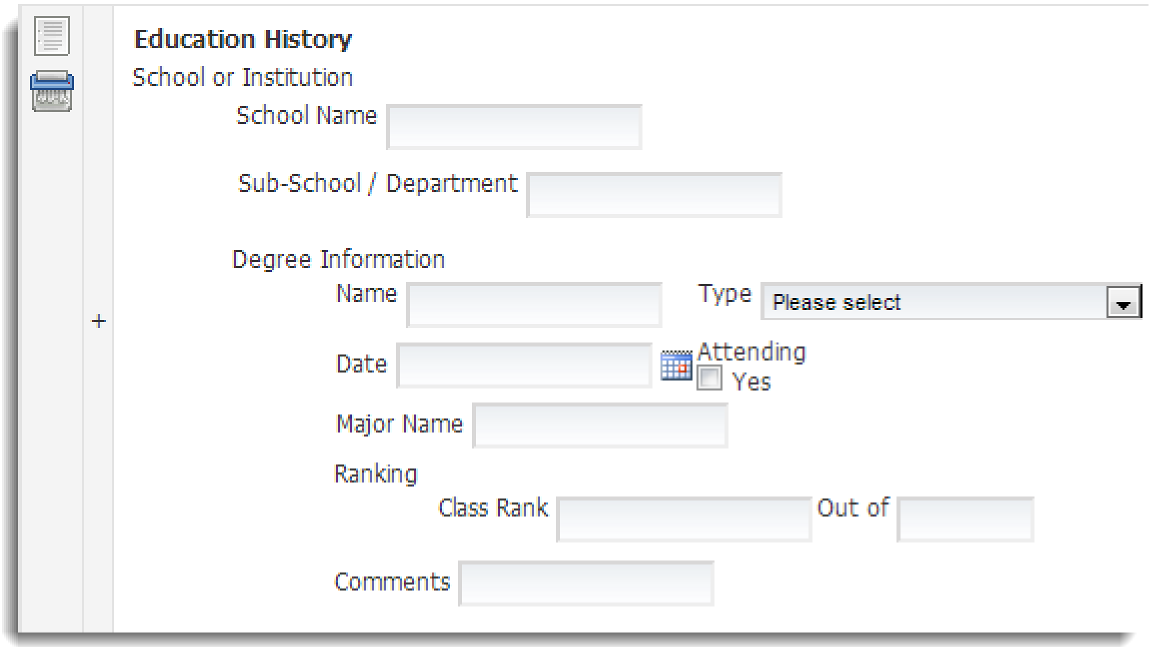
If the selected question is greyed out, it is already in use in the form. You cannot use the same question twice in a form.

3. Drag and drop an active question to include it in the form. The question is placed where you drop it.
4. Click to modify a question's title or other properties.



5. Click to delete a question.

ⓘ Some library questions act as containers; a set of related, more detailed enquiries is attached. These related questions cannot be added separately to the form. For example, Education History contains more detailed questions relating to the degree type, field of study, and so on.

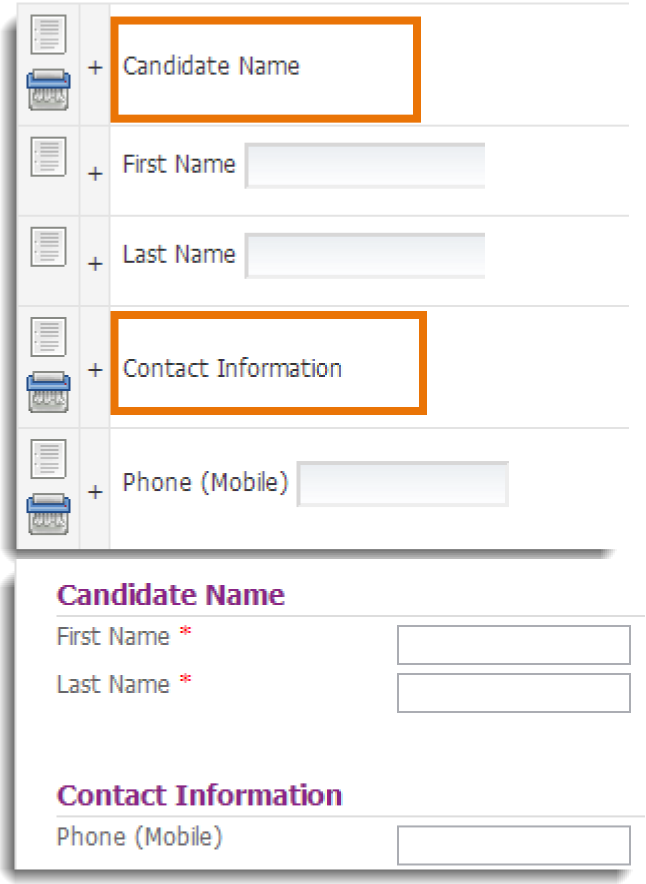


Adding User-Defined Questions

If you cannot find the question you need in the Question Library you can create your own.

A number of question types are available:

- Section Question – Acts as a container for an explanatory paragraph prior to the set of questions that relate to it. You can pin a Section Question to the end of your questionnaire or anywhere else you would not expect to find a question. It can also be used to visually divide questions in the form into various groups. A Section Question is written in a different font colour and is bigger. The section ends when another section starts.



- Free Text Question – Enables free text to be typed into the form
- Multiple Choice Question – Enables candidates/interviewers to select more than one option from the list
- Single Choice Question - Enables candidates/interviewers to select one option only from the list
- Simple Text no Answer – Enables candidates/interviewers to type free text into the form
- Image no Answer – Enables an image to be inserted, for example, a company logo. Refer to Adding an Image to a Form (see page 286) for more information

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ⓘ Once a new question is created it is available in the **Custom Questions** section in the Question Library for every user. Questions are not automatically displayed – you must use the **Filter questions** feature to display them.

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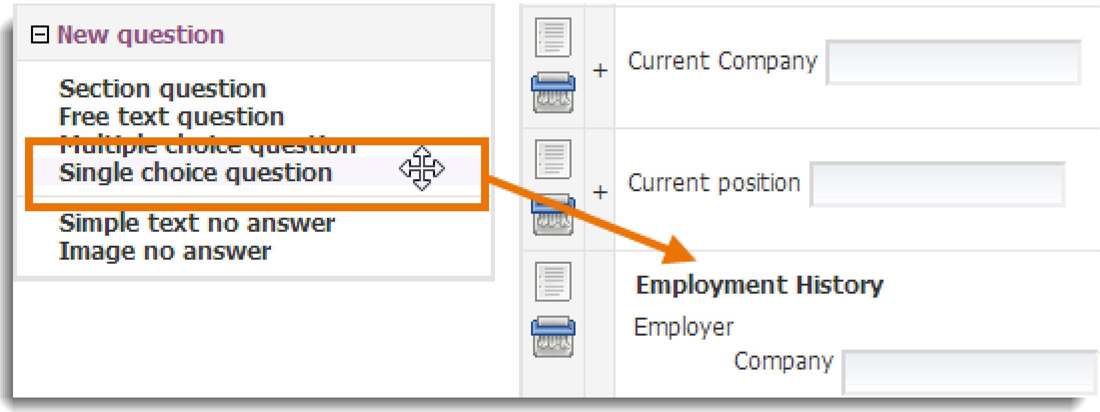
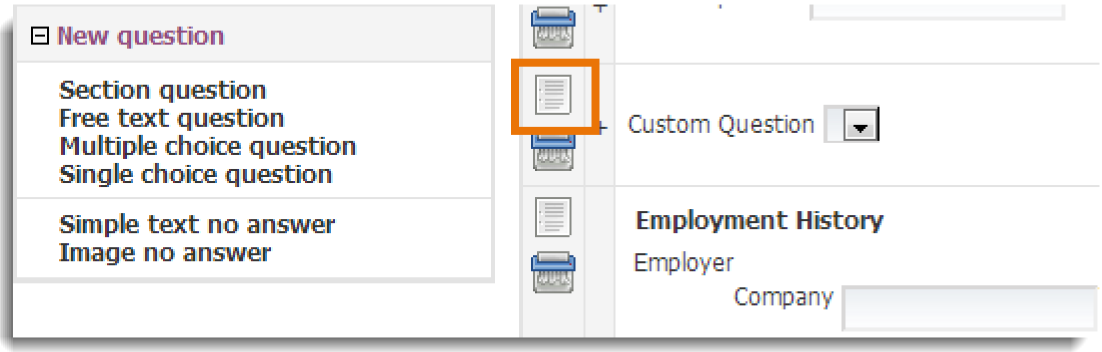
1. Drag the question type of your choice and drop it in the spot where you want it to appear.

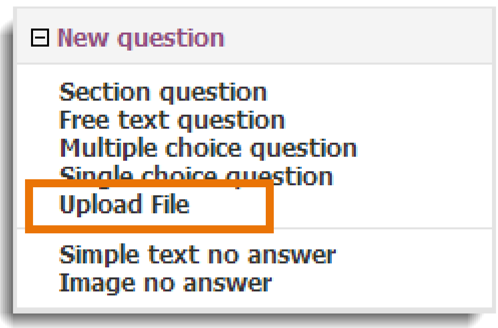


2. Click to define the question's title and other properties.



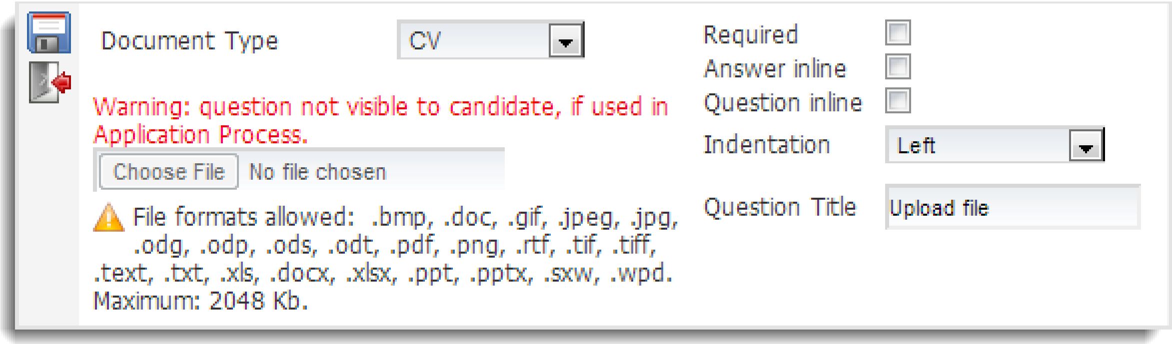
Upload File Question

When creating Diversity Questionnaires, Questionnaires, CVs, and Feedback Reports (but not forms in the Candidate Summary Management module), the **Upload File** option is available in the **New Question** section in Form Builder.



The Upload File question enables you to request additional documents from candidates. Typically this option will be used in email questionnaires sent to candidates during the Selection Process.

This type of user-defined question must be edited before you save the form. You must define the required document type, add the title of the question, define layout and content properties, and so on.



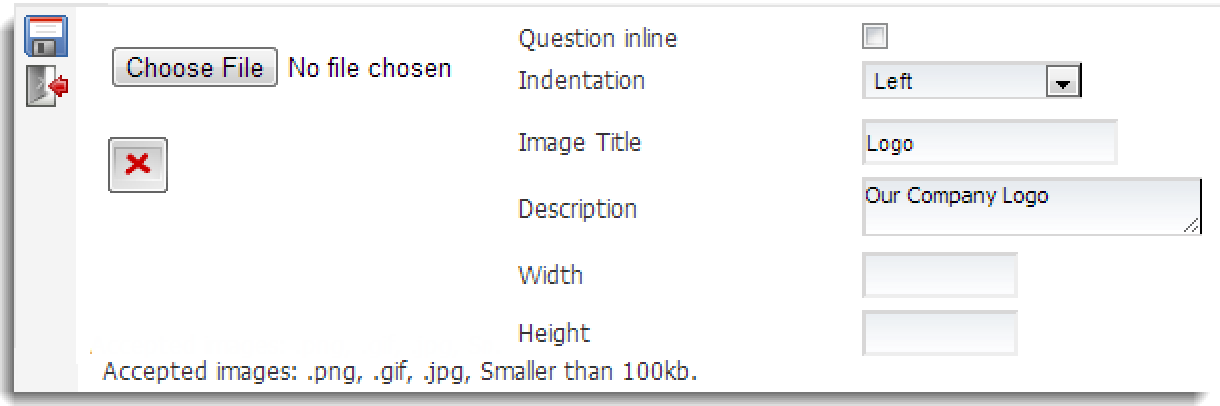
The maximum file size allowed for the uploaded document is taken from the **Size limit for any Upload Document** setting in Company Configuration (see page 14).

The document uploaded by the candidate will be available on the *Documents/Candidate Pools* page in the Candidate File.

Adding an Image to a Form

To add an image to a form use an Image no answer Question Type. Only .png, .gif, and .jpg files that are no larger than 100 KB can be uploaded.

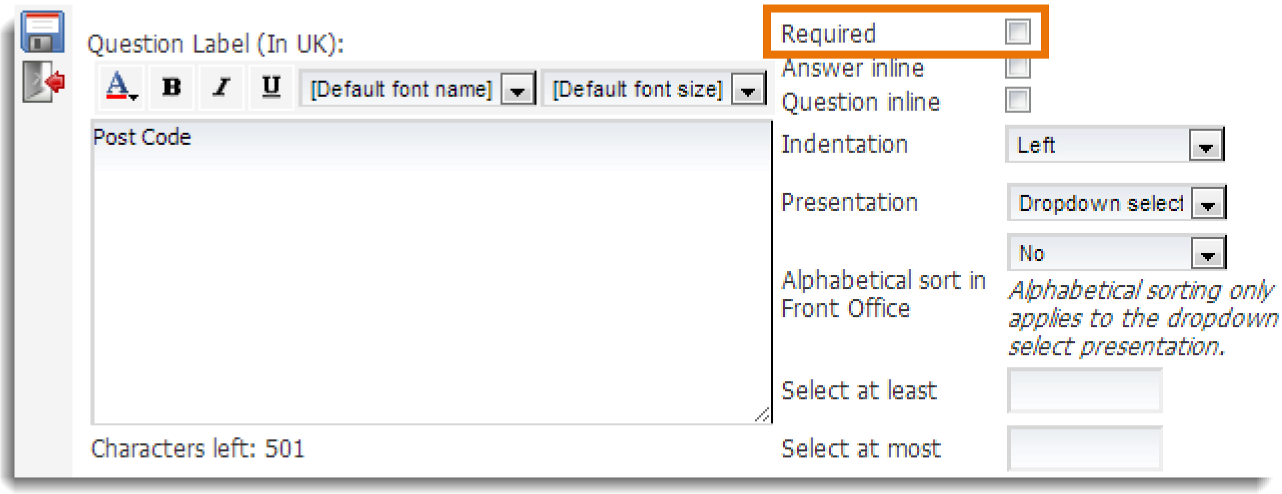
1. Click **Choose File** to locate the image on your hard drive or network.



2. Define the layout properties of the image.
3. If necessary change the original image's dimensions by typing the **Width** and **Height**.

Making a Question Mandatory

1. Select the **Required** option.



2. Click to save the changes.

Editing Forms

To edit forms, you must be a Global System Administrator or a Local System Administrator.

1. Access the *Form Types* page (see page 279).

   There are two ways to access and edit the content of your forms:

   - Select the **Form Name** in the Form Types list
   - Locate the form you want to edit and click

The *Form Builder* page is displayed. Here you can:

- Add, remove and edit questions
- Reorder the questions
- Preview the form
- View form information
- Create custom questions
- Define dependencies
- Translate the form
- Assign scores to questions

For a detailed description of how to use the Form Builder, refer to Configuring a Summary Management Form (see page 278).

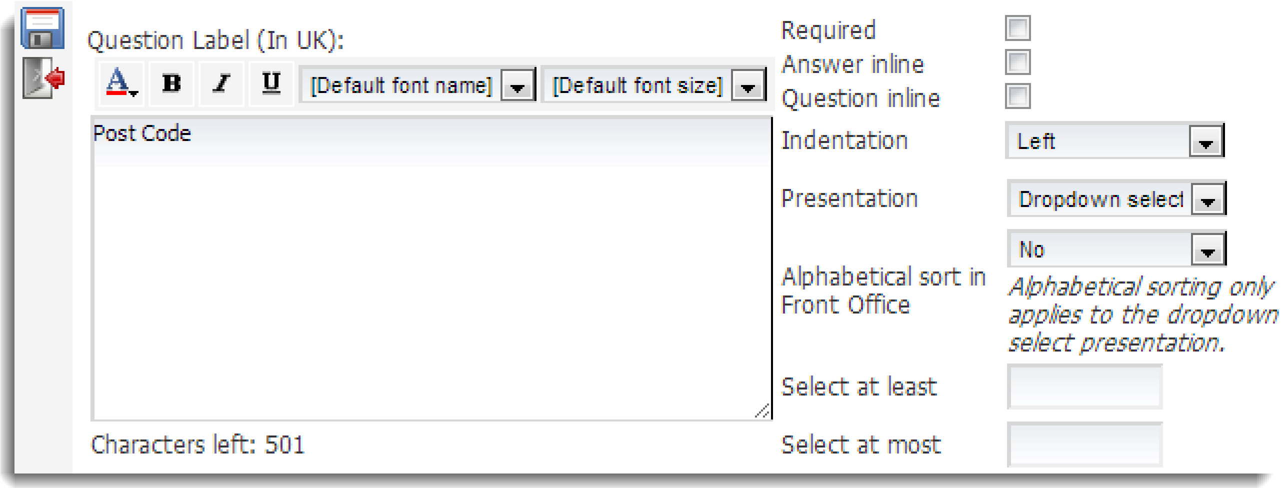
Editing Questions Imported from the Questions Library

Once a question is added to the form you can edit its content and properties, such as its layout.

ⓘ You cannot edit the names of mandatory and dedicated questions (First Name, Last Name, Data Privacy Statement, Sourcing Medium, Link Candidate to a Job or Pool). However, you can edit the layout properties of those questions.

Editing a Question Name, Layout Properties and Content Type

1. Click next to the question you want to edit. The question is displayed in edit mode.



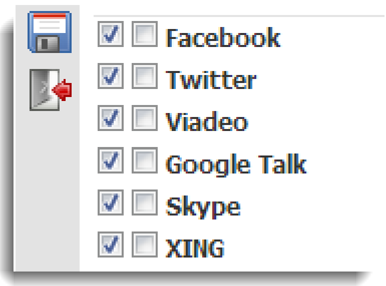
2. Click to save the question's properties.
3. Click to cancel.

ⓘ Editable elements depend on the question. For some questions such as ZIP Code, you can edit layout and content, whereas for Phone Number you cannot edit content properties.

Editing Container Type Questions

Some questions act as containers. For example **Social networking** includes inquiries relating to specific social networking accounts. Edit mode enables you to enable/disable any of the related questions in this type of collective question, or to make them mandatory.

1. Select/clear the first checkbox to enable/disable the question.



2. Select/clear the second checkbox to make the question mandatory/optional.

3. Click to save the settings.
4. Click to cancel the settings.

Editing User-Defined Questions

ⓘ User-defined questions must be edited before you save the form. You must enter the question title, possible answers for single and multiple choice questions, and so on. You can also define layout and content properties, and so on.

The options available in edit mode depend on the Question Type (for example for Multiple Choice questions the possible options must be defined, whereas for Image no answer questions you must upload the image that will appear in the form).

The table below presents sets of layout options set against Question Type combinations.

Option	Description	Section	Free text	Multiple choice	Single choice	Simple text	Image
Has title?	Display the question title.	✓					
Required	Mark the question as required, using a red asterisk (*).		✓	✓	✓		
Question inline	Display the question on the same line as the previous question.	✓	✓	✓	✓	✓	✓
Answer inline	Display the answer on the same line as the question.		✓	✓	✓		
Indentation	Align text right, left, or centre.		✓	✓	✓	✓	✓
Presentation	Display the answers as a dropdown list, or single or multiple columns.			✓	✓		

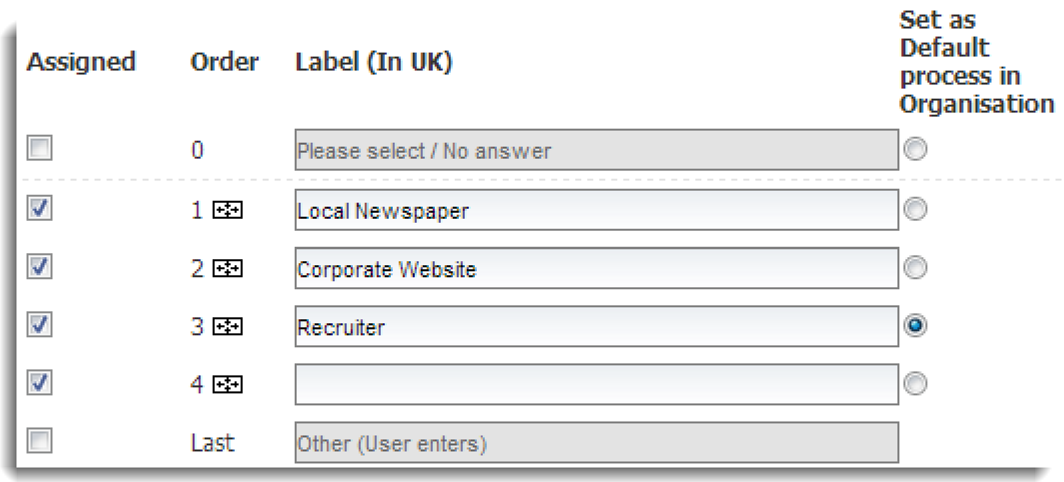
Content properties are also dependent on Question Type. They may be defined for free text, multiple choice and image type questions as follows:

Free text question	Multiple choice question	Image question
• Answer type (number, date etc) • Minimum and maximum length (in characters) • Answer size (one to 8 lines)	• Select at least (minimum number of selections) • Select at most (maximum number of selections)	• Image Title • Description • Image Size (width and height)

Editing Multiple and Single Choice Questions

1. Type the possible options.

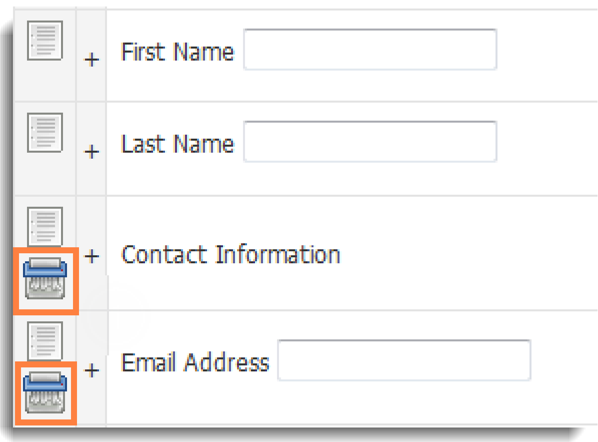
Once you start typing the first option, the next one becomes available. The next option is not mandatory; if you do not type in any information it will not be visible in the form.



2. Select/deselect **Assigned** to specify whether or not an entry is available in the form.
3. Select a radio button to set an entry as the default option.
4. To change the question order click then drag and drop the question to the place of your choosing.

Removing Questions from a Form

1. Click next to a question to remove it from the form.



You cannot remove mandatory questions such as:

- First Name
- Last Name
- Data Privacy Statement
- Sourcing Medium

Dedicated questions such as **Link candidate to a Job or Pool** cannot be deleted.

ⓘ Once a question is removed from the form it becomes available in the Question Library (not applicable to user-defined questions).

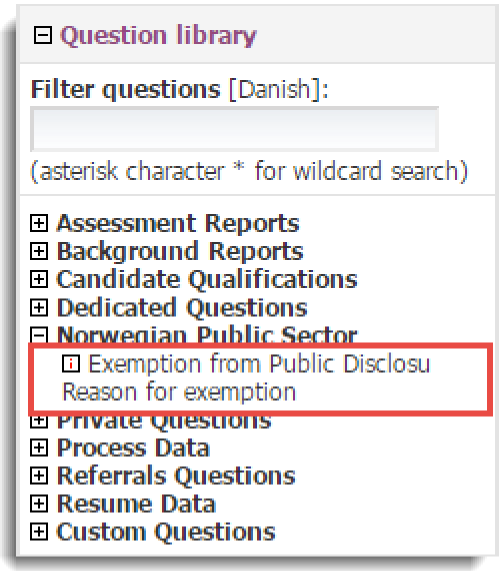
Norwegian Public Sector NOARK

ⓘ The following information is only relevant for TalentLink users based in Norway.

Organizations operating in Norway within the public sector are obliged to meet the requirements of the NOARK (Norsk arkivstandard OR Norwegian Archival Standard). A connected Act, the Public Administration Act determines that it should be possible to produce a list of candidates which might then be distributed to other candidates for full transparency for all candidates.

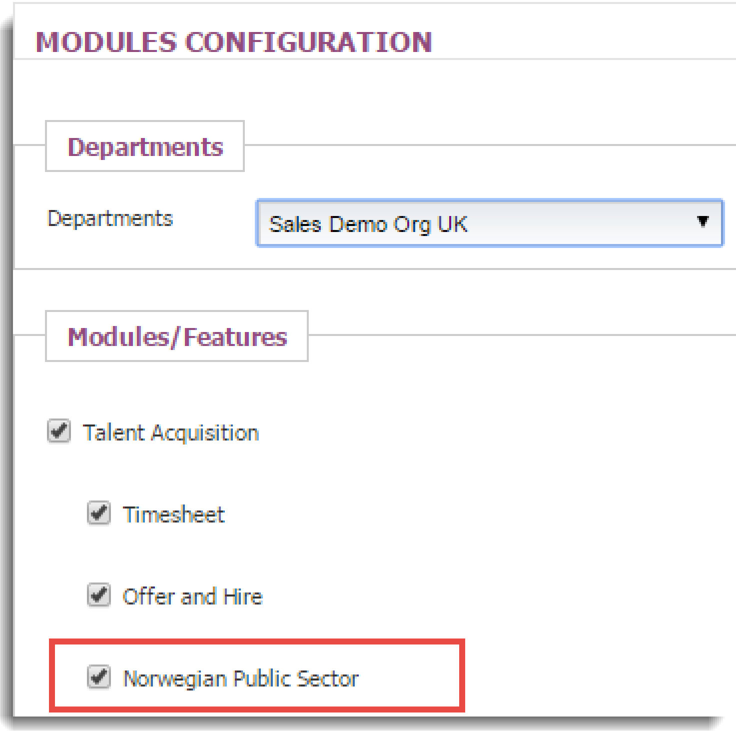
Candidates may request exemption from this public list with only their gender remaining outside of this rule. Two questions are provided within the Question Library to capture this information:

- Exemption from Public Disclosure - requires a Yes/No response from the candidate
- Reason for Exemption - requires the candidate to explain the reason for their request for exemption

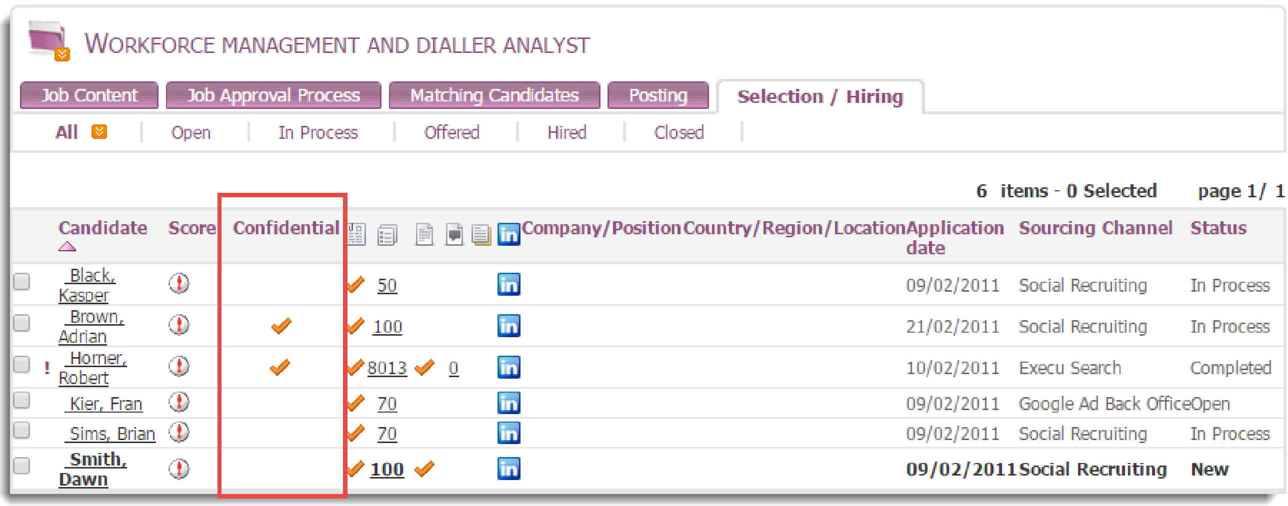


Lumesse

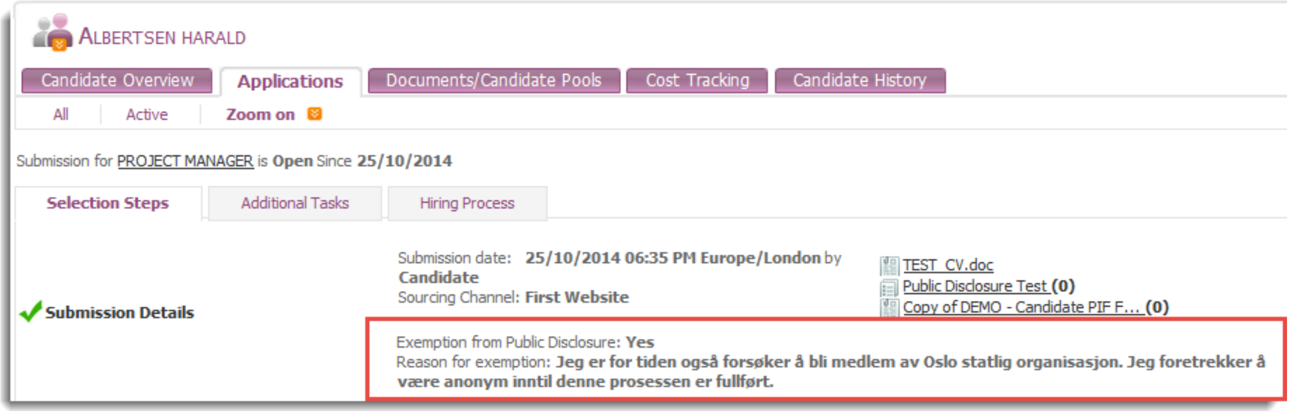
Before they can be added to your forms, the Norwegian Public Sector questions must first be activated by Lumesse then switched on by the GSA in the Modules Configuration section (**Settings>System Administration>Modules**).



TalentLink users will see the candidates' responses to these questions in the **Confidential** column on the *Selection/Hiring* tab of a *Job Details* page.

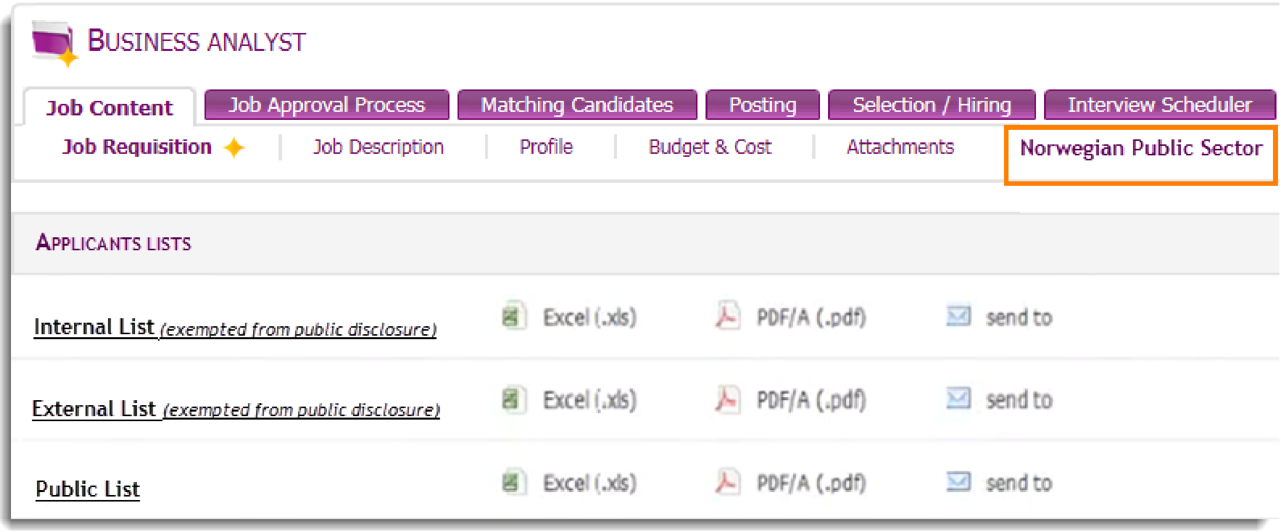


The Public Disclosure request and response will also appear in the **Submission Details** section on the *Applications>Selection Steps* tab of a candidate's application.



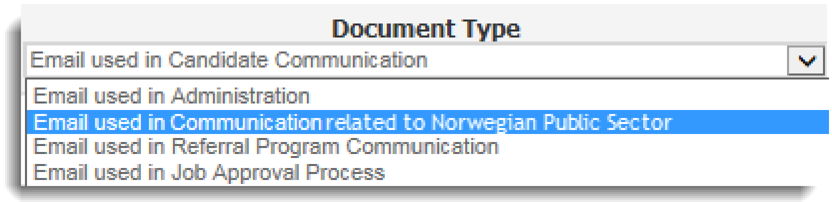
On the *Job Content* tab of a requisition the **Norwegian Public Sector** item gives users access to three types of Applicant List:

- Internal List - contains basic applicant information such as name and age
- Extended List - contains basic and extended applicant information such as education and employment history
- Public List - contains the applicant information as required for public disclosure



Users can open and review any of the lists by selecting them here, export them to PDF or Excel, send them as attachments via email or to the recipient's Communication Center where they will appear as URL links to the lists.

You will need to create templates for the Document Type *Email used in Communication related to Norwegian Public Sector*. Any templates defined here will be available to users when sharing applicant lists via the Send to email Recipient feature.

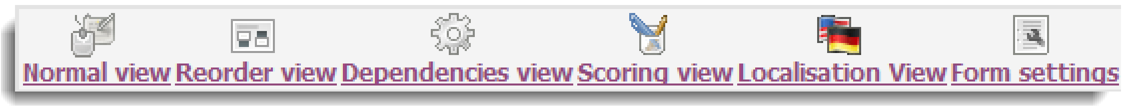


Editing Content - Views

The TalentLink Form Builder offers numerous possibilities to edit information. You can edit the content and layout of the question, and can also provide localization and create dependencies between questions.

These options are accessible through the **Views** at the top of the *Form Builder* page. Each is dedicated to different actions. You can:

- Add, edit and remove questions using the **Normal View** (see page 294)
- Reorder questions using the **Reorder View** (see page 294)
- Create dependencies between questions using the **Dependencies View** (see page 295)
- Score your questions using **Scoring View** (see page 296).
- Localize the questions using the **Localisation View** (see page 299)



Normal View

Normal View enables you to add, edit and remove questions.

Reorder View

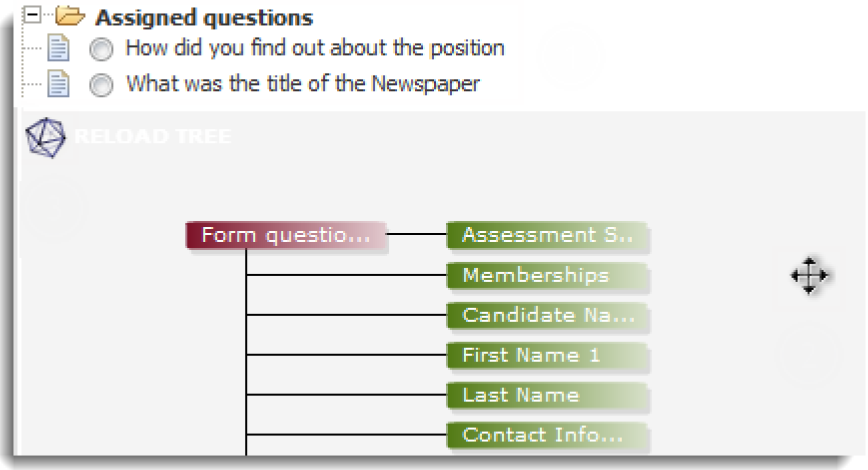
Reorder View enables you to quickly change the order of the questions using the drag and drop feature.

ⓘ You can also change the order of questions using **Normal View**, but you may find it more convenient using **Reorder View** as more questions are visible on the screen.

Dependencies View

Dependencies View enables you to create dependencies between questions. By defining a dependency you can enable/disable selected additional questions based on the answers provided by the candidate or interviewer. This functionality is available only for Single and Multiple Choice questions. This is why only questions of these types are visible in the **Assigned Questions** section.

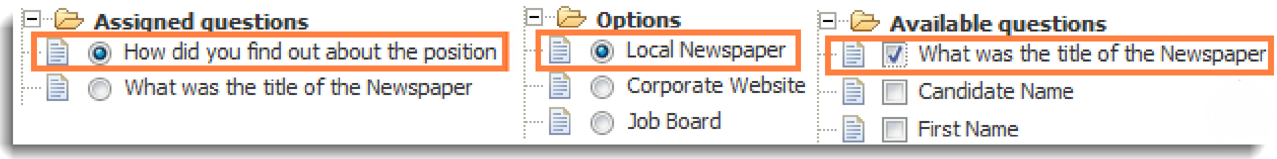
Assigned Questions lists the available multiple or single choice questions that may be used to create dependencies.



1. To scroll down/up the tree, left click on the Dependencies Workspace (anywhere in the tree area). Once you left click,  becomes available.
2. Click  to refresh the dependencies tree.

Defining Dependency Between Questions

1. Select the master question from the list of available Single and Multiple choice questions.



2. After you select a master question the list of possible answers (**Options**) is displayed. Select the option that will trigger a child question.
3. After you select a triggering option, the list of available child questions is displayed. Select the required child questions from the list. These questions are only visible to the respondent if they select the option chosen in step 2.

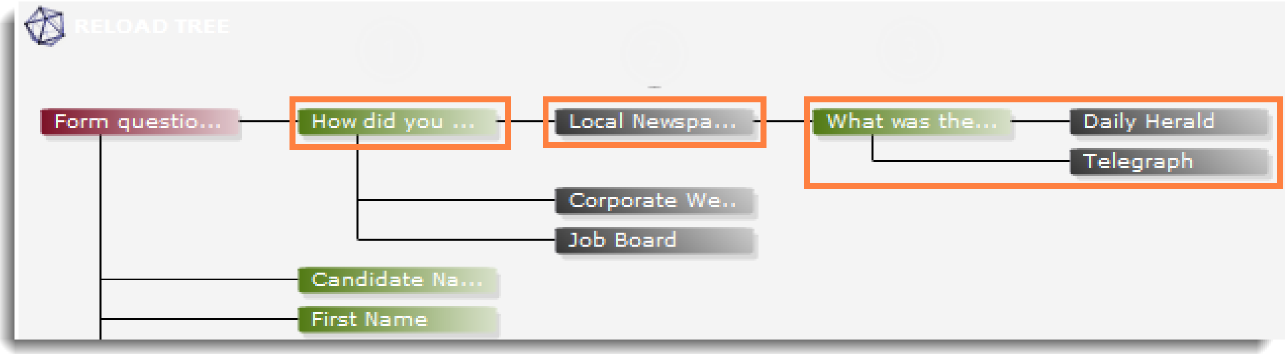
   In the above scenario:

   - The candidate replies to the question 'How did you find out about the position'.
   - Their chosen response is 'Local Newspaper'.
   - The child question 'What was the title of the Newspaper' is triggered.
   - If the candidate chooses any other option (Corporate Website or Job board) the child question is not triggered and is therefore not displayed.

4. Click  (in the upper right hand corner) to save the dependency definition.

Once the dependency is created and the form is saved it is displayed in the dependencies tree as follows:

- Master question
- Triggering option
- Child question



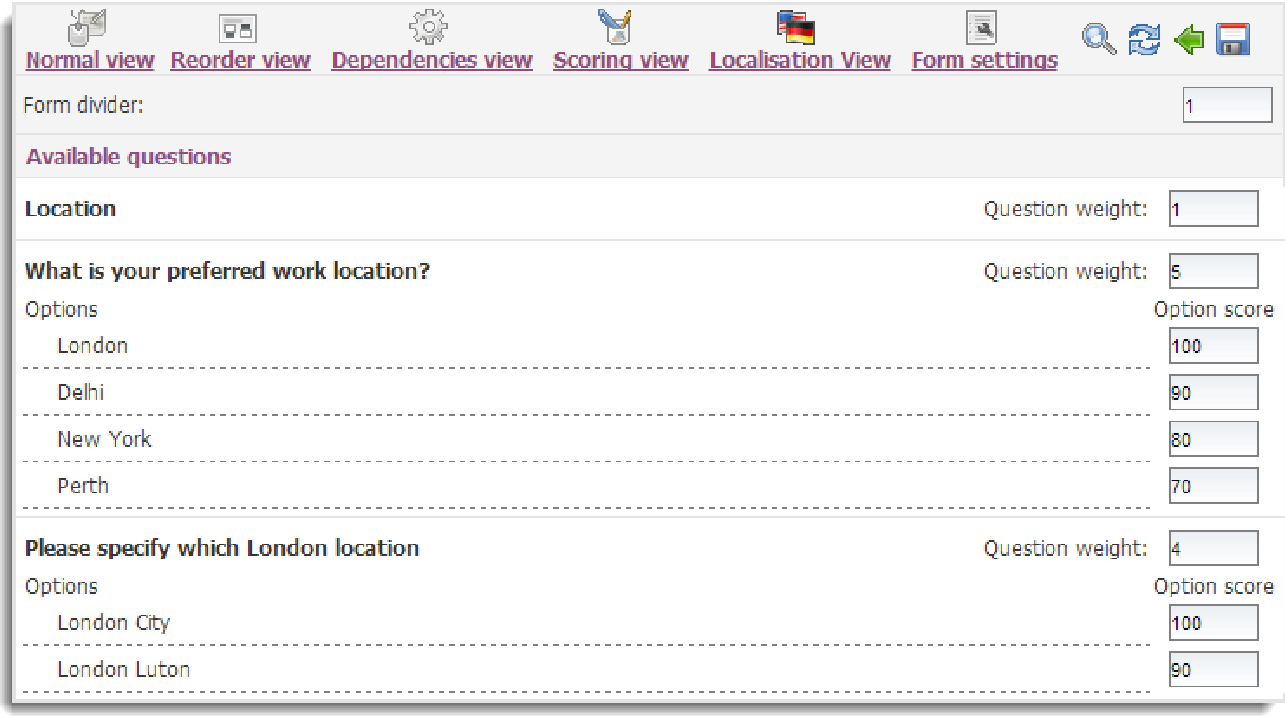
Scoring View

- Form scoring lets you use the results to:
- Rank candidates by the scores they achieve
- Automatically move candidates through the Selection Process
- Automatically reject candidates

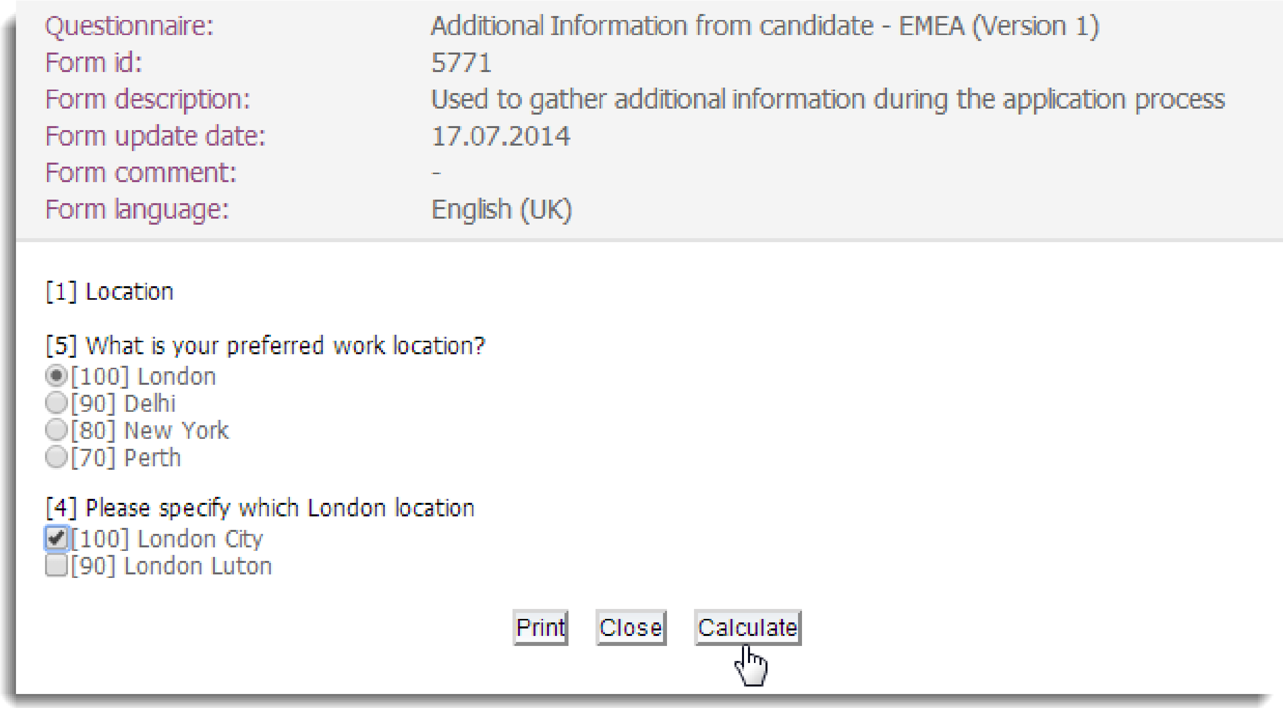
A score will remain with a question when it is saved in your custom question library. It can be changed by a user for different scenarios. The only question types that can be scored are those with predictable responses to single or multiple choice questions.

The scoring mechanism has two elements: a numeric score and a weighting for that question to mark it as being more important. You can add any numeric scores you require.

1. Enter question weightings and scores into the form as required then save and click to preview your form.



2. To test your scoring system, fill in the answers on the form preview page and click **Calculate**. This will show the total score for the options you select.



Questionnaire:	Additional Information from candidate - EMEA (Version 1)
Form id:	5771
Form description:	Used to gather additional information during the application process
Form update date:	17.07.2014
Form comment:	-
Form language:	English (UK)

[1] Location

[5] What is your preferred work location?
- (•) [100] London
- ( ) [90] Delhi
- ( ) [80] New York
- ( ) [70] Perth

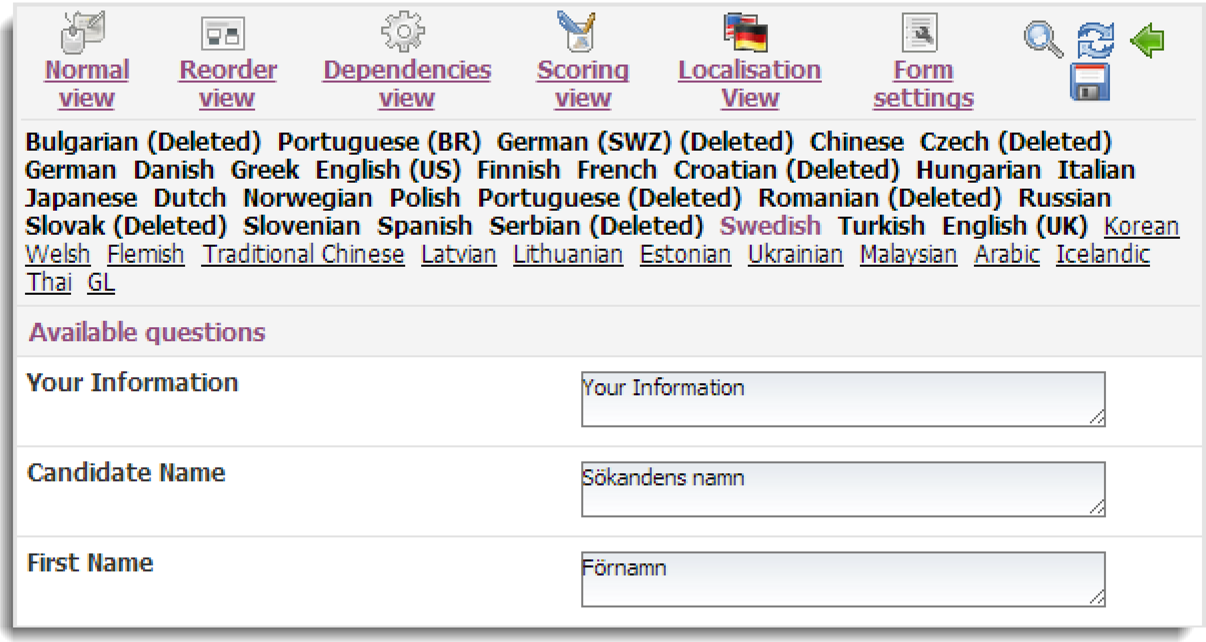
[4] Please specify which London location
- [x] [100] London City
- [ ] [90] London Luton

Print Close Calculate

Localisation View

The **Localisation View** enables you to translate the questions and options available in the form into any languages available for the Company. Only one form is created, but with many language versions. You do not need to create separate forms for different languages.

1. Select the target language.

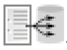


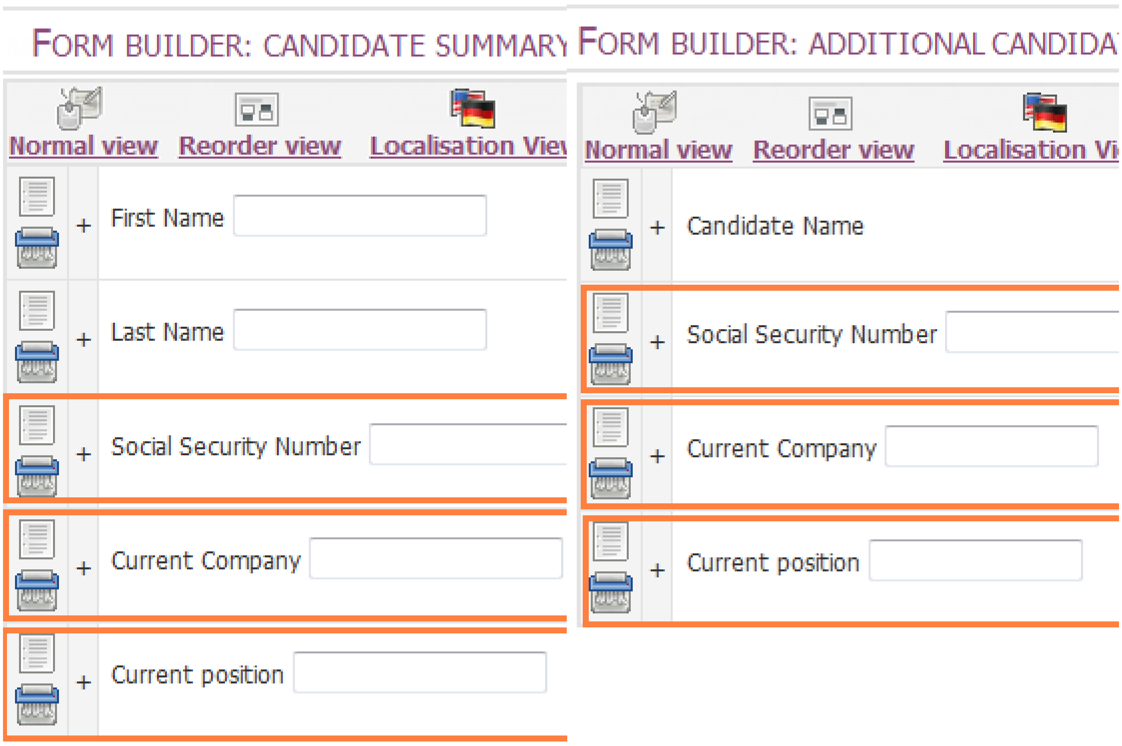
2. Translate question titles and options into the selected target language.

Question Mapping

Some questions are mapped into field values in the database to create connections between various forms in the system. If the same question is included in more than one form, editing it in one form will update the question everywhere it is used.

For example, you want to include Additional Candidate Information in the Candidate Summary. The Additional Candidate Information form must include such mapping questions and the same questions must be used in the Candidate Summary. Once a candidate fills in the Additional Information form during the Selection Process and it is registered in the system, answers to those questions are automatically available in the Candidate Summary.

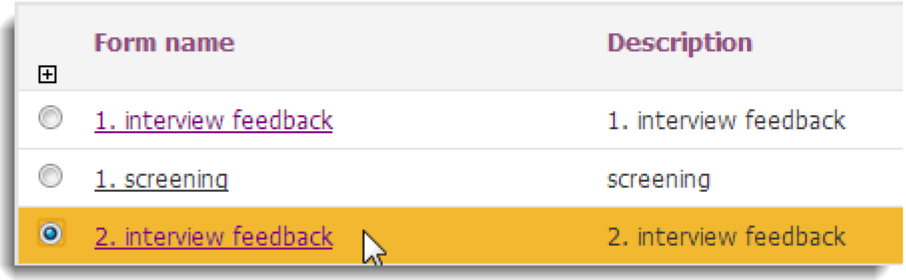
Mapping questions are indicated in the *Form Builder* page by .



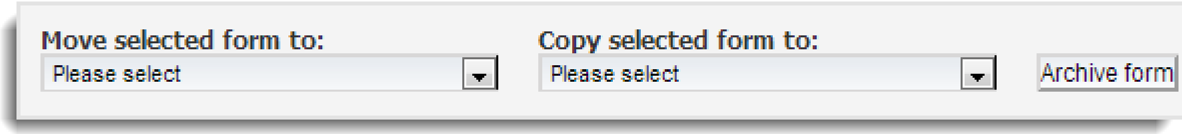
Moving Forms

1. Access the *Form Types* page (see page 279).

2. In the Form list, select the form you want to move.

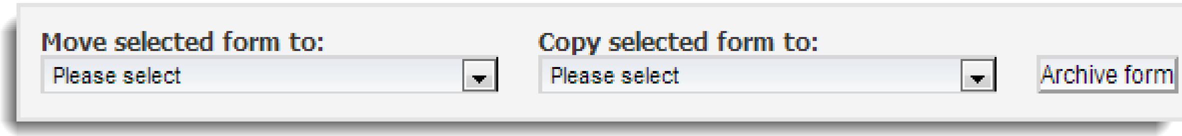


3. At the bottom of the page, in the **Move selected form to** dropdown list select the organization where you want the form to be moved.



Copying Forms

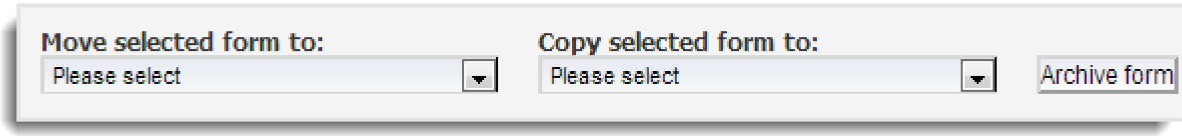
1. Access the *Form Types* page (see page 279).
2. In the Form list, select the form you want to move.
3. At the bottom of the page, in the **Copy selected form to** dropdown list select the organization where you want to copy the form to.



Archiving Forms

Forms cannot be deleted, they can only be archived. This is because they may still be in use in a process and therefore still visible to some candidates. Archived forms remain unchanged in any existing processes, and cannot be used in a new process.

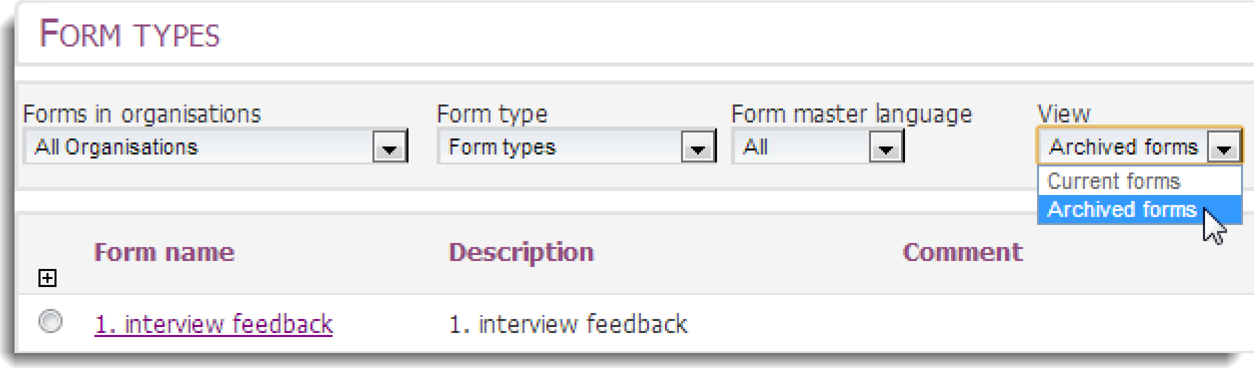
1. Access the *Form Types* page (see page 279).
2. In the Form list, select the form you want to move then click **Archive Form**.



Restoring Archived Forms

1. Access the *Form Types* page (see page 279).

2. Select **Archived forms** from the **View** dropdown list.



3. In the Form list select the form you want to restore.
4. At the bottom of the page click **Restore form**.

Diversity Questionnaire

Diversity Questionnaires are used by recruiters to collect, store and analyze data about candidates' personal details (for example, sex, disability, race), which can help to:

- Highlight possible inequalities
- Investigate the underlying causes of those inequalities
- Seek to redress any unfairness or disadvantage

Recruiters can submit Diversity Questionnaires to candidates during the Application Process, or as an attachment in the acknowledgment email sent to candidates, to gather personal details about each applicant.

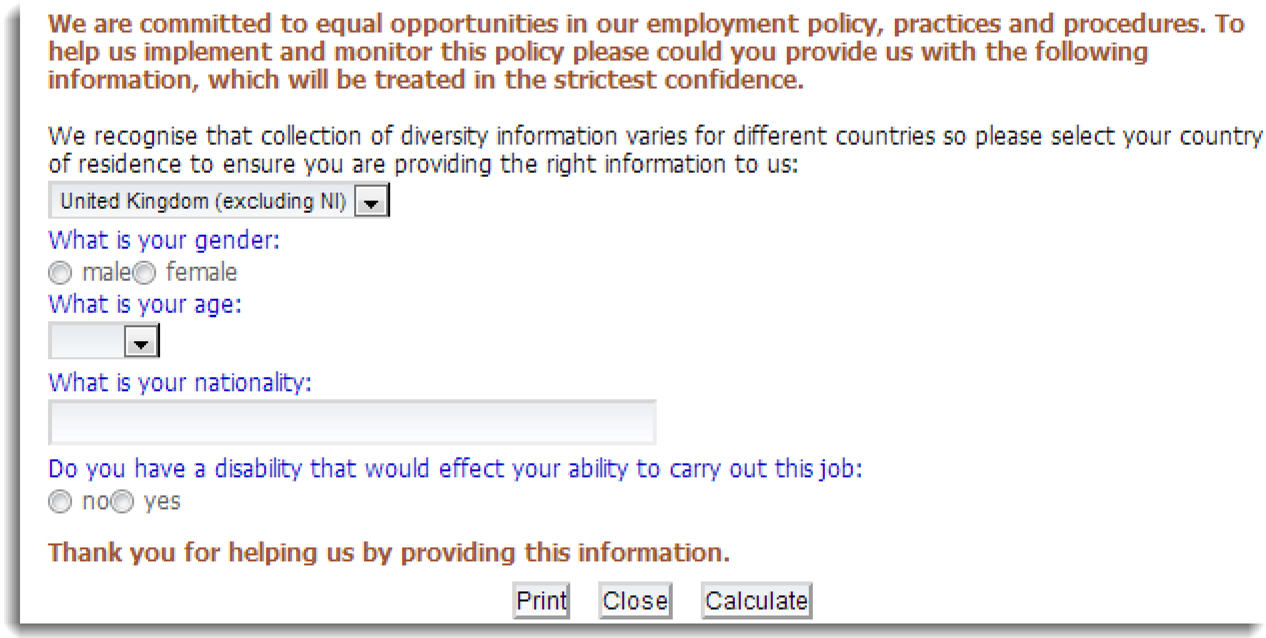
Diversity Questionnaires are available in the TalentLink Back Office in the following cases:

- When defining an Application Process for a posted job
- When contacting a candidate via email

When a candidate completes this type of questionnaire online, a document based on this template will be created in the Back Office. There are some special features available in documents based on Diversity templates:

- Diversity documents are not visible to end users or recruiters
- Diversity documents are not searchable

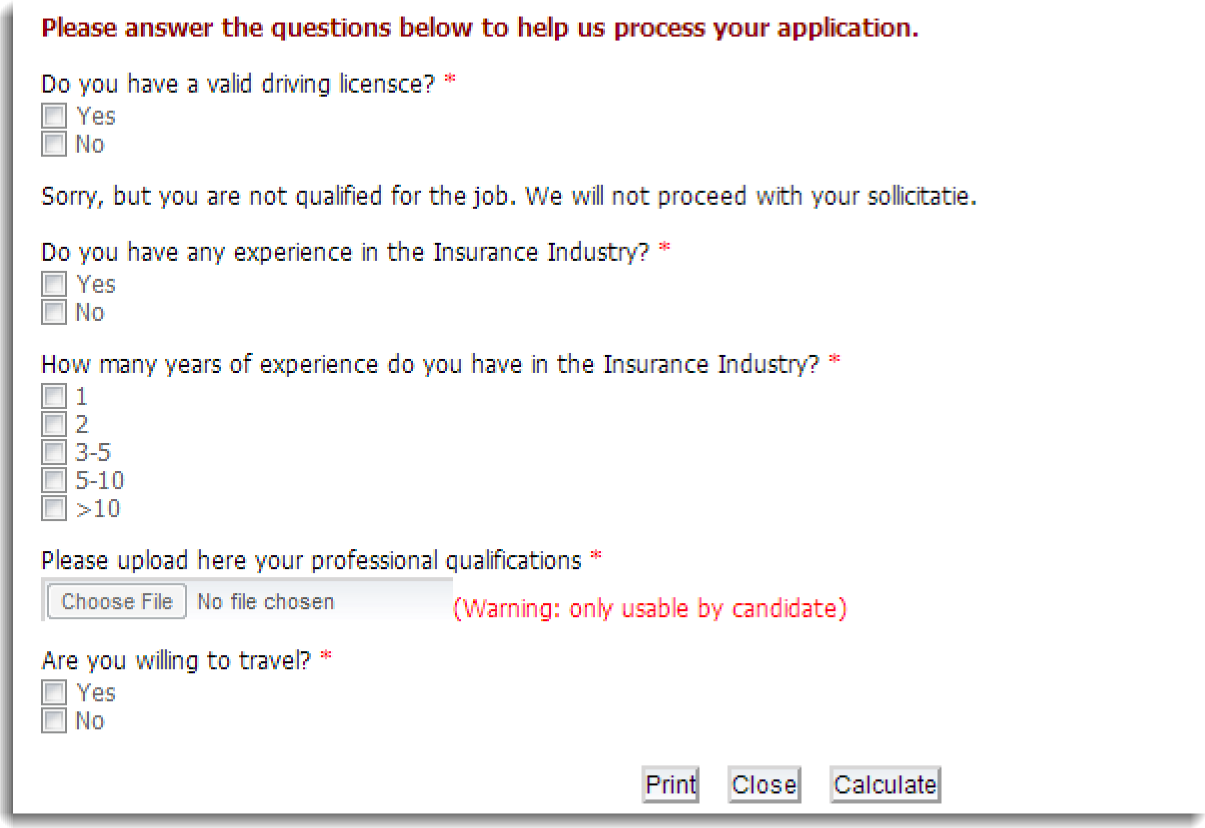
ⓘ Information gathered in Diversity Questionnaires is only accessible via Diversity Reports. For more information see the *Reports* chapter in the TalentLink User's Guide.



Profile

Profiles are special questionnaires that are filled in by candidates, which can be used with the Matching Candidates functionality in TalentLink (see page 19). This makes it possible to match a job profile against the Candidate Marketplace.

For each job opening you can select a profile and set criteria to match the job against the candidate database.


Please answer the questions below to help us process your application.

Do you have a valid driving licensce? *

- [ ] Yes
- [ ] No

Sorry, but you are not qualified for the job. We will not proceed with your sollicitatie.

Do you have any experience in the Insurance Industry? *

- [ ] Yes
- [ ] No

How many years of experience do you have in the Insurance Industry? *

- [ ] 1
- [ ] 2
- [ ] 3-5
- [ ] 5-10
- [ ] >10

Please upload here your professional qualifications *

Choose File No file chosen (Warning: only usable by candidate)

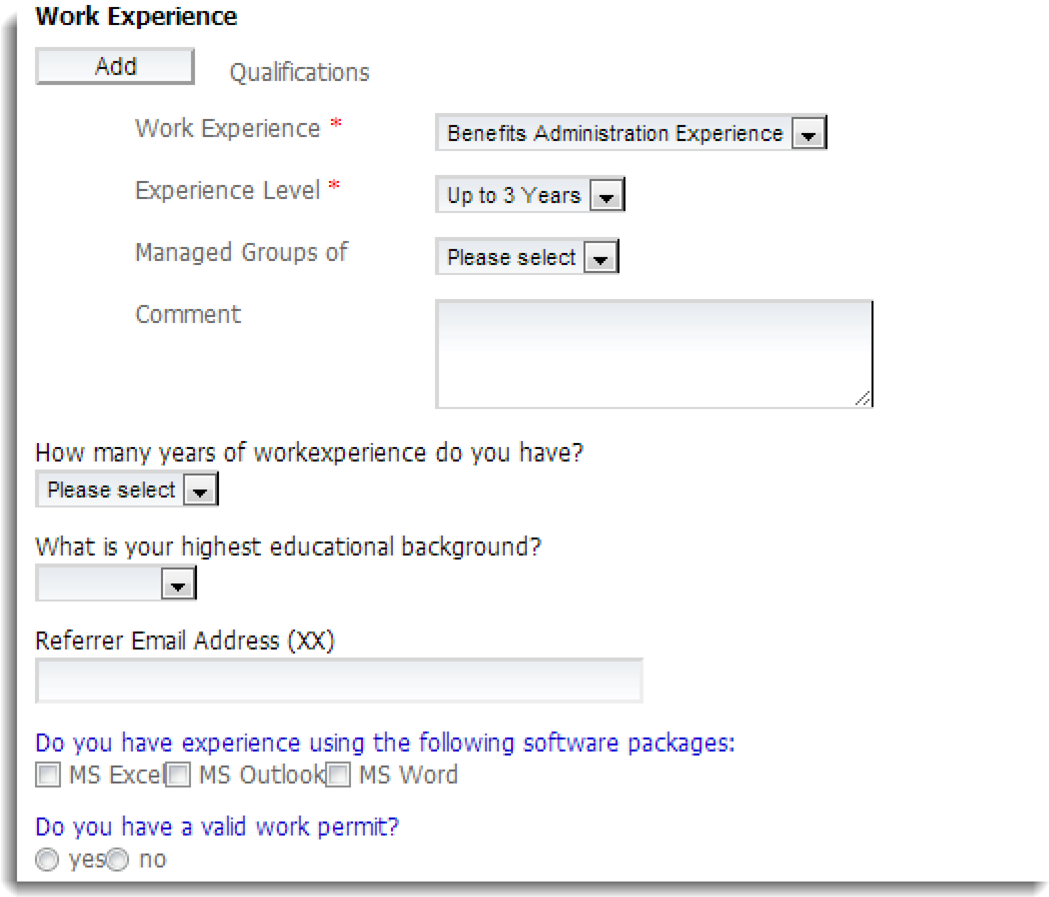
Are you willing to travel? *

- [ ] Yes
- [ ] No

Print Close Calculate

Questionnaire

Questionnaires are used in the Application Process, or can be sent to a candidate as a hyperlink in an email. Questionnaires usually contain additional questions with regards to the candidate's application.



Work Experience

Add Qualifications

Work Experience * Benefits Administration Experience

Experience Level * Up to 3 Years

Managed Groups of Please select

Comment

How many years of workexperience do you have?

Please select

What is your highest educational background?

Referrer Email Address (XX)

Do you have experience using the following software packages:

MS Excel MS Outlook MS Word

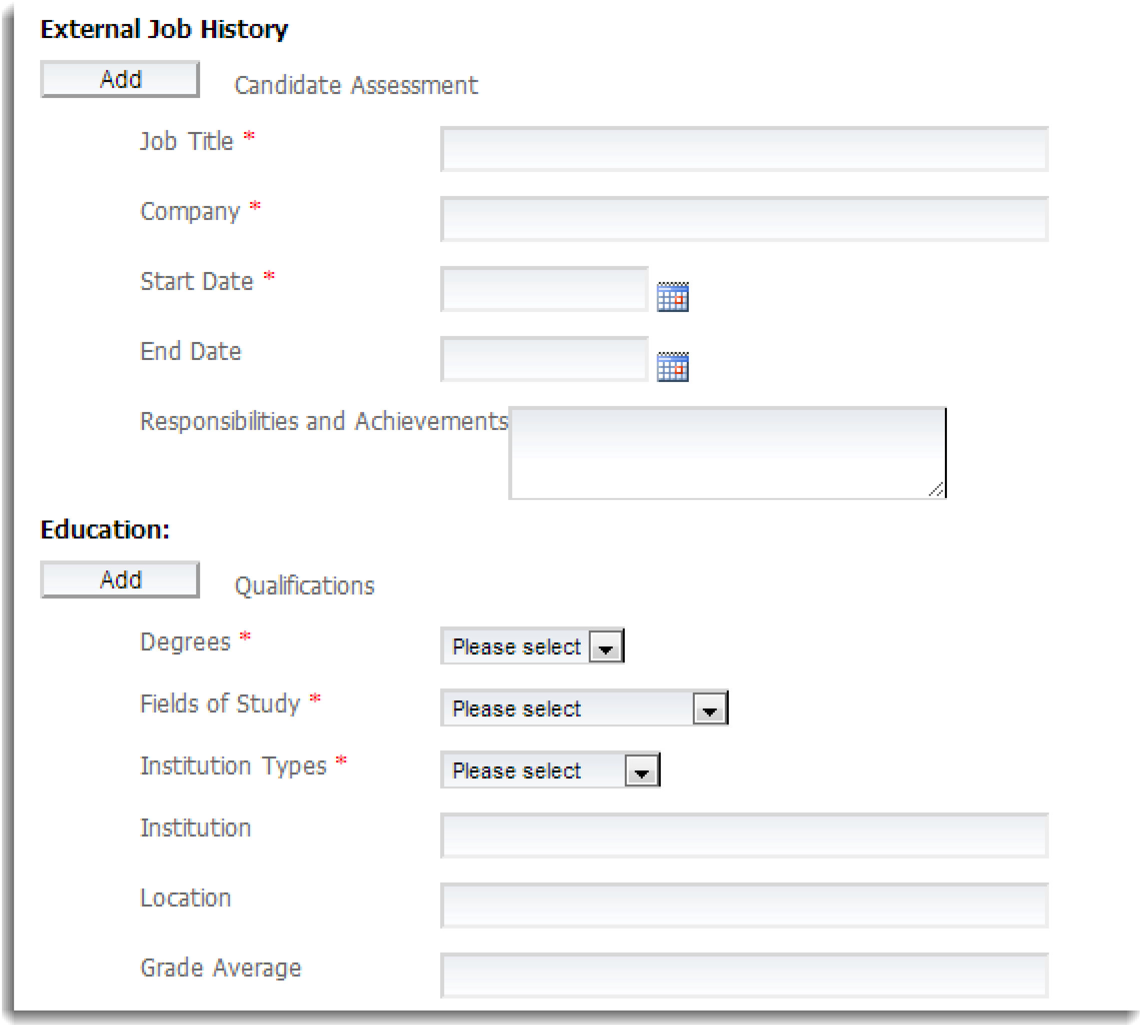
Do you have a valid work permit?

yes no

CV - Structured Resume

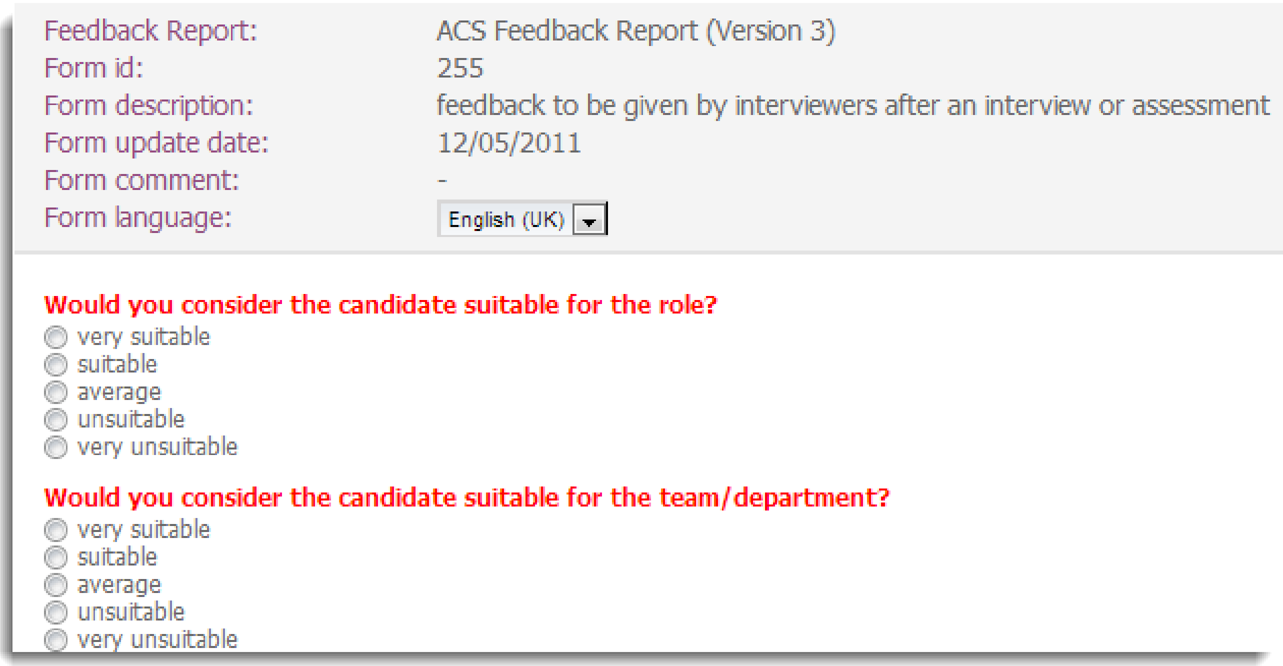
CVs are used to give applicants the opportunity to submit a structured resume in the Application Process.

ⓘ If you want this template to be available as a Matching Template in the job section, you need to create it as a Profile type.



Feedback Report

Feedback reports are part of the Selection Process and are used to capture the results of each selection step. They can be simple forms with a yes/no decision, or sets of questions for detailed feedback on how a candidate performed. TalentLink users or non-TalentLink users who receive a request to perform a Selection Process step must fill in these reports.



Candidate PIF

The Personal Information Form (PIF) is completed by the candidate in the Front Office during the Application Process. Some of the candidate's basic details collected in the PIF are shared with the Candidate Summary in the Back Office.

Candidate PIF - Best Practices PIF

TalentLink offers a range of Best Practice layouts for the PIF (see page 307).

Candidate PIF - Configurable Layout

You can also display a particular PIF depending on the job recruitment context (site type, job type, and submitter). These PIFs can be configured on a question-by-question basis using Form Builder.

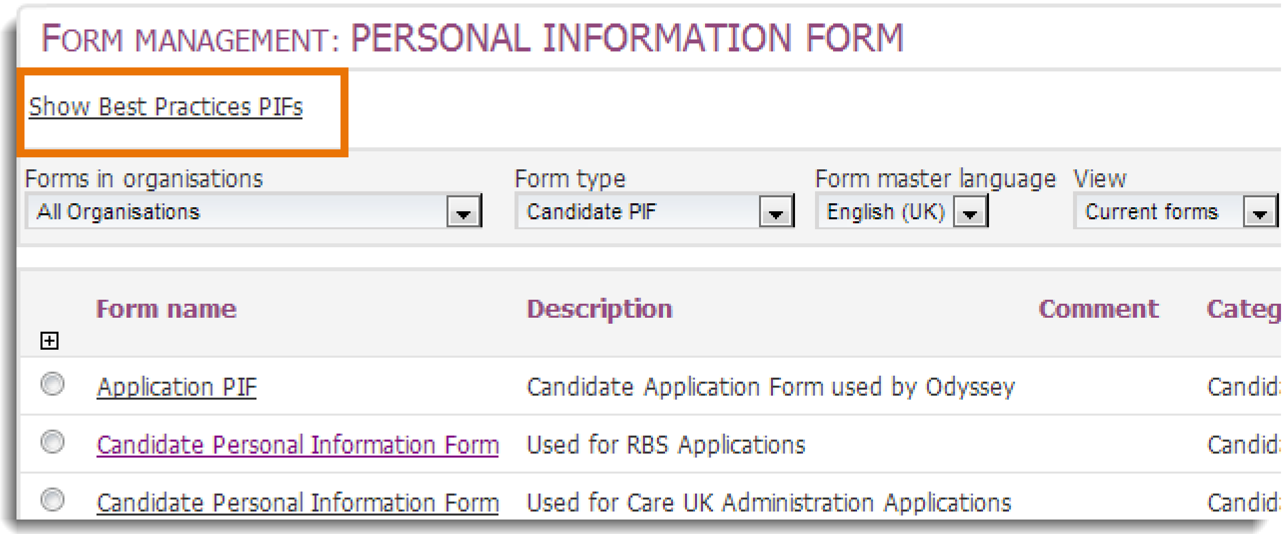
Managing Candidate PIFs

If you want to use the Configurable Layout, there are five default PIF templates that you can use when setting up your site. These are called the Best Practice PIFs.

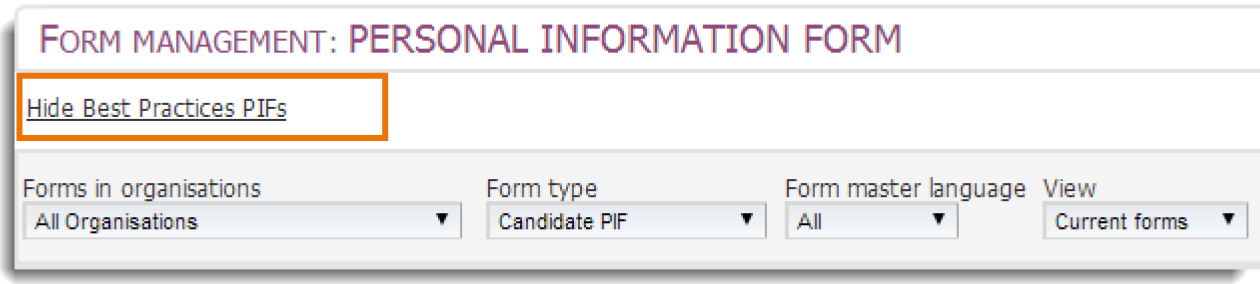
To preview the Best Practice PIFs:

1. Access the *Form Types* page (see page 279).
2. In the **Form type** dropdown list, select **Candidate PIF**.

3. At the top-left of the page, select **Show Best Practices PIFs**.



4. To collapse the **Best Practices** section, select **Hide Best Practices PIFs**.



ⓘ The Best Practices PIFs cannot be edited. To use these templates, you must copy them to your organization (see page 301) then edit these copied items (see page 308).

Editing Candidate PIFs

1. Access the *Form Types* page (see page 279).

   The *Form Types* page is displayed.

2. In the **Form type** dropdown list, select **Candidate PIF**.
3. Click the name of the PIF in the **Form name** column.

   The PIF opens in the *Form Builder* page.

4. Edit the form as described in Configuring a Summary Management Form (see page 278).

Using Forms and Questionnaires

The document templates created in the Forms & Questionnaires module are used in a number of places in TalentLink:

- By candidates during the online Application Process

For example, when a candidate completes an online questionnaire during the Application Process for a job. When the application is submitted, a document is created in the candidate file in the Back Office. This document is based on the published form, and will have all the answers and options chosen by the candidate. It can also receive a general score, in accordance with the scores assigned to questions by the creator of the template.

- By recruiters when creating documents in the Candidate File

  Refer to Creating Documents in the *Candidates* chapter in the TalentLink User's Guide.

- By recruiters when creating documents in the Selection Process

  Refer to *Selection Process* in Managing Job Approval and Selection Processes (see page 184).

- By recruiters when running an Advanced Search

  Refer to the *Search Capabilities* chapter in the TalentLink User's Guide.

- By recruiters when using the Matching Candidates functionality

  When a Candidate Profile is linked to a Job opening, the recruiter can view only those candidates that match the criteria in the profile. Refer to the *Job Openings* chapter in the TalentLink User's Guide.

- By recruiters when creating dispatching rules

  Refer to the *Job Openings* chapter in the TalentLink User's Guide.

- By recruiters when sending emails to candidates

  For example, when an email message contains a link to a questionnaire that the recruiter would like the candidate to fill in. For details see Contacting Candidates by Email in the *Candidates* chapter in the TalentLink User's Guide.

Managing Communication Templates

ⓘ To manage templates you must have the role Template Manager assigned to your account. GSAs automatically have this role, but LSAs will need to have this assigned to their account.

TalentLink enables you to create document templates that can be used to create common documents such as emails or hard copy letters, contracts and printable job adverts. This means that you can standardize the information you send to candidates.

Where are Communication Templates Stored?

Templates by OBS Level 1

Most communication templates are stored at the OBS Level 1, so each OBS can have their own set of branded templates to send to internal users and candidates.

Templates for the Whole Company

You can also store email templates in an OBS Level 1 called 'corporate library' which you can give all users access to. Printable job advert templates can NOT be stored at this level.

Templates at Site Level

Some emails can be stored at site level (linked to the website). These are edited via site management. These emails are sent when the candidates registers online, requests a new password, or uses the job alerts or email a friend functionality.

Document Types

In the Communication Templates module, the following templates (Document Types) are available:

Email Used in Administration

These are the three standard templates used by administrators to communicate with TalentLink users: new user account activation, activation confirmation and forgot password.

Email Used in Candidate Communication

This includes all standard templates that are available when contacting a candidate by email (also when contacting a candidate during the Selection Process).

Email Used in Referral Program Communication

If you are using the Referral Module to enable employees to refer candidates and then be paid a bonus for doing so, these emails are used to communicate the process and payments allocated.

Email Used in Job Approval Process

These emails can be sent to internal teams to request them to approve a requisition. You can add approve/reject merge fields so the user can make the decision via email without logging into TalentLink.

Email Used in Selection Process

These are the communications requiring users to participate when Selection Process steps are initiated, such as requests to review a CV or confirm an interview.

MS Word Letter/MS Word Contract Template

TalentLink enables you to create a template in Microsoft Word and upload it to the application. These templates can be used in the Microsoft Word Mail Merge to create documents that include data of all candidates selected to receive the document.

These templates can be any letter that will be sent to candidates (rejection letter, invitation to interview, and so on), whereas contract templates are only used for contracts when hiring a candidate.

Microsoft Word templates can contain all merge fields coming from:

- The Job Opening information
- Candidate Application information
- The Condition Form (also configurable fields and free form fields)

Shared Document

Shared documents can be attached to email templates used in the communication with candidates, for example a map or location information for interview invites, a newsletter, and so on. This way, recruiters can communicate additional information to candidates.

Signature

This enables you to create signature files that you can attach to your emails and letters.

Job Advert Print Out

The Job Advert Print Out template enables users to print the job advert as a PDF or Microsoft Word document. Merge fields can be inserted into the template to ensure all relevant information is included in the printed document, such as contact details and so on.

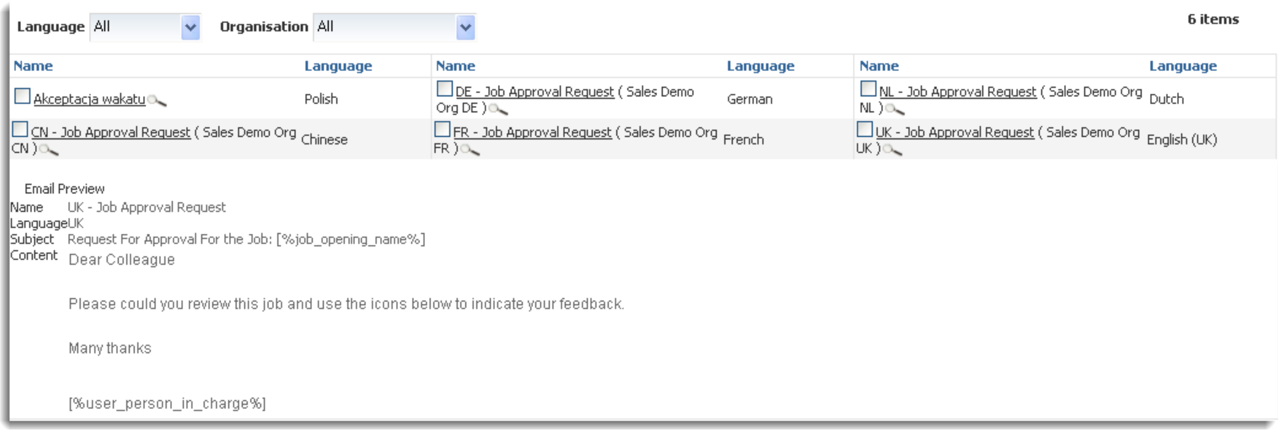
Accessing and Previewing Templates

ⓘ To preview templates, you must have either the Global System Administrator, Local System Administrator, or Functional Manager role assigned to you in the current organization. Refer to User Management (see page 327) for more information.

1. From the **Settings** section of the left dynamic menu, select **Communication Templates**.

   The *Template Management* page is displayed.

2. Select the required template in the **Document Type** dropdown list.
3. To preview a template click next to the required template.



Creating Templates

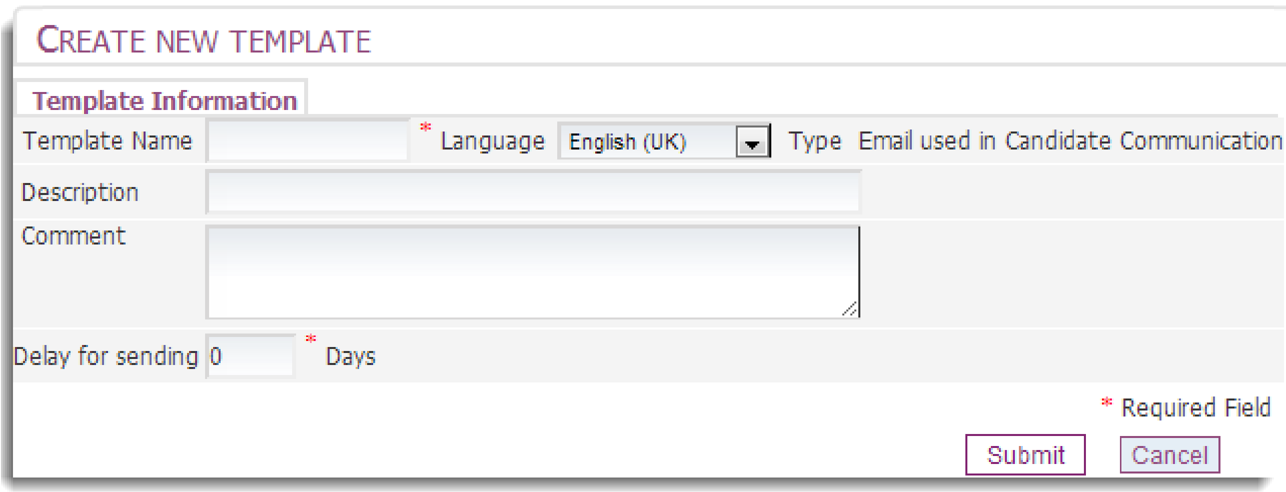
Creating Email Templates

1. Access the *Template Management* page (see page 311).
2. Select the type of template that you want to create from the **Document Type** dropdown list.

   ⓘ Email templates start with 'Emails used in...'

3. Click to create a new template.

   The *Create New Template* page is displayed.

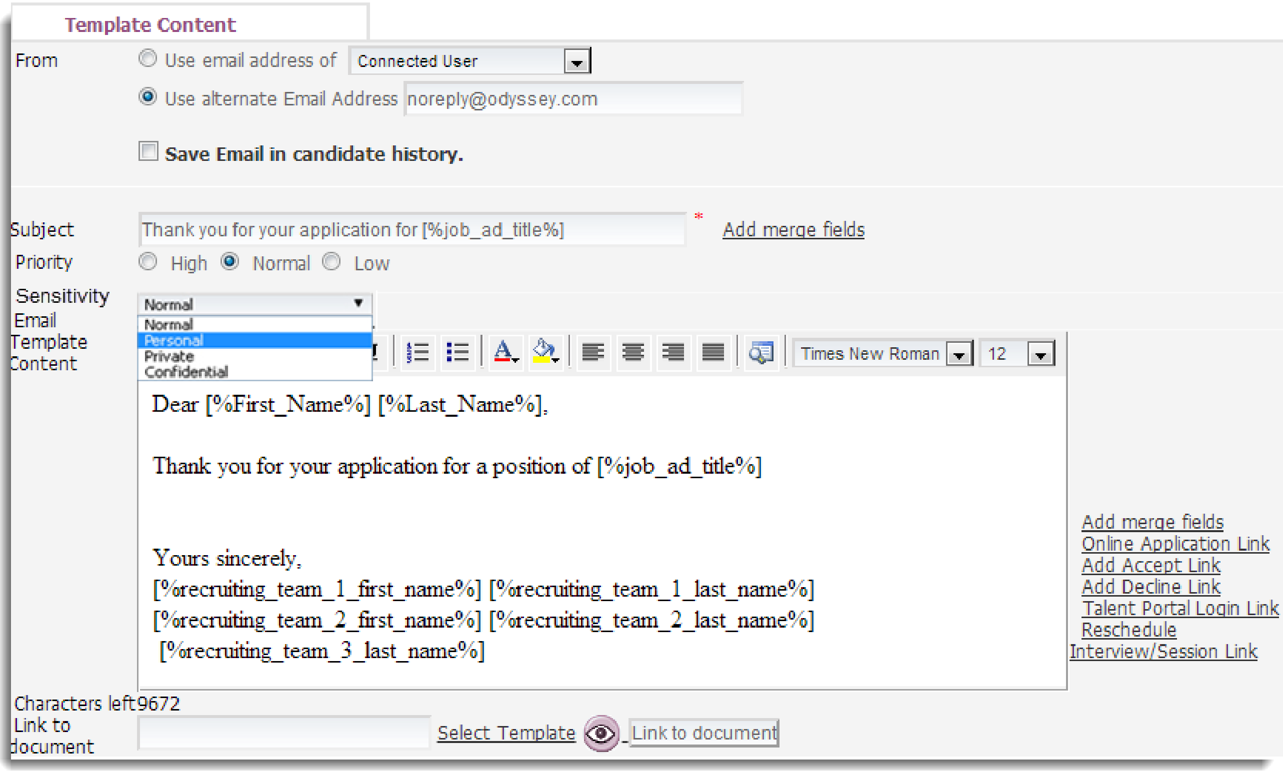


4. Enter the details as required then click **Submit**.

ⓘ The **Delay for sending** option defines when the email will be sent. For example, you may want to delay rejection emails for one or two days.

5. Select the organization in which you want to create this template.

   The **Template Content** section is displayed.



If you are creating an Email used in Candidate Communication template, the **Email Attachments** section is also displayed.

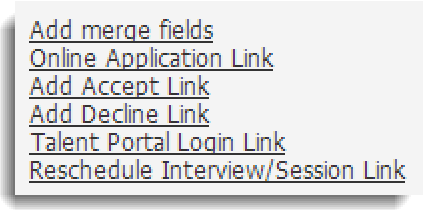
ⓘ You can toggle between the normal view and HTML by clicking .

6. You can set the default **Sensitivity** for emails that contain sensitive or personal information such as CV attachments. This will flag the email as *Normal*, *Private* or *Confidential*, etc.

ⓘ If your company uses email forwarding rules based on MIME settings (Multipurpose Internet Mail Extensions) the *Private* and *Confidential* **Sensitivity** flags can be used to ensure that sensitive emails are not forwarded to a deputy if the intended receiver is absent. Refer to Marking Emails as Private or Confidential (see page 315) for a full description of how to use this feature.

7. You can use merge fields in both the subject and email body to include information that will be automatically added to the text when the email is sent. The **Add merge fields** link is displayed on the right.

8. For some types of email template you can also add a number of different types of link into the email. The available options are displayed to the right of the text content box. If available, you can include a link to the online application for the job, or a link that enables the candidate to accept/decline an invitation to a job interview.



ⓘ If you choose to copy and paste text from a Word document you may need to makes changes to the formatting.

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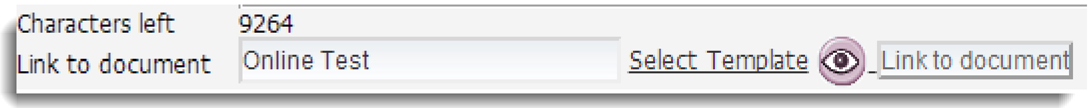
9. If you are creating an *Email used in Candidate Communication* template you can insert a link to another document, such as a questionnaire.



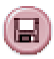
Questionnaires can be used to collect more information from the candidate.

- Click **Select Template**.
- Select the questionnaire that you want to link to in the email.
- Click **Link to document** to add the link to the email text content.

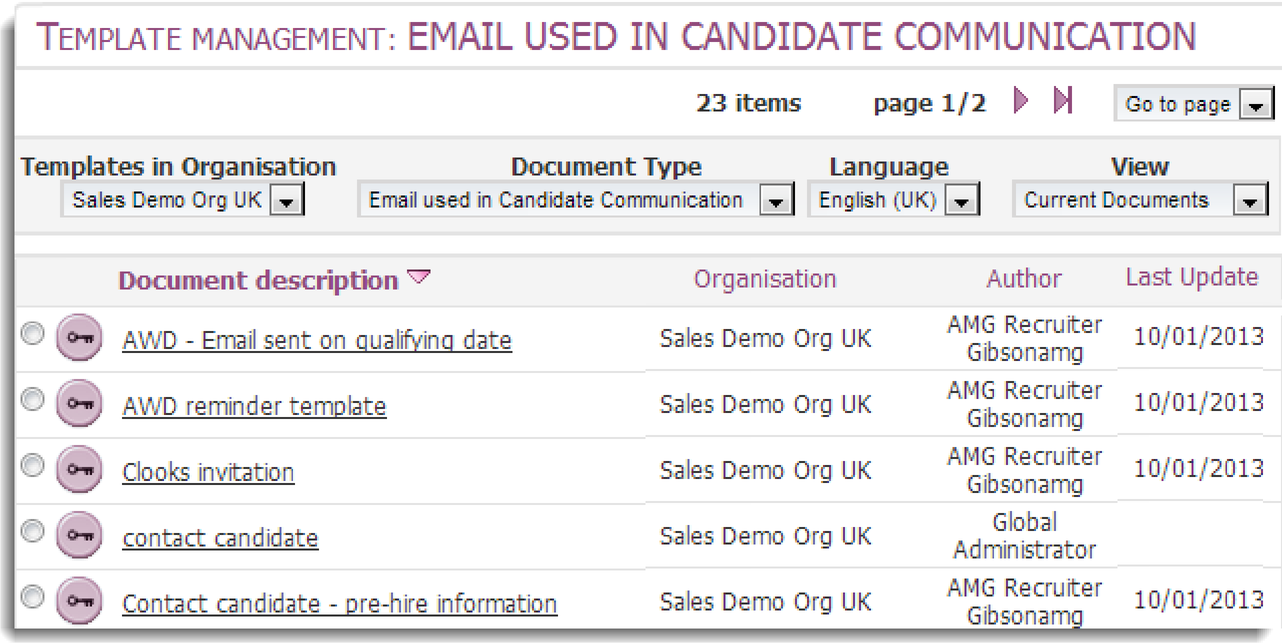
10. For some types of email template you can also add a document to the template.

This is useful if you want to provide additional instructions to a candidate such as a map to the interview location.

- In the **Email Attachments section**, click **Add a new document**.
- Select the document you want to attach to the email template.

11. Click 

The new template is added to the list on the *Template Management* page.



Marking Emails as Private or Confidential

Recruiters will frequently send out emails with CVs or Candidate Packs to line managers for review. If a manager is absent through sickness or vacation, etc., they will normally assign a deputy to handle the work that comes through their email account. Due to internal rules and regulations, all emails that contain personal information have to be treated with high sensitivity. Talentlink lets you set a Multi-purpose Internet Mail Extension (MIME) sensitivity flag on emails so that those which contain confidential information will not be forwarded beyond the intended recipient.

It can also be used to add an additional layer of protection/warning to the receiver that the mail contains information that should be treated with special care and attention.

ⓘ Your internal IT department will have to configure your email client MIME settings. The following two documents may be useful (these links were correct at the time of writing).

ⓘ http://home.scarlet.be/colleman/upgrades/SMIME.pdf ()

ⓘ http://csrc.nist.gov/publications/nistpubs/800-49/sp800-49.pdf

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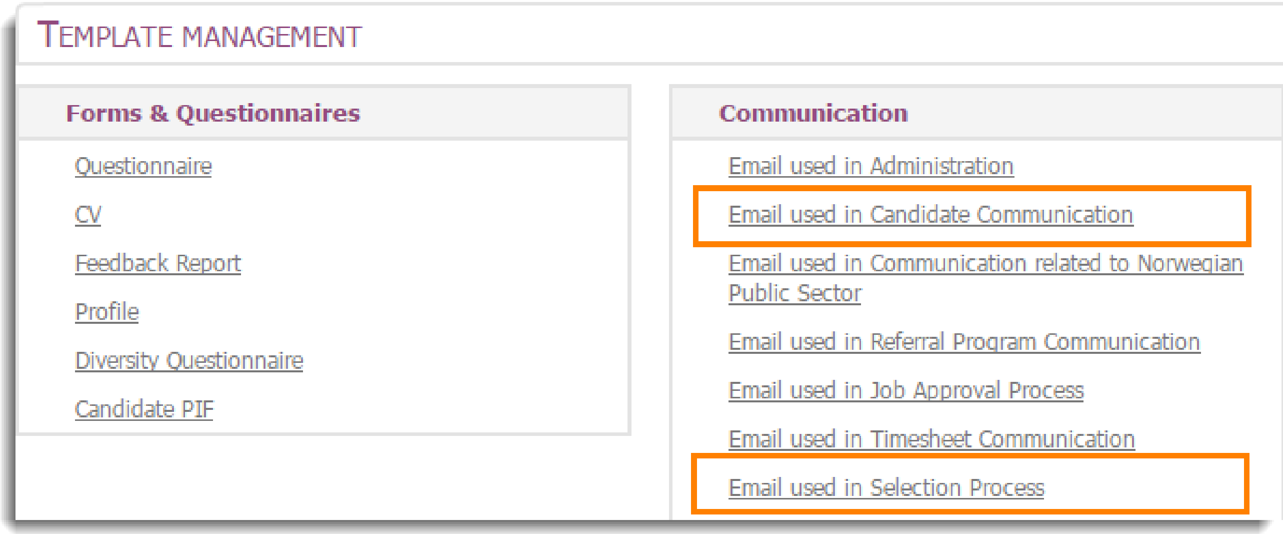
There are two types of email template where sensitivity is used:

- Emails used in Candidate Communication

Lumesse

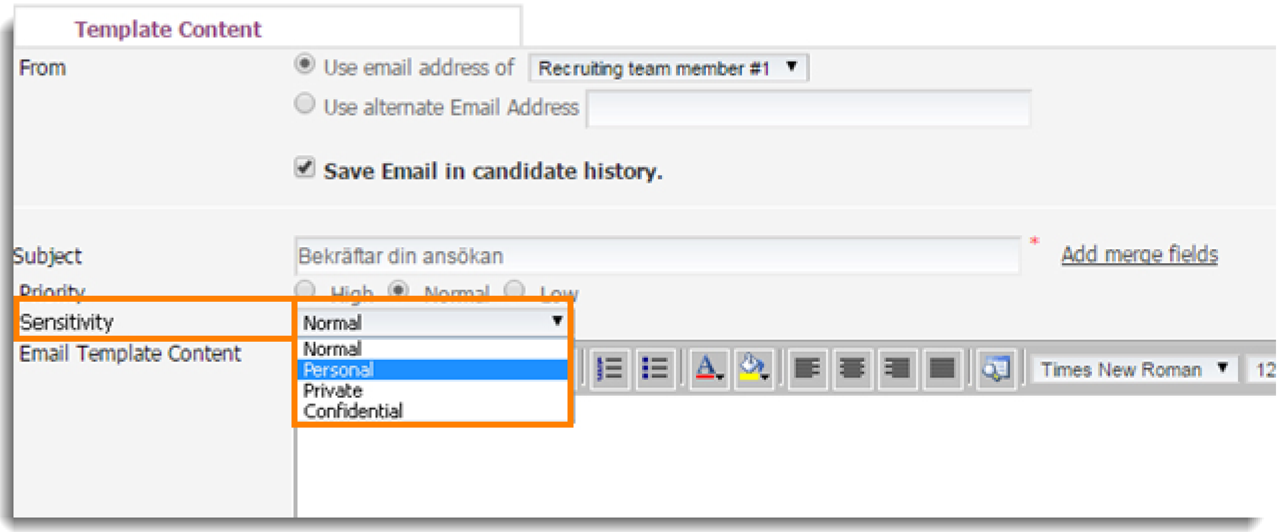
- Emails used in the Selection Process



Sensitivity Options

The **Sensitivity** dropdown list contains 4 options:

- Normal (this is the default option)
- Personal
- Private
- Confidential



The GSA or LSA can set the sensitivity on the template to make it the default option when a user composes a new email from a template. Users can override the administrator's choice to upgrade or downgrade the sensitivity as required.

Working with Templates

Selection Process emails are sent automatically when a user assigns a step. For example, a CV could be sent to a line manager by email without a human user being able to set the MIME sensitivity before the mail is sent.

From TalentLink 15.1 onwards the default MIME setting in the template email will be used for any automatically sent emails. System administrators should therefore select the default MIME setting carefully and inform their users of the decision.

Working with Sessions, Interview Scheduler and other interview steps

When arranging a Session or Interview step the templates used to confirm to interviewer or attendee (typically the line manager) are available for editing and review before sending. Here again, the MIME sensitivity can be confirmed or overridden by users prior to sending the email.

Examples of Where the Sensitivity Flag is Displayed

The following images show some of the places where the sensitivity flag is used. Sensitivity is displayed in the header of received emails.

It will also be attached to candidate documents such as CV reviews and Candidate Packs.

Sensitivity is used when assigning a selection step, as well as in other emails sent out during the Selection Process.

It is also used in interview scheduling when defining a meeting.

Creating Word Templates

This section describes how to create the following types of Word template:

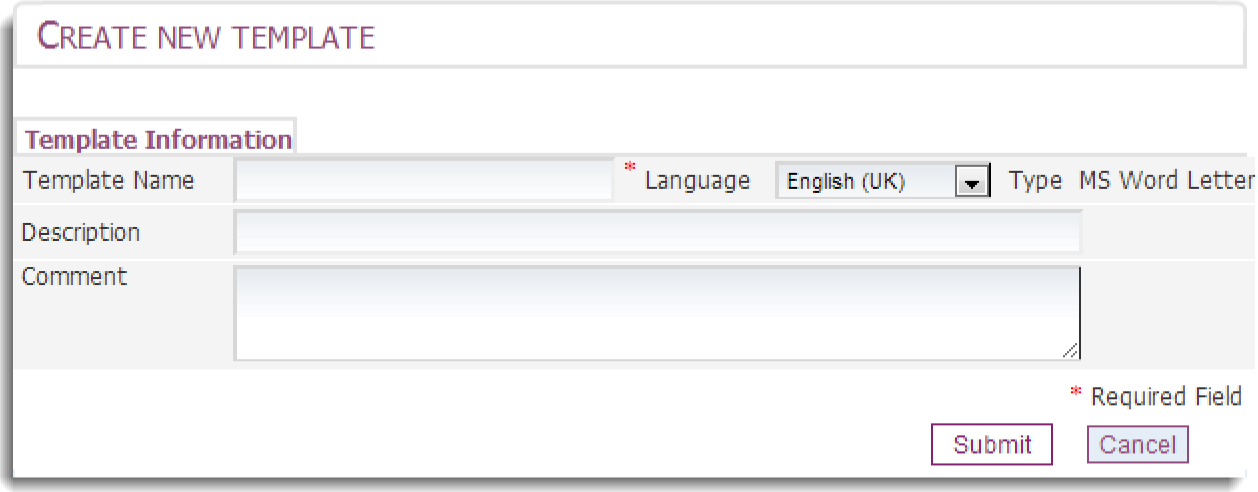
- MS Word Letter
- MS Word Contract Template
- Shared Document

In these templates you can use the Microsoft® Word Mail Merge functionality to create a set of documents that are essentially the same, but where each Merge Field automatically adds information into the document when created. This is useful when you contact candidates by letter in bulk.

1. First create the document you want to use as a template. This will typically contain the unformatted text and logos of the contract or offer letter, but no merge fields.
2. Access the *Template Management* page (see page 311).
3. Select the organization in which you want to create this template.

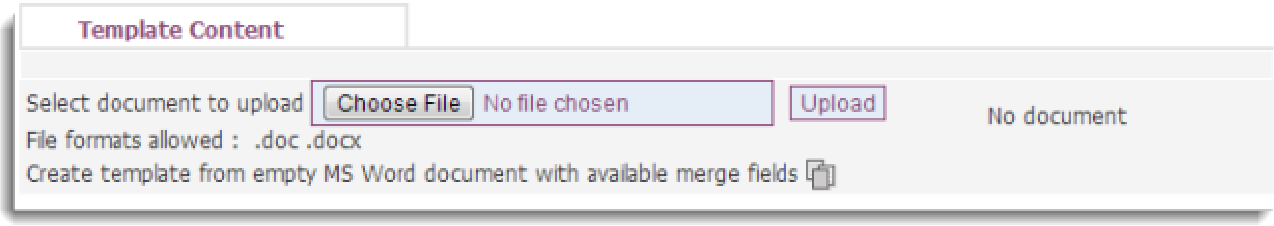
   The organizations that are available depends on your rights. If you only have rights in one organization, it will be automatically selected and the *Select an Organization* page will not be displayed.
4. Select the type of template that you would like to create from the **Document Type** dropdown list.
5. Click **Create New Template**

   The *Create New Template* page is displayed.



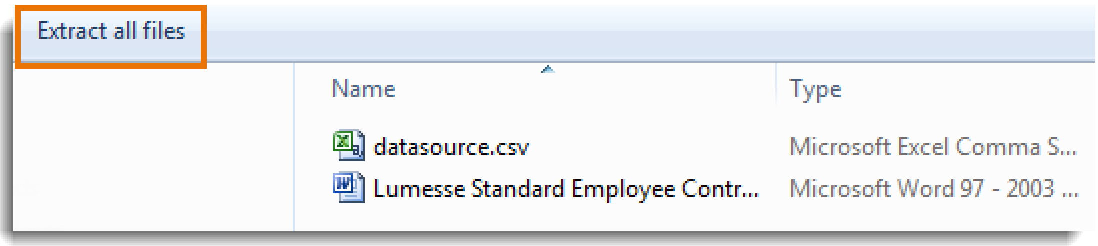
6. Define the Template Information:
   - Type the name of the template
   - Type a short description and a comment, if needed
   - Select the language of the form
   - Select the contract model - Permanent or Contractor (this is only necessary for MS Word Contract Template)
7. Click **Submit**.

   The **Template Content** section is displayed.

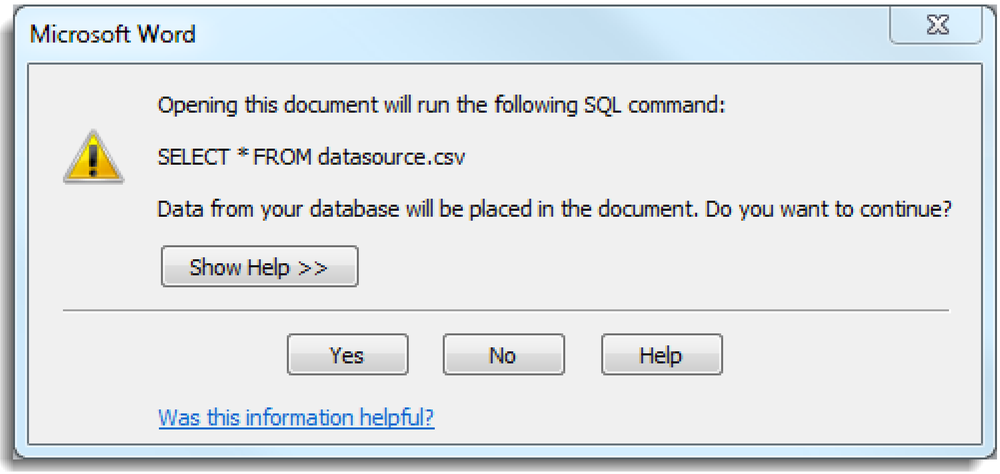


8. Click **Choose File** then locate and select your Word document.
9. Click **Upload**.
10. Click **Create template from empty MS Word document with available merge fields**.

    This will download a zip file containing the datasource.csv file that contains the merge fields and your Word template.
11. Navigate to where the two files have been saved then on the title bar click **Extract all files**.

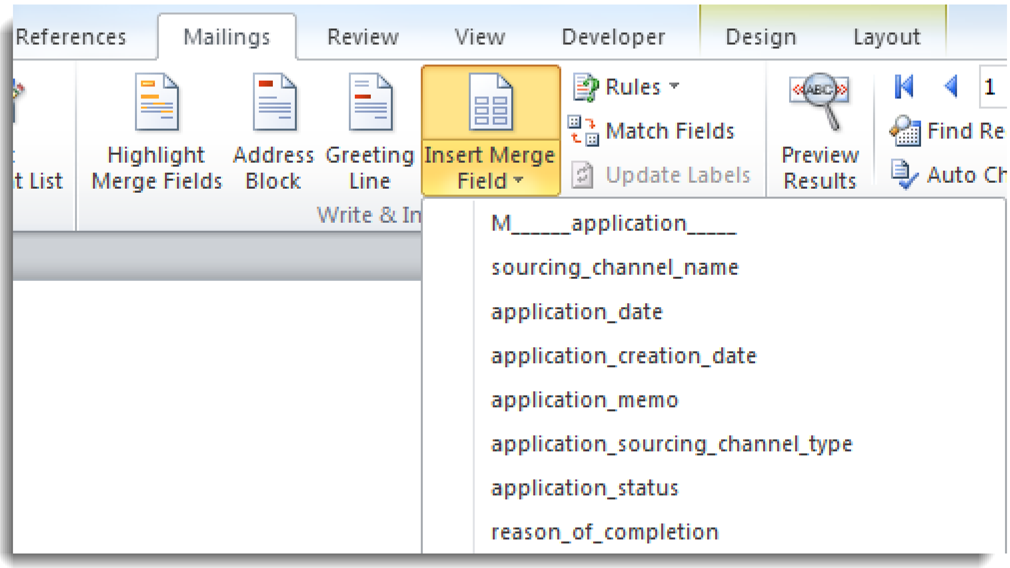


12. Select a destination to save the extracted files then click **Extract**.
13. Navigate to where you saved the two files then open the Word document.
14. When the prompt window appears click **Yes**.

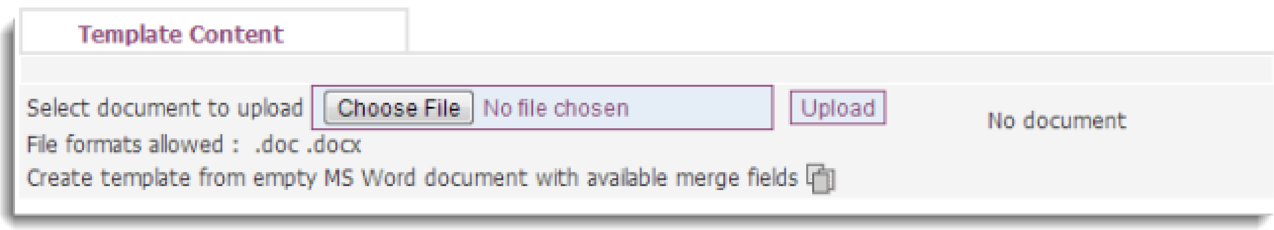


Your Word document will be displayed.

15. Within the Word document select the *Mailings* tab then click **Insert merge fields**.



16. Type your text and insert merge fields as required.
17. When you have finished formatting the document, save it on your local drive.
18. Re-upload the completed template to TalentLink, using **Choose File** then **Upload** to overwrite the unmerged version.



The new template is added to the list on the *Template Management* page.

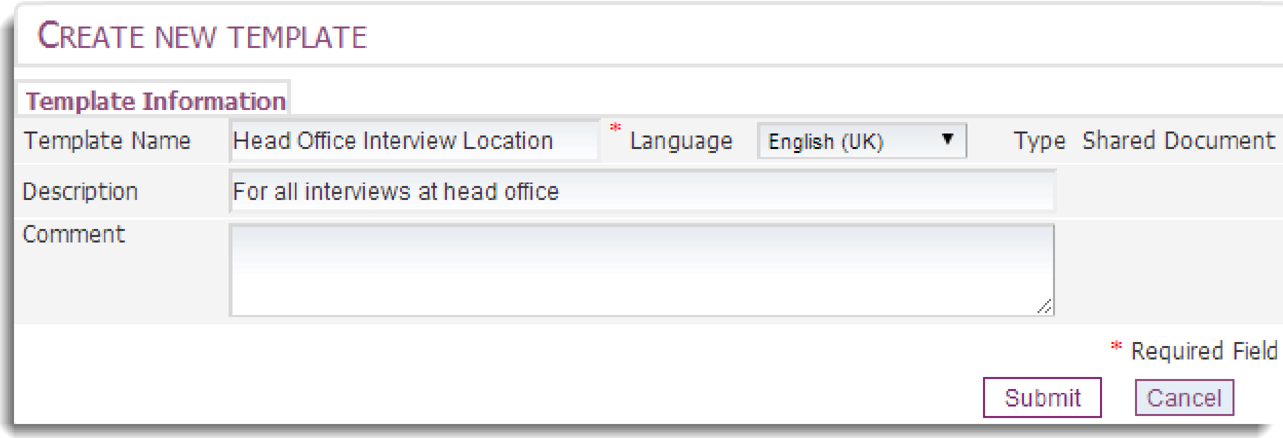
You can repeat this process with each template and reference the saved data source each time, but we recommend saving a data source for each contract as they can have different fields within them.

Creating Shared Documents

Shared documents are useful for making commonly used information, such as a company location map, available in email templates used in communication with candidates,

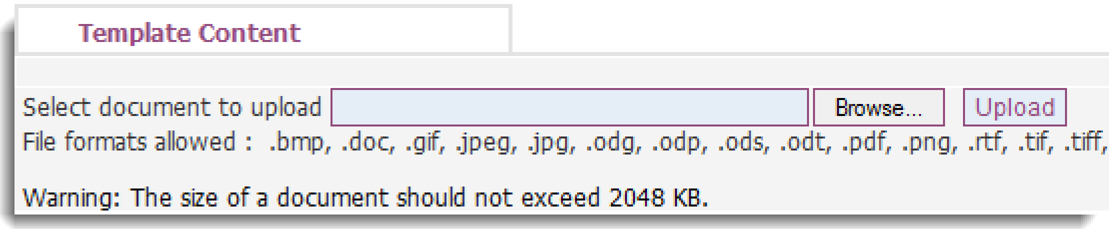
1. After preparing the picture or document you wish to share access the *Template Management* page (see page 311).
2. Select **Shared Documents** from the **Document Type** dropdown list.
3. Click **Create New Template**

   The *Create New Template* page is displayed.



4. Enter the required details then click **Submit**.
5. Select the organization in which you want to create this template.

   The **Template Content** section appears.



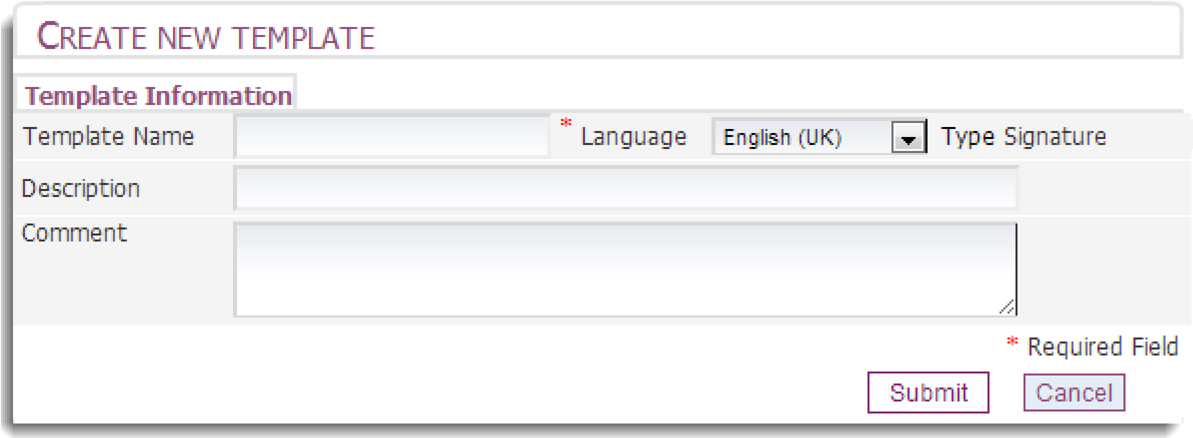
6. Click **Browse** and select the file you want to share then click **Upload**.
7. Click

Creating Signature Templates

1. Access the *Template Management* page (see page 311).
2. Select **Signature** in the **Document Type** dropdown list.

3. Click **Create New Template**

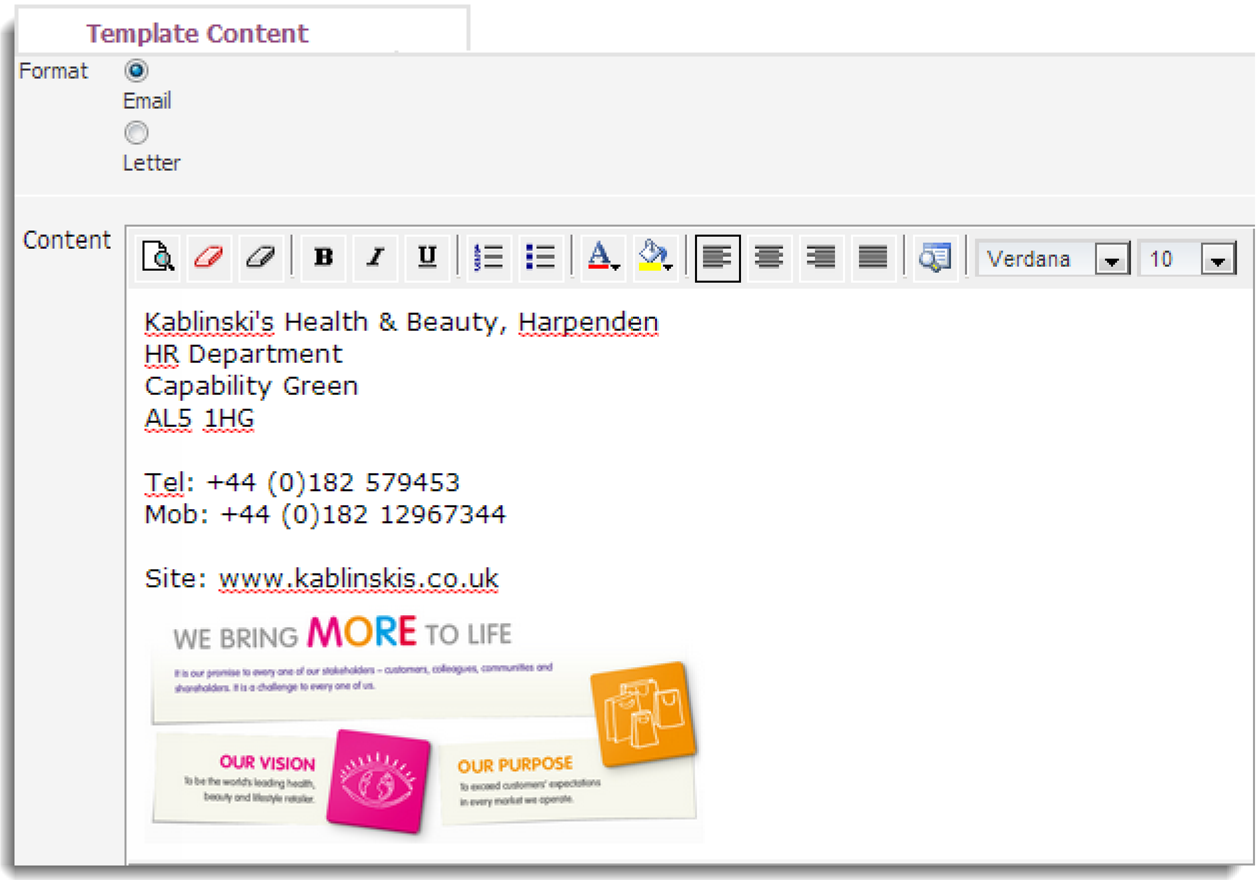
The *Create New Template* page is displayed.



4. Enter the details as required then click **Submit**.
5. Select the organization in which you want to create this template.

The **Template Content** section is displayed.

6. Select either **Email** or **Letter** Format.



7. Type the text content that you want to use in the signature.

You can use merge fields to include information that will be automatically added to the text when the email/letter is sent.

8. Click

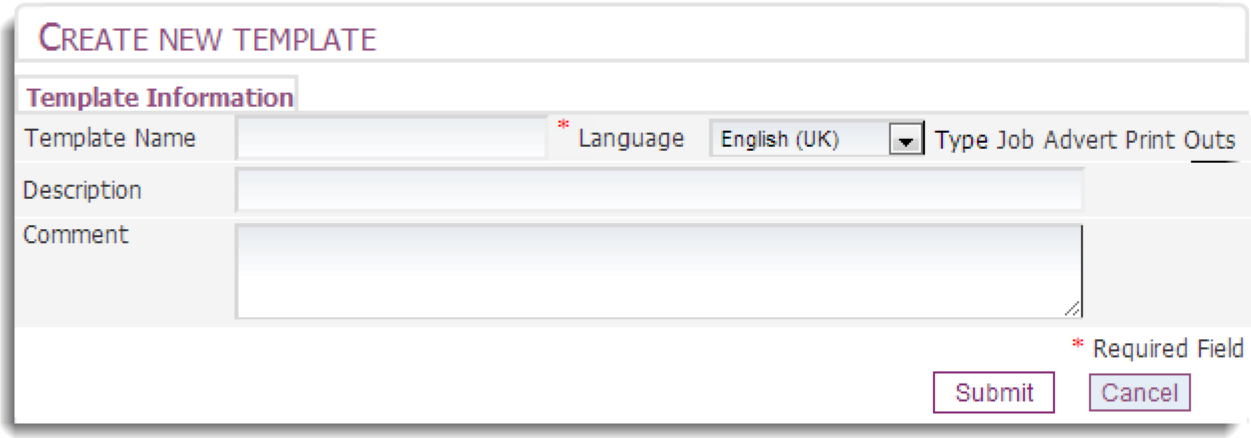
   The new template is added to the list on the *Template Management* page. It can be used as a default signature template at the company (see page 14), organization (see page 35), or user (see page 339) level.

Creating Printable Job Advert Templates

Job Advert Print Out templates enable users to print a job advertisement as a PDF or Microsoft Word document.

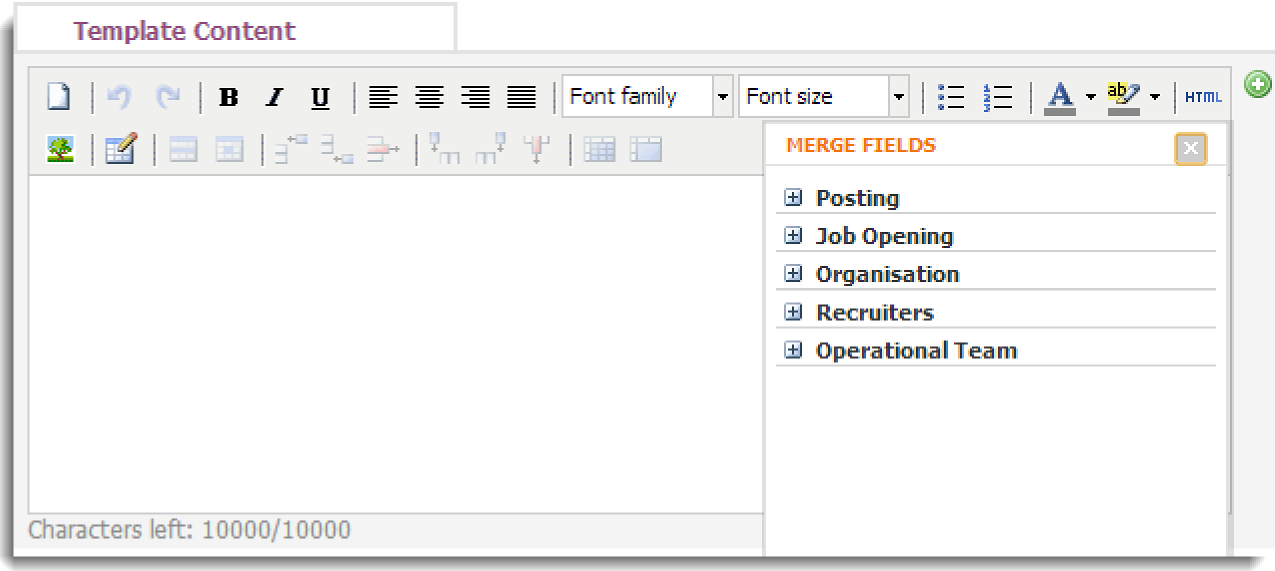
1. Access the *Template Management* page (see page 311).
2. Select **Job Advert Print Outs** from the **Document Type** dropdown list.
3. Click **Create New Template**

   The *Create New Template* page is displayed.



4. Enter the required details then click **Submit**.
5. Select the organization in which you want to create this template.

The **Template Content** section is displayed.



6. Type the content of the job advert and click to insert any required merge fields.
7. Click

Editing Templates

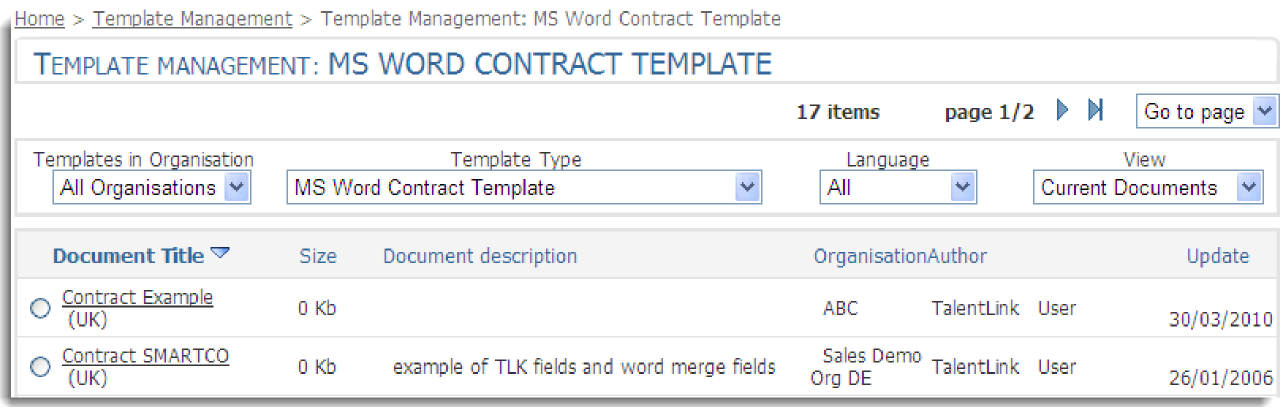
1. Access the *Template Management* page (see page 311).
2. Select the type of template that you would like to edit from the **Document Type** dropdown list.
3. Click the name of the template that you want to edit in the **Document Title** column.

   The *Template* page is displayed.

4. Make the required changes, then click

Editing Word Templates

1. From the **Settings** section of the left dynamic menu, select **Communication Templates**.
2. Select the type of template that you want to edit from the **Document Type** dropdown list.

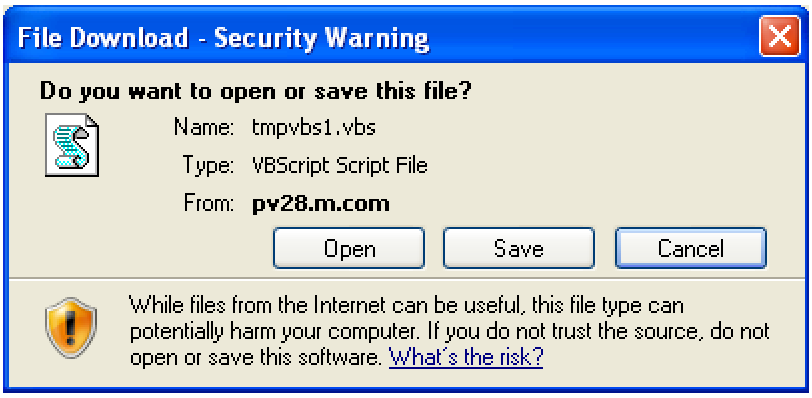


3. Click the name of the template that you want to edit in the **Document Title** column.

   The *Template* page is displayed.

4. Click  to edit the Word document.

   The *File Download* dialogue box is displayed.



5. Click **Open**.

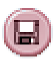
   The *Security Warning* dialog box is displayed.

6. Click **Run**.

   The Word document opens with the Mailings functionality activated. You may need to set the Header Record Delimiters.

7. Make the required changes to the text.
8. Save the file, then close it.
9. On the *Template* page, click **Browse**, then navigate to the modified file you want to use as the new template.
10. Click **Upload**.
11. Click **OK** to confirm your action.

    When complete, the *Document uploaded* message is displayed to the right of the **Upload** button.

12. Click 

Moving Templates

1. Access the *Template Management* page (see page 311).
2. In the Document list, select the template you want to move.
3. At the bottom of the page, in the **Move to Organization** dropdown list, select the organization where you want the template to be moved.

   A confirmation message is displayed when the template has been moved.

Copying Templates

1. Access the *Template Management* page (see page 311).
2. In the Document list, select the template you want to copy.
3. At the bottom of the page, in the **Copy to an Organization** dropdown list, select the organization where you want the template to be copied.

   A confirmation message is displayed when the template has been copied.

   The name of the template in the new organization is Copy of <original template name>.

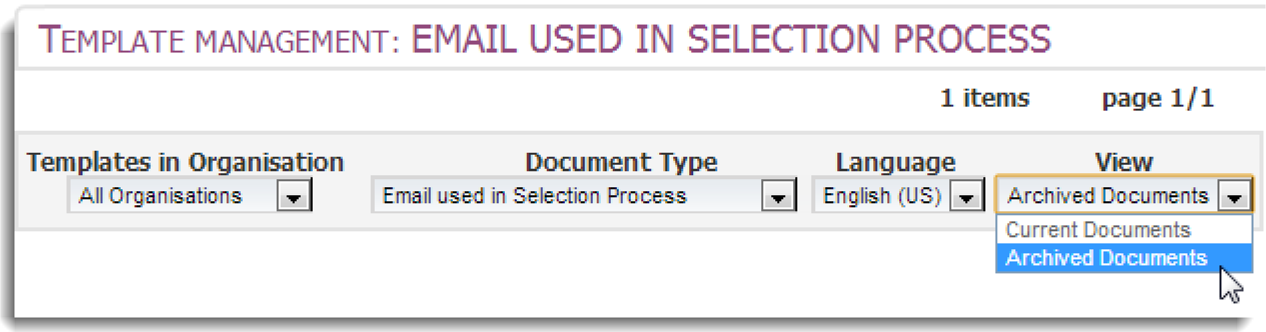
Archiving Templates

Templates cannot be deleted, they can only be archived. This is because they may still be in use in a process and therefore still visible to some candidates. If they are archived they remain unchanged in any existing processes, and cannot be used in a new process.

1. Access the *Template Management* page (see page 311).
2. In the Document list, select the template you want to archive.
3. At the bottom of the page, click 

Restoring Templates

1. Access the *Template Management* page (see page 311).
2. On the *Template Management* page, select **Archived Documents** from the **View** dropdown list.



3. In the Document list, select the template you want to restore.
4. At the bottom-left of the page, click **Restore**.

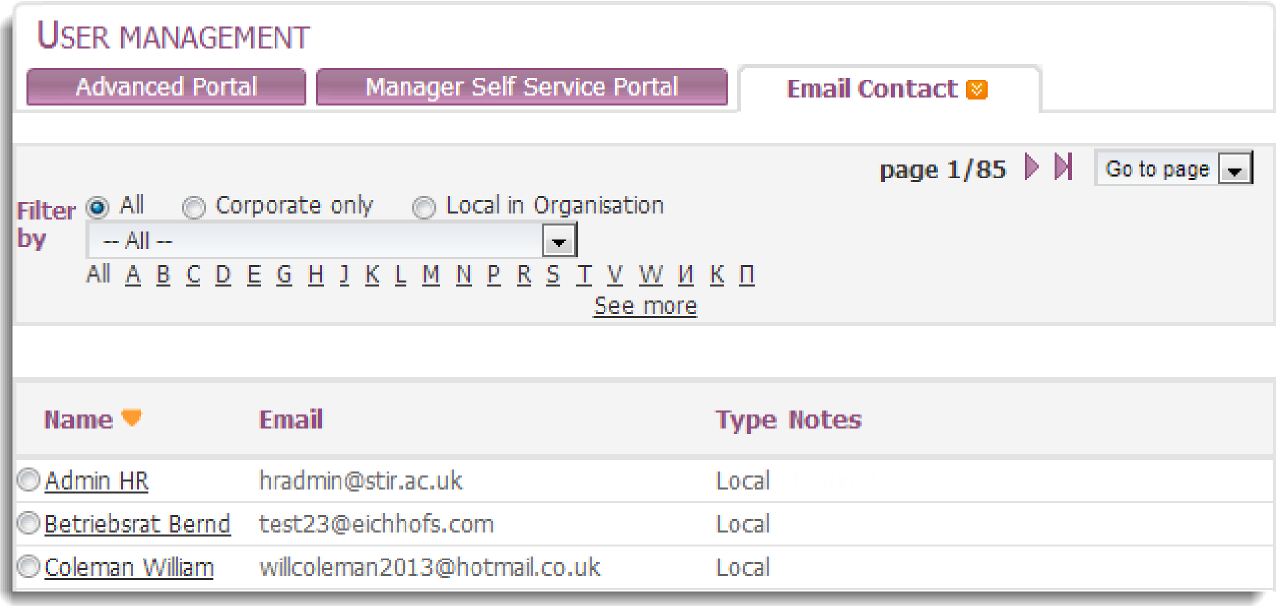
Creating Users and Assigning Roles

The following key business rules apply to User Management:

- A role assigned at organization level is propagated to all its sub-organizations
- A user must be assigned Organization User Access (see page 351) at OBS Level 1 as a minimum to enable them to use the folders and templates defined in this organization

> ⓘ This rule only applies to users who only have a role at a child organization level, not at OBS Level 1.

- You can create a user profile in advance and activate it at a later date
- The workspace users are Advanced Workspace users and Manager Self Service Workspace users. There is also an Email Contact user type



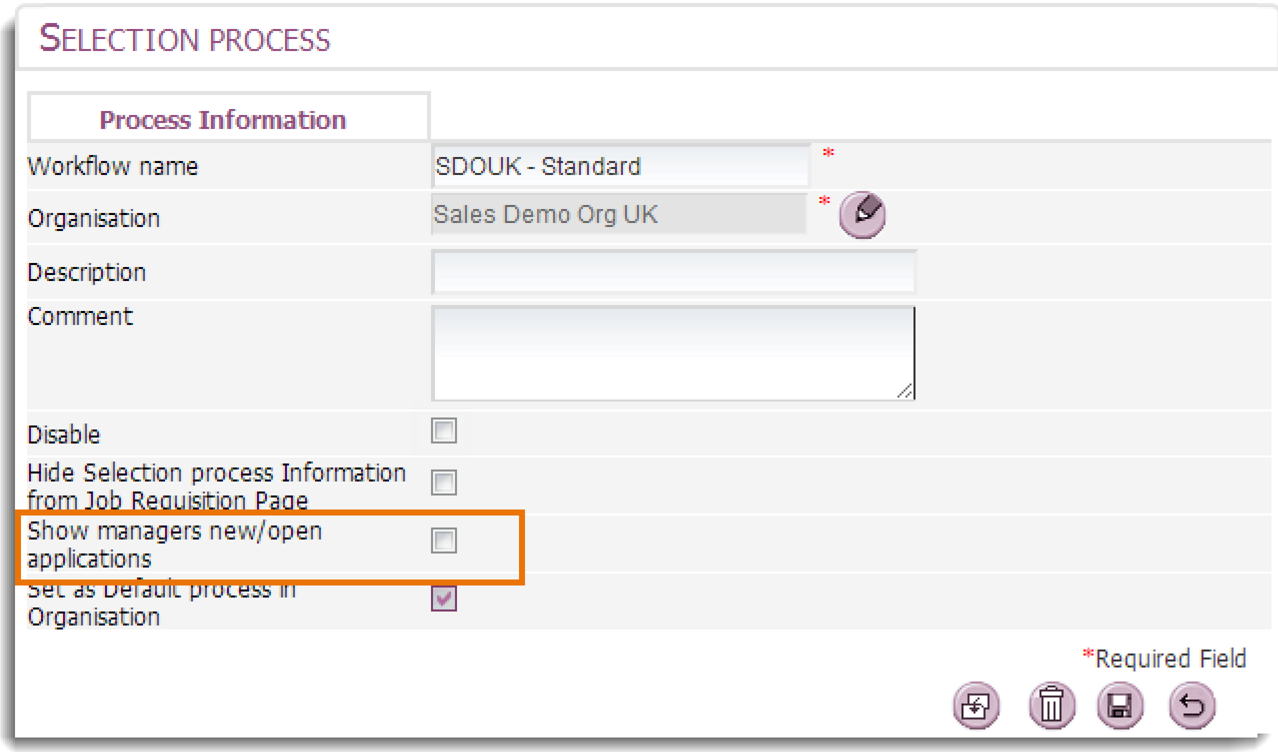
Comparison of MSS and Advanced Users

The major difference between MSS and Advanced users is that MSS can only view and edit jobs where they are on the team: Advanced users can manage any jobs or candidates in their OBS level.

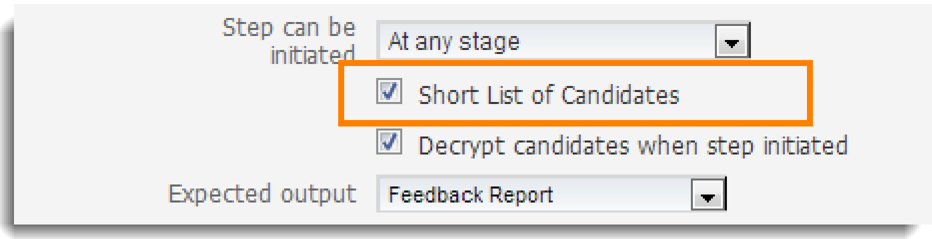
Advanced users are people who are using TalentLink every day to process candidates so they have a great range of access and control.

MSS users typically do not use TalentLink on a daily basis and do not carry out administrative tasks. The goal is to make the MSS user's job as simple as possible, therefore they have restricted access to approve only those things they have to, and to see only short listed candidates they need to see.

When creating a Selection Process, the option **Show Managers new/open Applications** controls the visibility of candidates for MSS users. MSS users see jobs and applications only if they are member of a job's operational team AND the application is short listed. Unlike Advanced users, MSS users typically cannot see new applications because the application gets short listed later in the Selection Process. If **Show Managers new/open Applications** is selected all applications are immediately shortlisted and as a result an MSS user will see them.



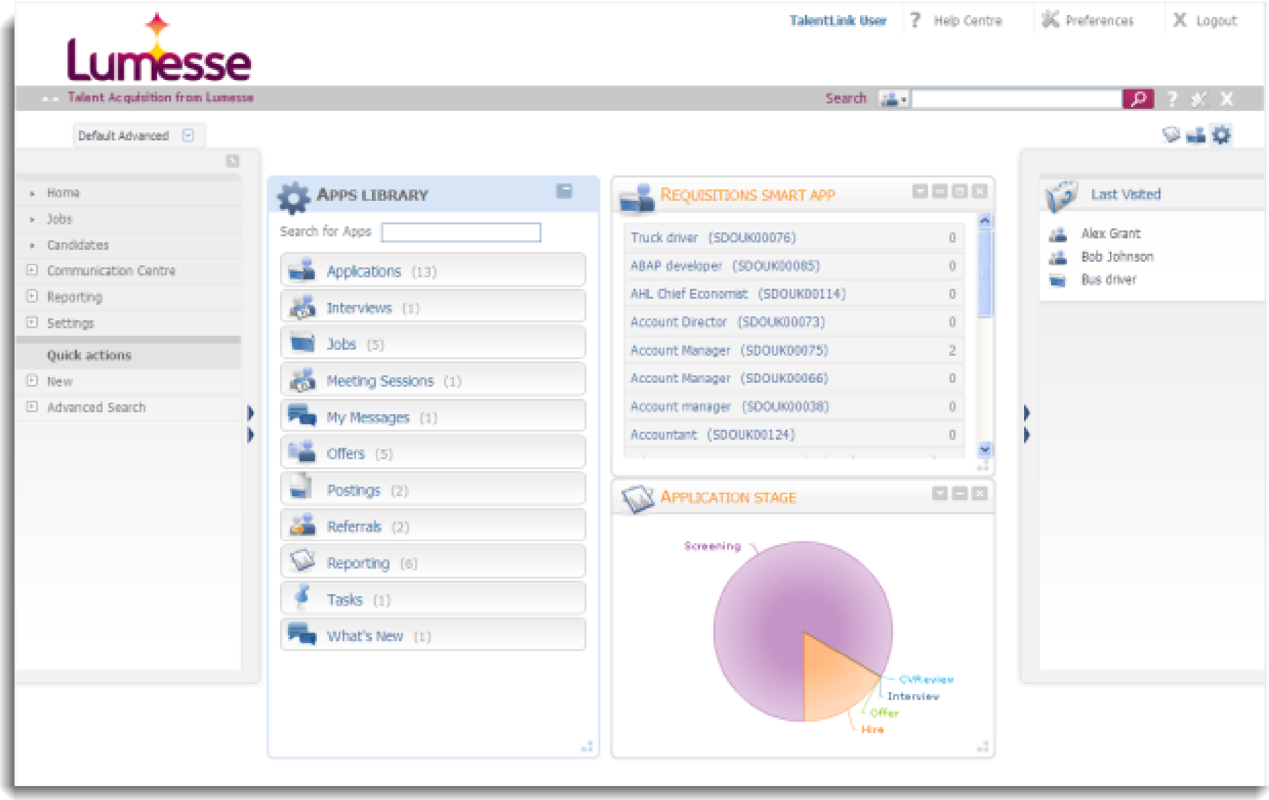
If the previous option is not selected, candidates can be made visible to MSS users at a specific step in the Selection Process. You can short list a candidate by selecting **Short List of Candidates** in the Selection Process step setup. This means that the a candidate's file will be visible to MSS users at this step.



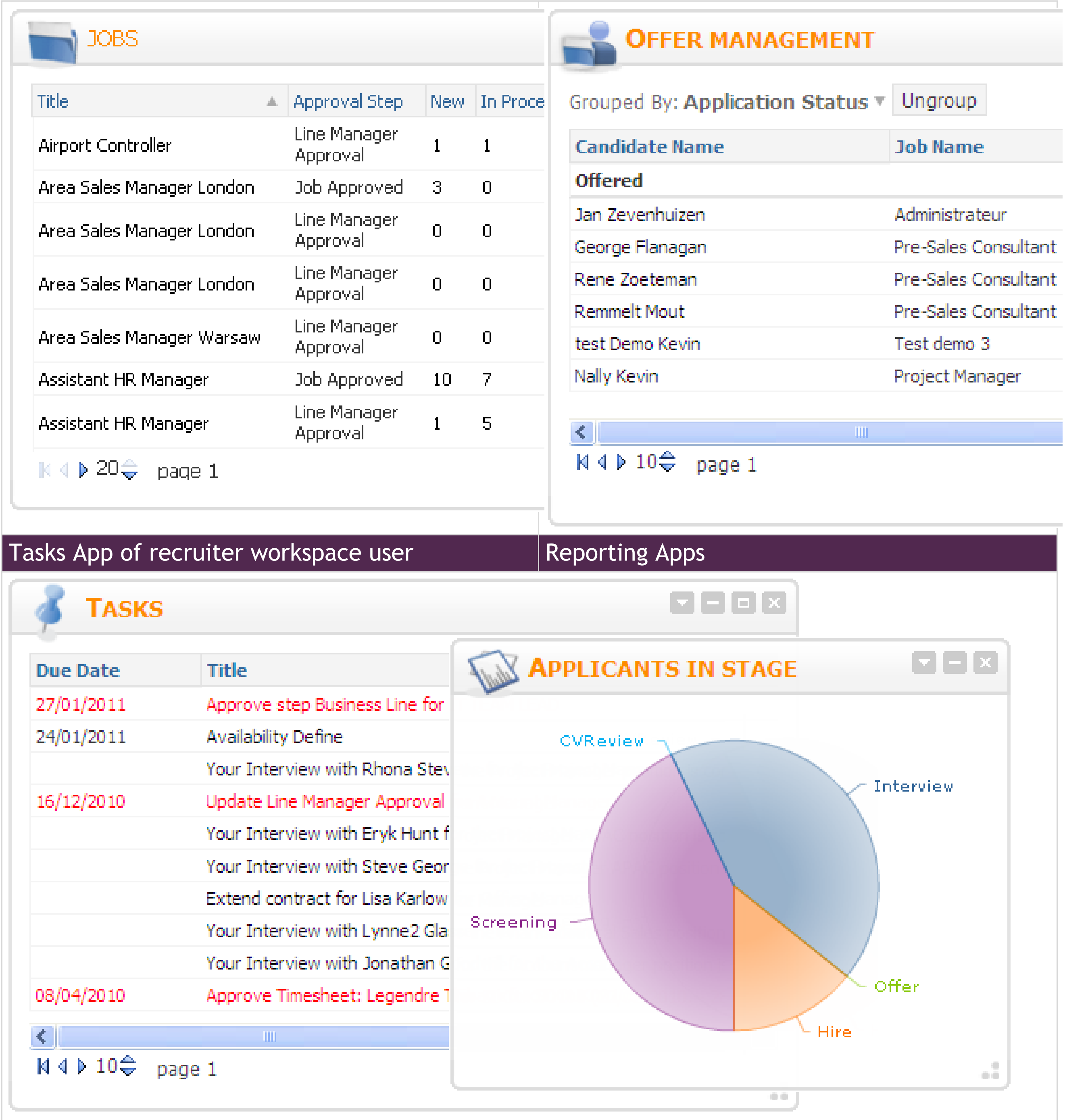
Advanced Workspace

The Advanced Workspace is a dedicated portal for all advanced users, including recruiters, HR consultants, and so on. Depending on their roles and rights (as set in their User Profiles), users can access the following functionalities and/or are able to carry out the following actions using different Apps:

- Access jobs and general applications
- Post jobs
- Run Approval Process
- Review applicants
- Manage Selection Process
- Contact candidates
- Manage Hiring Process
- Search in candidate database
- Run reports



Requisitions App of a recruiter workspace user	Offer Management App



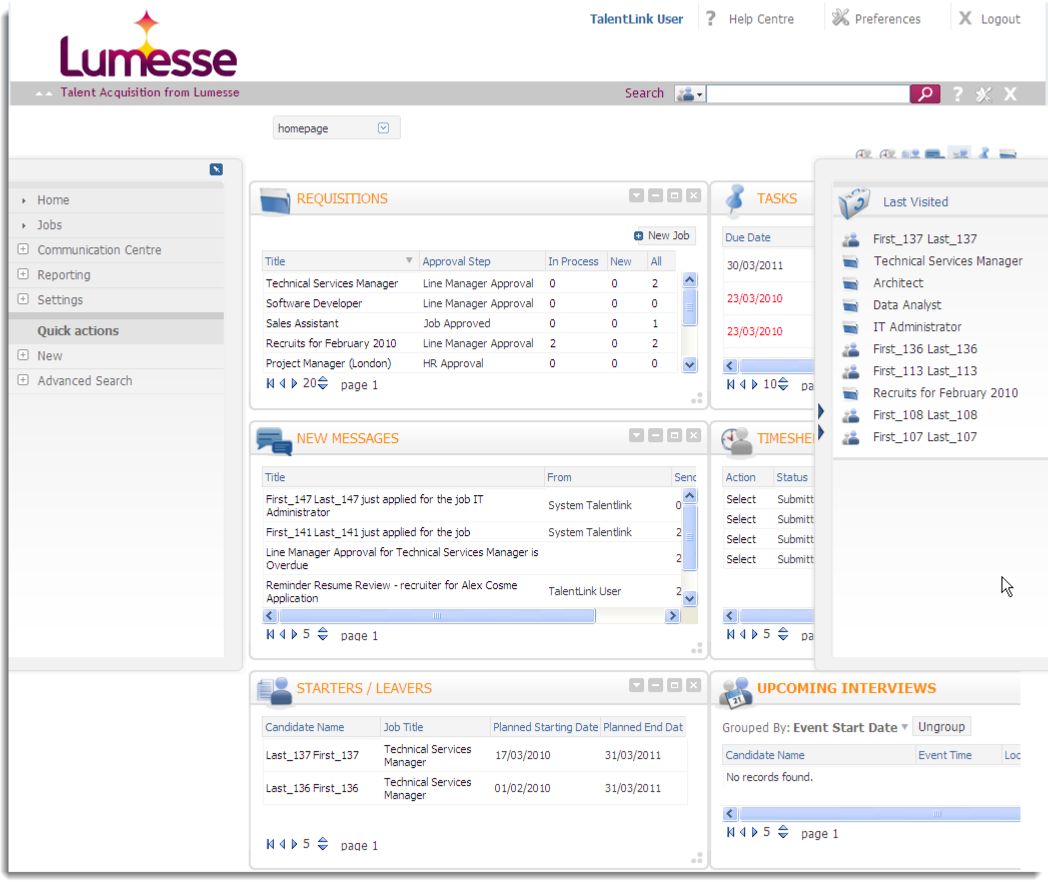
JOBS
Title
Approval Step
New
In Proce
Airport Controller
Line Manager Approval
1
1
Area Sales Manager London
Job Approved
3
0
Area Sales Manager London
Line Manager Approval
0
0
Area Sales Manager London
Line Manager Approval
0
0
Area Sales Manager Warsaw
Line Manager Approval
0
0
Assistant HR Manager
Job Approved
10
7
Assistant HR Manager
Line Manager Approval
1
5
20
page 1
OFFER MANAGEMENT
Grouped By: Application Status
Ungroup
Candidate Name
Job Name
Offered
Jan Zevenhuizen
Administrateur
George Flanagan
Pre-Sales Consultant
Rene Zoeteman
Pre-Sales Consultant
Remmelt Mout
Pre-Sales Consultant
test Demo Kevin
Test demo 3
Nally Kevin
Project Manager
10
page 1
Tasks App of recruiter workspace user
Reporting Apps
TASKS
Due Date
Title
27/01/2011
Approve step Business Line for
24/01/2011
Availability Define
Your Interview with Rhona Stev
16/12/2010
Update Line Manager Approval
Your Interview with Eryk Hunt f
Your Interview with Steve Geor
Extend contract for Lisa Karlow
Your Interview with Lynne2 Gla
Your Interview with Jonathan G
08/04/2010
Approve Timesheet: Legendre T
10
page 1
APPLICANTS IN STAGE
CVReview
Interview
Screening
Offer
Hire

Manager Workspace

The Manager Workspace is a dedicated portal for hiring managers, job approvers and local HR. These users have restricted access to certain features and to candidate files; they can only see job openings where they are members of the Operational Team, and they can only see short listed candidates assigned to them during the Selection Process. With this portal they can:

- Manage their own jobs
- Review short listed candidates
- Perform steps in the Selection Process

Manager Workspace users may use Apps such as Requisitions, Upcoming Interviews, Tasks, New Messages, Starters/Leavers and Timesheets to accomplish their assigned duties or deal with day to day jobs.



The tasks that a Manager Workspace user can carry out include:

- Restricted Access to My Jobs/My Short Listed Candidates (submitted to them by the recruiter)/My Tasks
- Propose simple task-oriented navigation with no training needs
- Create jobs
- Participate in and follow the Job Approval Process
- Participate in and follow the Selection Process (CV review/Interview, and so on)
- Participate in and follow the Hiring Process

Email Contact

During the course of the recruitment process, users need to communicate with other internal users (Recruiter and Manager Workspace users) and also with third parties/external actors. These actors receive tasks by email and are asked to provide feedback.

External actors who participate in the recruitment process are stored and managed directly in the system as Email Contact Users.

Email Contact users can:

- Participate in the Selection Process (CV review/Interview, and so on)
- Participate in the Hiring Process

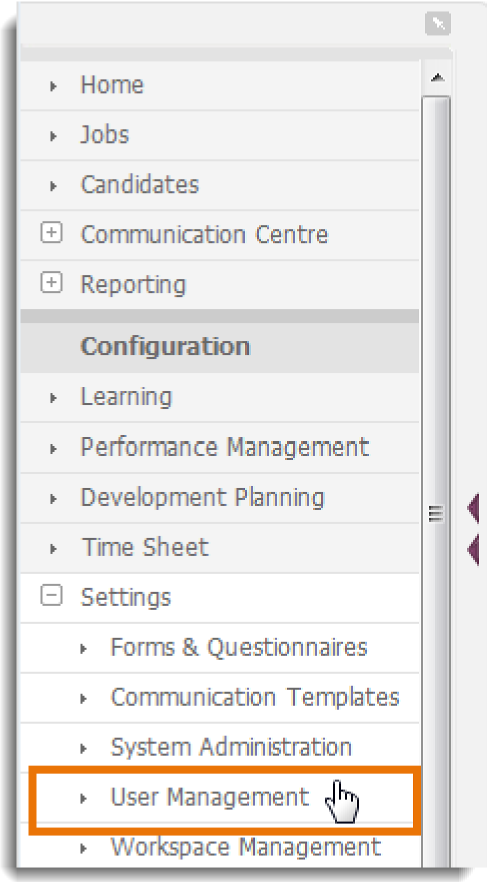
Creating Advanced and Manager Workspace Users

An administrator can:

- Create new users and define default login credentials
- Create bulk users from an Excel file (for more information contact your TalentLink consultant)
- Communicate the login details and activation link to an end user

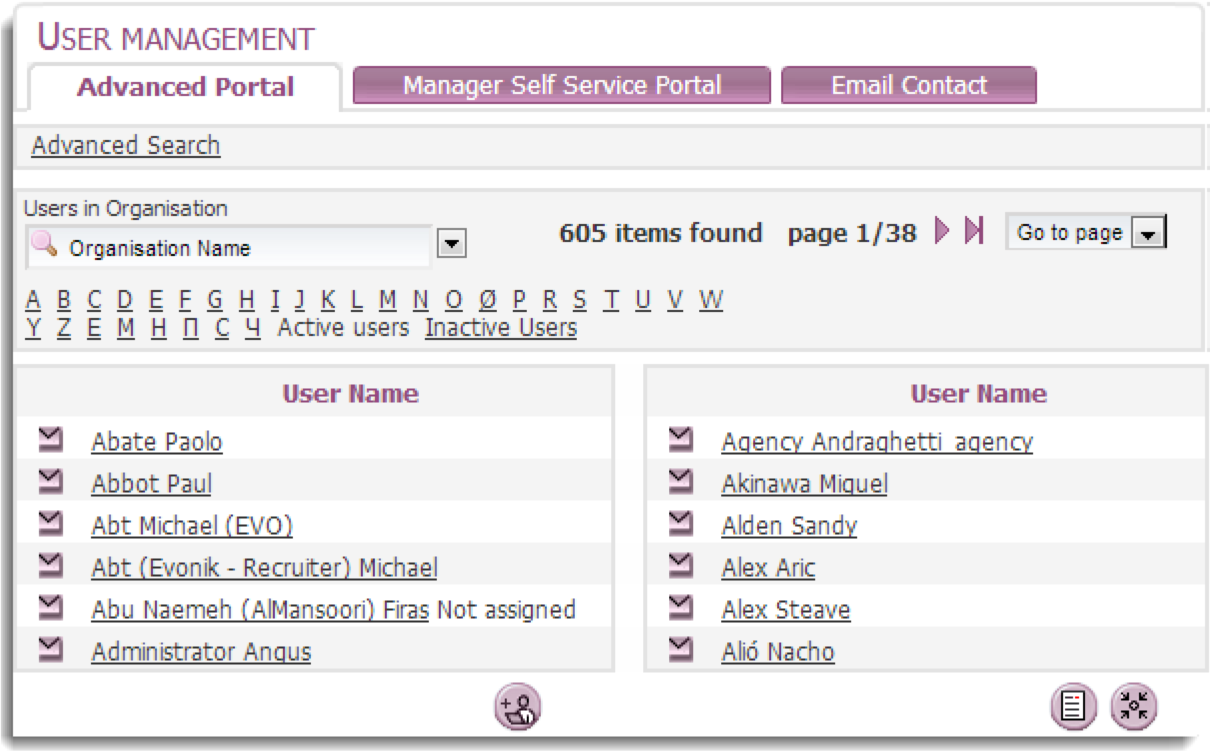
To create a new user:

1. From the Settings section of the left dynamic menu, select **User Management**.

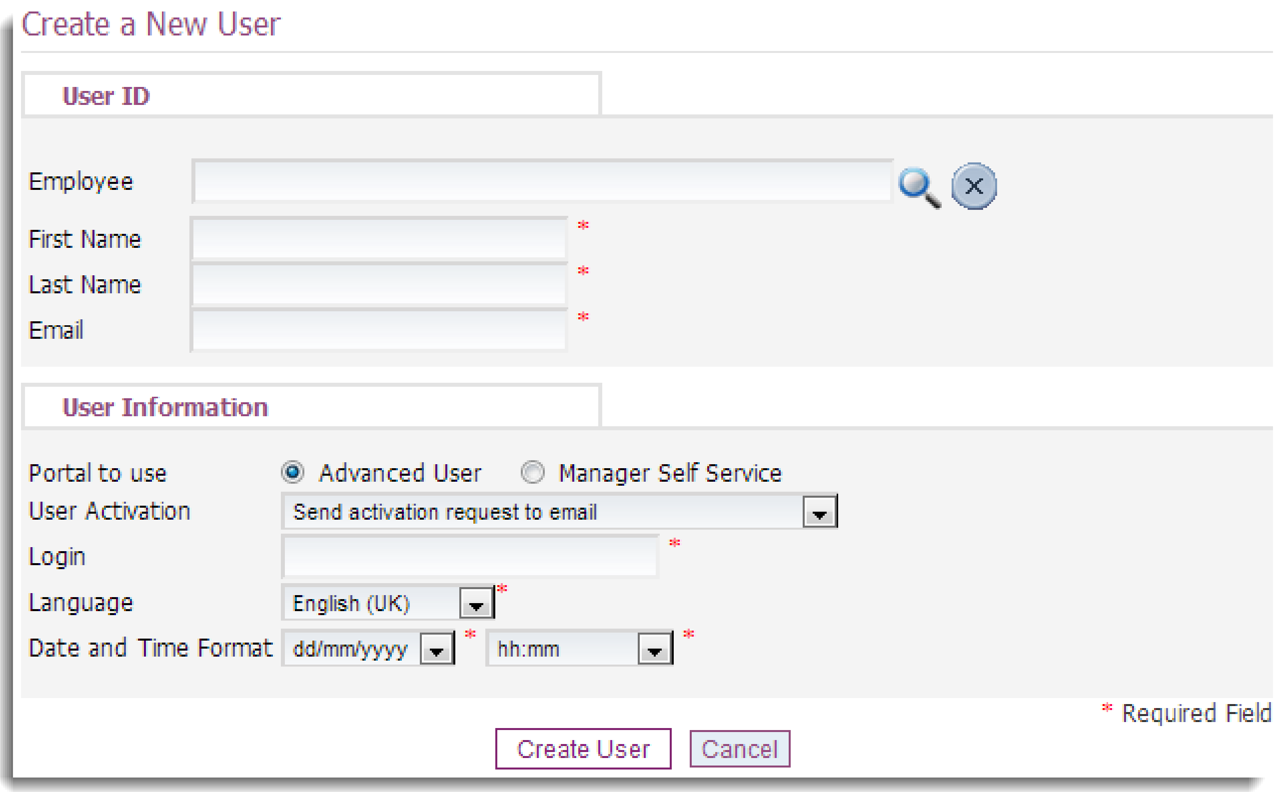


The *User Management* page is displayed with users sorted by user type on separate tabs: Advanced Workspace users, Manager Workspace users and Email Contact users.

2. Click to create a new user.



3. Complete the **User ID** fields.



4. Select the portal and specify whether to send the activation request to the user.

   ⓘ **Send activation request to email -** The user receives an activation email in their personal email inbox. This email contains an activation link. On the *Activation* page they are asked to provide a new password and a security question and answer.

   ⓘ **Activate user later -** The user is created, but the account remains inactive until you activate it manually.

   ⓘ **Activate user now and send email notification -** The account is activated instantly and a notification email is sent containing all the details the user needs to connect. If you do not want to send a notification email, select **Activate user now without sending email notification**.

   ⓘ **Activate the user now -** The system displays the login information fields, and you must define the login name and password for the new user. These fields are not available if you choose to send the activation request to the user.

5. If you activate the new user (with or without a notification email), you will need to:
   - Define the **Login** name and **Password**
   - Select the communication **Language** to be used when sending emails relating to user accounts (password modification, account activation, and so on). This does not affect the language displayed on the log in page as this is determined from cookies stored on the user's computer, or from the language used for their internet browser (where no cookies are stored).
   - Select the **Date and Time Format** that is used in all fields relating to dates, interview sessions, and so on

   ⓘ For security reasons, password rules may be enabled (for example, 8 characters minimum). Password rules are defined by the company in accordance with the customer's requirements. Click **Password Rules** for more information, or click **Generate Password** to create a password automatically.

   ⓘ Users can change the **Language** you selected in their User Preferences (see page 339).

6. Click **Create User**.

   The main *User Management* page is refreshed and the new user is available in the Users list. Unless you selected **Activate User now**, a new user is initially displayed in the **Inactive User** list until the account is activated by the user or the administrator.

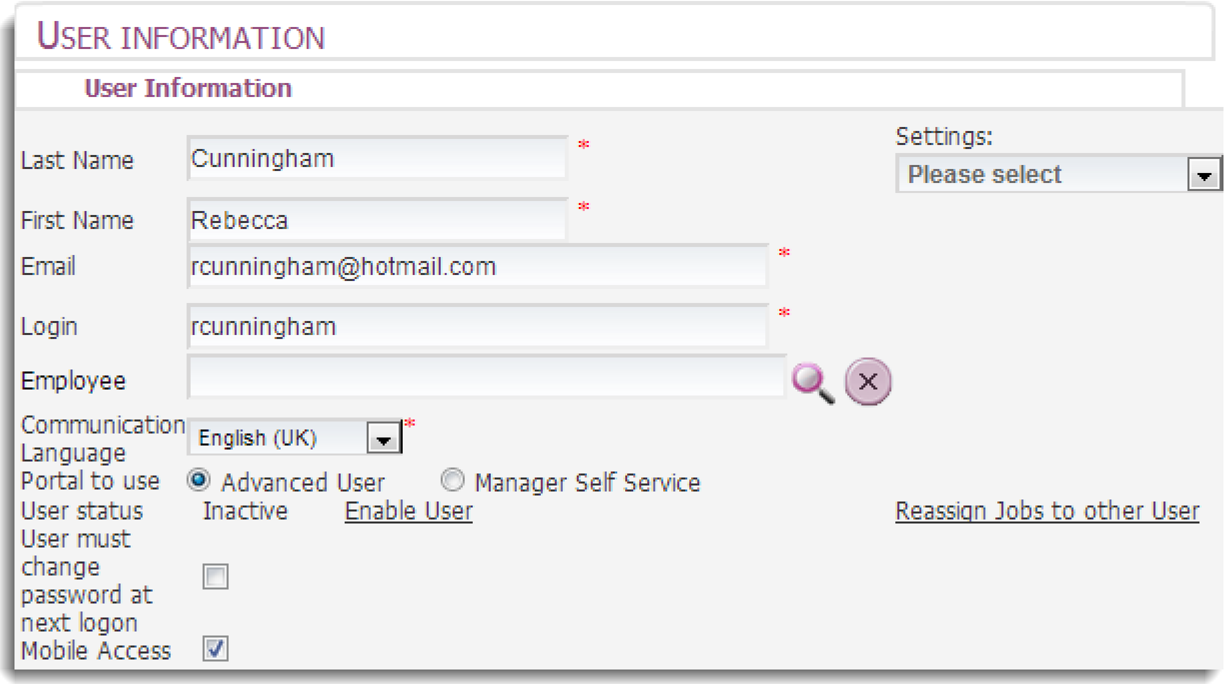
   A newly created user will not have any roles or rights assigned to them, so you will do this next.

Creating or Editing a User Profile

A user's profile defines the combination of roles they are assigned in specific departments, in accordance with the company's needs. For new users, you can define a new User Profile and for existing users, you can edit their User Profile.

1. Select the user's name from the *User Management* page to access the User Profile. The *User Information* page is displayed.

ⓘ If you create a new Advanced user, this user is first displayed in the **Inactive Users** list in the Advanced Workspace. If you create a new Manager Workspace user, this user is first displayed in the **Inactive Users** list in the Managers Workspace.

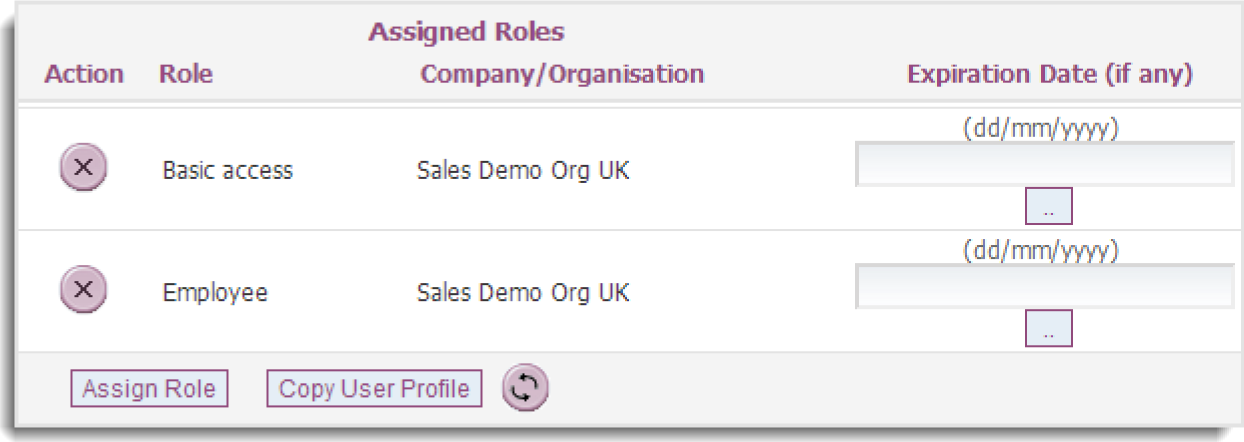


2. If you previously selected *Activate User Later*, you can **Enable User** now to activate their account or leave this till you've completed their account settings.
3. Specify whether the **User must change password at next logon**.
4. If mobile access is switched on (via Company Configuration), select **Mobile Access** if you want this user to be able to access the mobile version of TalentLink.
5. To reassign jobs from this user to another, select **Reassign Jobs to Other User** (see page 344).
6. Define User settings using the **Settings** dropdown list.
   - Define User Preferences (see page 339)
   - Specify the user details in User Data (see page 341)
   - Configure Event Notification (see page 342)

   When you have activated this user and assigned a role, two more options will appear in the **Settings** dropdown list:

   - Define values for job creation using the Personal Job Template (see page 341)
   - Activate the Mail Gateway (see page 343)

7. Click **Assign Role** to assign new roles to the user (see page 347).



8. Click in front of a role to delete roles assigned to an organization (see page 352).
9. Use **Copy User Profile** (see page 338) to copy another user's profile to this user. This assigns all the same rights to the selected user, but does not remove any roles already assigned to them. Only the GSA can carry out this action.
10. In the **Security** section, click to add document security rights (see page 345)

    This option is only available if the document security settings are already configured in Organization Management.

11. Set the named access roles (see page 351)

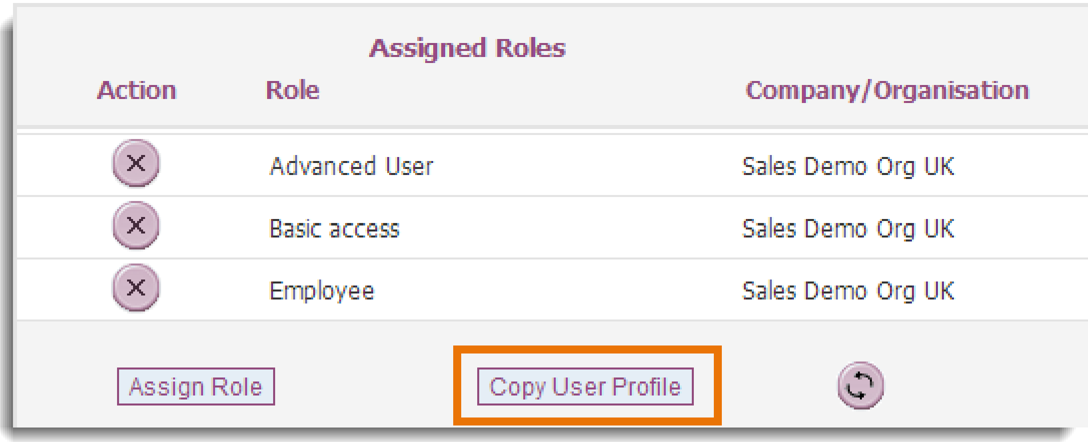
    A GSA can click **Become this user** to log in as this user, for example, if you need to give support to this user by checking their account. Local System Administrators can use this functionality, but only for users assigned rights in the same organization as themselves.

ⓘ This feature is only intended to provide support by enabling you to test the roles and rights settings of a user. It must not be used to perform recruitment actions on behalf of a user.

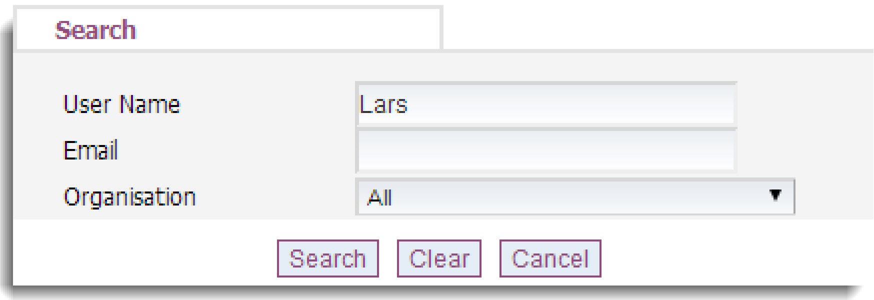
Copying a User Profile

During User Profile set up, you can use the **Copy User profile** functionality if an existing account has a profile that matches the requirements for a new user.

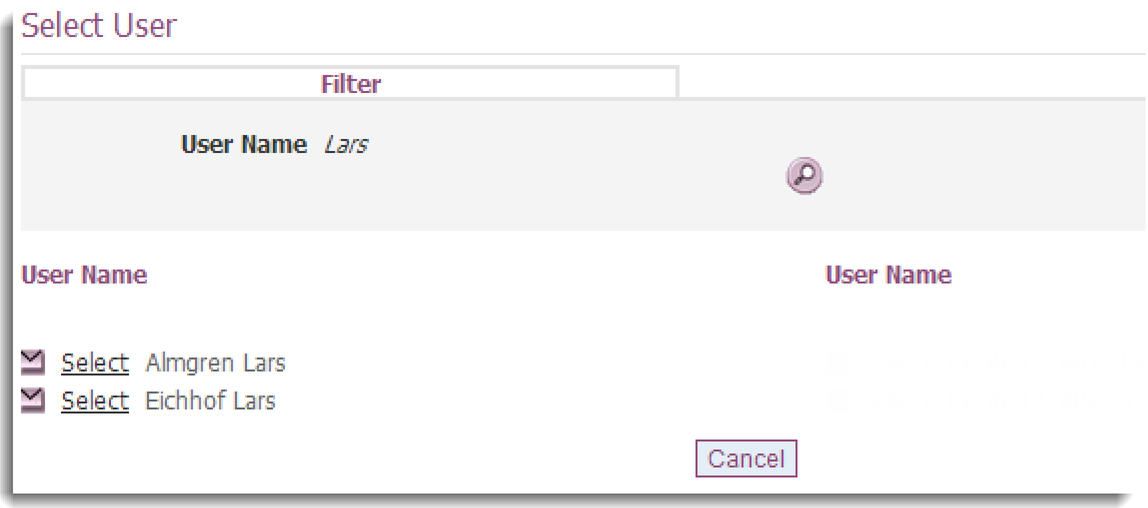
1. On the *User Information* page, in the **Assigned Roles** section click **Copy User Profile**.



2. The *Quick Search* page is displayed. Enter the required criteria then click **Search**.



3. Click **Select** next to the User whose profile you want to copy.



The profile of the selected user is copied into the new User Profile.

User Profiles Update

User Profiles are updated as a batch, which is launched every 20 minutes.

When you edit a user profile the modifications are displayed for this user only after the batch is launched.

1. To activate the changes immediately, click in the user's *User Information* page.

User Preferences

1. On the *User Information* page, select **User Preferences** from the **Settings** dropdown list.
2. Enter details as required then click **Save.** The main fields are described here:

   Preferred date and time format ensures that all dates in TalentLink are shown in this format.

   Preferred Language sets the system language so that all forms and communication templates will be delivered in this language if translated versions are available. (The user's login page language is separate from the system language and is determined from cookies stored on the user's computer, or from the language used for their internet browser if no cookies are stored.)

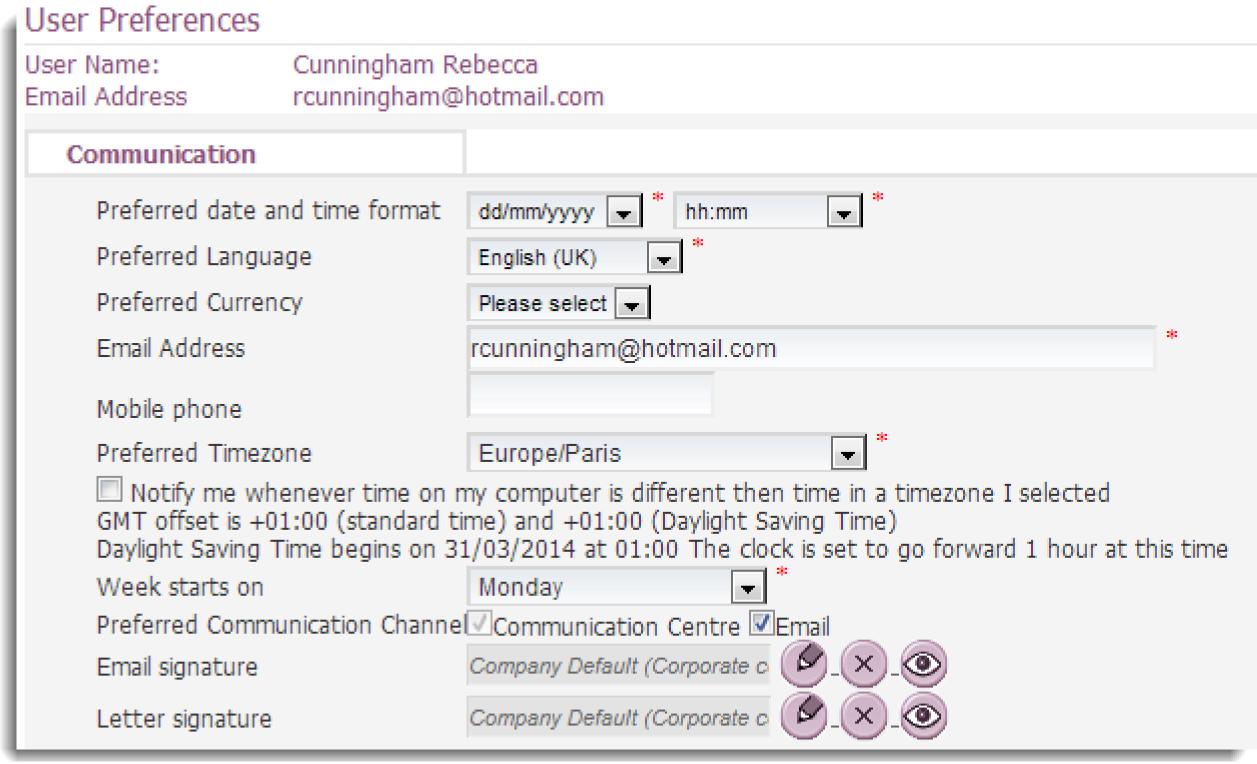
   Preferred Currency sets the currency used on jobs and offer forms.

   Preferred Timezone is essential to ensure that the time used on interview scheduling is clearly indicated to the candidate or other interviewers when dates and times are booked.

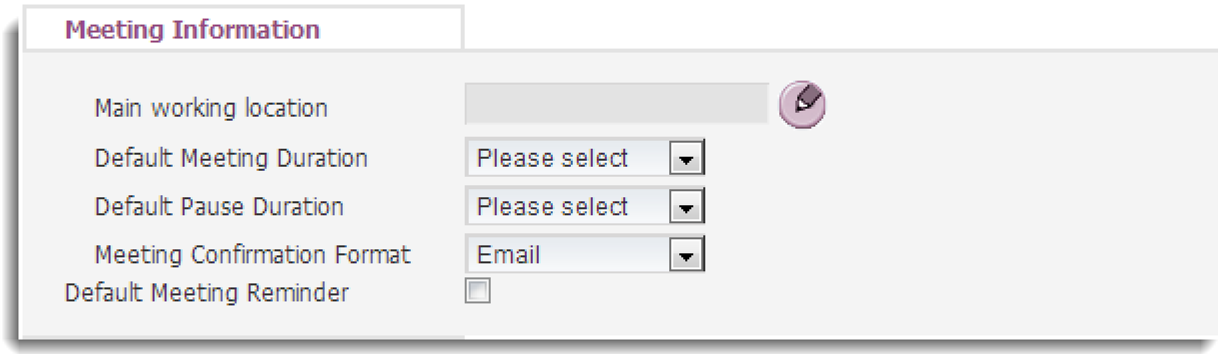
   Week starts on defines how a user's calendar is displayed. The selected day will be the first day shown when using any of the calendar popups in the system.

   The **Preferred Communication Channel** settings specify how you would like to be notified when an action is required from you. By default this is in the Communication Centre, however if you also want to be notified about job approvals, select this option. Email notification is useful if you want to be able to approve jobs using email without needing to login to TalentLink. For more information see the *Job Openings* chapter in the TalentLink User's Guide.

The **Email signature** and **Letter signature** fields define the signature files used in your communications. For more information about creating signature files, refer to Managing Candidate Communication Templates (see page 310).



The **Meeting Information** section defines default meeting information.



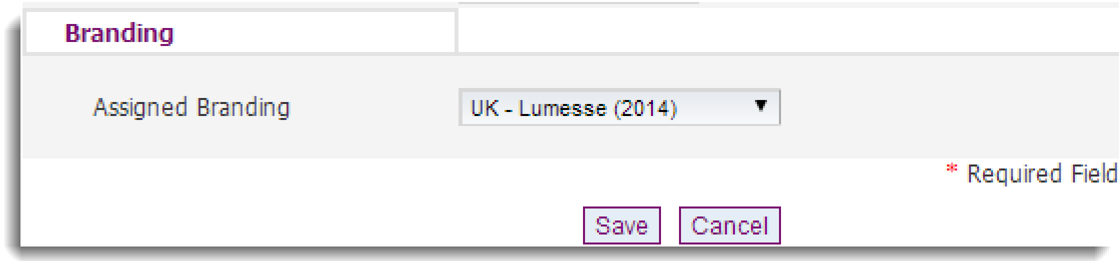
Main Working Location is used when meetings or interview sessions are created. Before you can select a main working location, it must be defined in Location Management (see page 227).

Default Meeting Duration specifies the length of time for a meeting.

Default Pause Duration specifies the break time between meetings, which is useful when a user is setting up several meetings in one day.

Meeting Confirmation Format sets how the user would like to be notified. *Vcal* sends a calendar invite to both the interviewer and the candidate, which they can add to their personal calendars.

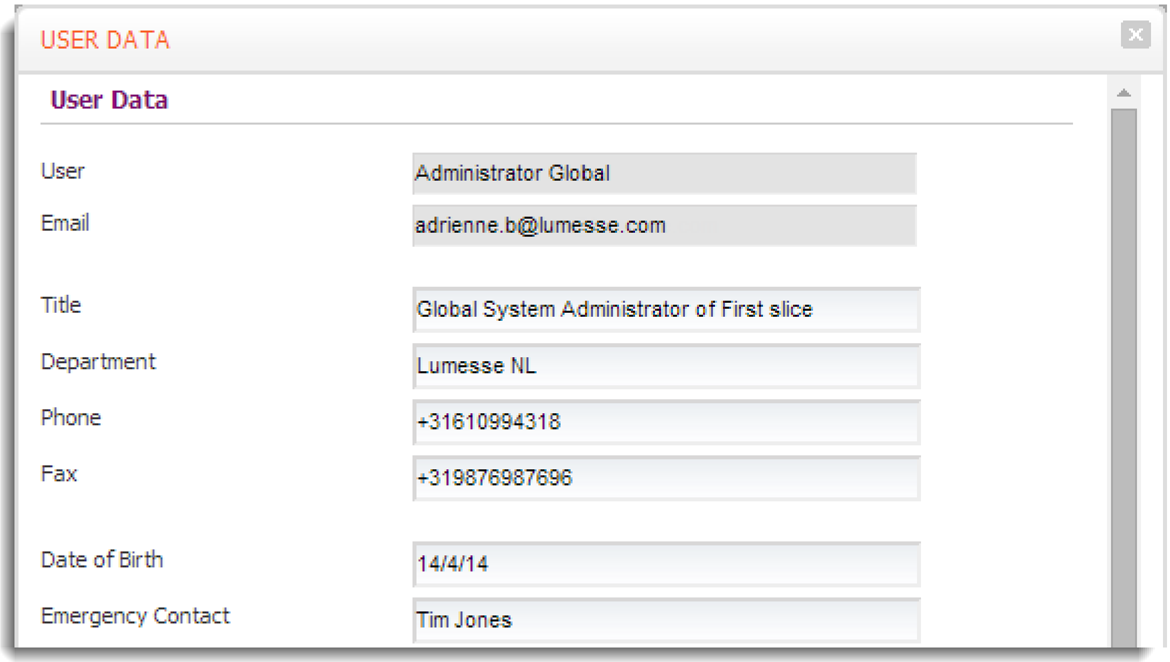
Default Meeting Reminder enables a reminder to be sent.



Assigned Branding enables the user to set the branding they see when they log into TalentLink.

User Data

1. On the *User Information* page, select **User Data** from the **Settings** dropdown list.



2. Enter the required details. The available fields are defined in Corporate Configurable Field Management (see page 74).

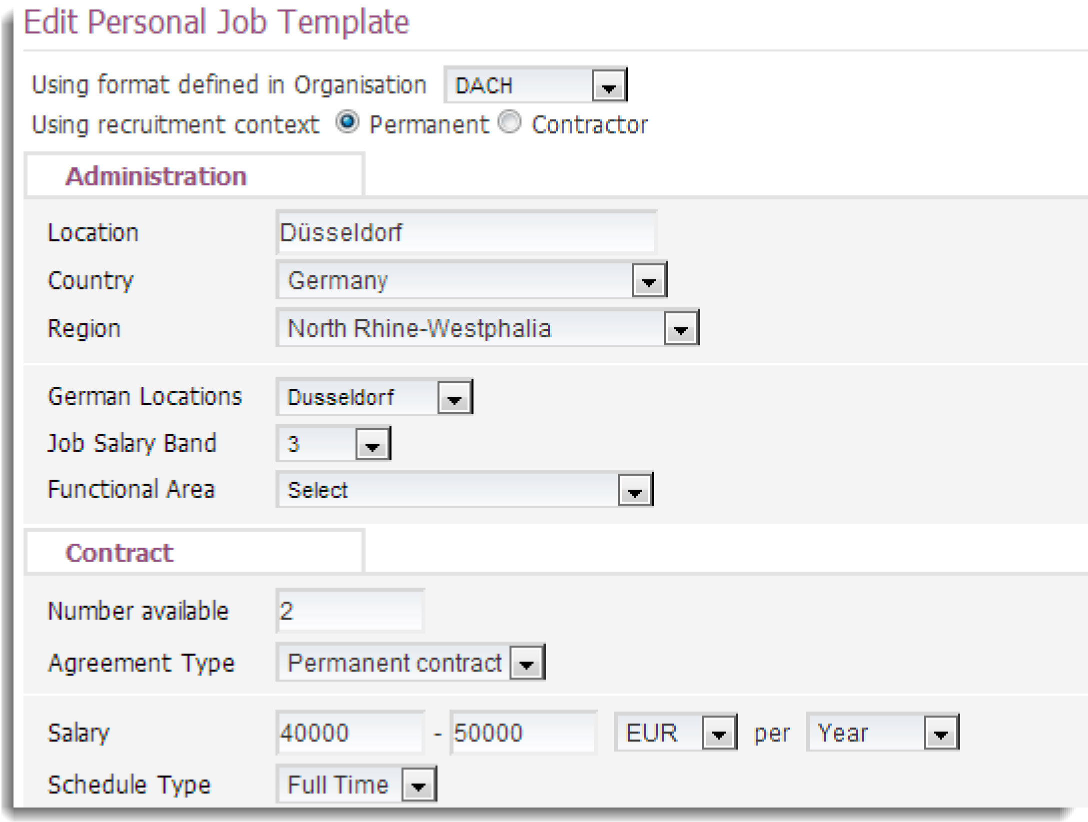
ⓘ These fields can be used as merge fields in Email or Word Templates.

Personal Job Template

The Personal Job Template is used to make the completion of a requisition as simple as possible for infrequent users like hiring managers. These users often find it difficult ot remember all relevant data for requisitions if they do not recruit throughout the year. The template enables a manager to store their personal default settings, such as their preferred location. When used in conjunction with Team Member templates and Rate Card templates, a requisition can be almost entirely auto-populated.

1. On the *User Information* page, select **Personal Job Template** from the **Settings** dropdown list.

2. Select the Organization and the Recruitment Context (Permanent or Contractor) for which you want to pre-define values.
3. Pre-define information for the job opening page, then click **Save**.



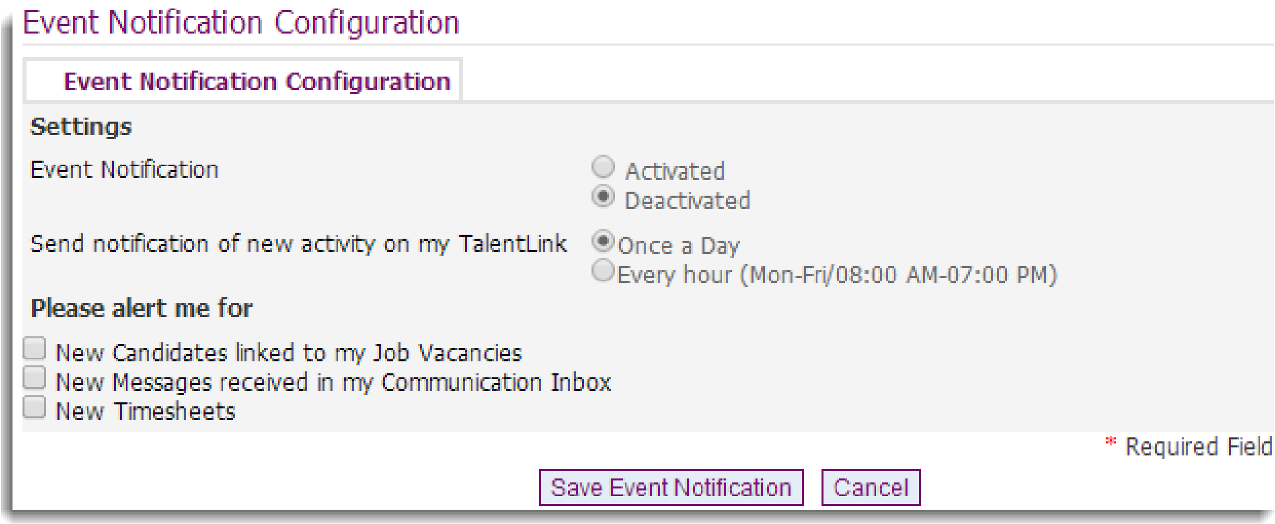
The user will have these values already pre-filled when they create a job for the selected recruitment context in the specified organization.

Configuring Event Notification

TalentLink tasks, messages and new candidate applications are all examples of Events. The Event Notification system can trigger alerts to the user's email when an Event is received.

1. On the *User Information* page, select **Event Notification** from the **Settings** dropdown list.

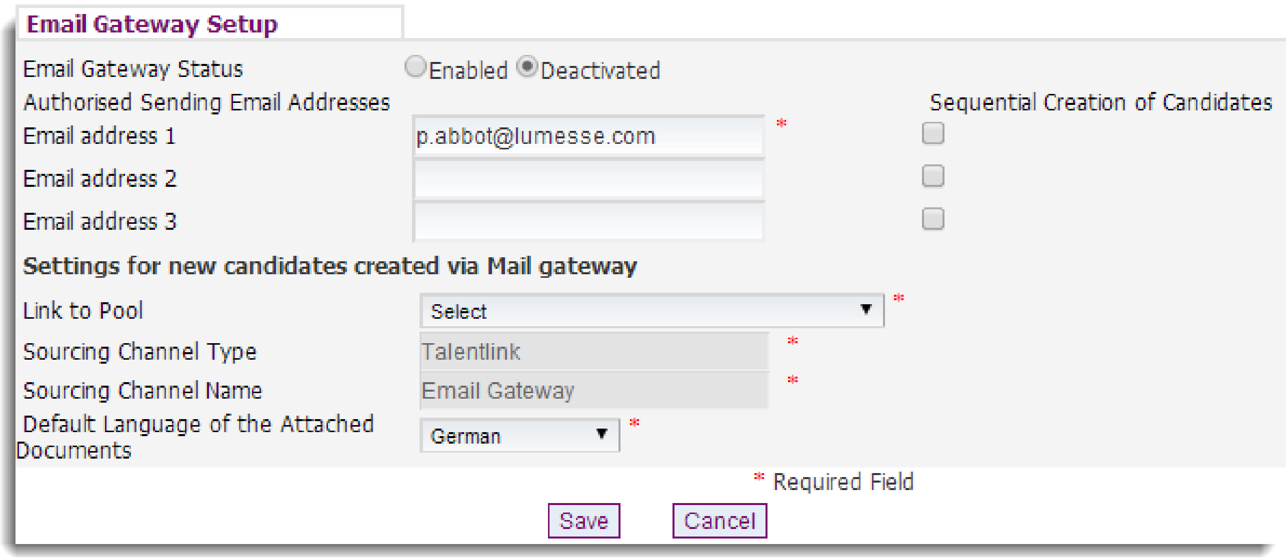
2. Activate the Event Notification and select other options as required, then click **Save Event Notification**.



Activating Mail Gateway

An Email Gateway enables users to automatically create a candidate from an email in their inbox. You can only activate the Email Gateway after the user is activated and a role is assigned.

1. On the *User Information* page, select **Active Mail Gateway** from the **Settings** dropdown list.
2. Enable the Email Gateway.



3. Set up to three authorized sending email addresses. These are the email addresses permitted to forward emails to the email gateway.
4. You can also select **Sequential Creation of Candidates** for each email.

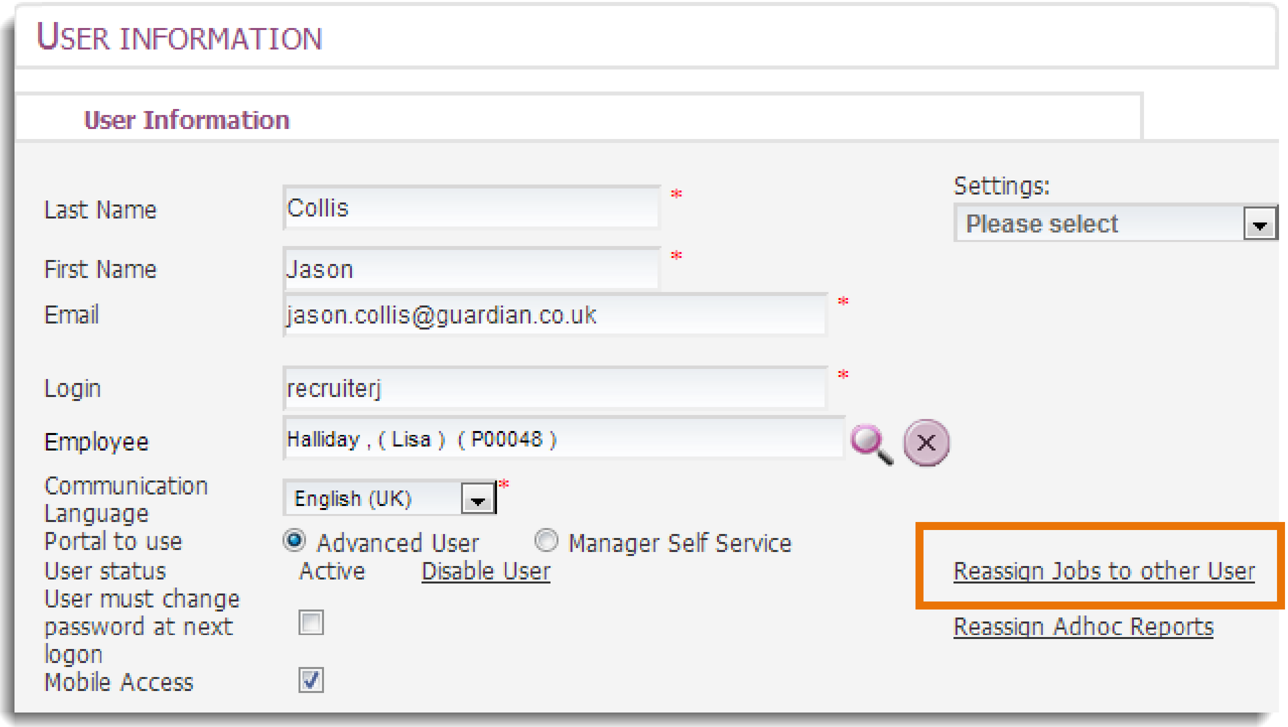
   This feature enables the system to create candidates as numbered candidates, using the recruiter login ID plus sequential numbering as the last name.

5. Enter other details as required then click **Save**.

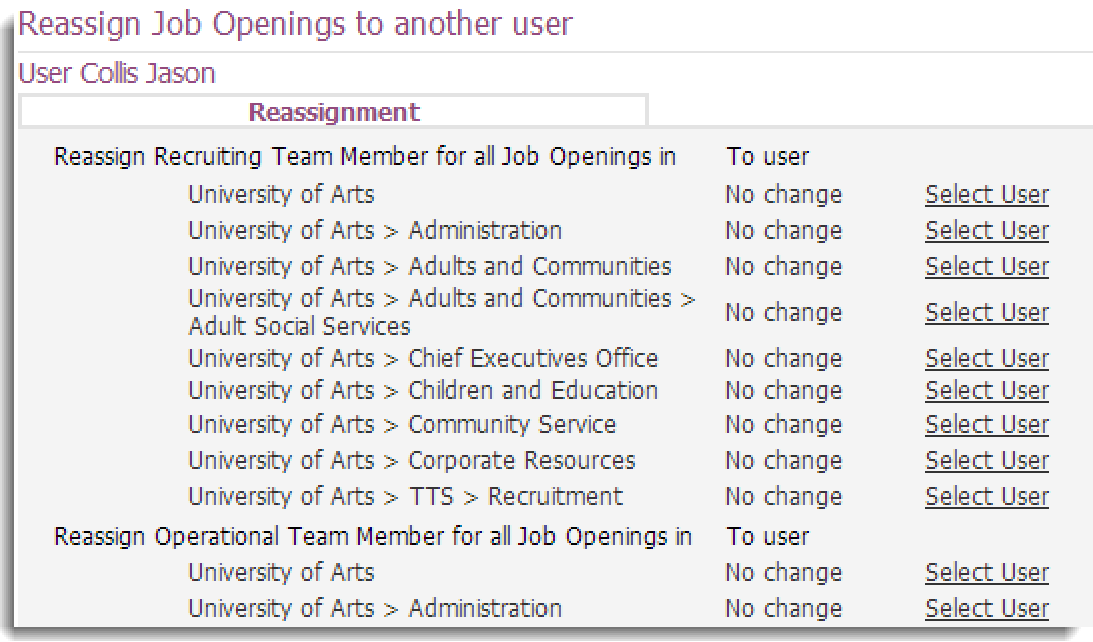
Reassign Requisitions to Other User

If a user leaves the company or goes on vacation, you can reassign all their job openings to another user to ensure that the process is continuous.

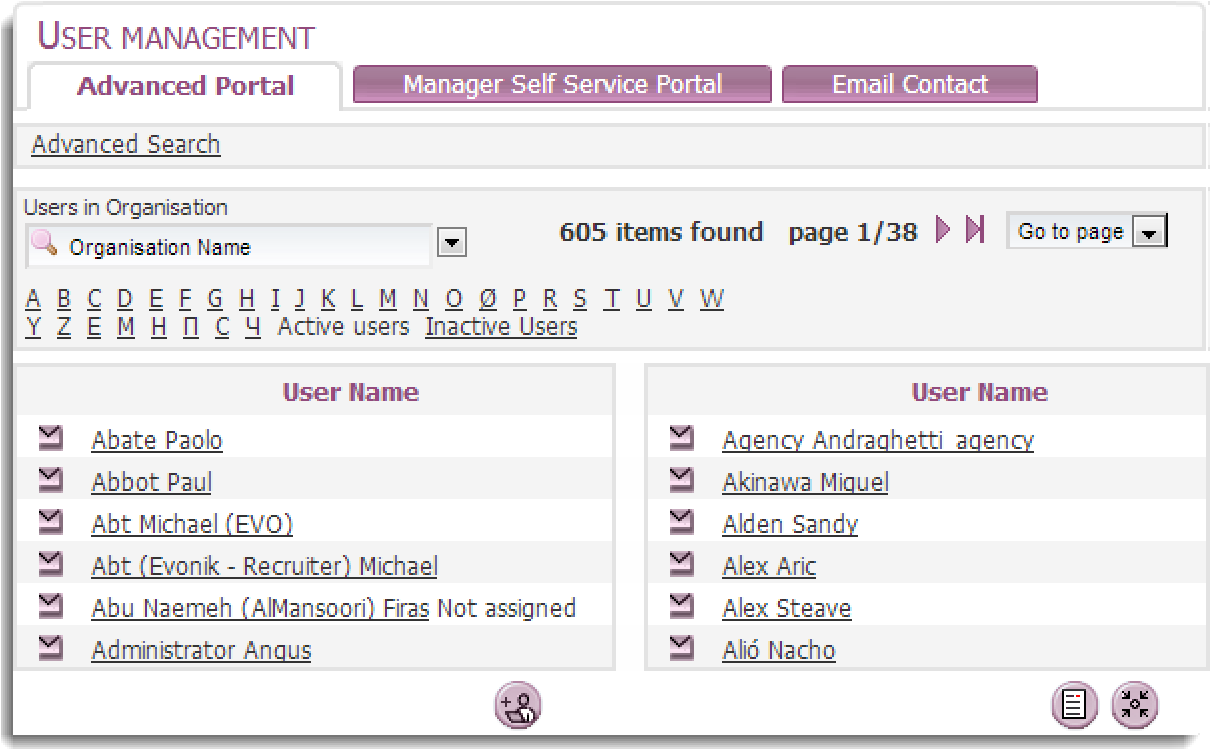
1. On the *User Information* page, select **Reassign Jobs to Other User**.



The *Reassign Job Openings to Another User* page is displayed.

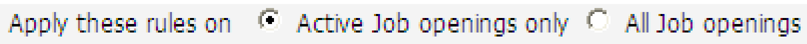


2. Click **Select User** to specify which user to reassign jobs to.



3. Select a user to reassign job openings to. The page closes automatically after selection.

ⓘ At the bottom of the page you can specify whether this reassignment is for **Active Job openings only** or for **All Job openings** (this includes archived jobs).

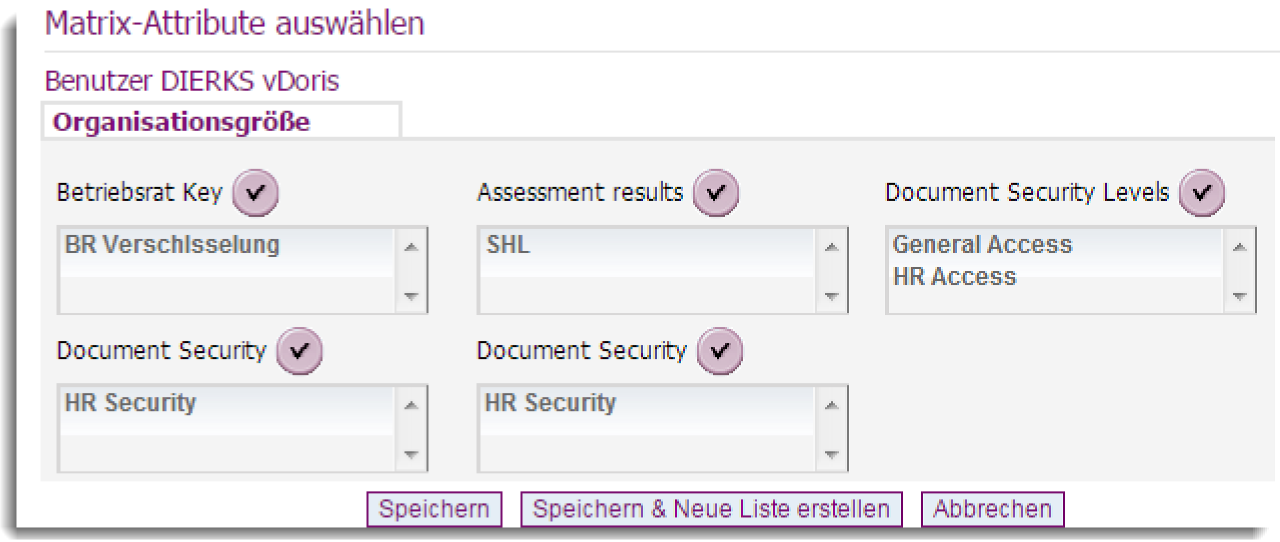
ⓘ 

Adding Document Security Rights

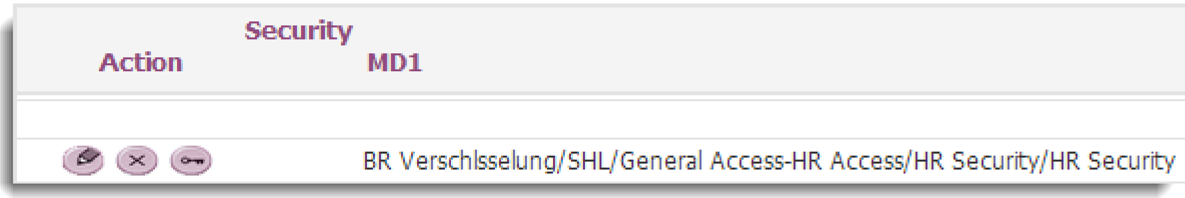
If **Document Security** is configured in Organization Management (see page 35), you can grant users document security keys. These keys give a user rights to lock documents in a candidate file and to open locked documents.

1. To add a key to a user's profile, on the *User Information* page, click in the **Security** section.

2. Select the Organization Dimension for which this user needs to be able to lock and unlock documents, then click **Save**.



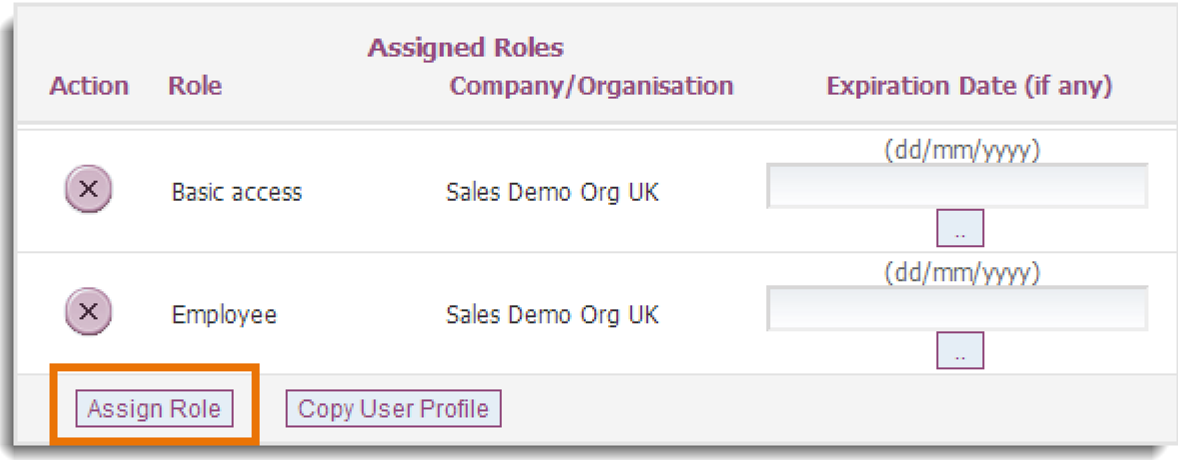
You can edit the rule or delete it by clicking  as required.



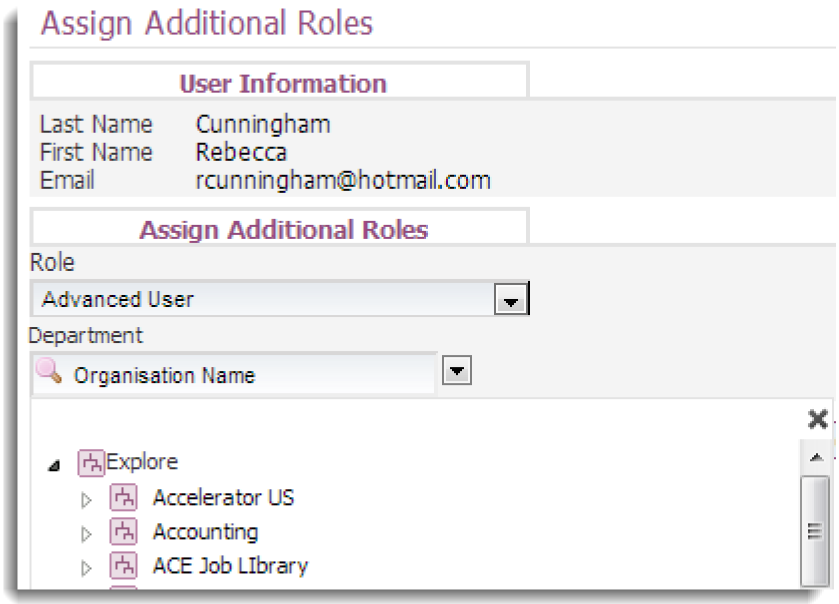
Assigning new Roles

Normally, roles are assigned to selected organizations within the organization chart structure as this reflects the design of the security model. For example, if a user is granted the Standard Recruiter role in ABC organization, they can view/create jobs only for that organization. To enable a user to carry out the same actions for another organization within the company, you must assign the role separately for each organization.

1. On the *User Information* page, In the **Assigned Roles** section click **Assign Role**.



2. Select the **Role** from the dropdown list.



3. Use the Organization incremental search or the Chart tree to select the organization in which this role should be active.
4. Click **Assign Role**.

The Role appears in the User Profile Assigned Roles list along with the organization information.

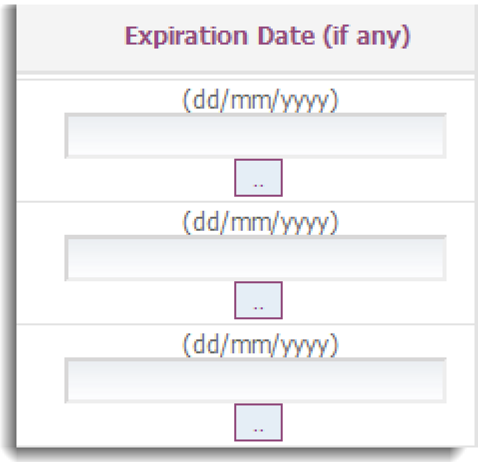
Normally the short organization path is shown, displaying the level 1 node name and the assigned department name. However, a tooltip displaying the full path is available.

After updating a user's profile, the changes are not instantly available. You can wait for the automatic update or update the profile manually by clicking .

is only available if a user has roles in fewer than six different organizations.

You can also define an expiration date for each role. This is useful if users need to take on a role temporarily, such as when another user goes on vacation.

5. Enter the date manually, or use the calendar feature.



Description of Standard TalentLink Roles

Basic Access

- View users in the organization and send them communication items
- Access the Communication Centre
- View and use templates in the organization (but cannot edit templates)
- Contact candidate via email
- Request link to pool
- Create/edit/delete corporate library documents
- Link candidate to a job

Hiring Manager MSS

- Access job opening list from the left dynamic menu
- Use templates on application level
- Use/create/delete corporate library templates
- View and update cost tracking for candidate
- Update documents for selection (questionnaire, feedback report)
- Manage candidate profiles in job openings

- Edit job description
- Edit job opening (headcount data as well)
- Send job summary via email
- Update candidate application status
- Assign candidate to interviewer
- Set offer as declined
- Act as operational team member
- Manage sessions
- Submit offer conditions

> ⓘ The Hiring Manager MSS cannot create candidates, link candidates to a position, view candidates from the right dynamic menu, view job advertisements, or see *Candidate Matching* or *Timesheets* tabs.

Access Our Standard Reports

- Access Our Standard Reports from the left dynamic menu ('Our' means organization level e.g. Our Applications per Contract Type)

Access Reporting Apps

- View all reports the user has access to on the Workspace

Access to Live Listings

- View all Live Listings reports

Access to My Standard Reports

- Access My Standard Reports from the left dynamic menu e.g. My Job Openings per Contract Type

Manage Homepage - Configure Workspace

- Ability to resize windows and configure apps (see page 350)
- Add/remove apps
- Can reset the original WorkSpace
- No access to Workspace library

Standard General Application Recruiter

- Complete control of General Applications (similar to Standard Recruiter but for General Applications - see next item, Standard Recruiter)

Standard Recruiter

(Complete control of requisitions)

- Access the Communication Centre
- Access *Selection* and *Hiring* tabs
- Access candidate list from the left dynamic menu
- Access job opening list from the left dynamic menu

- View templates of the organization (questionnaires, contracts, emails)
- Access to all tabs of a requisition
- Create and view candidate file (but cannot delete)
- View and create costs related to an application
- Create/edit/delete corporate library documents
- Edit a questionnaire on the fly
- View and manage candidate packs
- Access and manage job openings
- Post to internal and external career sites
- Link candidate to job openings
- Post to a job board
- Post to an agency
- Create/edit job advert
- Delete job advertisement and the Application Process associated with the advertisement
- Edit job description, people in charge and headcount sections
- Update candidate application status
- Set applicant as H*ired/Offer Accepted/Offer Declined*
- Assign candidate to interviewer
- Request and define contract extension
- Act as operational team member, act as person on charge
- Write an offer/contract
- Submit, perform and close Selection Process steps

View all Applications in Candidate Overview in all Organizations (optional)

- ability to able to see a candidate's applications in other organizations of the environment (organizations where the user has no roles). In this case the user can display the position name but cannot click to open it. This role was introduced for security purposes (RPO's).

Managing Homepage Roles and Rights

Manage Homepage is a set of roles and rights that relate to Homepage management. The following roles are based on superiority - a superior role includes the rights of an inferior one by default.

Superiority ↓	Role	Rights
	Manage Homepage - Configure Windows	Resize and move the Apps available on the Homepage.
	Manage Homepage - Configure Apps	All rights listed above plus access to Apps configuration (visible columns, actions, and so on).

		Manage Homepage - Configure Workspace	All rights listed above plus the ability to add/remove Apps from the Homepage using the Workspace Library. This role can also create new versions of Apps.
		Manage Homepage - Configure Multiple Workspaces	All rights listed above plus the ability to configure multiple Workspaces.

Sharing Workspaces

A separate role is dedicated to workspace sharing. The Manage Best Practices Workspaces role enables a user to share workspaces with other users through the Library and modify shared workspaces. Changes are made immediately and the altered workspace is available in the Library. Owners may also stop sharing workspaces. The Manage Best Practices Workspaces role is granted to all GSA users by default.

Sharing Apps

Users who have the following *combination* of roles can share Apps:

- Manage Homepage - Configure Apps
- Manage Best Practices Apps

Organization User Access Role

If you grant an operational role to a user, for example, as a recruiter or hiring manager at sub-organization level only, you should also add the Organization User Access role (Role 112) at organization level. This role allows the user to access any shared information (folder, templates) that is only defined at organization level. The Organization User Access role contains the following rights:

- Access Candidate File
- Access Employee File
- Access Candidate via Pool
- Access Employee via Pool
- Use Templates (questionnaire, résumé, interview report, email, Word mail merge)
- Use Pools

Setting Named Access Roles

For each user, you can set Named Access for Jobs and/or Candidates.

Named Access specifies which additional rights, defined in the Role granted through Named Access, this user has for jobs and/or candidates that they would not normally be able to access.

For example, a user has rights only in a certain department, but they receive a candidate file belonging to a different department in their Communication Centre. They can access this candidate file based on the Named Access Role defined in their Profile; actions allowed for this item are defined by the additional role.

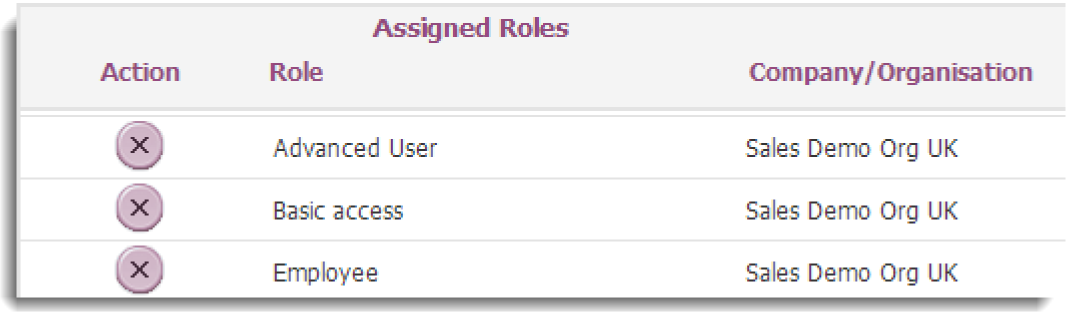
ⓘ This functionality is only available if Named Access is activated at Company Level (see page 12). Here, an administrator can define the general rule, which can be edited at the level of each user.

1. On the *User Information* page, in the **Named Access Roles** section select the roles from the dropdown lists.

ⓘ You must select the Named Access Role for Job Openings and for Receiving Candidates separately.

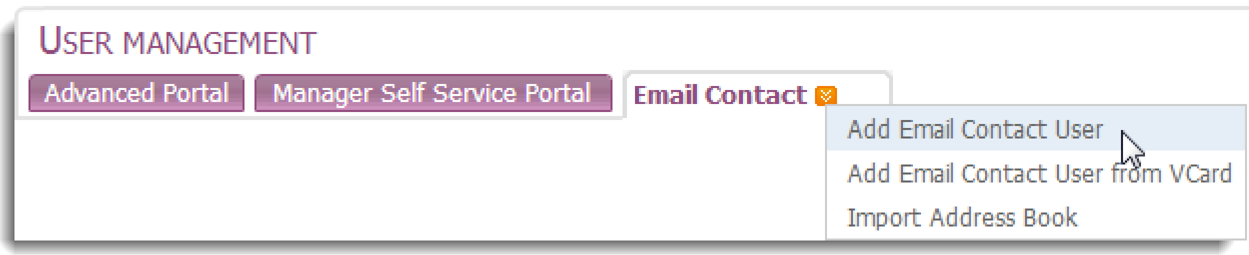
Deleting a Role

1. On the *User Information* page, click ⊗ in front of the role, assigned to a specific organization, that you want to delete.

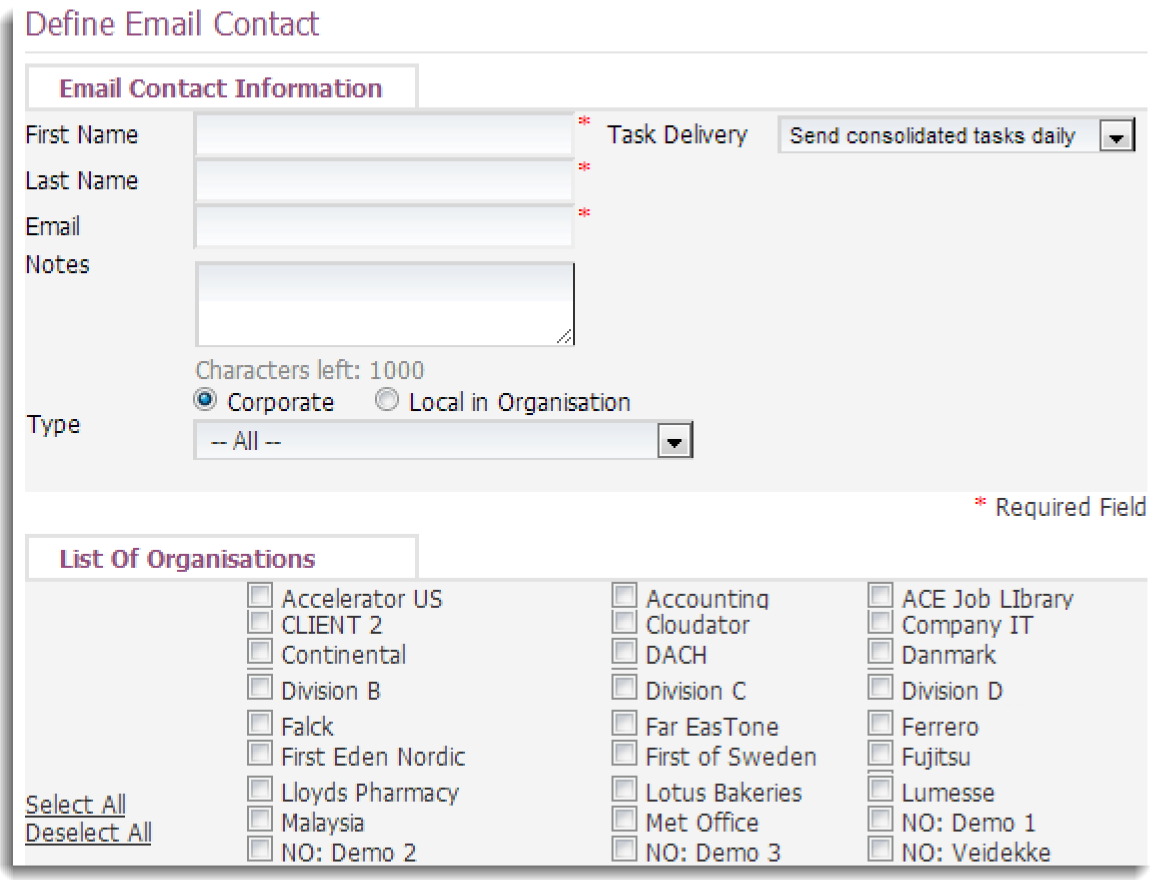


Creating Email Contact Users

1. From the Settings section of the left dynamic menu, select **User Management**.
2. On the *User Management* page, select the *Email Contact* tab.
3. Click then select **Add Email Contact User**.



The *Define Email Contact* page is displayed. Here you can enter all the new user's details.



4. Enter the details as required.
5. Decide whether this Email contact type is Corporate or Local (if Local, select the organization to which the user belongs).
6. If you want to create a Corporate Email Contact user, select the organization in which this user will be active from the List of Organizations, or, if the user needs to be active in all the organizations, choose **Select All**.
7. Click **Save & Close** to add the Email Contact user to the list and make them available in all selected organizations.

ⓘ You cannot create an Email Contact user with the same email address as an existing user (active or inactive Email Contact, Advanced Workspace or Manager Workspace users). If you try, an alert message is displayed and the Email Contact user is not created.

Adding an Email Contact User from a vCard

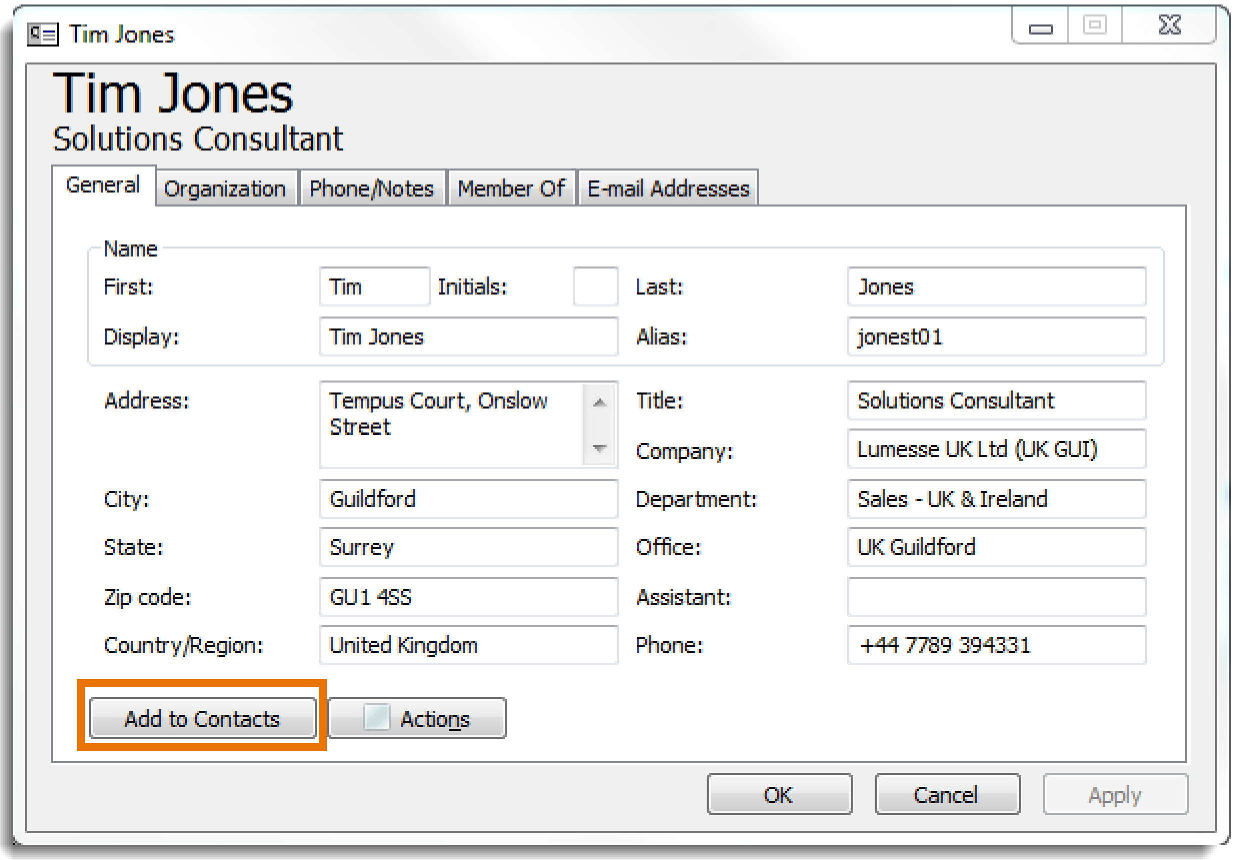
Currently, you can import existing Email Contacts from your Microsoft Outlook account. You can upload vCards from your computer to automatically complete the fields in the *Define Email Contact* page when you create an Email Contact user.

Uploading a vCard

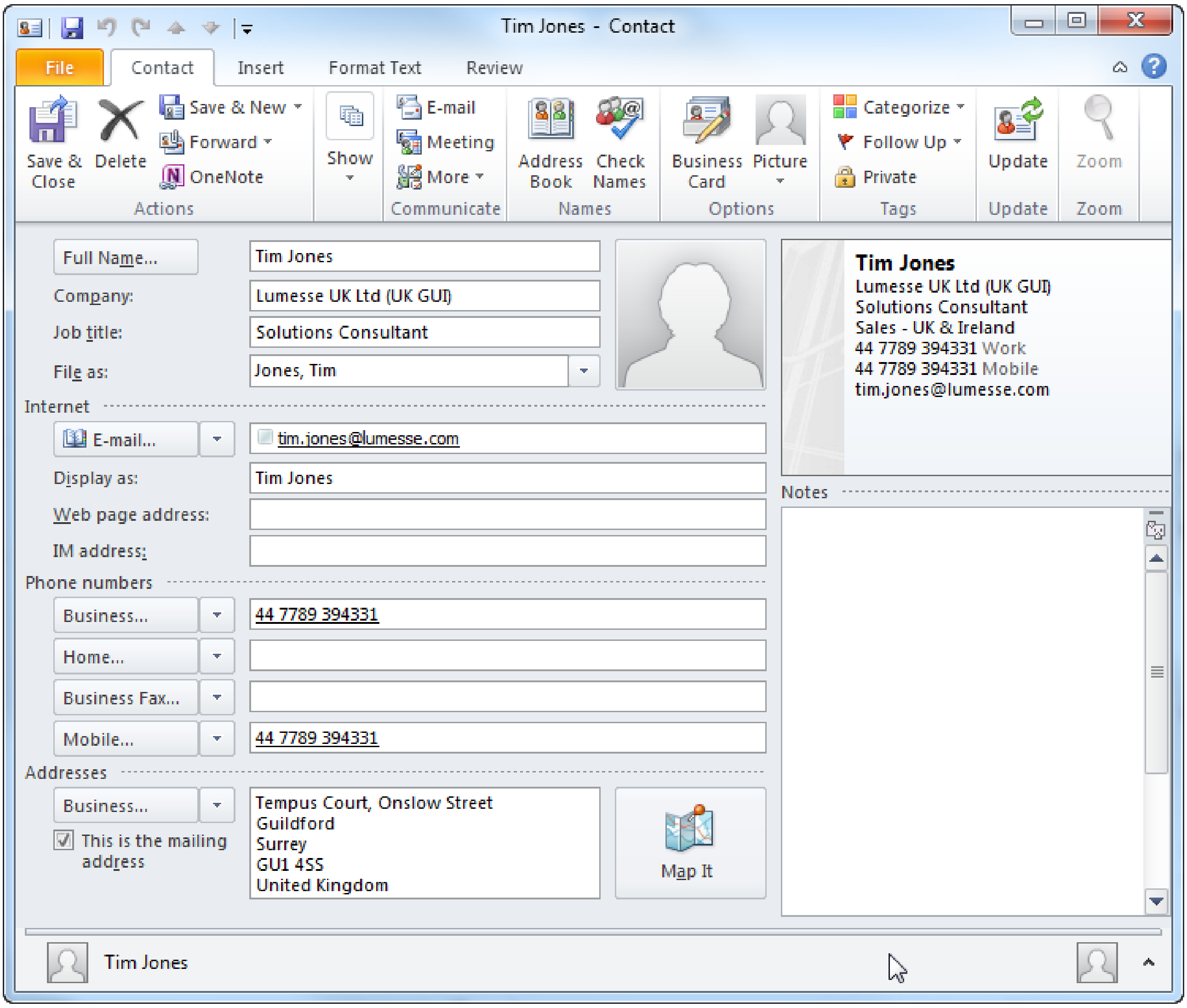
You must first perform an export from Microsoft Outlook to your computer.

ⓘ In this description Microsoft Office Outlook 2010 is used.

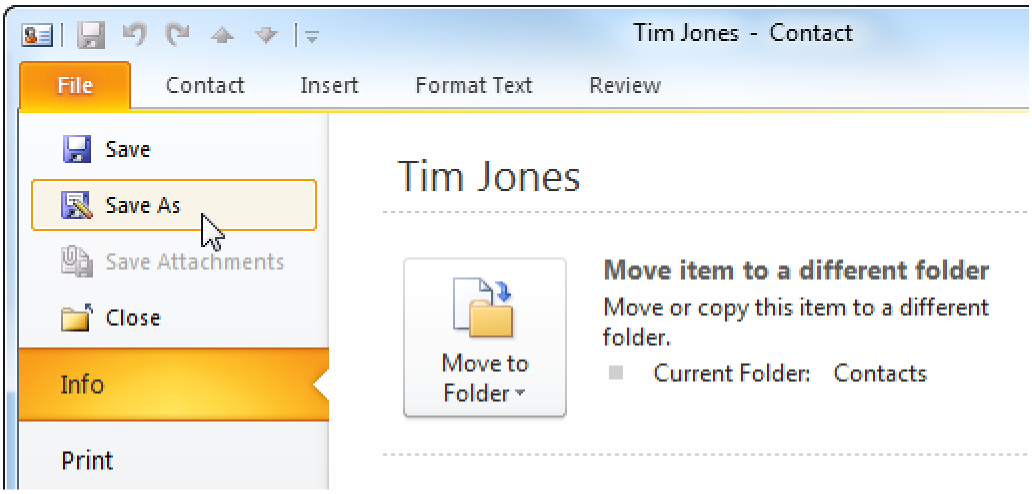
1. From your Microsoft Outlook account, search for a person then click **Add to Contacts**.



The person's details are displayed.



2. In the File menu, click **Save as**,then select **Save as Type> vCard Files**.

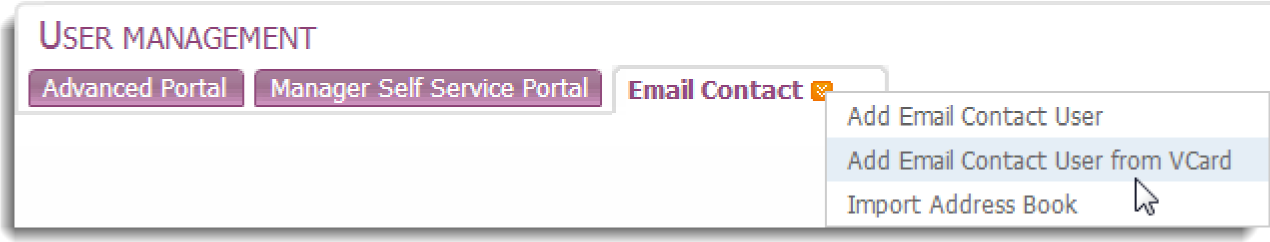


The vCard is uploaded to your computer. The format of the file is .vcf.

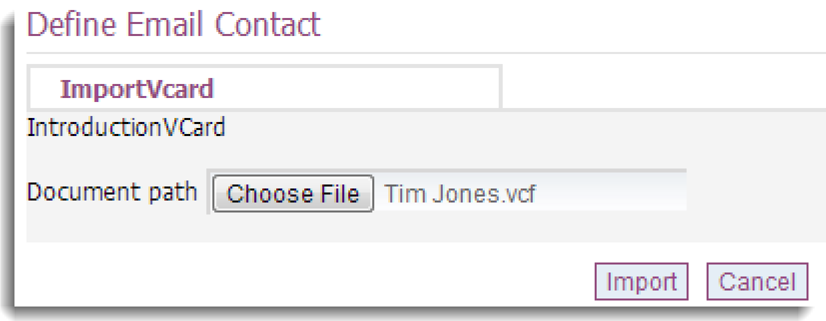
Importing a vCard

Only .vcf files can be imported as Email Contact users.

1. From the **Settings** section of the left dynamic menu, select **User Management**.
2. On the *User Management* page, select the *Email Contact* tab
3. Click then select **Add Email Contact User from VCard**.

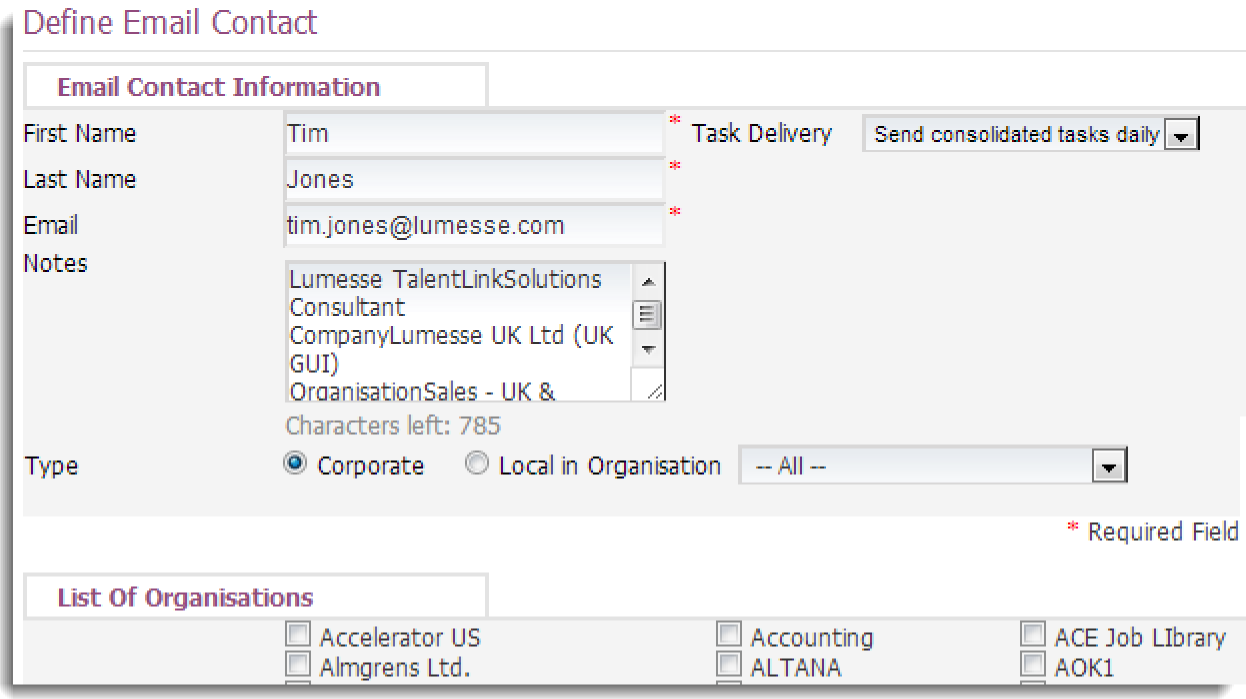


4. On the *Define Email Contact* page, click **Choose File** then locate the vCard on your computer.



5. On the *Define Email Contact* page, click **Import**.

The information in the vCard is imported into the *Define Email Contact* page.



ⓘ Based on the vCard content, the following fields are automatically populated:

ⓘ **First Name**

ⓘ **Last Name**

ⓘ **Email**

ⓘ Details in the vCard such as the contact's title, company, phone numbers, address and so on, are added to the Notes field.

6. Enter other details as required then click **Save & Close** to make the imported vCard available as an Email Contact user.

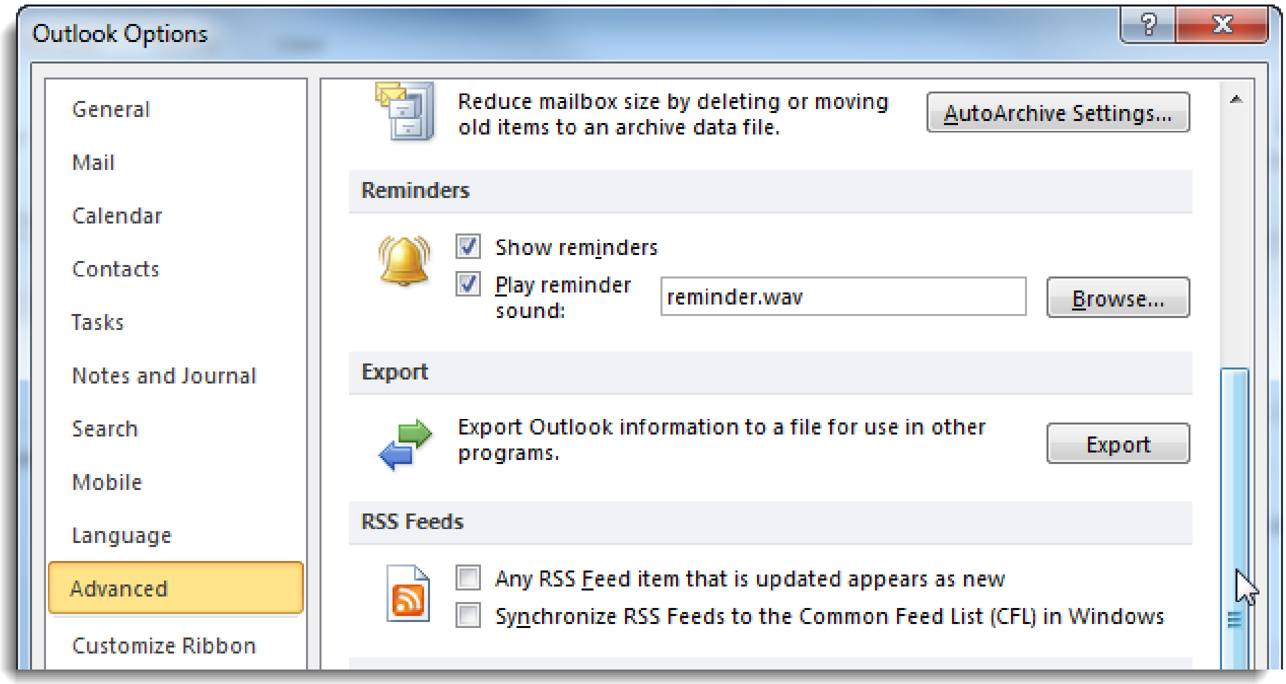
Importing your Address Book

You can import the entire contents of your Microsoft Office Outlook Address book and automatically create Email Contact users based on the information in your vCards.

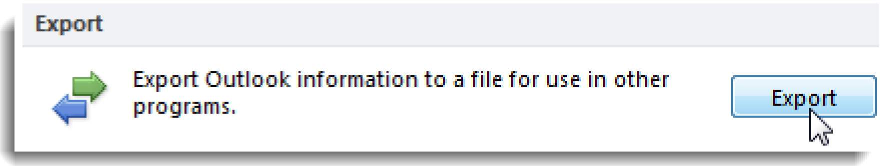
Uploading the Contents of Your Address Book

ⓘ You must first export your address book to your computer as a .csv file. In this description Microsoft Office Outlook 2010 is used.

1. In Microsoft Outlook click the *File* tab, then click **Options>Advanced**.

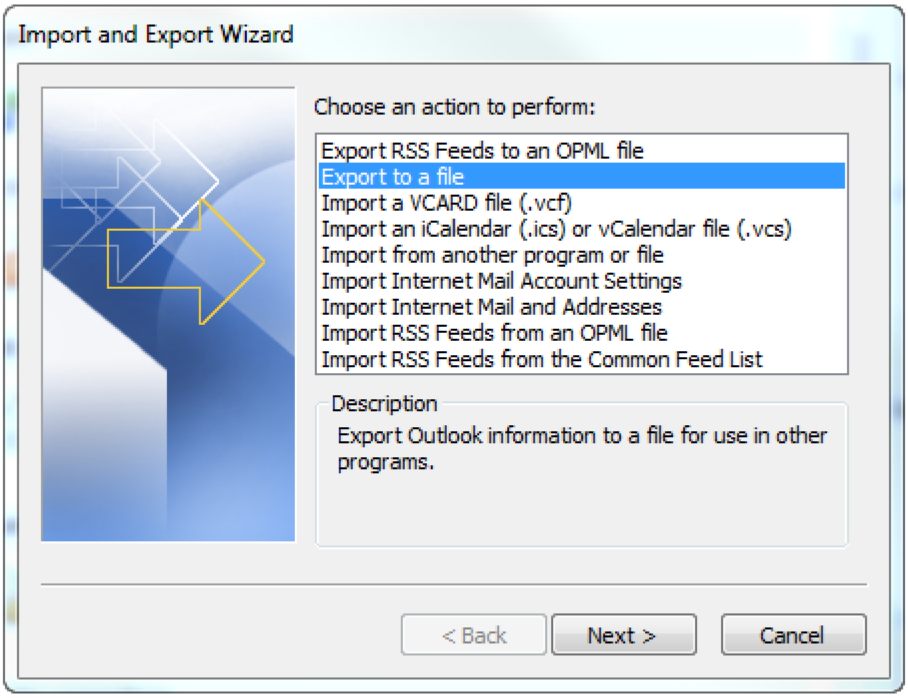


2. In the **Export** section click **Export**.

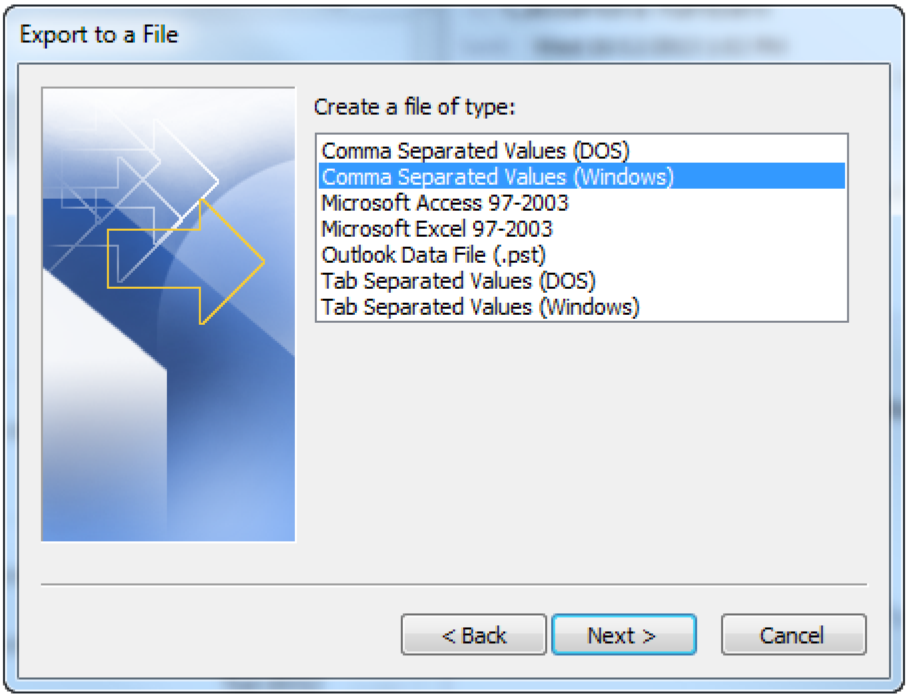


The Import and Export Wizard is displayed.

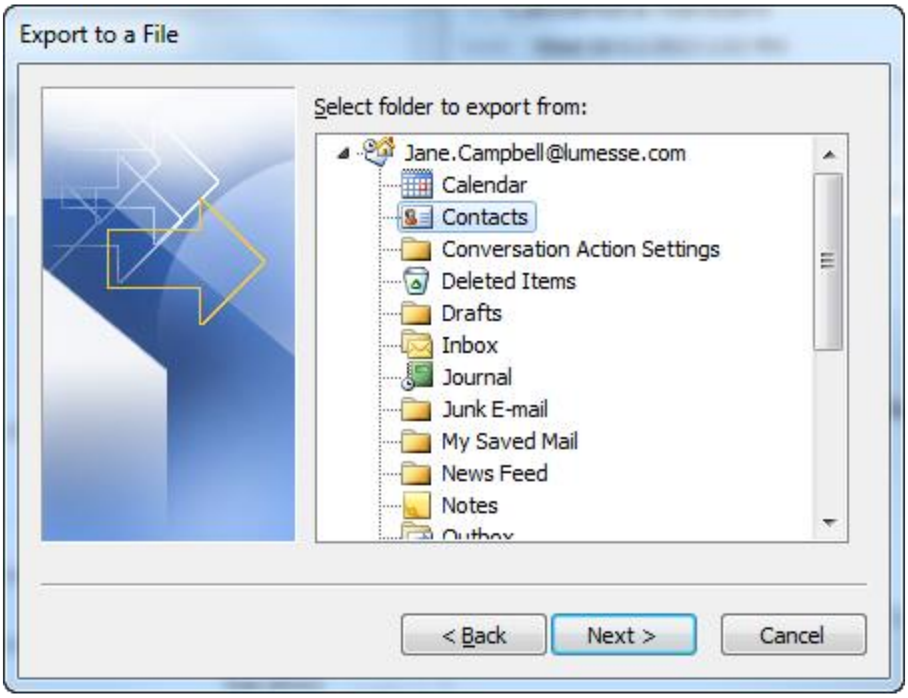
3. Select **Export to a file** then click **Next**.



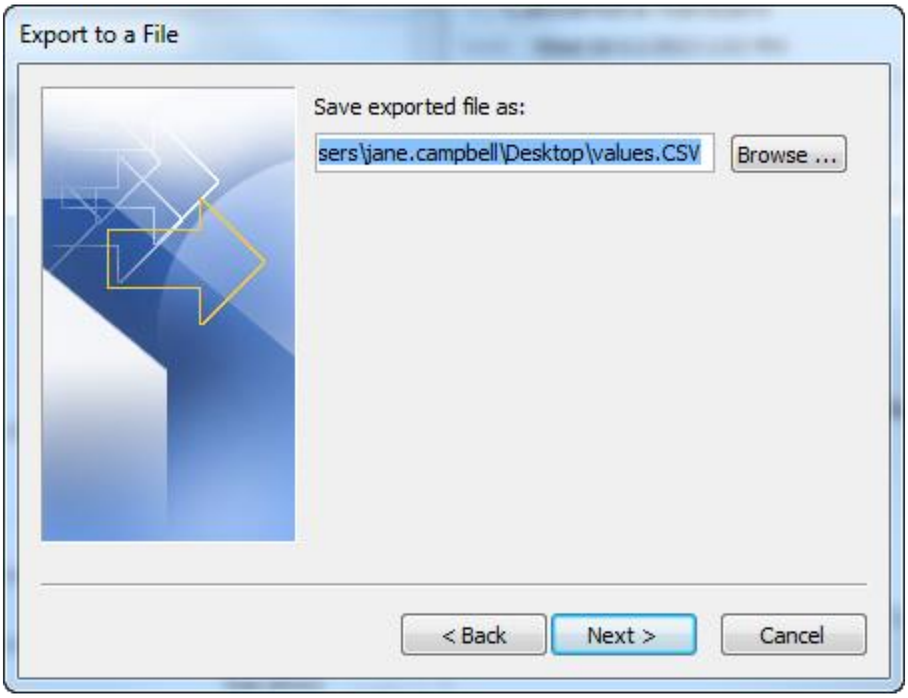
4. Select **Comma Separated Values (Windows)** as the format of the file to be exported, then click **Next**.



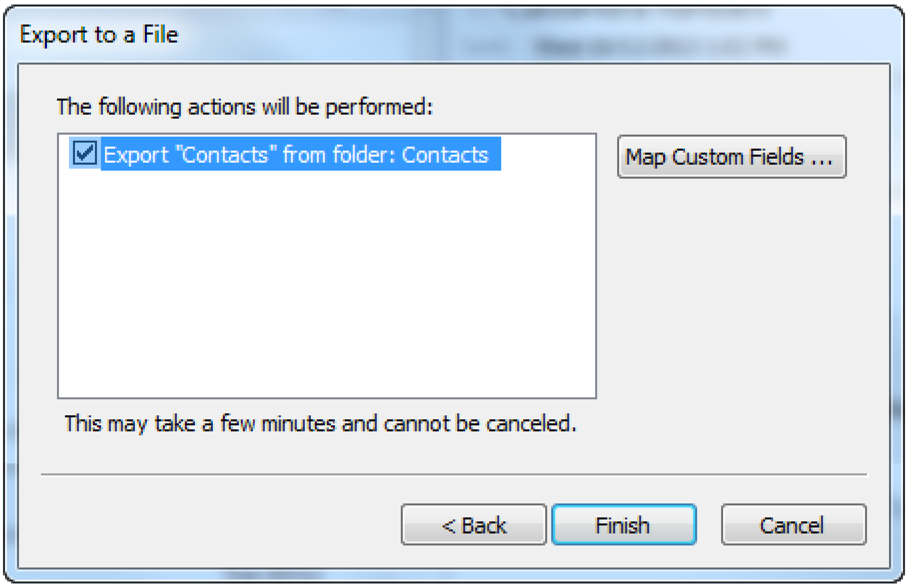
5. Select the **Contacts** folder, then click **Next**.



6. Click **Browse**, select a destination folder and in the **File name** box type a name for the file.



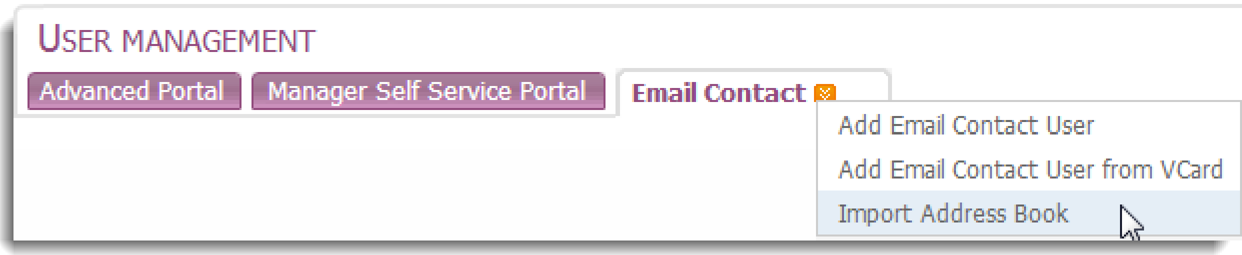
7. Click **OK**, then **Next**, then **Finish**.



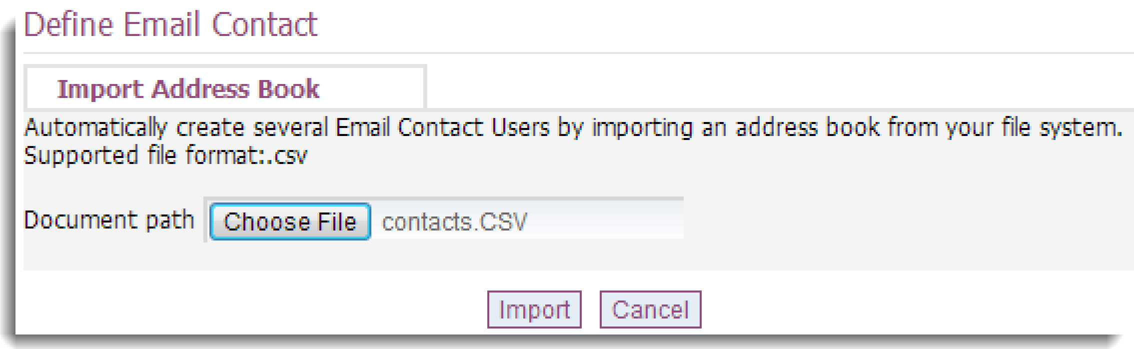
Importing the Contents of the Address Book

ⓘ Only .csv files can be imported into TalentLink.

1. From the **Settings** section of the left dynamic menu, select **User Management**.
2. On the *User Management* page, select the *Email Contact* tab.
3. Click then select **Import Address Book**.

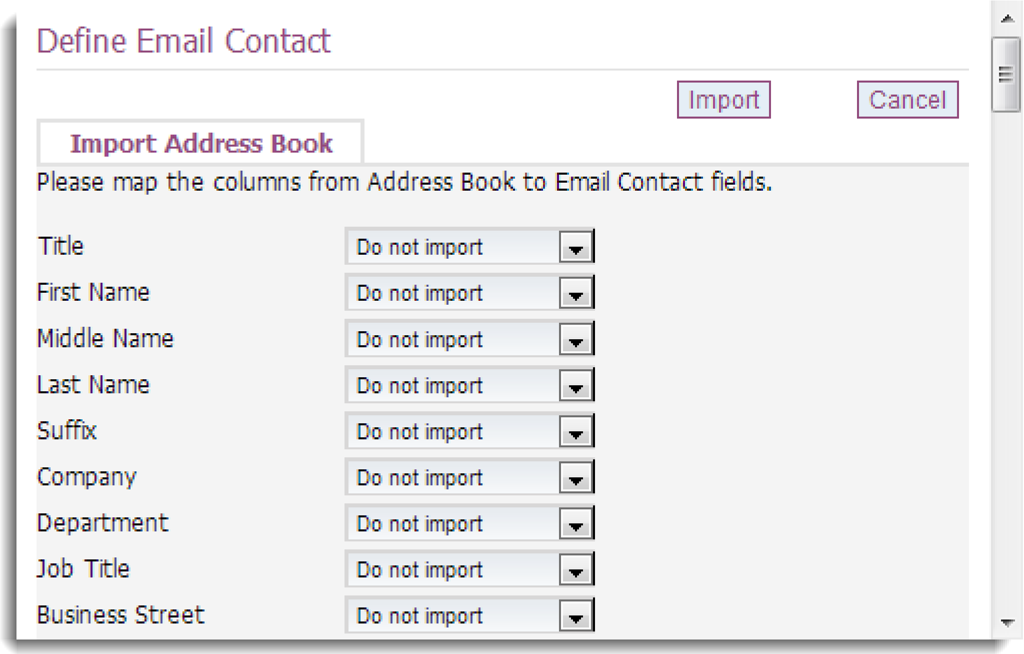


4. On the *Define Email Contact* page, click **Choose File** then locate the address book on your computer.



5. On the *Define Email Contact* page, click **Import**.

The columns in the .csv file related to data in the business cards in your Address Book are displayed. You can decide which columns to import by manually mapping them to the Email Contact fields.



ⓘ You can manually map columns related to the:

ⓘ First Name

ⓘ Last Name

ⓘ Email Address

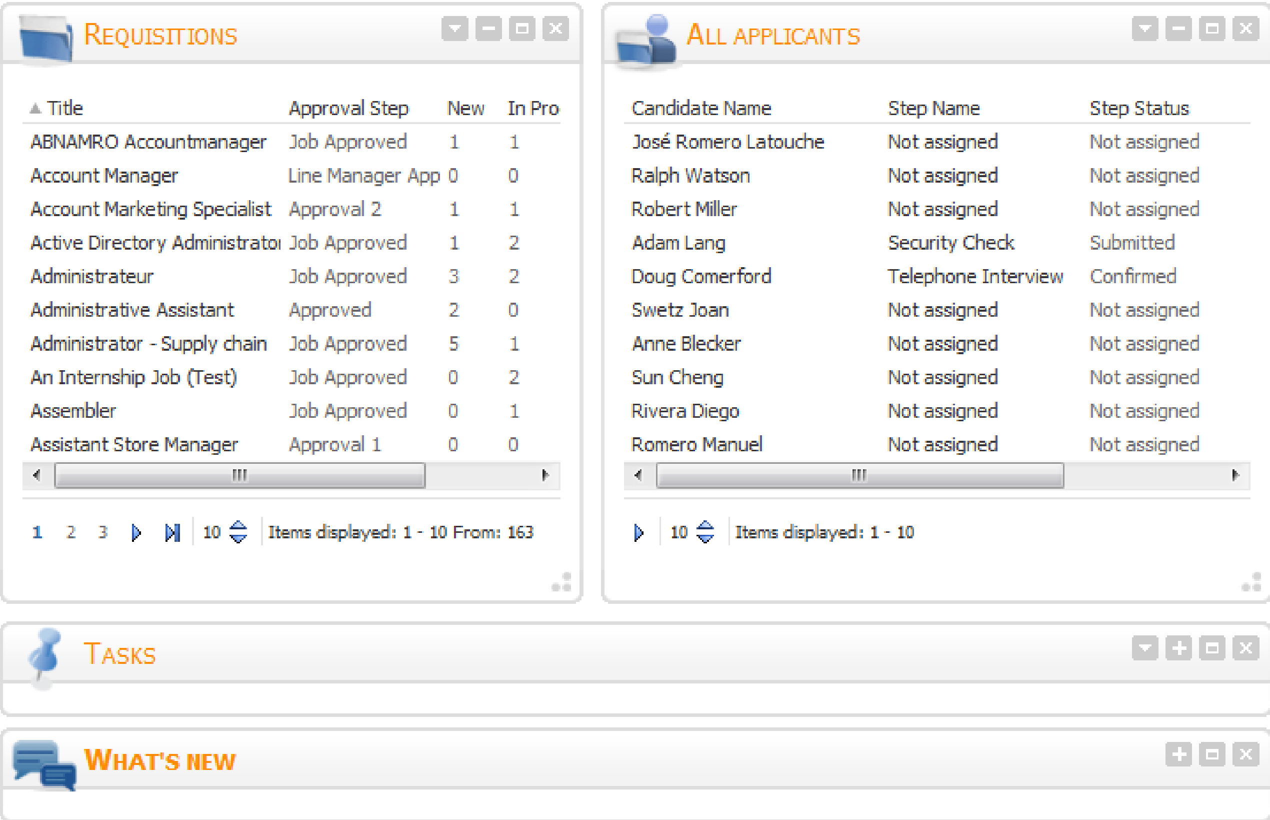
ⓘ Additionally, you can select some columns to add to the Notes section (Title, Organization, and so on).

6. After you have defined all mapped columns, click **Import**.

The columns are imported based on your configuration.

Configuring and Assigning Workspaces

TalentLink users can switch between multiple workspaces, each containing a different set of Apps configured according to specific needs and preferences.



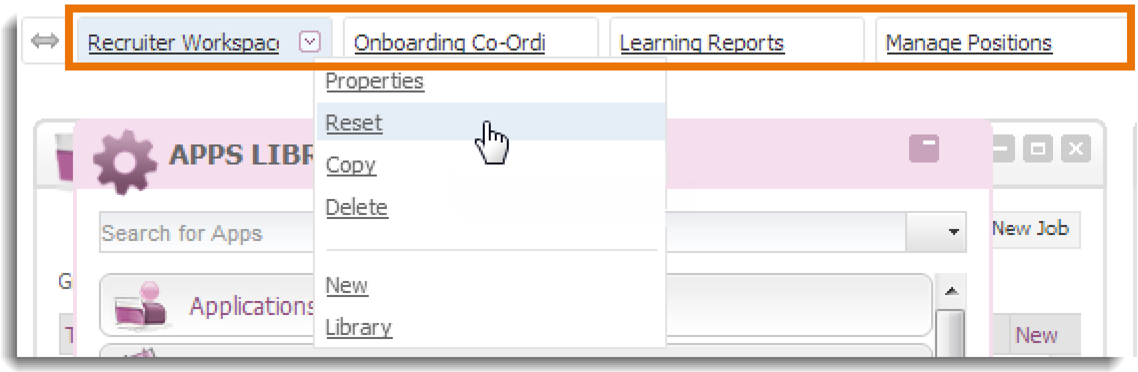
Access to Multiple Workspaces is subject to specific roles and rights. Refer to Managing Homepage Roles and Rights (see page 350) for more information.

Advanced users can create their own workspaces based on their responsibilities and the nature of the business, for example, for Graduate Recruitment. They may also use the Best Practices Workspaces available in the Library. These are provided by the system or defined by Admin users.

To deliver a Best Practices Workspace, an Admin user must create and then share it with others. Any such workspace becomes available in the Library. Admins can also unilaterally assign workspaces to selected Advanced Workspace and Manager Workspace users. Admins may also change the default workspaces available for new users and import/export workspaces between accounts.

Getting Around Multiple Workspaces

You can easily switch between available workspaces and access workspace settings using the dedicated Workspaces Bar at the top of the page.



The current workspace is displayed first on the left in the Workspaces Bar.

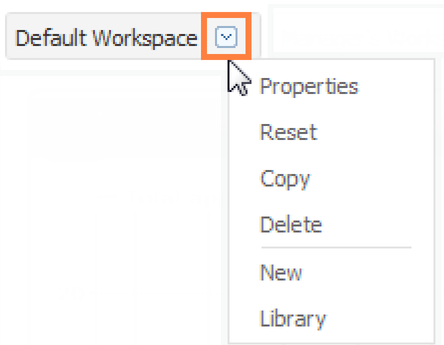
ⓘ Only five workspaces are displayed at a time.

- Click on the current workspace to see the available options.
- Click next to the last displayed workspace to see the remaining workspaces configured for the selected user.

ⓘ A user can have a maximum of 20 workspaces enabled.

Workspace Configuration

1. Click on the current workspace button to access the Configuration menu.



- Select **Properties** to edit the title and description, share the workspace with other users, and translate the workspace titles and descriptions into any languages enabled for the company
- Select **Reset** to restore the default settings of the Best Practices Workspaces
- Select **Copy** to copy the current workspace
- Select **Delete** to disable a workspace and remove it from the Workspace Bar
- Select **New** to create a new workspace (see page 365)

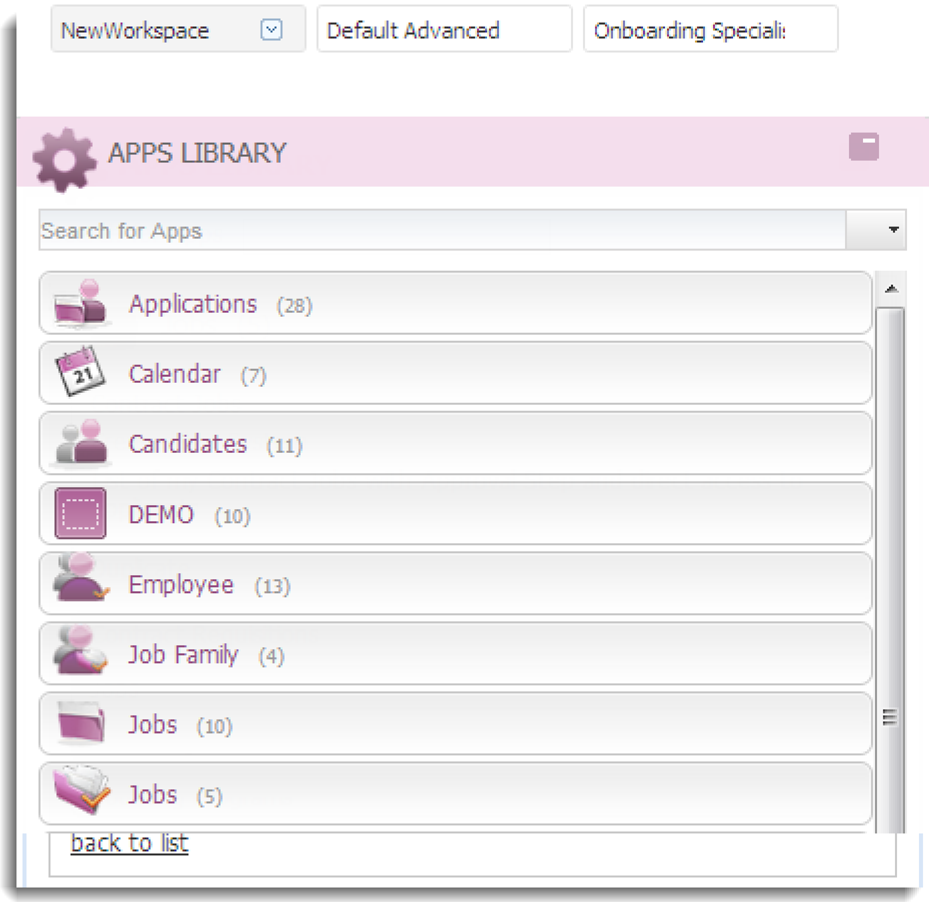
- Select **Library** to access and rate the Best Practices Workspaces

See *Getting Started with TalentLink* in the User's Guide for further information about each option.

Creating a New Workspace

1. Click on the current workspace button then select **New**.

   A new empty workspace is displayed along with the Apps Library. You can start populating the new workspace with the required Apps.

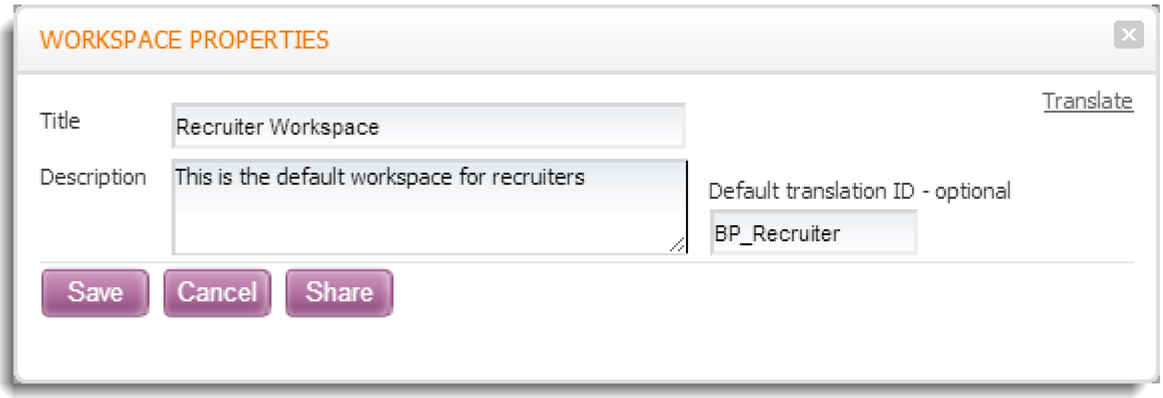


2. Drag and drop Apps from the Apps Library to populate the new workspace.
3. Configure the Apps using  in the top right corner of each App (enable/disable columns, change column order, and so on).
4. Resize the Apps using in the lower right corner of each App, and rearrange them to enhance your workspace usability.
5. Select **Properties** from the Workspace Configuration menu to change the name, add a description and supply any required translations.

Sharing a Workspace

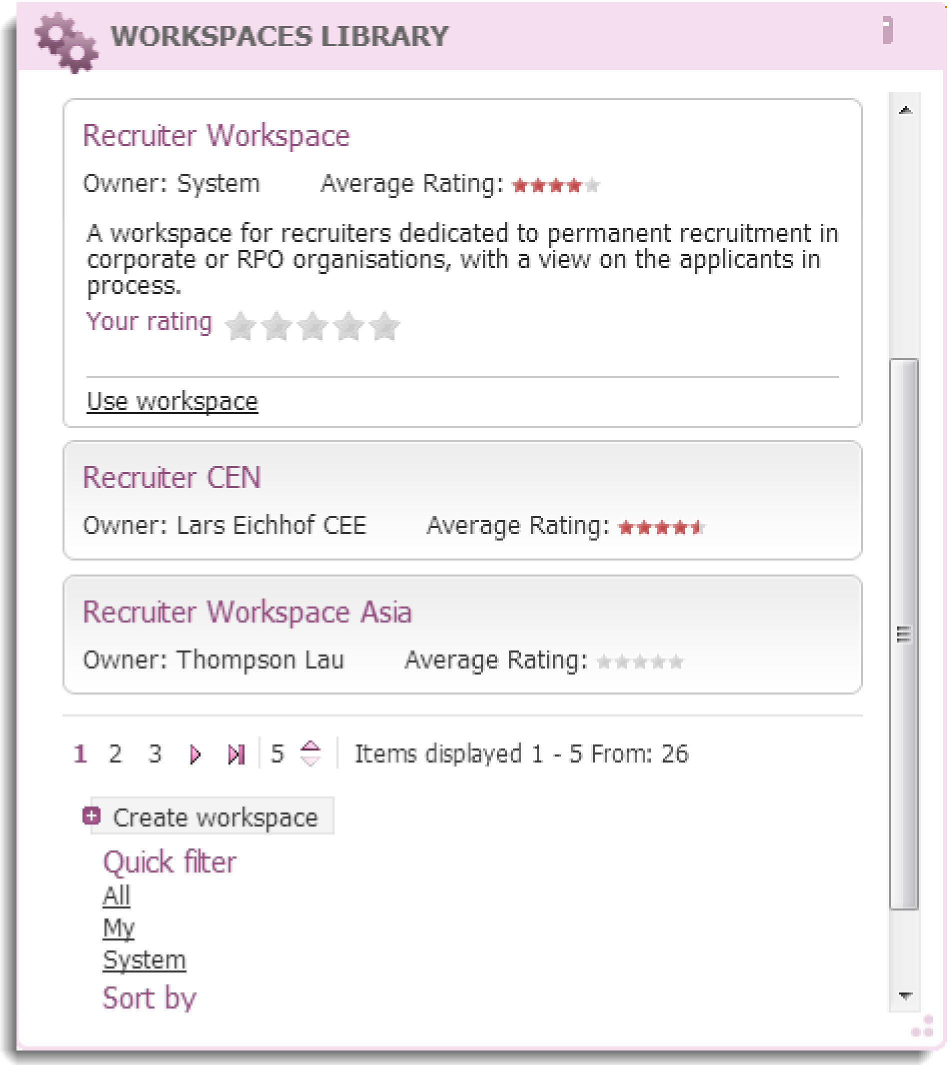
You can share your workspace to make it available for other users in the Library. By sharing a workspace, you create a Best Practice Workspace.

1. Click on the current workspace button then select **Properties**.
2. Edit the details if required and translate the **Title** and **Description** to any languages available for the account then click **Save**.



3. Click **Share** to share the workspace.

A Shared Workspace becomes available as a Best Practices Workspace in the Library.



Editing a Shared Workspace

The owner (creator) of a Best Practices Workspace can edit it.

These changes are only effective for users who start using the workspace after the owner makes the changes. Users who are already using the workspace will not notice any alterations.

Unsharing a Workspace

The owner of a Best Practices Workspace can stop sharing it, which means it is no longer available in the Library. However, users who were already using the workspace can still access it.

1. Click on the current workspace button then select **Properties**.

2. Click **Unshare** to stop sharing the Workspace.

The workspace is removed from the Library and may not be used by other users.

Workspace Management

Admin users may access Workspace Management from the left dynamic menu. There are several configurable options:

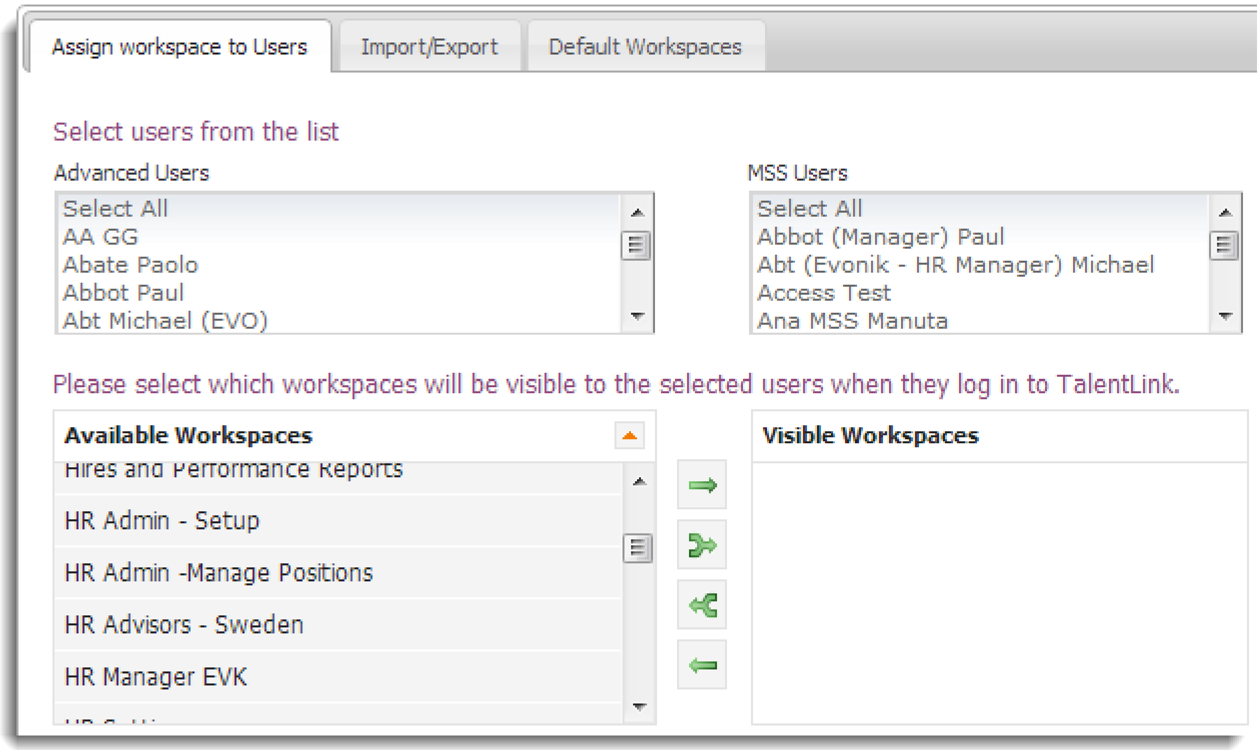
- **Workspace Assignment** (see page 368) assigns selected workspaces to Advanced Workspace and Manager Workspace users
- **Import/Export** (see page 369) exports workspaces to files, and imports them to another account
- **Default Workspaces** (see page 370) assigns default workspaces for new users

Assigning Workspaces to Users

Admin users may impose a selected workspace on Advanced Workspace and Manager Workspace users by assigning it to them.

1. From the **Settings** section of the left dynamic menu, select **Workspace Management**.
2. On the *Workspace Management* page, select the users you want to assign workspaces to.

ⓘ Use CTRL + Click to select multiple users.



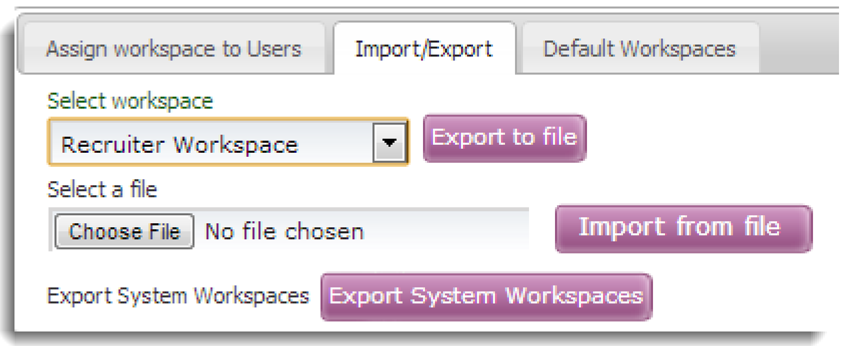
3. In the **Available Workspaces** section, select workspaces and use the right arrow to move them into the **Visible Workspaces** section.
4. Click **Save**.

ⓘ Note that a workspace must be shared to enable assignment. Unshared workspaces are not visible in the workspace list.

Importing and Exporting Workspaces

This option is useful especially for multi-tenant customers. Administrators do not need to create model workspaces in each account but can instead create them on one account, then export them to files and import those files to other accounts.

1. From the **Settings** section of the left dynamic menu, select **Workspace Management**.
2. On the *Workspace Management* page, select the *Import/Export* tab.

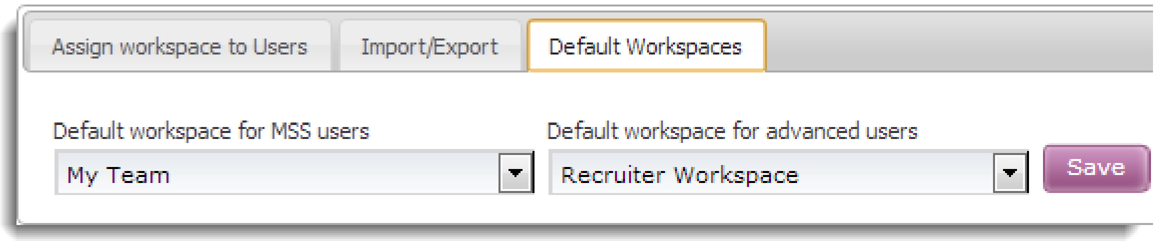


3. To export a workspace, select the required workspace and click **Export to file** to save the XML file to disk.
4. To import a workspace, browse for the XML file, then click **Import from file**. The imported workspace is immediately added to the list of available workspaces.

Default Workspaces

TalentLink provides two default workspaces - one for Advanced users and one for MSS users. They are available to all users logging in to Cloud9 for the first time. GSA users can change these settings.

1. From the **Settings** section of the left dynamic menu, select **Workspace Management**.
2. On the *Workspace Management* page, select the *Default Workspaces* tab.



3. Select the Default Workspaces for both types of user then click **Save**.

Creating a New Hires Plan

This section describes how to configure the New Hire Planning Management module. The New Hire Planning Management module enables users to record the planned budgets for new hires within an organization. TalentLink will verify whether the headcount for new requisitions is budgeted, and assign the appropriate Approval Workflow. New hire plans are configured at sub-department level.

In the New Hire Planning Management module you can:

- Create a plan for new hires
- View the new hires audit log

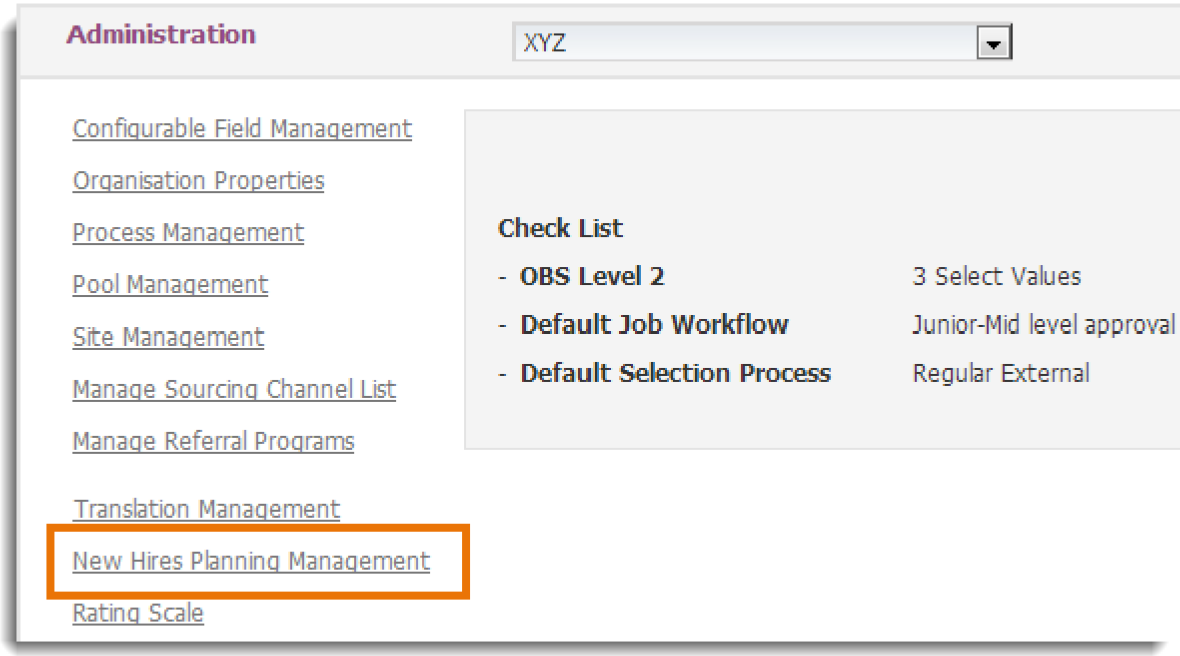
Before you can create a plan for new hires:

- The New Hires module must be activated by Lumesse resources
- The New Hires module must be enabled in TalentLink (see page 27)
- The Job Approval Processes for budgeted and non-budgeted headcount must be defined (see page 164)

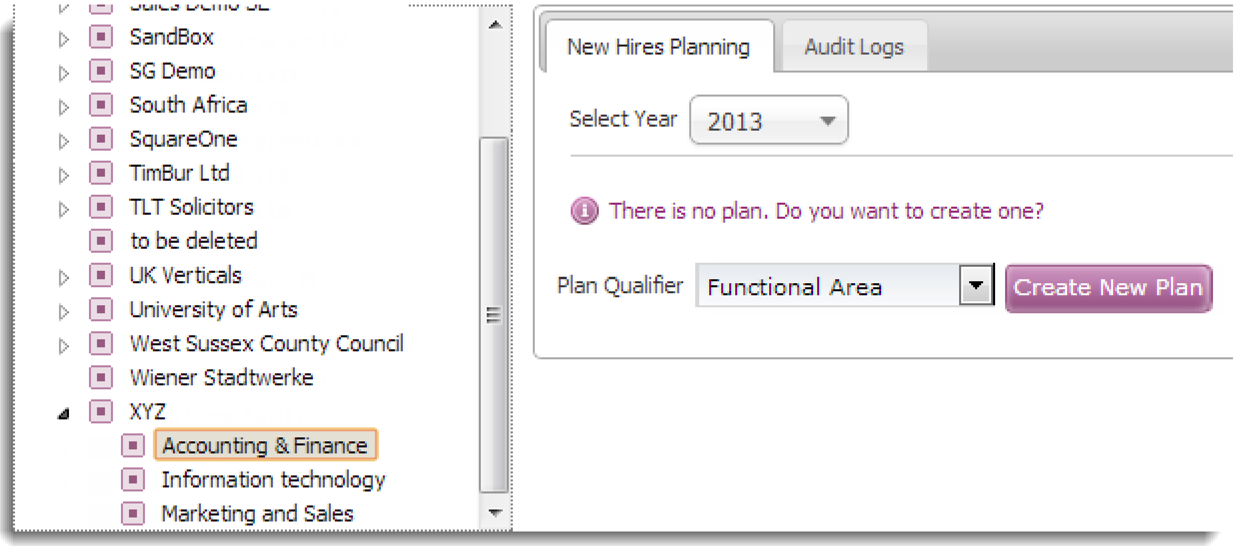
Accessing New Hires Planning Management

You can create new hire plans at organization level. Plans can be created by Global System Administrators, Local System Administrators and Functional Managers with rights to access to New Hires Planning.

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. In the **Administration** section, select an organization then select **New Hires Planning Management**.



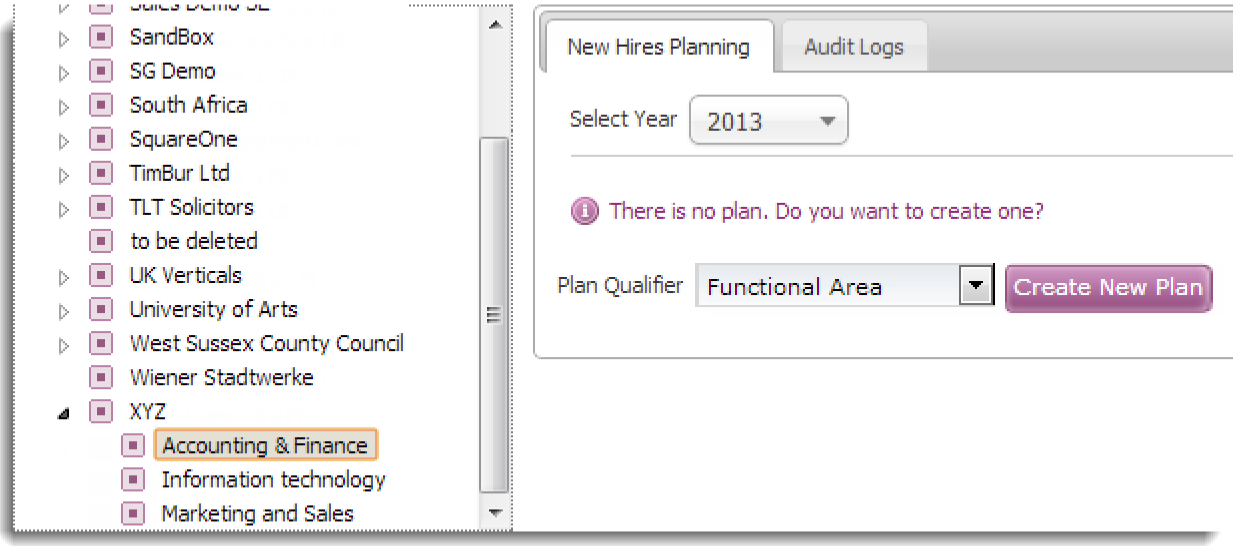
The *New Hires Planning Management* page is displayed.



Creating the New Hires Plan

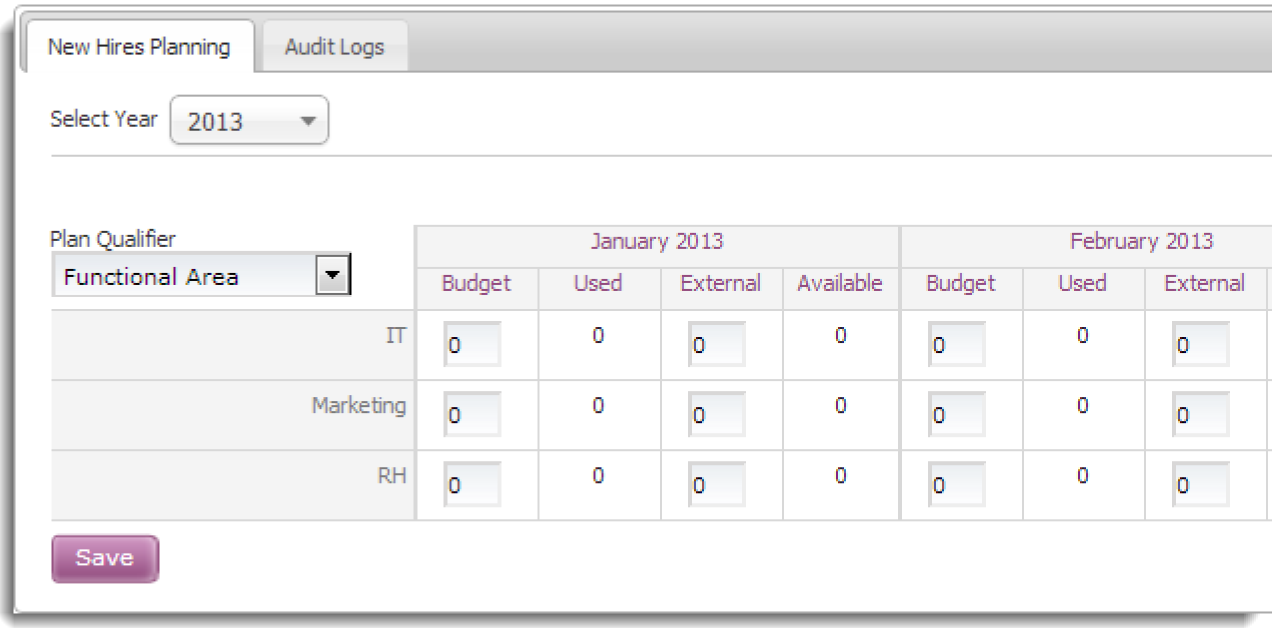
Each sub-department within the OBS can have one New Hires Plan for the year. The dimension of the plan is based on an LOV.

1. In the organization tree, select a sub-organization.



2. Select the **Year** for which you want to create the plan.
3. Select the plan dimension from the **Plan Qualifier** dropdown list.
4. Click **Create New Plan**.

The **New Hires Planning** section displays a monthly view of a calendar year.



5. Update the plan with the headcount budgeted for new requisitions. This is described in the next topic.

Updating the New Hires Plan

- When the New Hires Plan is in draft you can update:
  - The dimension
  - The external headcount values
  - The budgeted headcount values

  If you change the dimension of the draft plan the budgeted headcount data will be deleted from the plan.
- When the New Hires Plan is activated you can update:
  - The budgeted headcount values, if the new budgeted headcount is more than the used value plus the external value
  - The external headcount values, if the new external headcount is more than the used value plus the budgeted value
  - The dimension can be changed if the plan is not is use

You cannot change the plan to an editable draft format once the plan is active and in use.

1. After creating the plan (see previous topic) update the following fields with the new hire monthly budgeted headcount:
   - **Budget -** For requisitions raised within TalentLink and outside of Talentlink
   - **External -** For requisitions raised outside of TalentLink
2. Click **Save**.

The plan is saved as a draft.

3. Click **Activate** to activate the plan.

   The plan shows a month by month view of headcount budgeted, the headcount used and headcount still available.

Viewing the Audit Log

The Audit Log for the New Hires Planning Management module provides information on:

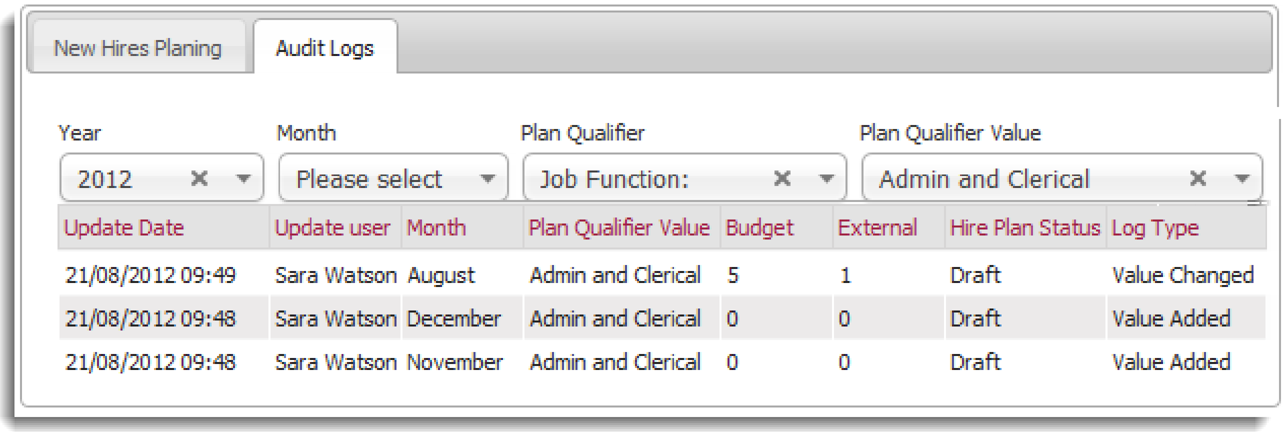
- When the plan was updated
- Who updated the plan, which month and field they updated
- Which dimension of the plan was updated
- The status of the plan

To access the Audit Log:

1. From **Settings**, select **System Administration**.
2. In the **Administration** section, select an organization.
3. In the organization tree, select a sub-organization.

   The **New Hires Planning** section is displayed.

4. Select the *Audit Logs* tab.



5. Select values from the following dropdown lists to filter the information displayed in the log:
   - Year
   - Month
   - Plan Qualifier
   - Plan Qualifier Value

Managing your Sourcing Channels

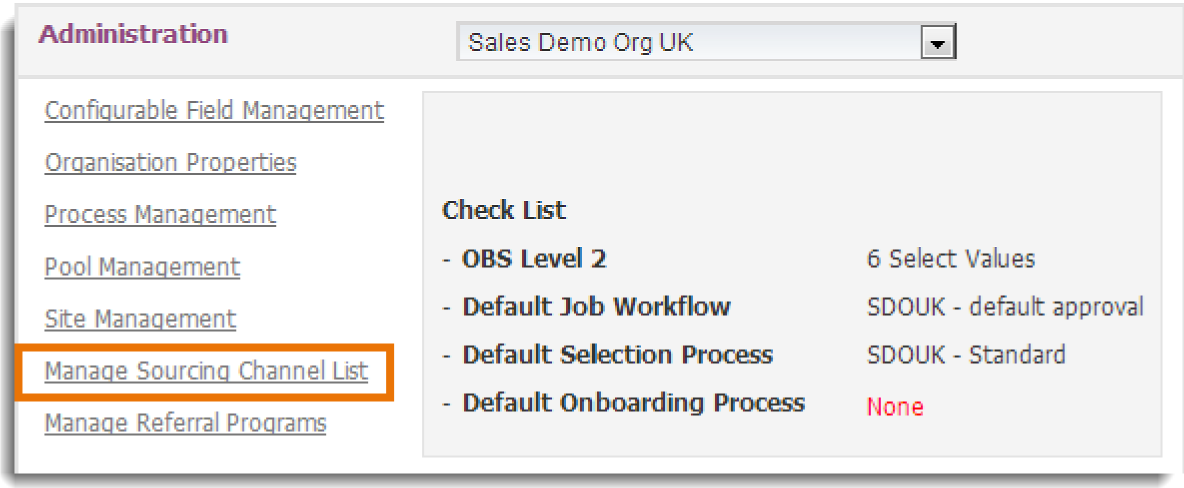
Sourcing Channels are what candidates use to apply for jobs and thereby enter your database. This could be via social media, a newspaper advert, a job board, or a corporate website. TalentLink enables end users to manually create Sourcing Channel Names in the Candidate PIF, and also in emailed job adverts. This can result in duplicate entries for the same Sourcing Channel, inconsistencies in naming, and spelling errors. These duplications, inconsistencies and errors affect reporting accuracy.

The Manage Sourcing Channels List functionality enables the GSA/LSA to maintain an accurate list of Sourcing Channels.

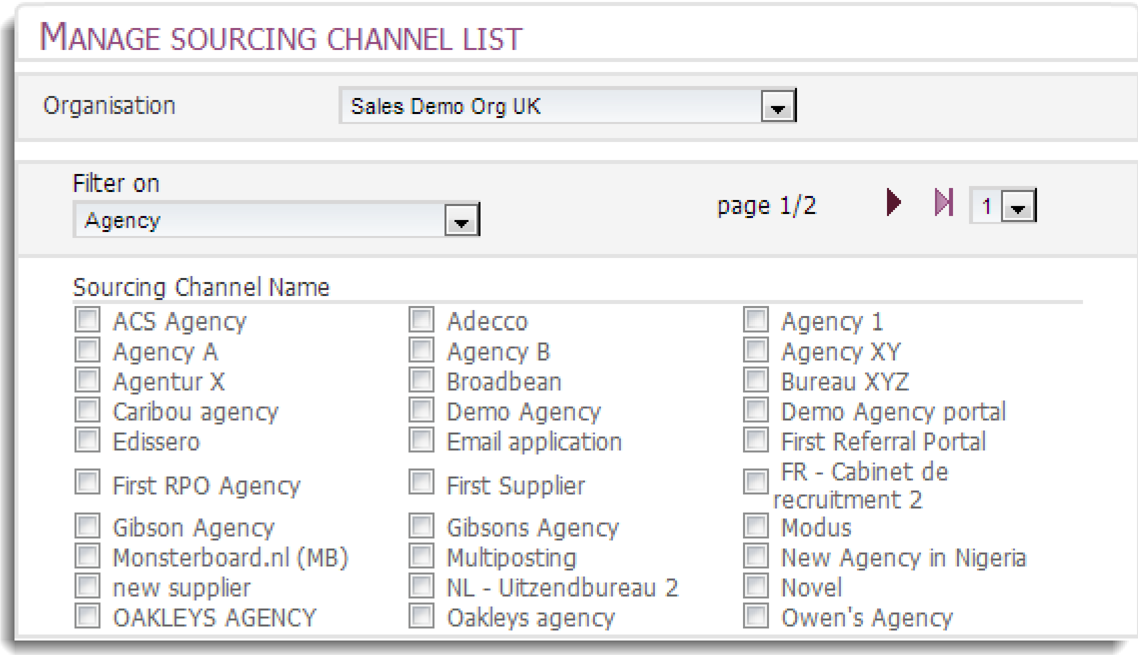
Accessing the Manage Sourcing Channels List

To manage Sourcing Channels list you will need the permission '623 - Manage Sourcing Channel List'. This is assigned to the GSA/LSA role and to the Functional Manager role.

1. From the **Settings** section of the left dynamic menu, select **System Administration**.
2. From the **Administration** dropdown list, select an organization then select **Manage Sourcing Channel List**.



The *Manage Sourcing Channel List* page is displayed.



From this page you can:

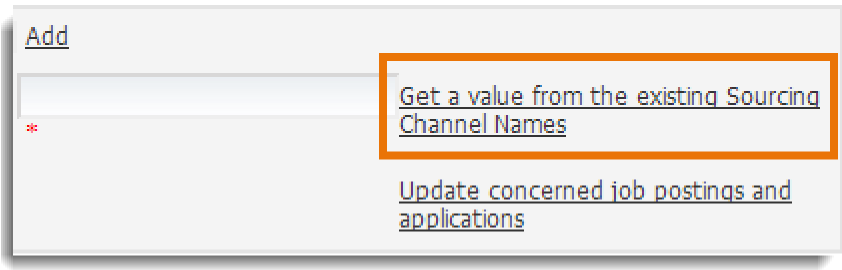
- Select the organization for whom you want to manage the list
- Filter the type of Sourcing Channel
- Add a new Sourcing Channel name (see page 377)
- Merge Sourcing Channels to improve reporting results (see page 376)

Merging Sourcing Channel Names

1. On the *Manage Sourcing Channel List* page, select the checkboxes next to the Sourcing Channel Names you want to merge.
   - In **Replace Selected Values by** type the name you want to assign to your selections.

   OR

   - Near the bottom-right of the page click **Get a Value from the Existing Sourcing Channel Names** and select a name from this list.

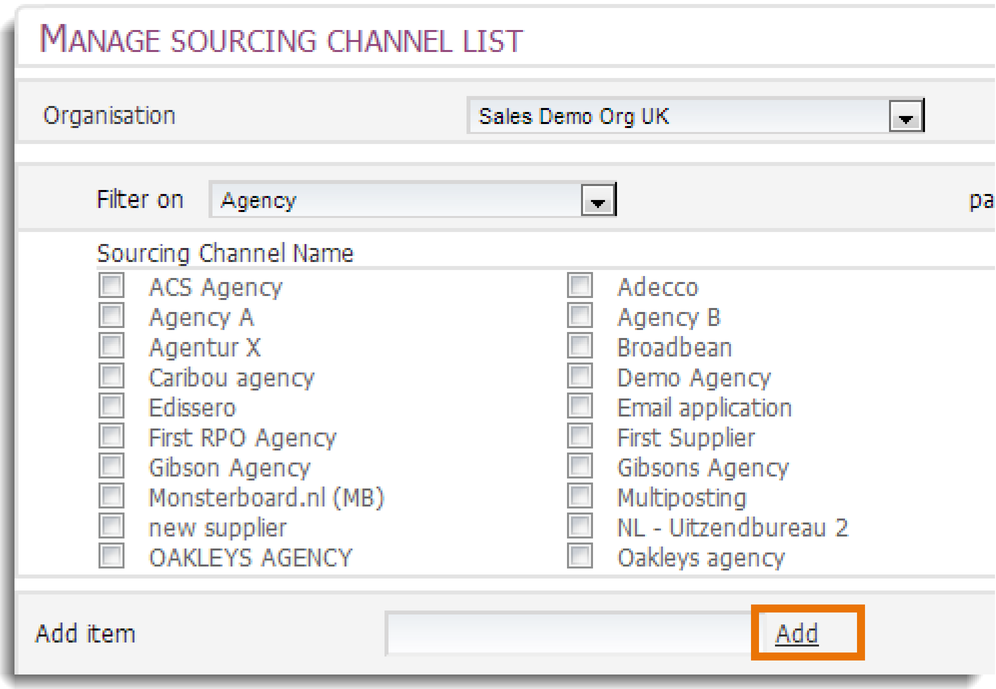


2. Click **Update Concerned job Postings and Applications**.

All job postings and applications using the original Sourcing Channel Name will be updated to use the new name.

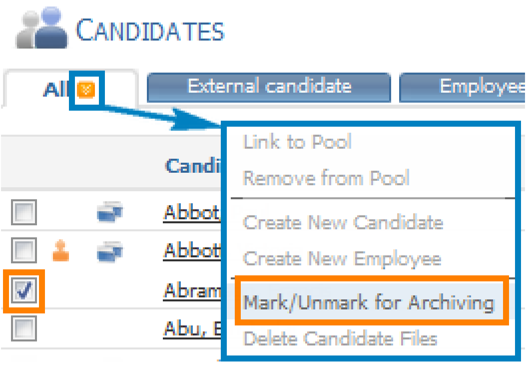
Adding a Sourcing Channel Name

1. On the *Manage Sourcing Channel List* page, type the sourcing channel name in the **Add item** field, then click **Add**.



Archiving Candidate Data

TalentLink users can mark inactive candidates for archiving but they cannot delete them from the system: only a GSA can do this.



Archiving a Candidate

When a candidate is archived TalentLink removes the following information from the database:

- All contact information, e.g. names, addresses, telephone and email details
- All documents submitted by the candidate
- All documents created by the Lumesse customer that may capture personal information e.g. Interview feedback forms
- All information in Memo and Comments fields
- All Contract and offer sections

TalentLink then moves the candidate record to a different database table which is not visible to users including GSAs. This new table holds:

- Candidate ID
- Creation Date – when the candidate was created in system
- Update Date – the last date when candidate profile was updated
- Start Inactive Date – date when candidate profile become 'inactive'
- Origin
- Application Source Name e.g. Monster, Adecco etc.
- Application Source Type e.g. JobBoard, Agency, External Site, etc.
- Candidate Type
- Candidate Status
- Data privacy
- Sex
- Archived Date
- Application Source Medium e.g. Database, Email, etc.
- Candidate Initial Type (External Candidate, Employee)

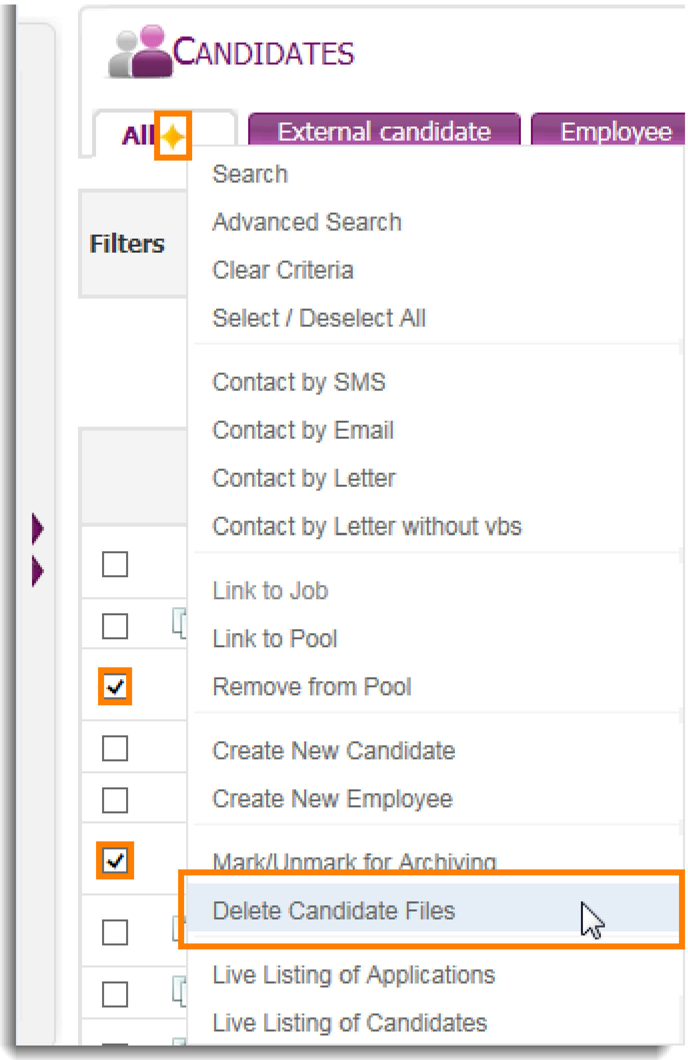
This basic application information enables Lumesse to continue to support trending data in our reporting features.

From the point of automatic deletion it is not possible to identify this information with any single applicant.

Deleting a Candidate from the Candidate Listing

ⓘ The GSA can only delete candidates who have no active applications.

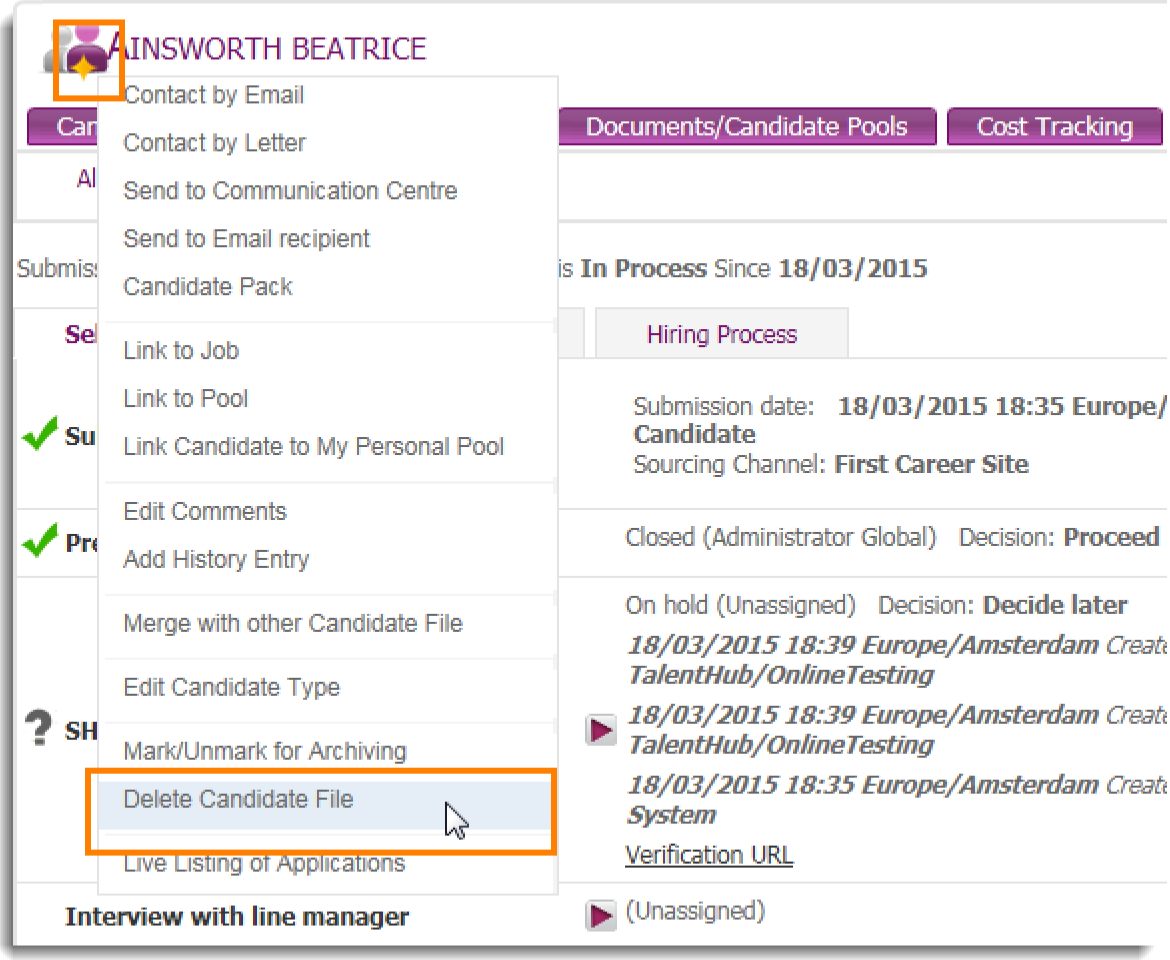
1. From the Candidate Listing select checkboxes beside the candidates you wish to delete.
2. At the top left click the icon beside **All** then select **Delete Candidate Files**.
3. At the prompt click **OK** to delete the selected candidates.



Deleting a Candidate From an Application

ⓘ The GSA can only delete candidates who have no active applications.

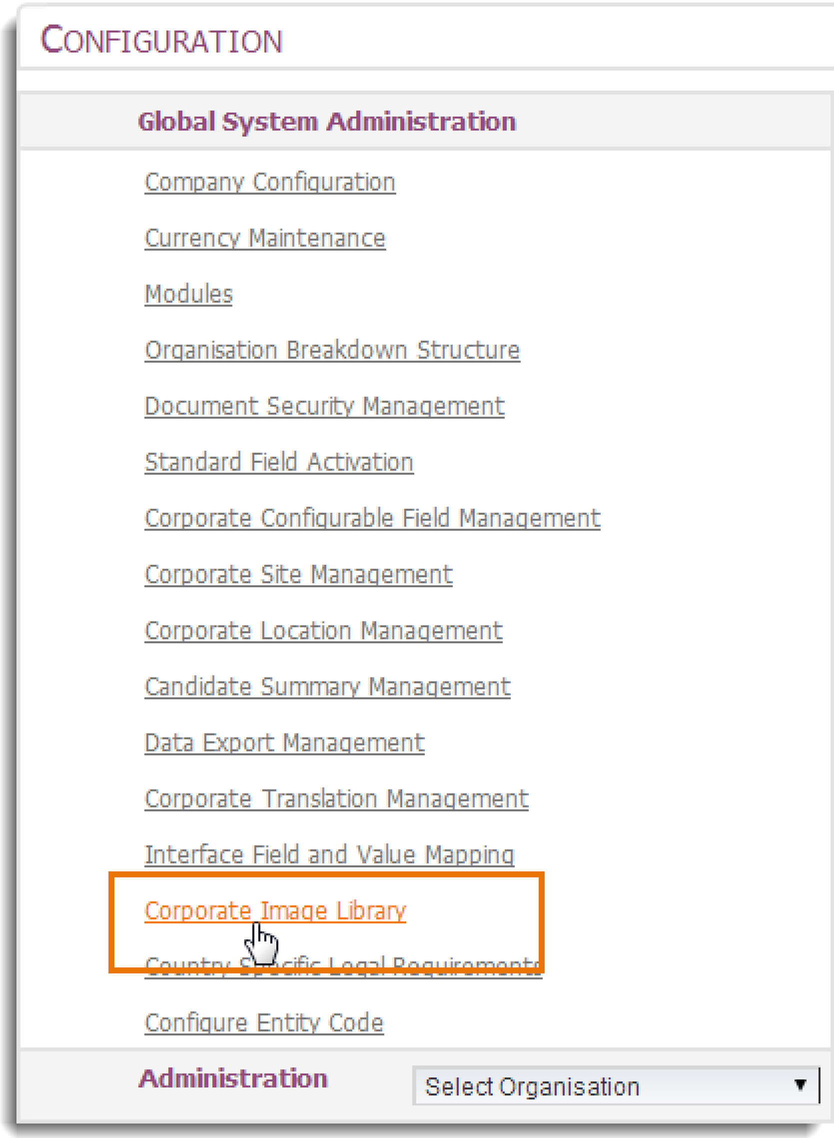
1. Open a candidate's application within a Job Listing.
2. At the top left click the icon beside the candidate's name then select **Delete Candidate File**.
3. At the prompt click **OK** to delete the candidate.



Applying Corporate Branding to Job Advertisements

The Image Library is a repository of graphics that can be used when a job advertisement is created. Many Lumesse customers operate a mix of online and traditional advertising to find new candidates. TalentLink includes a wide variety of sourcing options to distribute and attract candidates to open positions; the Image Library feature supports the ability to create paper-based job advertisements which may be added to company noticeboards.

1. To access the Image Library, from the **Settings** section of the left dynamic menu select **System Administration**.
   - If you are a GSA select **Corporate Image Library**.
   - If you are an LSA, from the **Administration** dropdown list select an organization then select **Image Library**.



Activating and Configuring the Image Library

The Image Library feature must be activated by Lumesse resources.

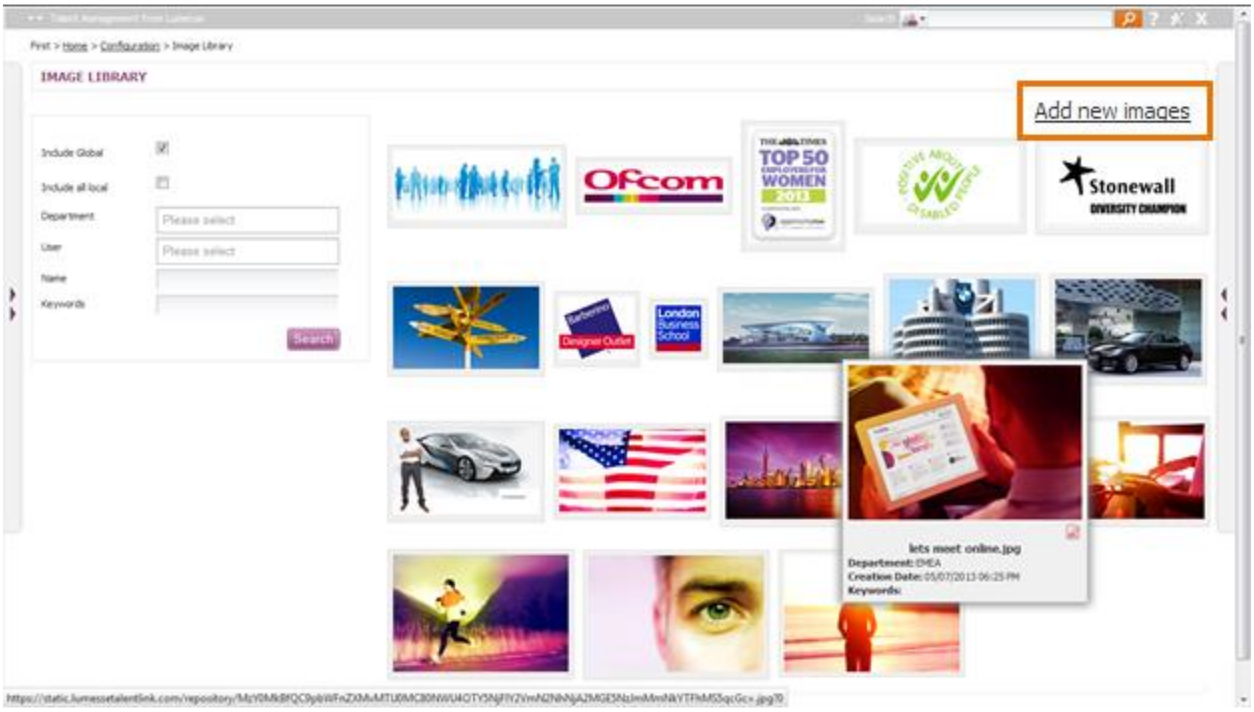
The table below describes the rights required to manage the Image Library. These rights are added to the roles by default.

Role	Right	Enables
GSA	953 Manage Corporate Image Library	Access to the corporate Image Library and to an organization's Image Library.
LSA	954 Manage Local Image Library	Access to the Image Library belonging to their organization.
Functional Manager	954 Manage Local Image Library	Access to the Image Library belonging to their organization.

Adding an Image to a Library

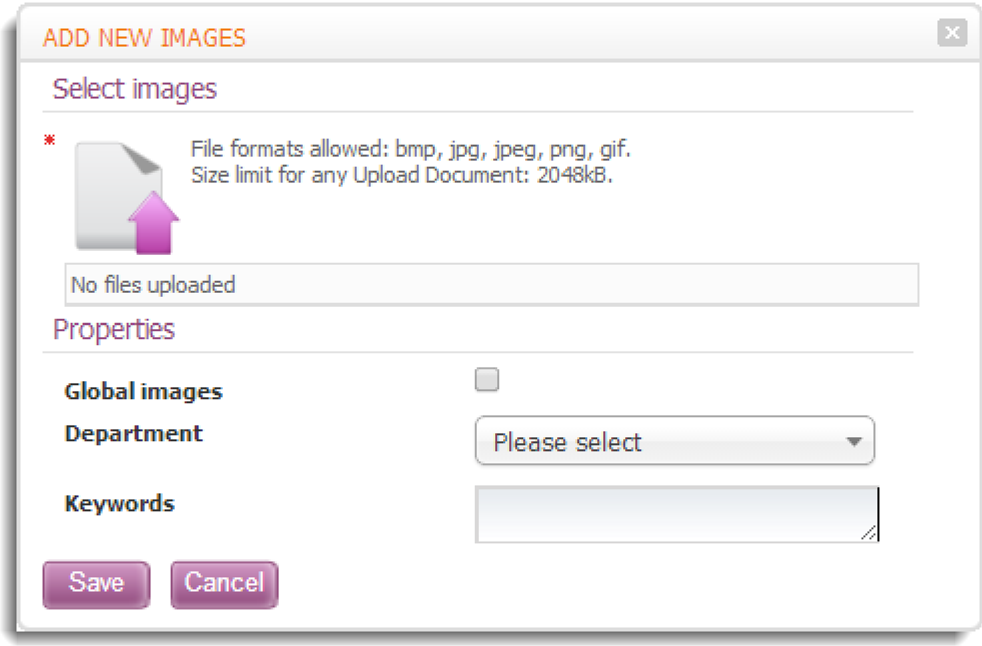
Images may be uploaded to a corporate library or to libraries at each organization level 1.

1. From the **Settings** section of the left dynamic menu, select **Systems Administration**.
2. Either select **Corporate Image Library** or from the **Administration** dropdown list select an organization then select **Image Library**.
3. Select **Add new Images** at the top right of the page.



4. Select the document icon to browse your local folders and select images for upload.

Up to 10 images may be uploaded at one time.



- To make the images available across all departments select **Global Images**.

> ⓘ The **Global Images** checkbox will only be visible if you are a GSA.

- If the images are not global, in the **Department** dropdown list select an OBS level 1 organization to associate this image with.

5. Type any relevant **Keywords** as this enables you to do a keyword search for stored images in the library.

> ⓘ The name of the user who is uploading the image is automatically associated with it. User names can be used as search criteria when browsing the Image Library.

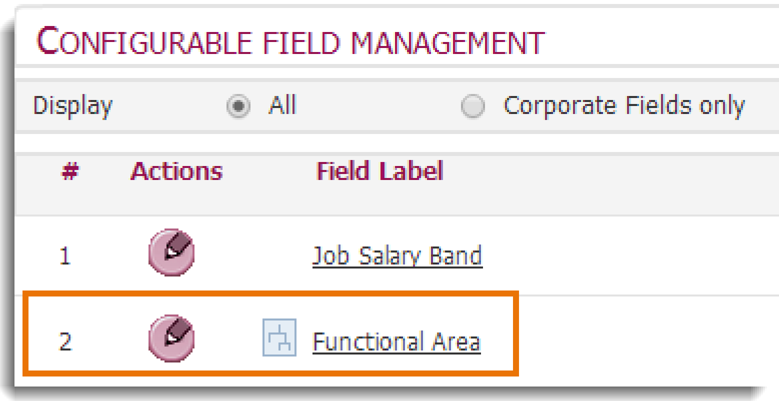
6. Click **Save** to add this image to the library.

Using LOVs

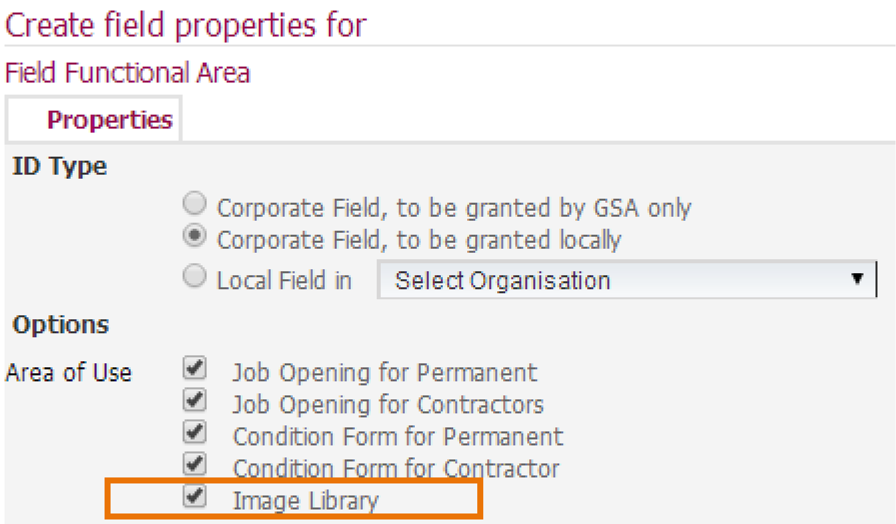
You can add any of your configured list of values (LOVs) as attributes to your images. First you have to make the LOV available for use in the Image Library.

1. From the **Settings** section of the left dynamic menu select **System Administration**.
   - If you are a GSA select **Corporate Configurable Field Management**.
   - If you are an LSA, from the **Administration** dropdown list select an organization then select **Configurable Field Management**.

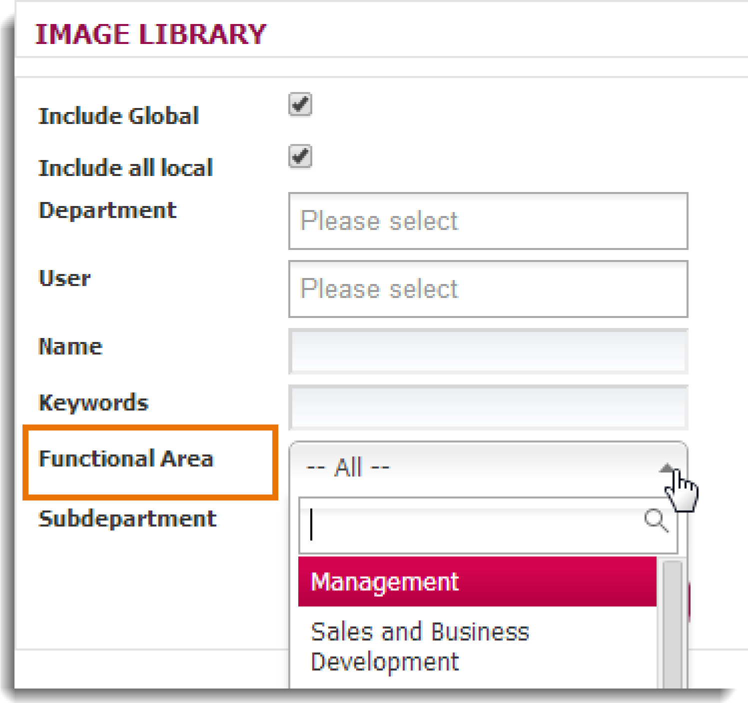
2. Create a new LOV or click to edit an existing one. Refer to the TalentLink Administrator's Guide, Corporate Configurable Field Management for full instructions on creating LOVs.



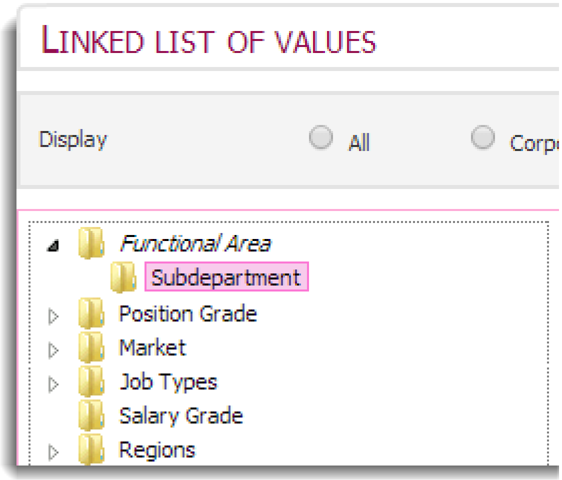
3. In the *Field Properties* page, **Area of Use** section select the **Image Library** checkbox.



Once you've created the LOV you can use it in the Image Library to assign these fields to your images.

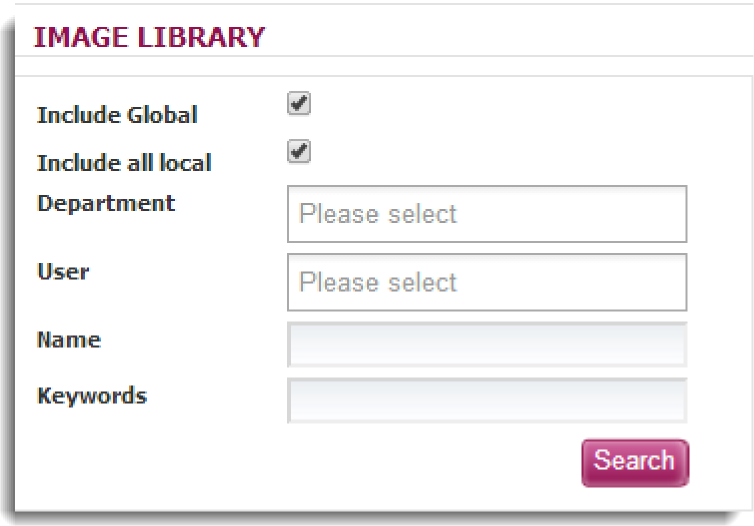


Linked LOVs can be added then used as search criteria in the same manner.



Searching the Image Library

Stored images can be easily retrieved using the search options.



The table below describes the search options.

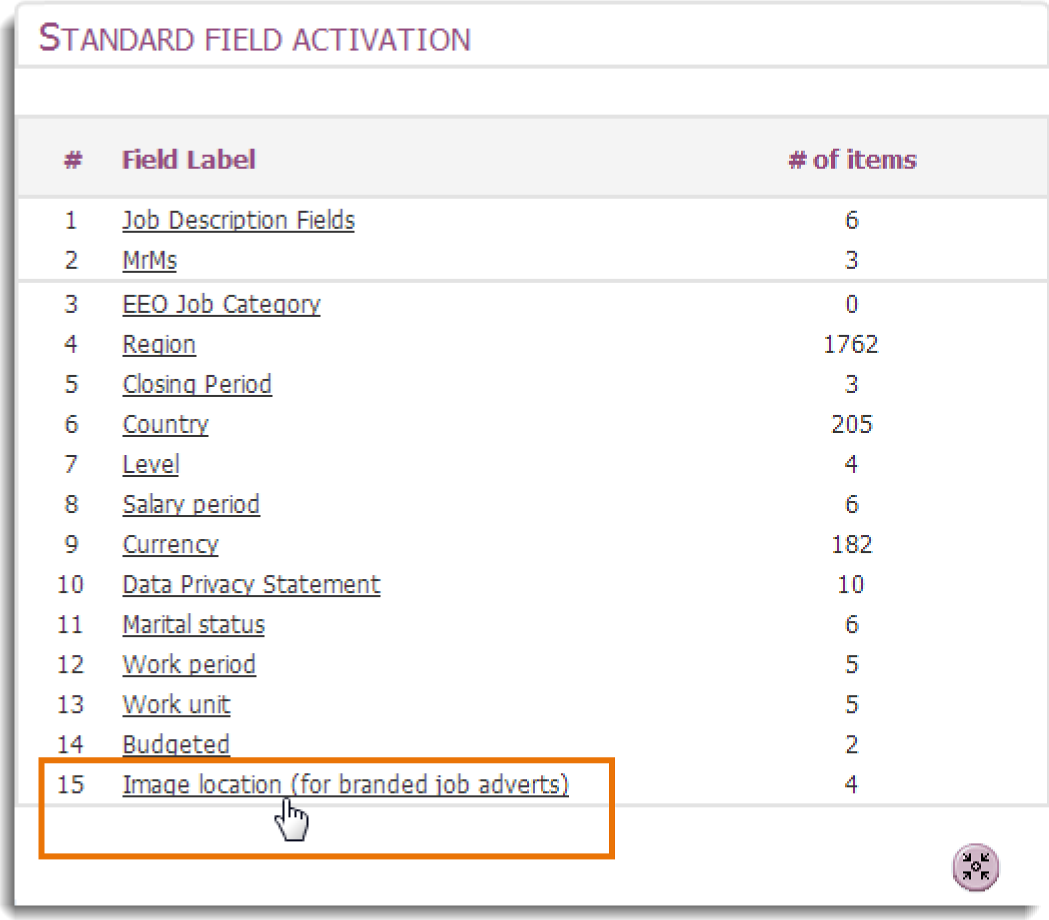
Element	Description
Include Global	The search will include all images where the **Global Images** checkbox was selected during upload. (When adding images the **Global Images** checkbox will only appear if the user is a GSA). Global images are available for all users of an organization.
Include all local	The search will include all local images. (Local images are only available to users of the selected organization)
Department	Filtering by department shows only images associated with that department when the image was uploaded. You can select multiple departments to filter on.
User	Filtering images by user shows only images uploaded by those users. You can select multiple users to filter on.
Name	Selecting a name filters images by file name.
Keywords	Filtering images by key word shows only images associated with that key word when the images was uploaded.

Specifying Where Images are Placed in Advertisements

The Image Library enables users to add up to four images to a careers site posting and to a printable job advertisement. The **Image location (for branded job adverts)** LOV is used to specify where images are placed on a job advertisement. Image Location values are corporate, meaning that your settings for Image Location will be applied across your whole environment.

ⓘ Only a GSA has permission to perform the following actions.

1. From the **Settings** section of the left dynamic menu, select **Systems Administration** then select **Standard Field Activation**.
2. Select field label 15 **Image location (for branded job adverts)**.


STANDARD FIELD ACTIVATION

#	Field Label	# of items
1	Job Description Fields	6
2	MrMs	3
3	EEO Job Category	0
4	Region	1762
5	Closing Period	3
6	Country	205
7	Level	4
8	Salary period	6
9	Currency	182
10	Data Privacy Statement	10
11	Marital status	6
12	Work period	5
13	Work unit	5
14	Budgeted	2
15	Image location (for branded job adverts)	4

3. Click to select the areas where images can be displayed.

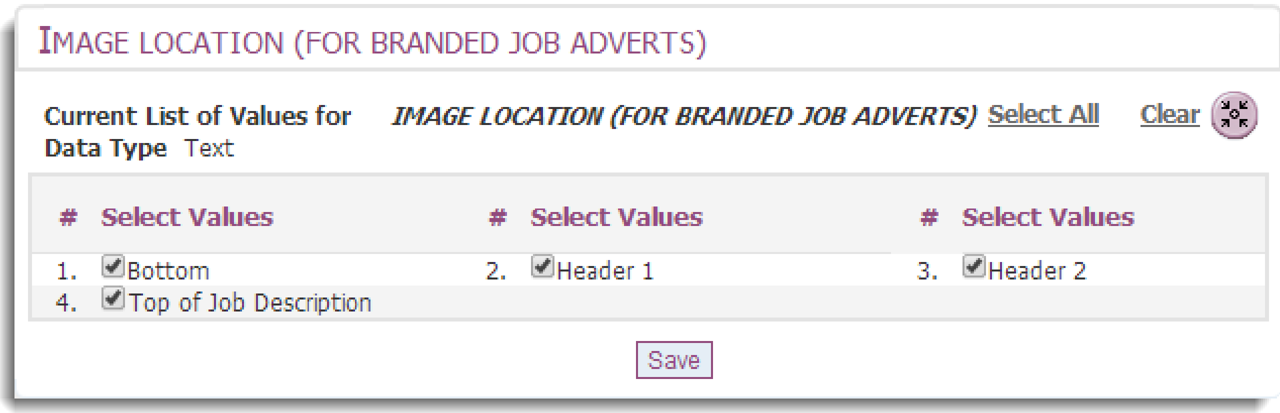


IMAGE LOCATION (FOR BRANDED JOB ADVERTS)

Current List of Values for *IMAGE LOCATION (FOR BRANDED JOB ADVERTS)* Select All Clear
Data Type Text

#	Select Values	#	Select Values	#	Select Values
1.	Bottom	2.	Header 1	3.	Header 2
4.	Top of Job Description				

Save

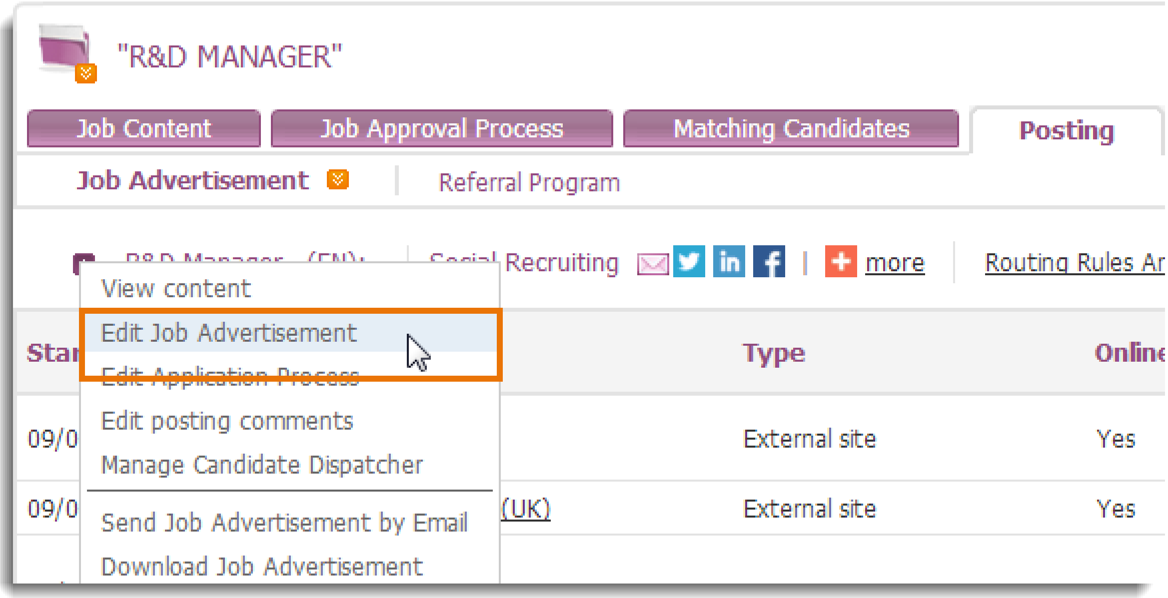
4. If you:
   - Do not want an image to appear in a location **deselect** the checkbox next to the location name
   - Want an image to appear in a location **select** the checkbox next to the location name

5. Click **Save**.

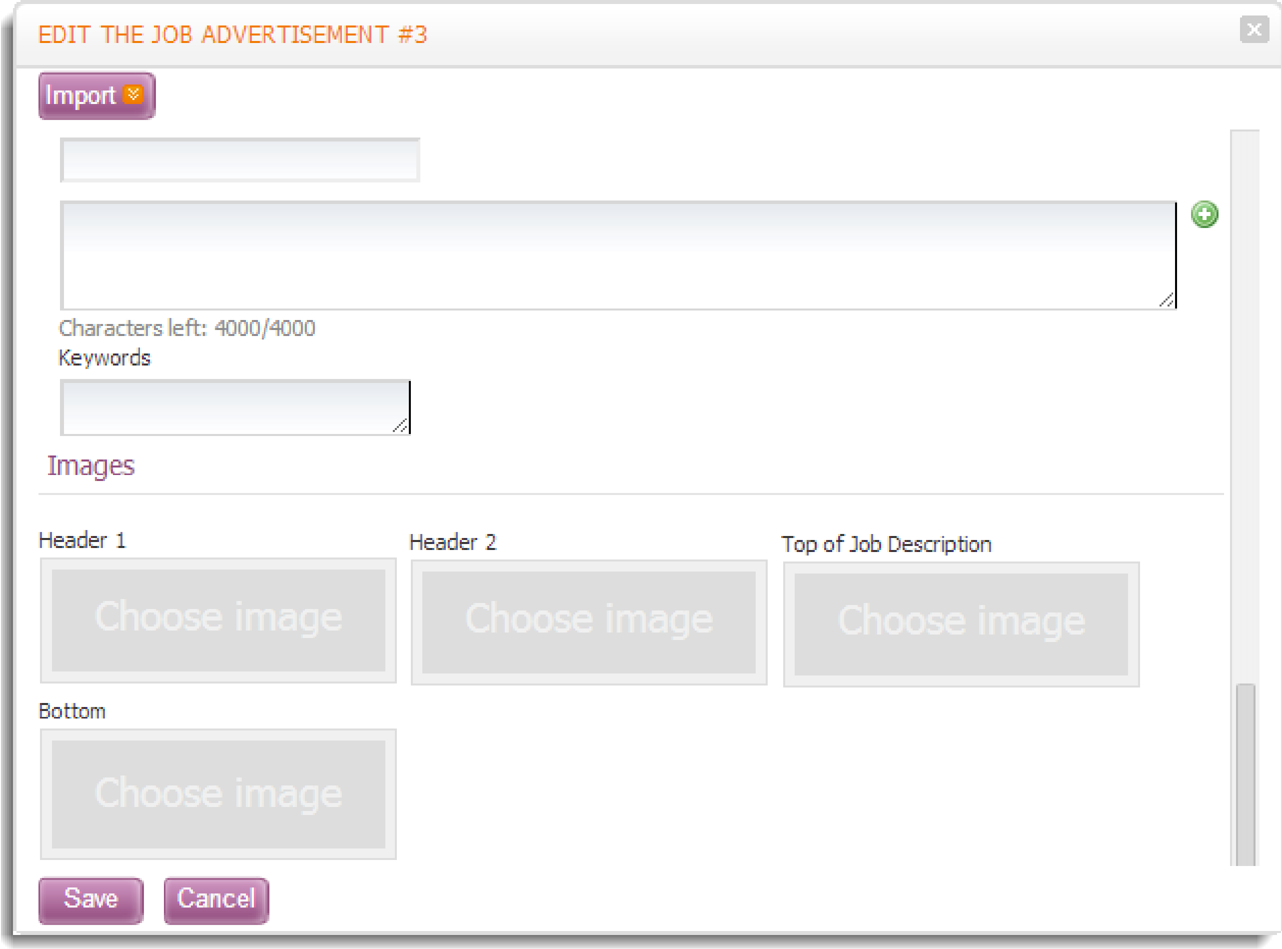
Using the Image Library with a Careers Site Posting

Once images have been uploaded by Systems Administrators recruiters can include these images within postings.

1. From the *Posting* tab of a job requisition either:
   - Click beside **Job Advertisement** and select **Add New Job Advertisement**.
   - Click beside the job title and select **Edit Job Advertisement**.

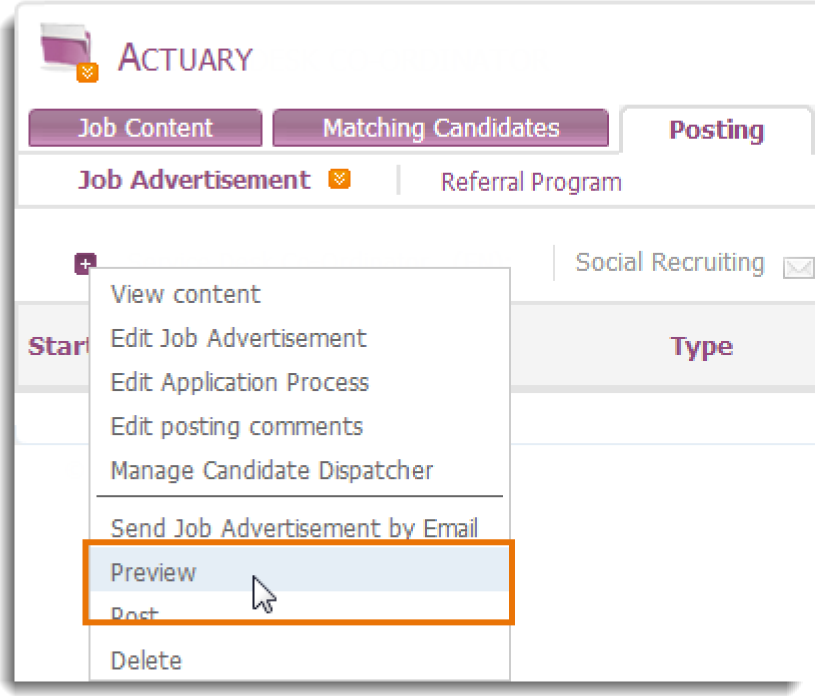


The image placeholders are displayed for at the bottom of the editable page.



2. Click an empty image location box to view the images in the library.
3. Hover over an image in the library to see a larger version (clicking on it will display full size image).
4. Click the small arrow icon in hover-over mode to set this image in your chosen location.

5. To see how the image will appear to a candidate, click [+] beside the job title and select **Preview**.



6. Click  beside the relevant advertisement to display the content.

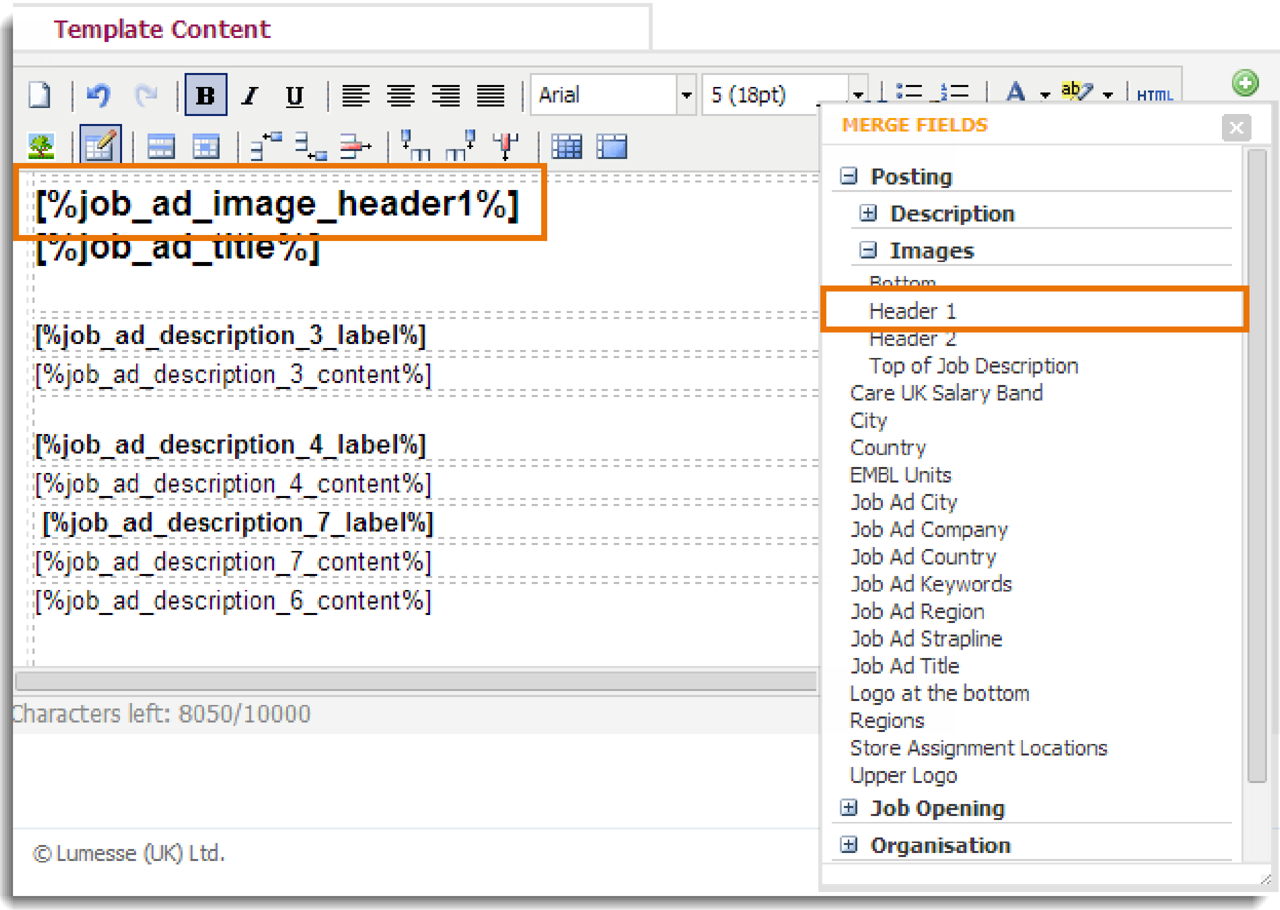
Using the Image Library with Printable Job Advertisements

Images stored in the Image Library can also be used in your printable job advertisements. To do this you can create a Printable Job Advertisement template and add the required images directly into the template.

Configuring the Printable Template

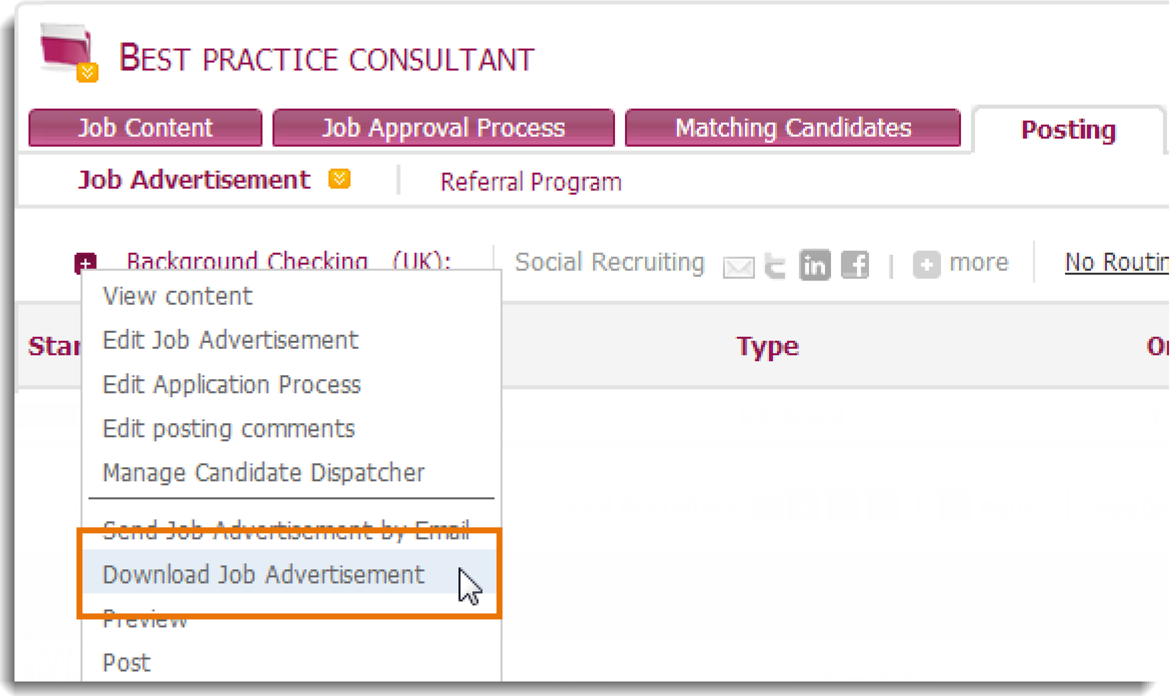
Instructions for creating Printable Job Advertisement templates are available in the TalentLink Administrator's Guide, Communication Templates, *Creating Printable Job Advert Templates*.

As part of the configuration of your template you should select the relevant image merge fields from the list. The merge fields displayed relate directly to the field labels selected for use by the systems administrator with the standard field **Image location (for branded job adverts)**. For example, if two field values are selected, only those two merge fields will be visible when creating a printable template.



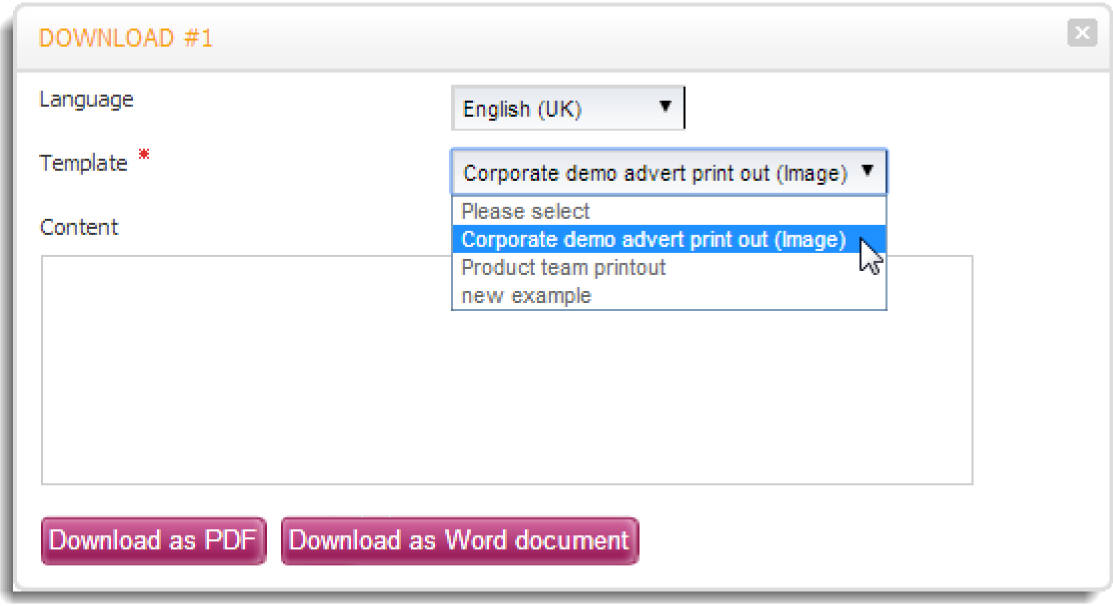
Using the Printable Template

1. From the *Posting* tab of a job requisition click ⊞ beside the job title and select **Download Job Advertisement**.



ⓘ The **Download Job Advertisement** option will only appear if you have defined a job advertisement print out template.

The *Download* page is displayed.



2. Select a template from the list to preview it in the Content area.

The displayed template can now be downloaded and saved to your computer in .PDF or .DOC format for printing.

Onboarding

ⓘ To activate onboarding please speak with your Lumesse consultant.

TalentLink can be integrated with several third party onboarding solutions. Onboarding integration is activated and managed entirely outside of TalentLink by your Lumesse consultant; there is no TalentLink configuration required by the GSA or LSA.

Your Lumesse consultant will use the Queue Management system to configure the trigger point of the integration which will send a candidate's record to the third party system. Application statuses such as *Offered* will typically be used but any application status can be the trigger for the interface. (The *Quick Hire* feature deployed in v13.2 will also be supported).

Activating the Integration

Onboarding integration requires Lumesse to take some action.

TalentLink contains an organizational hierarchy with levels from 0 (the customer name only) to an unlimited number of sub-levels. Level one, (or OBS#1) is the major organizational element as this is where the configuration differences are managed, typically the regions or business units of our customers.

There are two configuration of provider available, a local provider at Level #1 or a Master provider for the full TalentLink environment.

With this integration only one provider may be activated per organization #1.

A local OBS#1 integration takes priority over a global provider's at the top level. This ensures that local customer or department agreements always operate with candidates' records over any master agreement operating on the full slice of TalentLink.

Configuring on an individual local OBS#1 level does not mean that all other OBS#1 organizations require configuration. The Master provider activated at the Global level will operate on all other OBS#1 levels by default.

If no default Master provider is active then only the one organization using an on boarding provider will benefit from that service.

What will TalentLink Export?

The following table illustrates the maximum amount of information that can be sent to the first two provider systems.

For Silkroad it is possible to define which pieces of information should be passed at the OBS or slice level.

Field Name	TalentWise	Silkroad
Form of Address		Yes
First Name	Yes	Yes
Middle Name	Yes	Yes

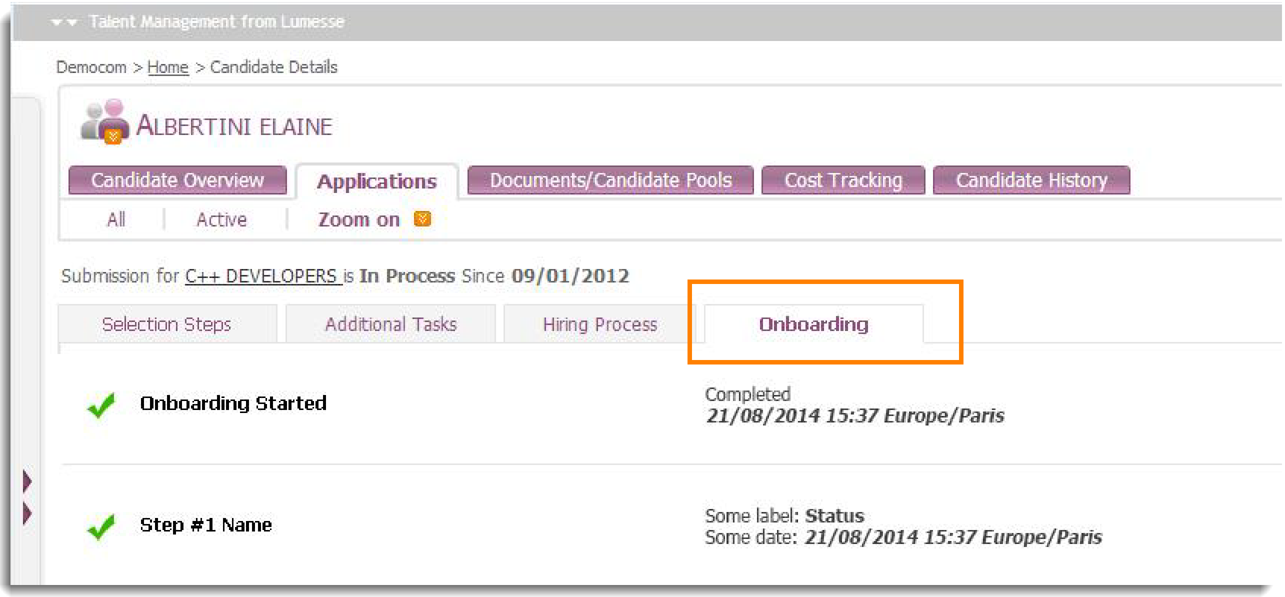
Field Name	TalentWise	Silkroad
Form of Address		Yes
Last Name	Yes	Yes
Email	Yes	Yes
Alternate Email		Yes
Street	Yes	Yes
City	Yes	Yes
State/Province	Yes	Yes
Zip	Yes	Yes
Country	Yes	Yes
Phone Number	Yes	Yes
DOB	Yes	Yes
SSN	Yes	Yes
Gender	Yes	Yes
Job ID	Yes	Yes
Job Name		Yes
Recruiter Name	Yes	Yes
Manager Name	Yes	Yes
Type of Contract	Yes	Yes
Company/Subsidiary	Yes	Yes
Contract Data[1]	Yes	Yes

ⓘ Employment history and education history are not sent.

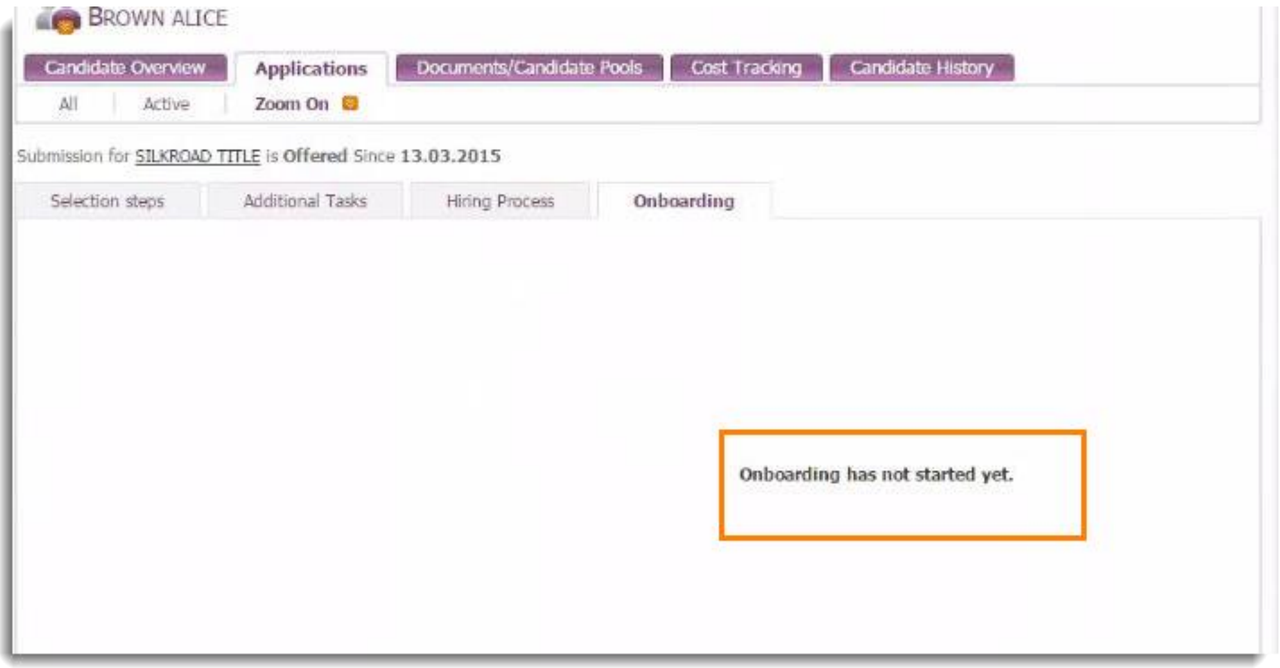
[1] Please note that it is possible to send all contract fields or to limit which specific fields should be sent.

What will you see in TalentLink?

If an onboarding integration is active, either globally or locally, the user will see an *Onboarding* tab within the Selection Process view of the application.



If the onboarding process is active but has not started then this will clearly display in the same tab.



Information Passed back to TalentLink

For the two onboarding providers initially in scope of the integration only TalentWise will pass back any information of value.

Silkroad

Silkroad will update TalentLink to confirm that the candidate record has been received. In the case of any errors an error message will be displayed.

A user would require access to Silkroad's own platform to obtain updated information.

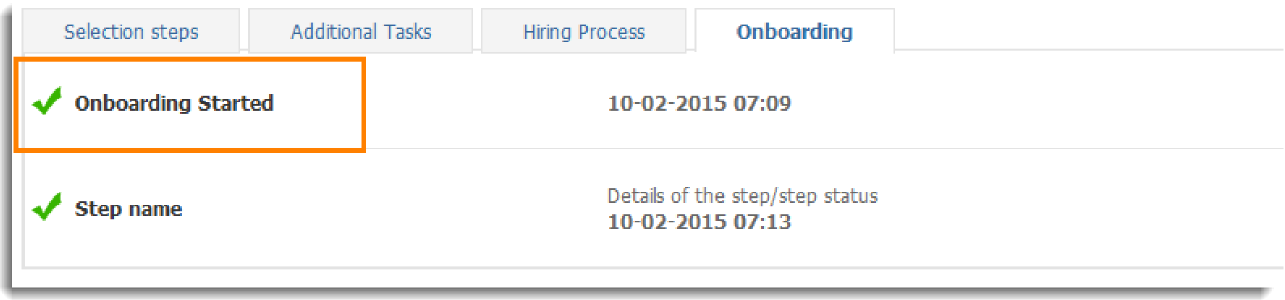
In the case of an error the relevant message would be displayed within TalentLink.

TalentWise

This provider will update the onboarding status from its own workflows as well as some error messages where relevant.

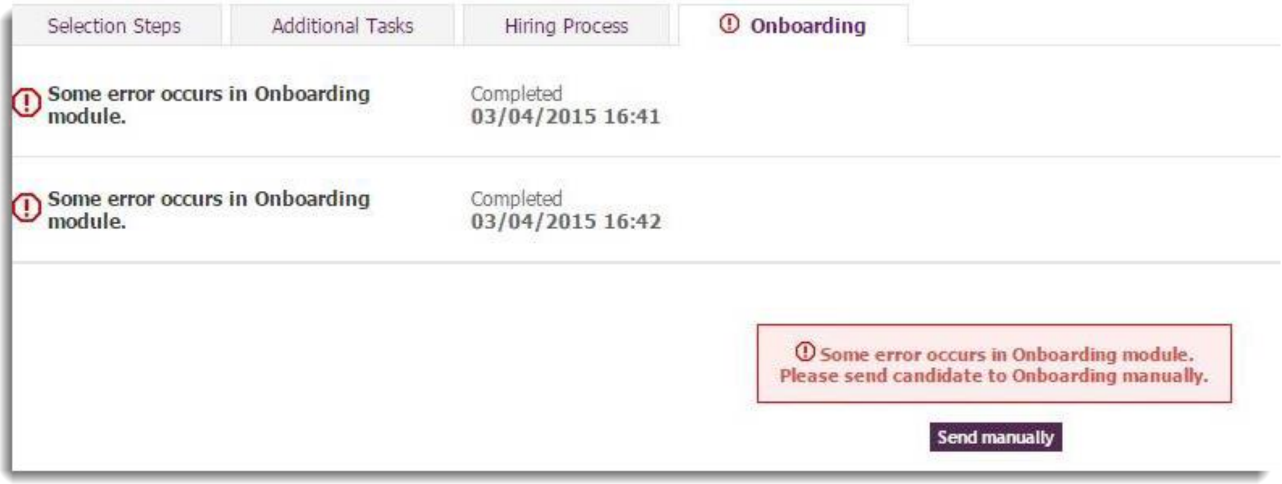
How does the Onboarding Process Start?

The onboarding integration will launch automatically when a candidate is put into a specific Application Status such as *Offer Accepted* or *Hired* depending on configuration.



This status will automatically enter the candidate's details into the Queue and trigger the export to the onboarding provider.

If this trigger process fails for any reason the user will see an error warning on the *Onboarding* tab and an error message within the specific tab:



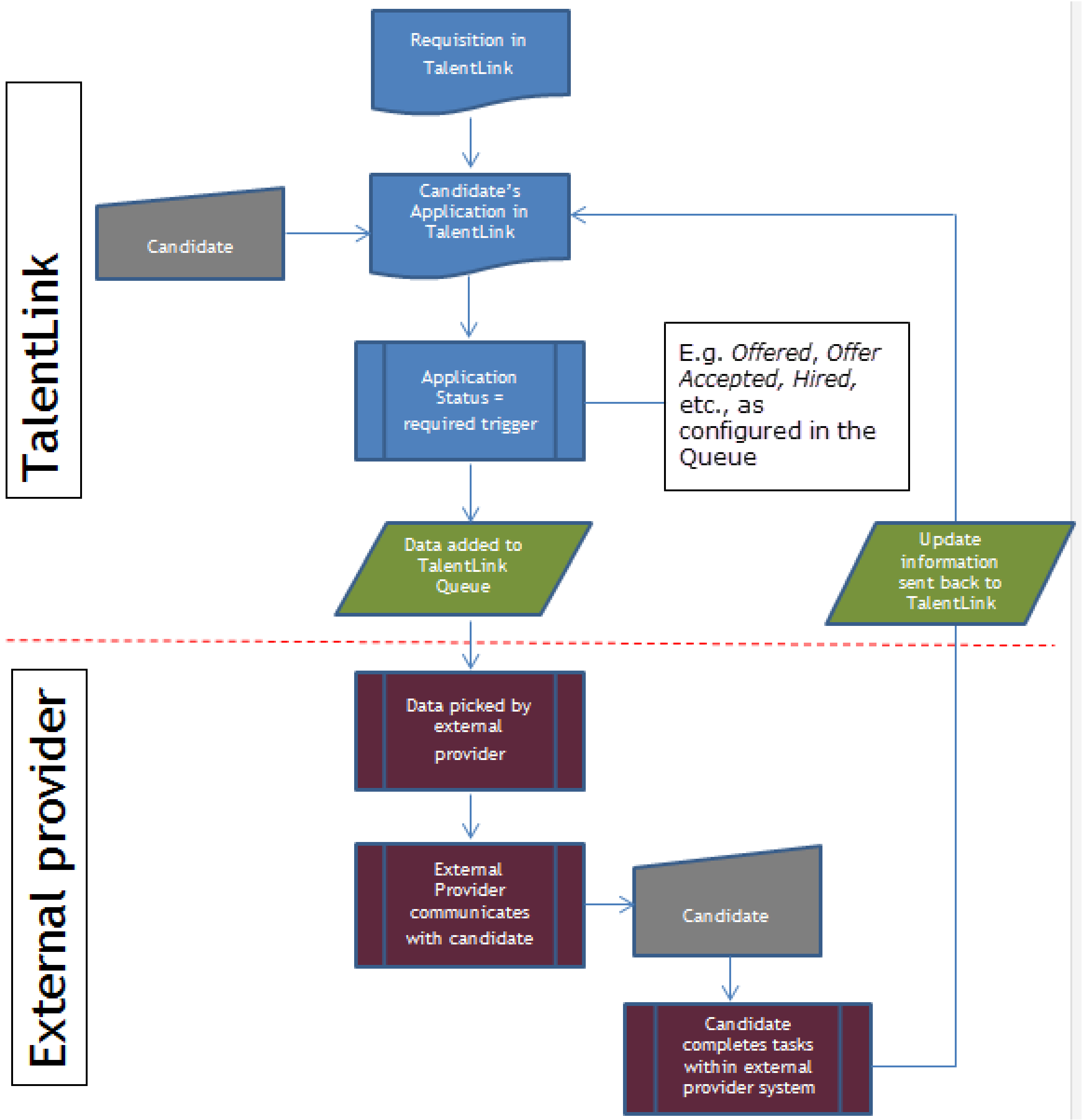
Example Errors in TalentWise

- Send Error: First Name is Required
- Send Error: Last Name is Required
- Send Error: First Recruiter must have Email

If there is an error in the automatic launch process a manual option is available. **Send Manually** simply forces the relevant candidate data into the Queue where it is picked up by the correct provider at the next scheduled time. The system administrator cannot perform any specific action to fix errors.

Lumesse

Integration Process Flow Diagram



Technical Specifications

The following technical specifications provide the range of operation of specific features/fields of TalentLink.

Job Openings

Item	Characteristics	Comments
Length of job title	150 characters	-
Length of job opening number	20 characters	-
Length of requisition number	20 characters	-
Length of freeform field in job description	3000 characters	-
Number of freeform fields in job description	8	-
Length of name of company	50 characters	-
Length of name of location	50 characters	-
Number of cost entries related to a job	Unlimited	-
Number of steps in the application process	5	-
Length of comments on a job	4000 characters	-
Length of comments on job postings	4000 characters	-
Number of times a job can be posted	Unlimited	-
Minimum duration of a job posting	1 day	-
Maximum duration of a job posting	Configured	-
Delay in posting to a career site powered by our technology	Less than 10 min	-
Delay in sending a job advertisement by email to a job board	Less than 1 hour	-
Length of recipient email address	100 characters	-
Length of cc email address	100 characters	-
Number of configurable list of values	40	Can be extended
Number of configurable OBS	20	-
Number of configurable freeform fields	12 (10 per defined key area)	-
Number of job advertisements per job opening	5	-
Length of job advertisement title	150 chars	-
Number of languages per job opening	5 (1 per advertisement)	Can be extended
Number of application processes per job opening	5 (1 per advertisement)	-
Number of steps in job creation/approval process	4 + close	-

Number of steps in selection process	25	-
Number of steps in hiring process	3 (approval, contract, hiring)	-
Length of comments for headcount	3000 characters	-
Length of comments for approval	3000 characters	-
Delay in posting a job advertisement in .xml format to a job board	Less than 1 hour	-

Candidate File

Item	Characteristics	Recommended
Length of candidate first name	45 characters	-
Length of candidate middle name	45 characters	-
Length of candidate last name	75 characters	-
Length of email addresses	160 characters	-
Length of phone numbers	30 characters	-
Number of email addresses	2	-
Number of phone numbers	3	-
Length of address	350 characters	-
Length of current company	150 characters	-
Length of current position	150 characters	-
Length of candidate source	120 characters	-
Length of candidate referral	120 characters	-
Length of memo pad	3000 characters	-
Number of documents related to a candidate	Unlimited	Fewer than 50
Number of active applications	Unlimited	-
Number of past applications	Unlimited	-
Number of applications for the same position	1	-
Number of documents related to an application	Unlimited	Less than 15
Number of entries in the candidate history	Unlimited	
Number of links to folders for a candidate	Unlimited	-

Number of links to personal folders	Unlimited	-
Number of cost entries related to a candidate	Unlimited	-
Length of employee code	30 characters	-
Length of candidate middle name	45 characters	
Length of address 2	350 characters	-
Length of personal web site	300 characters	-
Length of fax number	30 characters	-
Length of assigned location	400 characters	-
Length of current compensation	150 characters	-
Length of academic title	150 characters	-

Template Documents

Item	Characteristics	Recommended
Number of templates per department	Unlimited	Fewer than 50
Length of template name	256 characters	Fewer than 100
Length of template description	512 characters	Fewer than 512
Maximum number of items per template	Unlimited	Fewer than 2 pages scrolling
Length of item label	128 characters	Fewer than 2 lines with word wrap under SVGA
Length of freeform field	4000 bytes	3000 characters
Length of List of Value (LOV) entry	128 characters	No word wrap under SVGA
Maximum number of items in a List of Values	Unlimited	Fewer than 100
Maximum number of LOVs per page	Unlimited	Total weight of LOVs less than 32 KB
Length for “other” field in an LOV	128 characters	160 characters
Maximum number of columns for radio buttons and checkboxes	3	3
Maximum number of lines when editing a freeform field	8	Depends on number of fields on the template and vertical scrolling
Maximum number of columns when editing a freeform field	Dependent on style	40

Email Templates

Item	Characteristics	Recommended
Length of template name	160 characters	Less than 100
Length of email subject	160 characters	Less than 100
Body of the email	8000 bytes	-
Number of links to document templates in the body	1	1
Number of recipients	Up to 8 KB long	-
Number of cc	Up to 8 KB long	-

Document Attachments

Item	Characteristics	Recommended
Length of document name	160 characters	-
Length of document description	240 characters	-
Size of the document	2 MB	Less than 100 KB

Department Configuration

Item	Characteristics	Recommended
Number of departments	Unlimited	-
Length of the name of a department	Unlimited	-
Number of jobs per department	Unlimited	-
Number of candidates per pool	Unlimited	-
Number of candidate folders	Unlimited	-
Number of candidates per folder	Unlimited	-
Number of users granted by department	Unlimited	-
Number of candidates per personal folder	Unlimited	-

System Configuration

Item	Characteristics	Recommended
Length of the name of a list of values	90 characters	-
Number of items per list of value	Unlimited	Fewer than 100
Length of the name of an item in a list of value	90 characters	-
Number of languages used for defining an LOV	13	-
Length of the name of an OBS	90 characters	-
Number of items per OBS	Unlimited	Fewer than 10
Length of the name of an item in an OBS	90 characters	-
Number of configurable LOVs	40	Can be extended
Number of configurable standard LOVs	8	
Number of system LOVs with configurable contents	6	
Number of languages used for configuring LOV content	13	
Number of configurable OBSs	20	
Number of languages used to define an OBS	13	

Job Boards

Item	Characteristics	Recommended
Number of job boards	Unlimited (related to contract)	-
Length for job board name	38 characters	-
Number of configurable categories	2	-
Length of category name	50 characters	-
Number of entries per category	49	-
Length of category entry	50 characters	-
Number of language per category	1	-

Process Configuration

Item	Characteristics	Recommended
Number of default application processes	1 per department	-
Number of job creation/approval process templates	Unlimited	1 per department or OBS combination
Number of steps in job creation/approval process	4 + close	-
Number of selection process templates	Unlimited	1 per department or OBS combination
Number of steps in selection process	25	-
Number of selection process templates	Unlimited	1 per department or OBS combination
Number of steps in hiring process	3 (approval, contract, hiring)	-

User and Security Management

Item	Characteristics	Recommended
Number of users	Unlimited	-
Number of users per department	Unlimited	-
Number of users per OBS	Unlimited	-
Number of roles granted per users per department/OBS	Unlimited	-
Number of combination of department/OBS granted per user	Unlimited	-
Number of roles	Unlimited (8 by default)	-
Length for the first name of a user	45 characters	
Length for the last name of a user	45 characters	
Length for password	30 characters	
Length for email address	160 characters	
Number of application-level rights	36	-
Number of department/OBS-level rights	248	-
Number of object-level roles (ODA)	2 (1 for candidates, 1 for job openings)	-

Search Capabilities

Item	Characteristics	Recommended
Number of candidates that can be searched at a time	Unlimited	Fewer than 15000
Number of documents per candidate that can be searched	Unlimited	Fewer than 15000
Length of the keyword search string	3000 characters	Fewer than 256 characters
Number of candidates that can be retrieved at a time	1000000	Fewer than 2000
Number of languages used for indexing and searching data	10	-
Number of document templates used to perform a Query By Form (QBF)	4	-
Number of search favourites per user	10	-

Standard Reports (Europe only)

Item	Characteristics	Recommended
Number of standard reports	10	-
Number of custom reports	Unlimited	-
Number of functional domains of reports	30	-
Number of selectable columns	5	-
Number of selectable filters	100	-
Number of sort criteria	2	-
Number of group criteria	2	-
Number of pages per report	Unlimited	-

Inactive Session Timeout

A session is considered inactive if a connected user does not generate any traffic between the browser and the server for a time period that exceeds the value indicated below. For security reasons, TalentLink releases all resources held by expired sessions.

Item	Characteristics	Recommended
Back office sessions expire after	30 minutes	
Inactive application process expires after	30 minutes	

Inactive candidate home page expires after	30 minutes	