SuccessFactors HCM Suite

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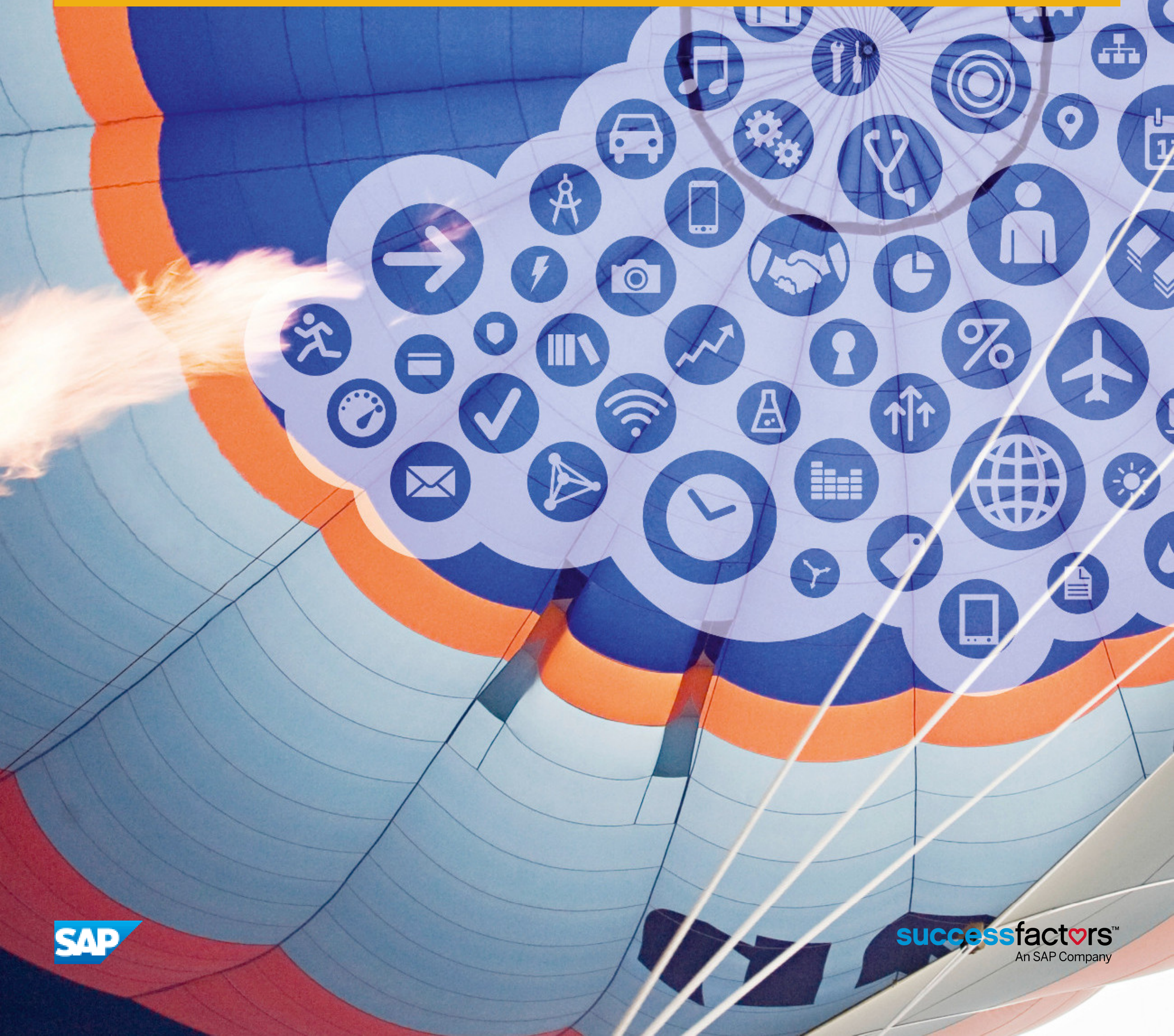
SuccessFactors Recruiting Management

Implementation Guide (Internal)



Content

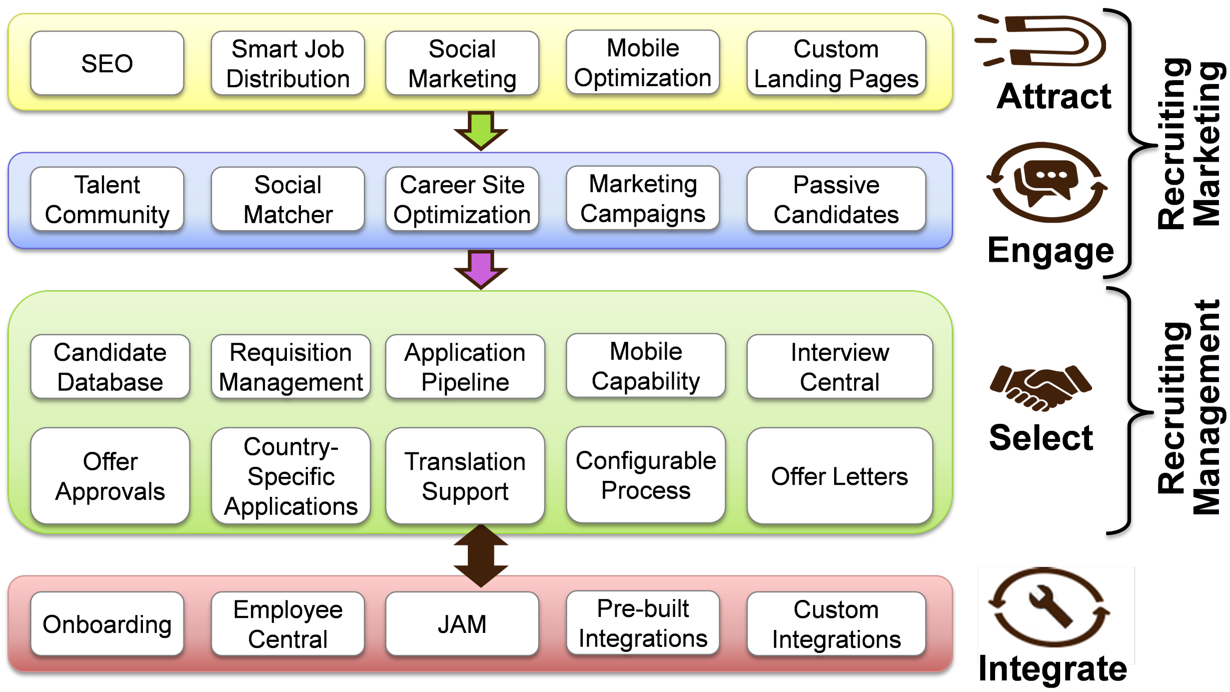
1 About this Document

This guide covers how to configure the SuccessFactors Recruiting Management product. It is intended for Professional Services, Customer Success, Solutions Consultants, sales, and anyone else who needs detailed knowledge about the Recruiting Management module.

2 What is Recruiting?

The SuccessFactors Recruiting solution helps companies attract, engage, and select the best talent match. The Recruiting Execution solution consists of two modules: Recruiting Marketing and Recruiting Management. Used together, these modules can help clients find the best candidate for a job, make an employment offer, and convince the candidate to accept that offer.

Recruiting Execution allows recruiters and recruiting teams to configure the solution to meet specific workflow needs. For example, some clients may use third-party agencies to help source candidates, or may hire predominantly manufacturing staff, whereas others may hire predominantly office workers. The figure below shows the features and capabilities of Recruiting Execution.



Recruiting Execution Solution

The recruiting process connects candidates who search and apply for jobs with recruiters who post jobs and work with both candidates and hiring managers. The solution's two modules emphasize functionality for both candidates and recruiters.

- *Recruiting Marketing (RMK):* Focuses on attracting and engaging candidates. This module increases sourcing ROI by showing clients which marketing strategies result in the best candidates for the lowest cost. The Recruiting Dashboard, a key part of Recruiting Marketing, displays metrics for elements like time to fill a position and budget savings. Recruiting Marketing also features smart job publishing to distribute jobs, Search Engine Optimization (SEO) to drive more traffic, and a talent community to capture passive candidates.
- *Recruiting Management (RCM):* The RCM Applicant Tracking System supports the sourcing capability of Recruiting Marketing. The module supports opening requisitions, processing candidate applications, and selecting the best candidate for a position. Other features enable you to:

- Identify, screen, select, hire, and onboard internal and external job applicants.
- Move candidates through recruiting pipeline to the appropriate stage
- Search database of internal and external candidates, and forward prospective applicants to a requisition
- Track internal data about application process in the applicant record
- Manage interview, offer, and hire process to close the requisition

The components shown are based on options and features configured in Provisioning and Admin Tools, as well as XML templates.

2.1 XML Templates Overview

To configure the recruiter and candidate experience according to client workflows, you must understand the role of XML templates in Recruiting Management. After establishing baseline configuration settings, most configuration work takes place in the XML templates. The primary XML components for Recruiting Management are:

- Candidate Profile template (also known as CPT)
- Application template (also known as the Candidate Data Model template, Candidate Interest Form template, or CDM)
- Requisition template (also known as Req template)
- Offer Details template (also known as the Offer Approval template)
- Event template
- Event Application template

Additional platform XML templates that are sometimes associated with Recruiting include:

- Succession Data Model (also known as the Employee Profile template)
- Corporate Data Model (also known as the Foundation Objects template, Job Code Entity template, or Job Classification Object template)

Other XML templates that are related to integrations include:

- Recruiting Management - Employee Central transformation template
- Background Check Transformation template
- Onboarding Transformation template

2.1.1 Use XML Templates In an Instance

Each instance requires a single candidate profile; the system does not support multiple candidate profiles.

Each Requisition template can reference only one Application template; however, a single Application template can be referenced by multiple Requisition templates.

An instance can contain multiple Offer Approvals, and any end user creating an Offer Approval can access all Offer Approval templates. You can select any Offer Approval template, but the template pulls data only from the requisition and application. This means you can create an offer approval using an Offer Template that is attempting to call data from fields that do not appear on the requisition or application.

The product only supports a single event template which must tie to a single event application.

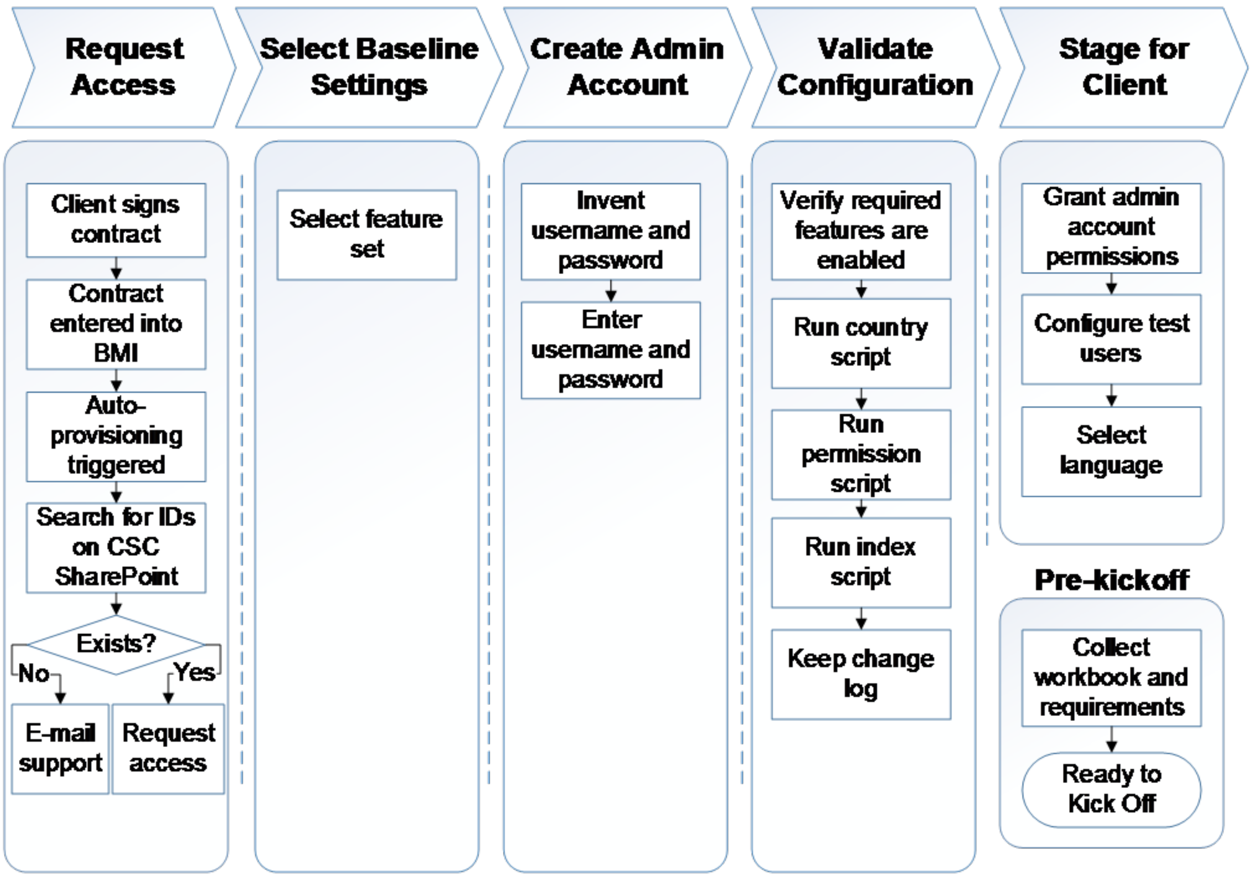
3 Provision and Set Up an Instance

Establishing a baseline instance is the starting point for configuring Recruiting. The baseline instance provides the foundation for configuring Recruiting according to client requirements.

You can find documentation about project methodology, best practices, and blueprint XML files at: https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx .

For information about requesting Provisioning access, see: https://mysp.successfactors.com/ps/Pages/Provisioning-Access.aspx .

Configure a baseline instance to turn on the components most clients use before a consultant configures an instance that satisfies individual client requirements.



Instance Provisioning Process Overview

3.1 Requesting Instance Access

Before you can configure the baseline settings or perform any other tasks, you must request access to the instance. The request and support path vary based on your role (such as Customer Success or Professional

Services) and intended use of the instance (such as demo or live client). In all cases, provide business justification with access requests.

3.1.1 About Instance Creation

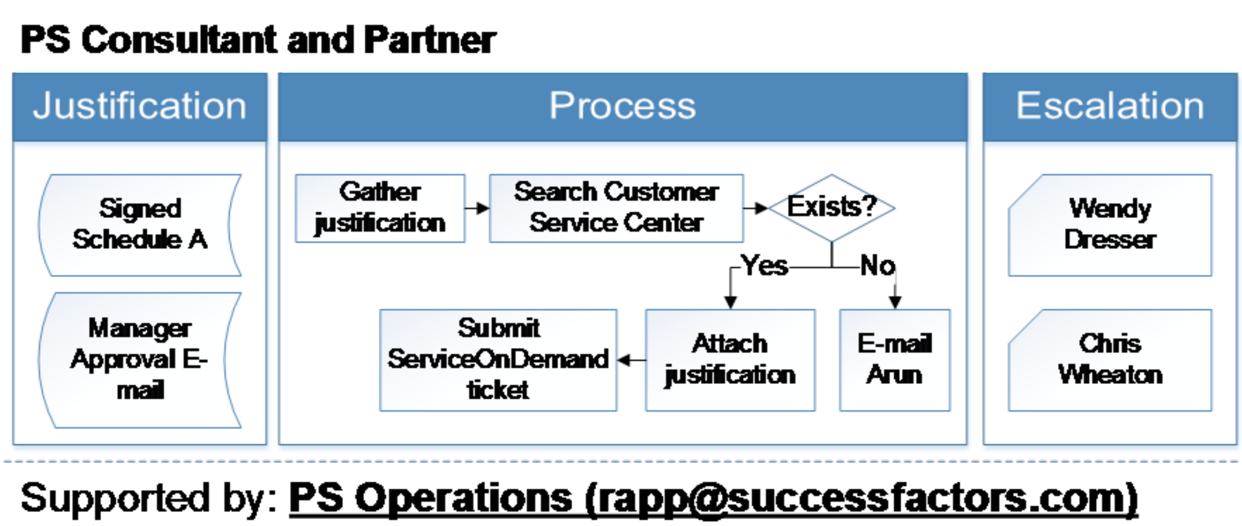
Instances must be autoprovisioned before you can request access. Entering a signed client agreement into BMI triggers the autoprovisioning process. If you do not see the agreement, contact Accounts Receivable (ar@successfactors.com) . If the sales order has been in ByDesign for more than seven days and you do not have an instance, open a JIRA ticket requesting a status update.

You can search the instance ID by client name at the Customer Service Center: http://support.successfactors.com .

3.1.2 Requesting Instance Access for Professional Services, Customer Success, and Partners

If you are a Professional Services consultant or partner working with a new or existing client instance, make requests through Service On Demand via the Customer Service Center site. Internal CS team members obtain access on a datacenter level to the client instances they support during their onboarding process. If a CS representative requires access to an instance housed in a different datacenter, consult the CS manager.

Context



Requesting Instance Access Process Overview

Procedure

1. Obtain a signed Schedule A and a copy of the Practice Manager approval e-mail.
2. Navigate to the *Customer Service Center SharePoint* site at http://support.successfactors.com and click *Service On Demand*.
3. Search by client name to obtain the instance ID.

   Tip

   If you cannot find the client by instance ID, check the spelling of the client name for accuracy and case. The search input is case sensitive. If you have verified the name for case and spelling, the instance may not exist. File a JIRA ticket to request help locating the instance ID.
4. Complete the relevant information in the request form, making sure to attach the Schedule A and approval e-mail.

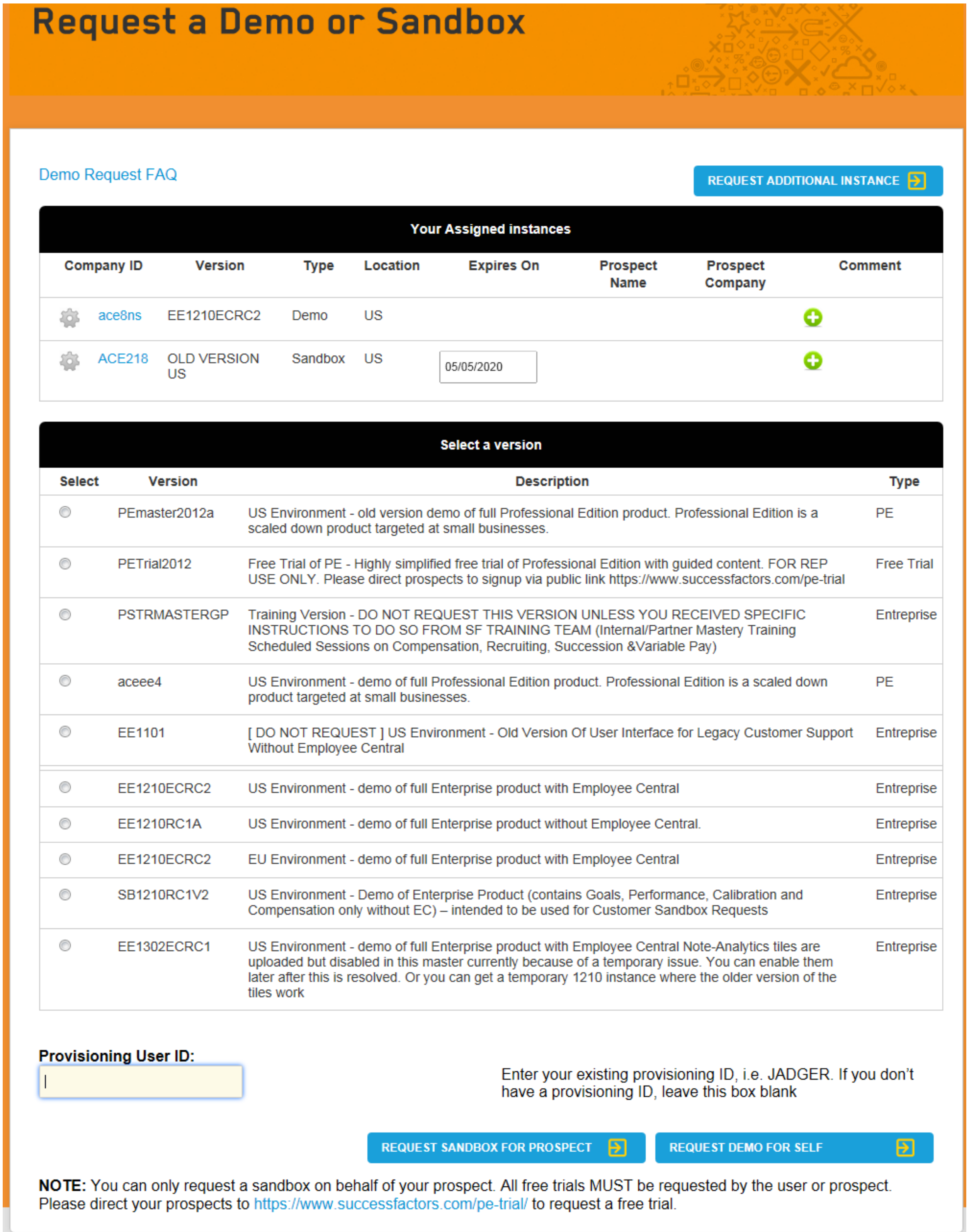
   Include information about all environments where a new account is needed.
5. Complete the request.

   Your ticket is assigned to the Professional Services queue.

3.1.3 Requesting Instance Access for Demo and Sandbox

To access a demo or sandbox instance for testing, sales, or other needs, use the autoprovisioning tool

Context



Request a Demo or Sandbox

Demo Request FAQ

REQUEST ADDITIONAL INSTANCE

Your Assigned instances

	Company ID	Version	Type	Location	Expires On	Prospect Name	Prospect Company	Comment
	ace8ns	EE1210ECRC2	Demo	US				
	ACE218	OLD VERSION US	Sandbox	US	05/05/2020			

Select a version

Select	Version	Description	Type
	PEmaster2012a	US Environment - old version demo of full Professional Edition product. Professional Edition is a scaled down product targeted at small businesses.	PE
	PETrial2012	Free Trial of PE - Highly simplified free trial of Professional Edition with guided content. FOR REP USE ONLY. Please direct prospects to signup via public link https://www.successfactors.com/pe-trial	Free Trial
	PSTRMASTERGP	Training Version - DO NOT REQUEST THIS VERSION UNLESS YOU RECEIVED SPECIFIC INSTRUCTIONS TO DO SO FROM SF TRAINING TEAM (Internal/Partner Mastery Training Scheduled Sessions on Compensation, Recruiting, Succession &Variable Pay)	Entreprise
	aceee4	US Environment - demo of full Professional Edition product. Professional Edition is a scaled down product targeted at small businesses.	PE
	EE1101	[DO NOT REQUEST] US Environment - Old Version Of User Interface for Legacy Customer Support Without Employee Central	Entreprise
	EE1210ECRC2	US Environment - demo of full Enterprise product with Employee Central	Entreprise
	EE1210RC1A	US Environment - demo of full Enterprise product without Employee Central.	Entreprise
	EE1210ECRC2	EU Environment - demo of full Enterprise product with Employee Central	Entreprise
	SB1210RC1V2	US Environment - Demo of Enterprise Product (contains Goals, Performance, Calibration and Compensation only without EC) – intended to be used for Customer Sandbox Requests	Entreprise
	EE1302ECRC1	US Environment - demo of full Enterprise product with Employee Central Note-Analytics tiles are uploaded but disabled in this master currently because of a temporary issue. You can enable them later after this is resolved. Or you can get a temporary 1210 instance where the older version of the tiles work	Entreprise

Provisioning User ID:

Enter your existing provisioning ID, i.e. JADGER. If you don't have a provisioning ID, leave this box blank

REQUEST SANDBOX FOR PROSPECT

REQUEST DEMO FOR SELF

NOTE: You can only request a sandbox on behalf of your prospect. All free trials MUST be requested by the user or prospect. Please direct your prospects to https://www.successfactors.com/pe-trial/ to request a free trial.

Demo Request Tool

Procedure

1. Navigate to http://demorequest.successfactors.com/index.php?id=2004 .
2. Fill in the required information.
3. Click *Request Additional Instance*.
4. Select the version for your demo instance.

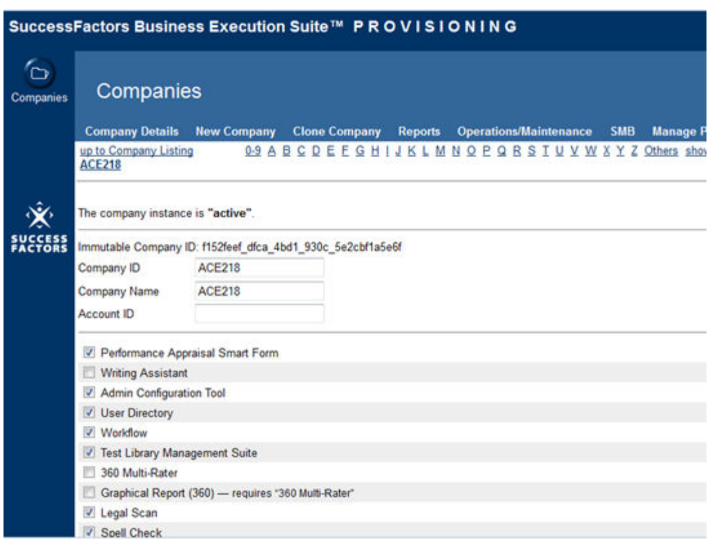
   Generally, this is **`US Environment – demo of full Enterprise product without Employee Central.`**
5. Enter your Provisioning user ID and select the type of account (either a sandbox for a prospect, or a demo for yourself).

Related Information

http://demorequest.successfactors.com/index.php?id=2004

3.2 Select Baseline Company Settings in Provisioning

Once you have access to instance provisioning, select baseline features relevant to Recruiting.



Changing the instance name or ID might break Recruiting links. If you must change the instance name or ID, consult Engineering by opening an RCM JIRA ticket.

Related Information

Configure Company Settings [page 29]

3.3 Creating Admin Account

The *Provisioning* > *Company Settings* section includes the option to create an admin account for configuring the Recruiting Management module. You can find the admin account fields toward the bottom of the Company Settings page.

Admin Account Creation

To reduce the liklelihood of logging into the wrong instance, use an account naming convention that provides information about the instance associated with the account. This reduces the likelihood of logging into the wrong instance.

Table 1: Admin Account Naming Convention

Field	*Recommendation*
Username	Use “admin” followed by the user’s first and last initial. For example, for user John Smith, adminjs.
Password	Use the instance ID as part of the password and preface or append a unique combination of letters, numbers, and a special character. Your password should be 8 characters, contain mixed-case letters, a number, and a special character. For example, if the instance ID is ACE218, a password might be ACE218$q.
First Name	User's first name
Last Name	User's last name. To differentiate support accounts from live client accounts, consider appending (SF) to the end of the name.
E-mail	User's work e-mail address. User account e-mail addresses need not be unique; you can set up multiple accounts against a single e-mail address.

3.4 Validating a Clean Instance

Audit the configuration before finishing and staging the instance for a client.

Context

Submit a request to Cloud Operations Service Requests (COSR) to run the scripts ton build the initial index, add permissions, and populate the character code for countries.

Procedure

1. Audit the initial configuration against the contract
   a. Gather any documented client requirements, including executed contract and Schedule A.
   b. Create a checklist of necessary features based on the client's requirements.
   c. Verify that the instance is accurately configured to support each feature.
   d. Upload these core documents in SuccessCentral. Save or print the baseline Company Settings to a PDF file and upload it to SuccessCentral.
2. In JIRA, open three support tickets, one for each script, to request COSR run the initial instance scripts.
   a. The first script request builds an index for the instance. Make sure that you specify it is a new instance. with the format `< DataCenter>/<InstanceID>`, and not a reindex.
   b. The second script populates the two-letter character code for countries in the territory table. Request COSR to run the following script for your instance, with the `< DataCenter>/<InstanceID>` format:

```
ant -f sfv4client.xml runclient -
Dscript_class="com.successfactors.legacy.service.ejb.UpgradeClient" -
Dscript_args="-c
<clientname> -dontask -executeScript
./db/oracle/
upgrade_populate_column_alpha2code_numericcode_territory_table.sql"
```

> **Recommendation**
>
> Do not use this script as is. Modify it with the appropriate changes to the client name as noted in italics.

   c. The third script adds missing permissions for new companies. Request COSR run the following script for your instance, including the <DataCenter>/<InstanceID> format:

```
-- SQL to insert missing permissions
set serveroutput on;
-- SQL to insert new USER_GROUP for "Manage Data Privacy Configuration Admin
System group
declare
procedure createMissingPermissions(permission_type in
varchar2,permission_string in varchar2,group_name in varchar2,grp_leader in
varchar2) is
permExist number(38,0);
permId number(38,0);
```

```
groupIdExist number(38,0);
groupId number(38,0);
permMapExist number(38,0);
begin
select count(*) into permExist
from <change_on_execution>.permission
where permission_type = permission_type
and permission_string_value = permission_string;
if permExist = 0 then
dbms_output.put_line('inserting permission :' || permission_string);
-- PERMISSION table entry is missing - insert into PERMISSION, USERS_GROUP ,
GRPPERM_MAP table
insert into <change_on_execution>.PERMISSION (permission_id, permission_type,
permission_string_value, permission_long_value)
values
(<change_on_execution>.perm_id_sq.nextval,permission_type,permission_string,-1
);
insert into <change_on_execution>.USERS_GROUP (users_group_id,
users_group_type, users_group_name, users_group_leader)
values (<change_on_execution>.grp_id_sq.nextval,'add-
hoc',group_name,grp_leader);
insert into <change_on_execution>.GRPPERM_MAP (users_group_id, permission_id)
values
(<change_on_execution>.grp_id_sq.currval,<change_on_execution>.perm_id_sq.curr
val);
else
-- PERMISSION table entry is found, retrieve the permission id for
'datamgmt_config' of type 'sys_admin'
select permission_id into permId
from <change_on_execution>.permission
where permission_type = permission_type
and permission_string_value = permission_string;
dbms_output.put_line('permission exists :' || permission_string || '
permission id :' || permid);
-- check if groupId exists for the permission id
select count(*) into groupIdExist
from <change_on_execution>.USERS_GROUP
where users_group_type = 'add-hoc'
and users_group_name = group_name;
if groupIdExist = 0 then
-- group id doesn't found
dbms_output.put_line('inserting group:' + group_name);
insert into <change_on_execution>.USERS_GROUP (users_group_id,
users_group_type, users_group_name, users_group_leader)
values (<change_on_execution>.grp_id_sq.nextval,'add-
hoc',group_name,grp_leader);
insert into <change_on_execution>.GRPPERM_MAP (users_group_id, permission_id)
values (<change_on_execution>.grp_id_sq.currval,permId);
else
-- group 'Manage Data Privacy Configurations Admin System group' found for
type 'add-hoc'
select users_group_id into groupId
from <change_on_execution>.USERS_GROUP
where users_group_type = 'add-hoc'
and users_group_name = group_name;
dbms_output.put_line('group exists :' || group_name || ' group id : '||
groupid);
select count(*) into permMapExist
from <change_on_execution>.GRPPERM_MAP
where users_group_id = groupId
and permission_id = permId;
if permMapExist = 0 then
dbms_output.put_line('inserting grp-perm mapping permission Id ' || permId ||
' group id ' || groupId );
insert into <change_on_execution>.GRPPERM_MAP (users_group_id, permission_id)
values (groupId,permId);
end if;
end if;
```



```
end if;
end createMissingPermissions;
begin
createMissingPermissions('security_admin','recruiting_security_privileges_secu
rity_admin','Recruiting Security Privileges Admin Security Group',-1);
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
insert_job_requisition','sfapi insert job requisition group','sfapi insert
job requisition group');
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
update_job_requisition','sfapi update job requisition group','sfapi update
job requisition group');
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
upsert_job_requisition','sfapi upsert job requisition group','sfapi upsert
job requisition group');
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
insert_job_code','sfapi insert job code group','sfapi insert job code group');
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
update_job_code','sfapi update job code group','sfapi update job code group');
createMissingPermissions('recruiting_sfapi_job_requisition','recruiting_sfapi_
upsert_job_code','sfapi upsert job code group','sfapi upsert job code group');
commit;
end;
```

3. Coordinate and track changes
    a. Keep a change log when working with an instance. This is especially important when multiple consultants work with a single instance. Start by creating a template to log changes
    b. When working with other consultants, communicate about shared objects. Ensure that changes in scope and other changes do not override necessary settings on a shard object, like the succession data model
    c. Keep a new version of the XML file each time you make a change. Label each version with the date and time you made the change, and make a corresponding entry in the change log. If a new error appears in the instance, compare against an earlier version of the XML file. This can save you a lot of troubleshooting time. Winmerge, is a useful free tool for comparing files, available at http://winmerge.org/ .
    d. Keep all other configuration workbooks and documents organized in a method similar to XML file versions, by date and time.

> **Tip**
>
> When working with XML, download a copy of the current configuration before making changes to ensure you can roll back the changes if necessary.

3.5 Staging the Instance

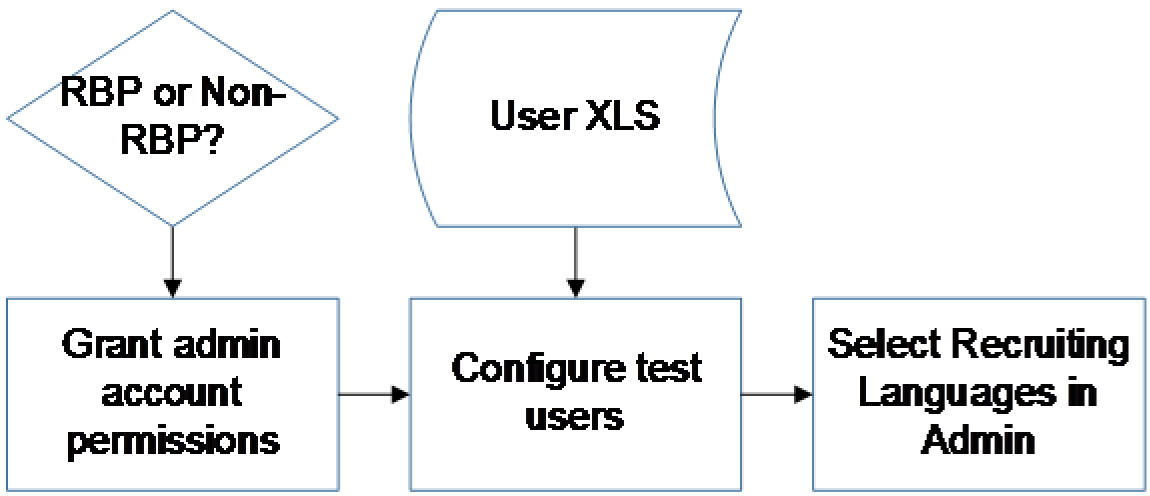
After creating an admin account, and verifying the instance settings, stage the instance for the initial Recruiting module configuration according to the customer's configuration workbooks. Instance staging involves three major processes, granting admin account permissions, confiuring the test users, and selecting recruiting languages.

Context

When staging the instance for client configuration, as part of granting admin account permissions, decide if the client requires role-based permissions (RBP).

Recommendation

In an instance with other modules turned on, or after going live into production, do not change the RBP settings as this may have negative impact. Do not enable RBP after production launch without consulting the client, and planning permissions migration for other modules



Staging Process and Inputs

Procedure

1. Enable Role-Based Permissions.
2. Navigate to *Provisioning* > *Company Settings* and select *Role-Based Permission*. In addition to selecting RBP settings, explicitly re-grant all permissions to the admin account.
3. Grant permisions. Even if all the permissions appear enabled when viewing the admin menu, by default, they are not explicitly. The way in which you grant permissions depends on whether RBP is enabled.
   - For RBP clients, log on as an administrative user and navigate to *Admin Tools* > *Manage Permission Roles*. Create a new role called *Admin.* Select all available options to grant user full access. Navigate to *Admin Tools* > *Manage Permission Groups*. Find the *Admins* group and add the new Admin user to the group. For new instances, you must create the *Admin* group. For the permission changes to take effect, log out, close the browser, and log back in.

- For non-RBP clients, log on as an administrative user and navigate to *Admin Tools* > *Manage Administrative Privleges.* Locate the admin account and grant all rights to the account. For the permission changes to take effect, log out, close the browser, and log back in.

> **Recommendation**
>
> If no changes are applied, you may need to explicitly grant admin permissions. Admin users created via Provisioning automatically have access to Admin Tools, but you must still explicitly grant permissions to their accounts. Another possible cause is that the instance was created with incorrect country lists, in which case you must open a ticket with COSR and request an execution of the country list script.

4. Load test users.
   - For RBP clients, navigate to *Admin Tools* > *Manage Security* > *Manage Employee Import.* Grant a user the ability to access the link. Upload a CSV file of test users.
   - For non-RBP clients, navigate to *Admin Tools* > *Manage Users* > *User Import*. Upload a CSV file of test users.
5. Select Recruiting languages. Navigate to *Provisioning* > *Company Settings.* > *Language Packs*.If you do not, you cannot edit or save the applicant status.

4 Configure a Baseline Instance

4.1 Configure Company Settings

A baseline configuration starts with *Provisioning* > *Company Settings*. This page includes various settings for the entire suite, some of which are not specifically relevant to Recruiting.

Provisioning > Company Settings

The table shows how to enable the settings and configure an instance that is sufficient for most clients, unless there is a client-specific requirement to deviate from the recommendations.

Table 2: Recommended Baseline Settings in Provisioning > Company Settings

Option name	*Recommended state*	*Critical?*	*Details*

Use email as external applicant userId	Enabled	No	If enabled, the candidate's e-mail address is the user name for external candidates. If disabled, the candidate is prompted to create an alphanumeric user name.
Enable Job Board Posting	Enabled	No	Should always be enabled. This is the setting that allows the Job Postings tab to exist in a requisition. This feature interacts with the intranetPosting, corporatePosting, agencyPosting, intranetPrivatePosting, and externalPrivatePosting field IDs in the Requisition XML.
Enable Source Quality Portlet	Disabled	No	Controls the visibility of the Source subtab on the Recruiting tab. This subtab shows a scatter plot of the top 10 sources, distributed by performance and cost of hire (as percent of salary). This is an out-of-date feature that is not useful to clients, because it requires manual data upkeep.
Enable Mass Copy Job Requisitions (Maximum copies allowed 30):	Enabled	No	Allows users to bulk copy requisitions.
Enable Applicant view as a pop-up	Disabled	No	Consult the client. Allows the application record to open in a separate window. This feature is infrequently used and may be deprecated in the future.

Enable Candidate Search OFCCP compliance warning and auditing (for US-based job reqs)	No Recommendation	No	Consult the client to determine whether OFCCP capabilities are required. If enabled, recruiting users conducting a candidate search receive a dialog box displaying the number of potential results and a prompt to accept the search results or refine the search criteria to adjust the number of search results. There are additional options in reporting to report on Candidate Searches.
Enable Radial Candidate Search	Enabled	No	If enabled, users may enter a zip code and distance to display results for candidate matches within a Zip code radius. There are two types of radial search, one for job boards and one for candidates. Radial Candidate Search requires configuration of country and Zip field IDs in the Candidate Profile XML.
Enable Candidate Conceptual Search (Available for clients in DC4, DC8, and DC12.)	Enabled	No	In combination with other setup steps, this switch enables the Conceptual search subtab on the Candidates subtab of the Recruiting tab, allowing recruiting users to perform a natural-language match on large blocks of text.

Enable Job Alerts for Candidates	Enabled if Recruiting Marketing is not used	No	Allows candidates to set up emails from Recruiting Management notifying them of new job postings. Clients using Recruiting Marketing may want to disable this feature since RMK provides external candidates with superior job alert functionality. If this feature is disabled, internal candidates do not have access to Job Alerts functionality, even though RMK does not provide an equivalent feature for internal job postings.
Disable Internal Email Job to Friend from Recruiting Management	No Recommendation	No	When enabled, users cannot email jobs from the internal career site to other users.
Disable External Email Job to Friend from Recruiting Management	No Recommendation	No	When enabled, users cannot email jobs from the external career site to other users.
Add home icon next to V12 global header	Enabled	No	Controls the appearance of the house icon next to the *Home* menu itiem in SuccessFactors HCM.

The next section that is specific to Recruiting is under *Provisioning* > *Recruiting Application*.

Table 3: Recruiting Application Settings

Option name	*Recommended state*	*Critical?*	*Details*	*Available in the Upgrade Center?*
Recruiting - requires “Question Object Management” and “Version 11 UI framework (ULTRA)”	Enabled	Yes	Enables Recruiting Management in the SuccessFactors HCM suite	
Question Object Management	Enabled	Yes	Required to enable Recruiting.	
Enable Background Check	No recommendation	No	Enable only if client has purchased and is using Verifications, Inc., or LexisNexis.	
Enable Onboarding Settings	No recommendation	No	Enable only if client has purchased and is using Verifications, Inc.	

Enable Stack Ranker style Interview Assessments	Enabled	Yes	If Interview Central is enabled in the instance, this switch enables the toolbar that shows which candidates rank highest. A dropdown menu enables the end user to select comparisons on overall interview rating and rating by competency.	
Enable Recruitment Agency Access.	Enabled	No	Enables the Agency portal. Some Requisition XML setup is required to enable agency postings.	
Disable Agency filtering by locale (show all jobs regardless of posting locale).	Enabled	No	Applies only in multi-language environments. By default, agencies can filter job postings based on language pack. Disable this option that all agency posted jobs appear to the agency, even if the job is not posted in the agency's language.	
Agency - Display Powered By SuccessFactors Logo.	Enabled	No	A UI-only element that hides or displays a reference to SuccessFactors in the agency portal. Enable unless the client requests otherwise.	
Enable Twitter integration	Disabled	No	Enables the RCM-Twitter integration that automatically tweets all externally posted jobs. This requires additional setup to provide Twitter account credentials. Enable only if requested by an RCM-only clients; do not enable with RMK.	

Disable CAPTCHA for external candidate account creation	Enabled	No	Consult with client. CAPTCHA is not accessibility compliance friendly. We use Google CAPTCHA because it is an Internet standard best practice. Anything easier than Google CAPTCHA is easy to hack.	
Enable E-Mail Verification for Career Site	Disabled	No	Enable only if client insists. When a candidate creates an account, this setting requires a candidate to verify their e-mail address before the account is created. If the candidate never receives the verification e-mail, he or she can re-create an account by signing up again with the same username or e-mail address. The system resends the validation e-mail.	
Enable YouCalc Model for Job Requisition	Enabled	No	Enables the YouCalc metrics widget on the Requisitions subtab. Additional setup is required when enabling this feature for the first time.	Yes

Enable Candidate Workbench	Enabled	Yes	Required. Enables a significant improvement in user interface and functionality on the application list page. Encourage existing clients to enable this switch in test mode, review the differences, and then enable it in Production. This switch is scheduled to become universal and it is better for clients to opt-in before that happens.	
Disable EaseIn/Ease-Out Animation.	Disabled	No	(Optional visual improvements.) This has a slight performance impact, so it can be disabled for clients with speed issues. Enter the desired delay in the *Animation Delay:* field.	
Disable FadeIn/Fade-Out Effect (Only available on Firefox).	Disabled	No	(Optional visual improvements.) This has a slight performance impact, so it can be disabled for clients with speed issues. Enter the desired delay in the *Animation Delay:* field.	
Enable Jam Integration for Job Requisition (requires Candidate Workbench, Jam Integration)	Disabled	No	Enables the Jam integration that allows a user to create an internal-only group for requisition participants to use in discussing recruiting progress.	
Enable Assessment Integration	No recommendation	No	Enable only if client has purchased and is using an integration with a SuccessFactors approved third-party assessment provider.	
Enable Interview Central and Set up Interviewers Popup (Not Ready for Production)	Enabled	No	Enables Interview Central tab.	

Enable advanced relevancy for candidate search	Enabled	No	(Optional, but recommended.) This enables the “cool little stars” Match Score column in the candidate search results that indicates the best match to the search criteria.	
Enable Separate Password Policy for External Candidates	Enabled	No	Allows admins to define a different password policy for external candidates than for SuccessFactors HCM users.	
Enable job role tags	Enabled	No	Allows admins to associate picklist values with Families and Roles data so users creating requisitions via Browse Families and Roles must first select from a picklist and then see only the relevant group of families and roles. Additional picklist and value mapping setup required.	
Enable Job Code	Enabled	No	Allows job code from Families and Roles to appear as the selectable value when using Browse Families and Roles to create a requisition. If disabled, behavior is to select the role instead of the job code. Must be enabled if Job Code Entity functionality is used in the instance.	
Enable Late Stage Applications	Enabled	No	Allows a recruiter to add a forwarded candidate to a requisition without having the candidate fill out an application first. Discuss with the client whether to enable this functionality.	

Enable Comment Visibility on the Jobs Applied Portlet	Enabled	No	Enables recruiting users to view application comments for each job requisition in the Jobs Applied Portlet.	
Enable Forward Candidate to Colleague for Internal Employees	Enabled	No	Allows permissioned users to forward candidates via e-mail to other SuccessFactors users.	
Allow Attach Resume and Cover Letter	Enabled	No	Allows the end user, when forwarding candidates, to select whether or not to include the resume and cover letter as a zip file in the forward candidate e-mail notification.	
Resume Parsing	No Recommendation	No	Enables resume parsing functionality. Clients must also complete Standardization Mapping.	Yes
Enable Offer Approval	Enabled	No	Enables offer approval functionality so permissioned users can create versioned offer approval records and specify a list of approvers. Requires additional XML setup.	
Enable Posting to specific agencies (Warning: Once this feature is enabled, it cannot be disabled)	Enabled	No	Consult with client. Allows recruiting users to select the agencies to which to post jobs, instead of posting the job to all agencies.	
Enable SFAPI Webservices	Enabled	No	Allows admin to grant selected users SFAPI permissions to recruiting objects.	

Enable Job Description Header and Footer	Enabled	No	Allows header and footer templates to be defined by an admin. The headers and footers can then be selected in the requisition by users who have appropriate permissions. Requires additional setup in the Requisition XML.	
Hide Jobs Applied Portlet	Disabled	No	If enabled, hides the Jobs Applied Portlet from all users. Encourage existing clients with this switch enabled to disable it and manage Jobs Applied Portlet visibility via admin-managed permissions. This switch is scheduled to be removed and it is better for clients to begin management of the feature in Admin Tools before that happens.	
Hide PoweredBy Logo on the career site	Disabled	No	A UI-only element that hides or displays a reference to SuccessFactors in the career site. Enable unless the client requests otherwise	
Allow users to optionally provide comments on application status change	Enabled	No	Adds a free-text box on the status change confirmation screen that appears when a recruiting user moves applicants to a different status. Enable unless client requests otherwise.	
Configure link for company logo on the career site	Enabled	No	Creates a hyperlinked image of the company logo in the upper-left corner of the career site.	

Do not allow admin users access to Recruiting Attachment documents	Disabled	No	If enabled, this switch prevents admins from accessing recruiting-related attachments via the File Storage Management feature in Admin Tools.	
Candidate Purge: Do not purge Candidate Profile if there are existing applications in the system for that candidate	No recommendation (DRM 1.0)	No	Prevents candidate data from being deleted if the candidate has active applications in progress. Applicable only in instances with DRM 1.0. Enable or disable based on the client's preference.	
Application Purge: Use Application Disposition date to start the Application aging for purge (Default is Application creation date)	No recommendation (DRM 1.0)	No	Determines the date on which the admin-configurable country-specific data purge countdown is based. Applicable only in instances with DRM 1.0. Enable or disable based on the client's preference.	
DRM 2.0 Application Purge: Use Application Disposition date to start the application aging for purge (Default is Application last modified date)	No recommendation (DRM 2.0)	No	Determines the date on which the admin-configurable country-specific data purge countdown is based. Only applicable in instances with DRM 2.0. Enable or disable based on the client's preference.	
DRM 2.0 Candidate Purge: Do not purge Candidate Profile if there are existing applications in the system for that candidate	No recommendation (DRM 2)	No	Prevents candidate data from being anonymized and made unsearchable in the instance if the candidate has active applications in progress. Only applicable in instances with DRM 2.0. Enable or disable based on the client's preference.	
Enable Social Sourcing	No recommendation	No	Enable only if the client is using RMK or Jobvite. Additional setup is required. RMK and Jobvite cannot both be used in the same instance.	

Jobvite	No recommendation	No	Enable only if the client is using Jobvite. Additional setup required.	
Recruiting Marketing	No recommendation	No	Enable only if the client is using RMK. Additional setup required.	
Enhanced Job Search UI	Enabled	No	(Required.) A UI and functionality improvement on the career site job search page. Encourage existing clients to enable this in test mode, review the differences, and then enable it in Production. This switch is scheduled to become universal and it is better for clients to opt-in before that happens. (The easiest way to identify whether this is enabled when viewing the job search page is to check for an automatic count of jobs that match the search criteria.)	

Enable Multilanguage Job Search	Enabled	No	If enabled, a *Job Language* field appears on the career site job search page and allows candidates to select from a list of enabled languages, filtering their search results to only jobs posted in the selected languages. Additional setup required. ➜ **Recommendation** Enabling multilanguage job search treats US English (en_US) and UK English (en_GB) as one language. Disabling this setting decouples the two languages.	
Enable Default Search to All Languages	Enabled	No	If enabled, the default value in the Job Language field on the career site job search page is set to `Any`. If disabled, the field attempts to default to the language of the candidate.	
Enable Radial Job Search	Enabled	No	If enabled, users can enter a Zip code and distance to display results for job matches within a zip code radius. There are two types of radial search — one for job boards and one for candidates. Additional XML setup is required.	

Complete Profile before Application	Enabled	No	If enabled, candidates who apply to a job are first taken to their Candidate Profile to complete the fields there, or review the information to ensure its accuracy. This helps provide the client with the most complete and up-to-date searchable candidate database information. Once the profile is complete, candidates are then taken to the Application page to complete the fields there. If disabled, the candidate can apply for jobs without completing the Candidate Profile, and it is possible to have applicants who are not searchable in the candidate database. Clients who enable this feature may want to review their configuration choices on the Candidate Profile and Application to ensure the candidate does not have to provide duplicate data on both records.	Yes
Enable Apply with LinkedIn™ for External Career Site (requires "Complete Profile before Application" and "Enhanced Job Search UI")	Enabled	No	Enables the *Apply with LinkedIn* action for external candidates who want to use data from their LinkedIn accounts on the Candidate Profile during the application process. Requires additional admin setup.	Yes

Enable Apply with LinkedIn™ for Internal Career Site (requires "Complete Profile before Application" and "Enhanced Job Search UI")	Enabled	No	Enables the *Apply with LinkedIn* action for internal candidates who want to use data from their LinkedIn accounts on the Candidate Profile during their application process. Requires additional admin setup.	Yes
Enable Merge Duplicate Candidate Profiles	Enabled	No	Shows a warning on the Candidate Profile if the candidate appears to be a duplicate. Enables admins with appropriate permissions to merge duplicate candidates.	Yes
Enable inline viewing of resumes (Inline Resume Viewer)	Enabled	No	Enables the ability to show an image of candidate resumes in the system rather than prompting the user to download and open resume attachments on his or her local computer.	

Enable Inactive Internal User Search Index Deletion(Contact SF Release team for deleting already existing internal inactive users search index)	Enabled	No	In a DRM 2.0 environment, this is redundant with newer functionality and has no functional effect. The behavior of the system is defined by the DRM 2.0 feature. However, the feature should be enabled. In a non-DRM 2.0 environment, this properly cleans the search indexes, so inactive internal users do not appear in search results after their profiles are deleted. The setting affects deactivations going forward. In an existing environment, you may need a script to clean up past deactivations that still appear in search results.	
Enable Additional Attachments Post Application	Disabled	No	Allows a candidate to come back and upload additional application attachments. This is legacy functionality. A better approach to this business need is to use a multistage application.	

Enable External Career Site Home Page. (This will turn this feature on for External Career Site and all micro-sites)	Enabled	No	(Required.) Enables a significant improvement in user interface and functionality on the career site. Encourage existing clients to enable this switch in test mode, review the differences, and then enable it in Production. This switch is scheduled to become universal and it is better for clients to opt-in before that happens.	Yes
Agency advanced ownership setting • Ownership for requisition. • Ownership for duration.	Enabled • No Recommendation • No Recommendation	Yes	Sets the period of time when an agency is listed as the owner of a candidate in the database.	
Enable Multi Stage Application	Enabled	No	Enables the ability to hide or display the application fields that appear in a given applicant status workflow step. Do not check this box without moving the application permissions to the job req XML, as detailed in the Multistage Application [page 95] section.	
Enable Recruiting Team functionality	Enabled	No	Allows multiple users to be specified with access to a requisition. Additional setup required.	

Enable Employee Referral Program • Enable Employee Referral Program (Not for use with Recruiting Marketing) • Enable Employee Referral Program for RMK (Requires Recruiting Marketing)	No Recommendation	No	Allows the user to configure Referral Ownership rules and Employee Referral Program Information in Admin Tools. Additional setup required.	

The final area to consider is the *Provisioning* > *Document Attachment* section. Table 4 shows the suggested settings.

Table 4: Document Attachment settings

Option name	*Recommended setting*	*Critical?*	*Details*
Attachment Storage Allocation	1000 G	Y	Upper limit to the attachment storage space allocated to the instance.
Attachment user limit	No Limit	Y	Upper limit to he attachment storage space allocated to the individual user.
Attachment max file size	5M	Y	The maximum size of a single attachment that can be uploaded. This value is not designed to scale to media files like video and audio.
Attachment Limit Notification Monitor Period	7	Y	Super admins and admins who have access to the File Storage Management feature in Admin Tools receive a notification when the company has hit a threshold of 75% of their total Attachment Storage Allocation. When the notification is turned on, the system runs a job every X days (1,3,5,7) to trigger the e-mail reminder.

Related Information

Candidate Profile [page 108]
Requisition [page 248]
OFCCP and VETS100 [page 619]
Radial Job Search [page 577]

Conducting a Candidate Search [page 154]
Configure Standardization Mapping [page 555]

4.2 Configure Logo and Company System Settings

Most settings on the Company System and Logo Settings page do not apply to RCM or RMK, or they apply across all products and are documented as part of Platform documentation.

The settings specifically outlined either apply to Recruiting or require particular clarification to confirm they are not applicable to Recruiting.

Table 5: Recommended Feature List

Option name	Recommended state	Critical?	Details

Logo Requirement	Set this to the company's preferred logo	Yes	Setting a logo causes to appear in the upper-left corner of the SuccessFactors HCM suite. The logo uploaded here also appears on the microsites by default, but can be overridden. It also appears on emails and offer letter templates where the [[LOGO]] token is used, as well as in some hard-coded e-mail templates such as the *Send Job to Friend* e-mail. Advise the client of this so they can make a choice between an internal branding logo for SuccessFactorsHCM or an externally facing logo to be presented in all these areas. How to upload images Partner access Upload all images used by the client to the datacenter that contains the client's instance. The instructions above apply to both the logo and other images, such as content used on the RCM microsites. This does not apply to RMK pages. After uploading the logo and obtaining a static URL, paste the static URL in the "URL of the Company Logo" field and click *Set Company Logo URL*. Allow an hour for changes to take effect. If the offer letter contains a [[LOGO]] token, but the company logo is not set in Admin Tools, no logo appears.

Outlook Calendar Integration	Disabled	No	Outlook calendar integration provides an icon on the application page. Clicking the *Create Meeting* icon pops up an ics file (in Outlook this appears as an appointment) with the applicant's name populated in the Subject line. This is not an interview scheduling integration. No additional data flows into the appointment record (no interviewers, dates/times, or applicant data, for example.) No acceptance data is passed from the appointment into RCM. Disabling this feature is recommended, because most clients are seeking full interview integration. This is an enhancement request that is under consideration. Enabling the Outlook Calendar Integration doesl not meet the interview scheduling integration expectation..
Hide External Users from search results	Not applicable	No	This setting does not affect the RCM or RMK products.
Enable HTML email notifications	Enable	No	Affects only system E-Mail Notification templates, not Recruiting Email templates.

4.3 Decide on Recruiting Operators

Many permissions and routing capabilities in SuccessFactors Recruiting Management are controlled based on a user's relationship to the requisition record. Set up these user relationships by entering the user into an operator field on the requisition.

Operator Functionalities

Operator designators are used in the following configuration areas:

- Requisition Route Maps
- Requisition XML field-permission
- Requisition XML feature-permission
- Requisition XML button-permission
- Application XML field-permission
- Application XML button-permission

These operators are central to the configuration of the system, so plan how they will be used early in the project; many configuration decisions cannot be made until the client identifies the users involved in the recruiting process.

Operator Fields

A predetermined list of operator fields is supported; each operator field has a related designator.

Table 6: Recruiting Operator fields and designators

Operator Field ID	*Designator*	*Dependent Operator Team*
originatorName	O	originatorTeam
hiringManagerName	G	hiringManagerTeam
recruiterName	R	recruiterTeam
coordinatorName	T	coordinatorTeam
sourcerName	S	sourcerTeam
secondRecruiterName	W	secondRecruiterTeam
vpOfStaffingName	Q	vpOfStaffingTeam
baseline permissions (no field id)	V	vTeam
candidate (no field id) *Used only in multistage application envi-ronments*	C	*None*

The V designator defines the permissions a recruiting user receives when viewing the record if the system cannot identify another operator association for them. For example, if the requisition is routed to an unrelated user to approve, that approval user would receive V permissions.

Operator designators determine permissions for users listed in the operator fields and also the users listed in the operatorTeam fields. For more information about operatorTeam fields, see the Manage Recruiting Team Settings [page 557] section of this guide.

Work with the client to determine how this list of operators will be used in their business process. Once the decision has been made, use *Provisioning* > *Job Requisition System Field Labels* to set up the operator fields with the appropriate labels:

Relational Operators

In addition to the operator fields, you can set up permissions and routing to users who have a defined relationship to the operator users. These relationships are derived from relationships established in the user data. The following table shows supported relationships to the operator fields, and the corresponding designator for each relationship.

Table 7: Relational Recruiting Operators

Operator Relationship	*Designator*
Operator’s Manager	xM
Operator’s Manager’s Manager	xMM
Operator’s Management Chain	xM+
Operator’s Direct Report	xD
Operator’s Direct Report’s Report	xDD
Operator’s HR Contact	xH
Operator’s Matrix Manager	xX
Operator’s Custom Relationship	xC

Most operator designators (R) can be appended with a relationship designator (M) to indicate a relational operator (RM). The exception is V, which cannot be set up relationally because it does not hold a single user but defines baseline permissions for users who are not in a specific operator or team field.

4.4 Admin Tools> Manage Recruiting Settings

After completing the baseline configuration settings in Provisioning, configure settings in Recruiting Admin. These initial baseline settings relate to multiple aspects of Recruiting, such as Requisition and Offer, to set the stage for configuring the system according to specific client needs. For a table of recommended settings, see Admin Tools for Recruiting [page 462]..

5 Configure Initial Settings in Admin Tools

After completing all the baseline settings according to the recommendations in the tables, the overall configuration is ready for additional customization according to client requirements. Next, configure the initial dependencies common throughout the system.

Initial Configuration Steps After Baseline Process Overview

5.1 System Quick Facts

- Keepalives extend a candidate or recruiting user’s authenticated session as long as they are actively using Recruiting pages.
- Mousing and moving between fields, or other normal on-page activity keeps a user's session active. If a user has been inactive for 25 minutes, they will be prompted with a timeout warning, where they can choose to extend their session. The timeout period of 30 minutes is not configurable, and both internal and external candidates are shown a timeout warning after 25 minutes of activity. If the session is not extended after the timeout prompt, the system autosaves the following pages:
    - Requisition
    - Application
    - Event
    - Event Application
    - Interview Central
    - Send Email
    - Recruiting Email Templates
    - Recruiting Offer Letter Templates
    - Recruiting Header/Footer Templates
    - Recruiting Sites Templates
    - Recruiting Onboarding Templates
- Customers and users can provide links directly into specific areas of Recruiting Management. These URLs are known as deep links, and are absolute rather than relative, meaning they are always the same.
- Recruiting and admin users can specify the subtab on which to land for different modules of the SuccessFactorsHCM suite. After logging in, the user can navigate to the *User System* menu (the same dropdown where can proxy as another user or log out, located next to the search bar) *Options* > *Sub Tab*

Configuration ▸. The user can then specify their preferred subtab for each module, for example, Interview Central, when navigating to the Recruiting module.

Deep Links

Table 8: Recruiting Management Deep links

Description	Linked Feature	Deep Link
RCM Tabs Deep Link	Recruiting Landing Page	`/sf/recruiting`
RCM Tabs Deep Link	Events	`/sf/recruiting/events`
RCM Tabs Deep Link	Job Requisition Summary	`/sf/recruiting/jobreqsummary`
RCM Tabs Deep Link	Sources	`/sf/recruiting/sources`
RCM Tabs Deep Link	Preferences	`/sf/recruiting/preferences`
RCM Tabs Deep Link	Candidates	`/sf/recruiting/candidates`
RCM Tabs Deep Link	Interview Central	`/sf/recruiting/interviewcentral`
RCM Tabs Deep Link	Help	`/sf/recruiting/recruitinghelp`
RCM Tabs Deep Link	Careers Landing Page	`/sf/careers`
RCM Tabs Deep Link	Job Applications	`/sf/careers/jobapplications`
RCM Tabs Deep Link	Job Search	`/sf/careers/jobsearch`
RCM Tabs Deep Link	Job Alerts	`/sf/careers/jobalerts`
RCM Tabs Deep Link	Saved Jobs	`/sf/careers/savedjobs`
RCM Tabs Deep Link	My Candidate Profile	`/sf/careers/mycandprofile`
RCM Tabs Deep Link	Saved Applications	`/sf/careers/savedapplications`
Multilevel Deep Link	Recruiting- Job Req- Create New	`/sf/recruiting/jobreqsummary/new`
Multilevel Deep Link	Recruiting - Job Req- Reports	`/sf/recruiting/jobreqsummary/reports`
Multilevel Deep Link	Recruiting - Job Req – Offer Approvals	`/sf/recruiting/jobreqsummary/offerapprovals`
Multilevel Deep Link	Recruiting – Events – Reports	`/sf/recruiting/events/reports`
Multilevel Deep Link	Recruiting – Events – Offer Approvals	`/sf/recruiting/events/offerapprovals`

Description	Linked Feature	Deep Link
Multilevel Deep Link	Recruiting – Preferences – My Saved Questions	`/sf/recruiting/preferences/mysavedques`
Multilevel Deep Link	Recruiting – Preferences – Team Recruiting	`/sf/recruiting/preferences/myrecteam`
Multilevel Deep Link	Recruiting – Preferences – My Saved Rating Scales	`/sf/recruiting/preferences/mysavedratings`
Multilevel Deep Link	Recruiting – Candidates - Search	`/sf/recruiting/candidates/search`
Multilevel Deep Link	Recruiting – Candidates – Saved Search	`/sf/recruiting/candidates/savedsearches`
Multilevel Deep Link	Recruiting – Interview Central – Opened	`/sf/recruiting/interviewcentral/open`
Multilevel Deep Link	Careers – Employee Referral	`/sf/careers/empreferrals`
Multilevel Deep Link	Careers – RMK Employee Referrals	`/sf/careers/rmkempreferrals`
Record-level Deep Link	Recruiting – Job Requisition – Requisition ID	`/sf/recruiting/jobreqsummary?reqid = <value>`
Record-level Deep Link	Recruiting – Events – Event ID	`sf/recruiting/events?eventid=<value>`
Record-level Deep Link	Careers – Job Search – Job Requisition ID	`/sf/careers/jobsearch?reqid=<value>`

5.2 Rating Scales

Rating scales are a Platform feature used by multiple modules. In Recruiting, a rating scale is associated with a Requisition Template and used to rate competencies on the Interview Assessment.

When selecting or creating prescreen questions on a requisition, users can use rating scales to specify directionality for answers (x or higher, y or lower). Rating scales have an advantage over other question types, as they allow more than one "correct" answer

To use rating scales, first define them in the requisitions, then select them during question set up. Rating scales can be translated.

Rating scales have a number of limitations — for example, the rating label, rather than the rating vvalues appears on the Interview Assessment. The Interview Assessment hover does not show the translated rating labels. On prescreen questions the number lead on the rating cannot be removed.

To create a new rating scale

1. Navigate to *Admin Tools* > *Company Settings* > *Rating Scales*.
2. If using the *Rating Scale Designer*, click the *Create New Rating Scale* button. If using the *Enterprise Rating Scale* tool, type the name of the rating scale and click *Create*.

To define or modify a rating scale

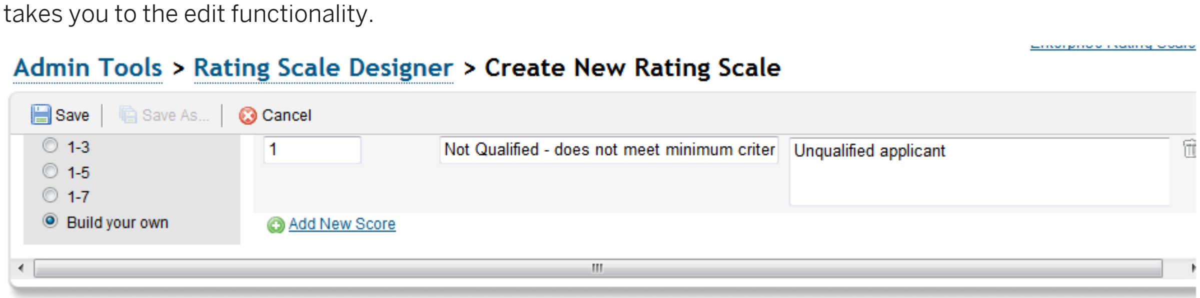
1. Open the desired rating scale. If creating a new scale, the creation process takes you to the edit functionality.
2. Preselect a rating scale by clicking one of the prebuilt rating scale options, or you can build your own. When creating a new rating scale, the system defaults to the 1-5 scale.
3. To modify the scale, enter the score, label, and description, and then click *Add New Score* for an interview rating scale.
4. Click *Save* to save the rating scale.

5.2.1 Create a New Rating Scale

Recruiting uses rating scales to rate competencies on the Interview Assessment, or select or create prescreen questions on a requisition.

Procedure

1. Navigate to *Admin Tools* > *Company Settings* > *Rating Scales*. If you are using the Rating Scale Designer, click *Create New Rating Scale*. If you are using the Enterprise Rating Scale tool, type the name of the rating scale and click *Create*.
2. To define or modify a rating scale, open the rating scale. If you are creating a new scale, the creation process takes you to the edit functionality.



3. Select a rating scale by clicking one of the prebuilt rating scale options, or build your own. When creating a new rating scale, the system defaults to the 1-5 scale.
4. To modify the scale, enter the score, label, and description, and then click *Add New Score*.
5. Click *Save*.

5.3 Picklists

A picklist defines the options that appear in dropdown menus throughout the product, including requisitions, candidate profiles, applications, and the offer process. The XML templates support picklist as a field type, and associate fields that are defined as picklist fields with picklist IDs.

A picklist field shows the values associated with that picklist ID. Set up picklists in *Admin Tools* > *System Properties* > *Picklist Management* > *Picklists*. Before loading any XML templates into the instance, create the appropriate picklists, because Provisioning checks for and validates that any picklists referenced by the XML file already exist.

There are a few details to keep in mind about picklists:

- *Language pack required:* Logged-in users who interact with Recruiting Management must have a valid language pack defined in their Employee Profile. If the language pack is not defined, is defined incorrectly, or refers to a language pack that is inactive for the instance or in Recruiting Languages, picklist fields may not work properly. For example, requisition picklist fields may appear as read-only, even if the user has write permission for those fields.
- *Parent-child (cascading) picklists:* You can set up cascading picklists that depend on other picklists as a way to help the user narrow down choices.. For example, the client may require the user to select a city, state (or province/region), and country. You can set up cascading picklists so that when a user selects a country, the state list automatically adjusts to display values that are appropriate to the chosen country, and when the user selects a state, the city list automatically adjusts to display values that are appropriate to the state.

Configuring picklists

1. Navigate to *Admin* > *System Properties* > *Picklist Management* > *Picklists*.
   a. To export existing picklists, select *Export all picklist(s)*, select the appropriate *Character Encoding*, and click *Submit*. This step ensures that you do not overwrite the existing configuration without examining existing settings. A CSV file is generated with the following columns:

   Table 9:

Column name	*Description*
picklistId	The ID in the system.
OptionId	Generated value.
minValue	Minimum value for a range.
maxValue	Minimum value for a range.
value	The only two values used fro Recruiting are: ◦ 99999 - defines a closed requisition status ◦ 88888- defines a hold requisition status

status	○ ACTIVE ○ DELETED - Neither reportable nor selectable. Causes existing records to report the picklist optionID instead of the label. ○ OBSOLETED - Reportable but not selectable.
external_code	Unique ID for the value; rarely used by Recruiting.
parentOptionId	Used for parent-child picklists. Uses the OptionID.
<language-specific columns>	Columns with localized information according to the purchased language packs.

2. In a new row at the end of the CSV file, enter the name used in the XML file in the ^picklistId column.
3. Set the minValue, maxValue, and value.
4. For each language, enter the value.
5. Save the file.
6. Use *Admin Tools* > *System Properties* > *Picklist Management* > *Picklists* to upload the modified file.

To add a parent-child (cascading) picklist

1. Create a new parent picklist item.
2. Save and upload the CSV file to create an OptionID.
3. Using the OptionID in the ParentOptionID column, create the child entries.
4. Save the CSV file and use *Admin Tools* > *System Properties* > *Picklist Management* > *Picklists* to upload the modified file.

For more information and detailed instructions about managing picklists, see the Platform documentation on picklist management .

5.4 Families and Roles

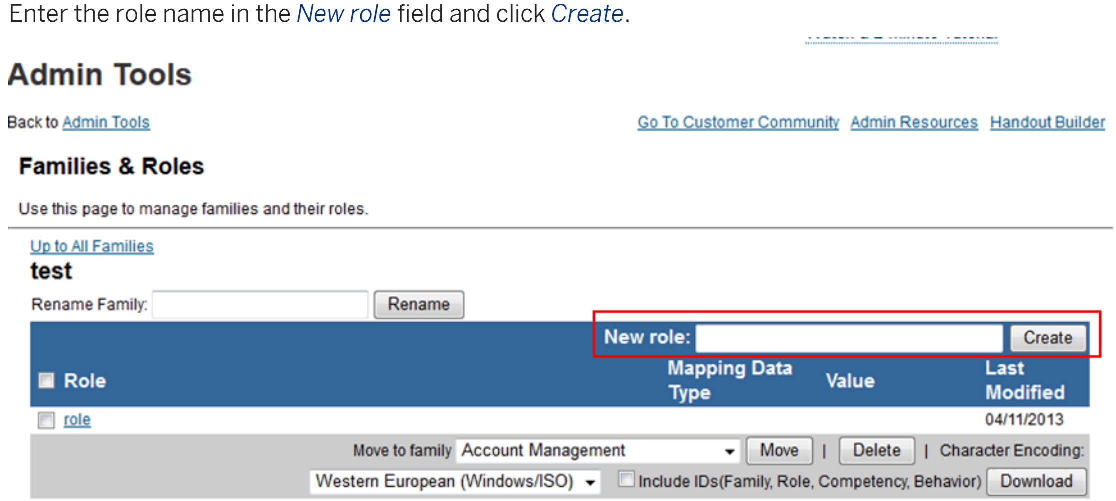
The Families and Roles feature allows the client to establish a job hierarchy based on the idea of job families (for example, Accounting), roles within families (for example, Sr Accountant), and optional job codes associated with that role.

Families and Roles in Recruiting allows users to browse the library of roles, select one or more roles or job codes, and prepopulate some data when creating a new requisition. Use *Admin Tools* > *Families and Roles* to manage individual Families and Roles, or import groups via *Admin Tools* > *Import Families and Roles* .

Creating Families and Roles

1. Navigate to *Admin Tools* > *Managing Competencies and Skills* > *Families and Roles*.
2. Enter the family name in the *New Family* field and click *Create*.

3. Enter the role name in the *New role* field and click *Create*.



4. Select the role you created, then click *Edit*. You see a window where you can associate the role with a job code.
   Click *Add job code* to select the job code.

5.4.1 Import Families and Roles

Procedure

1. Navigate to *Admin Tools* > *Managing Competencies and Skills* > *Import Families and Roles*.
2. Click *Choose File* to select your file containing families and roles. Family and Role import files have no header row.

Table 10:

Column	*Description of Content*	*Allowable Values*	*Sample Content*
Column A	Declare the type of item you are importing.	FAMILY ROLE	FAMILY
Column B	Family name	Text	Accounting
Column C	If the row type is FAMILY, leave blank. If the row type is ROLE, populate with the role name.	Text	Senior Director, Accounting
Column D	If the row type is FAMILY, leave blank. If the row type is ROLE, populate with the job description (optional; if no job description is required, leave this column blank).	4,000 characters of text	This job involves... Skills and qualifications are... You should apply with us if you...
Column E	If the row type is FAMILY, leave blank. If the row type is ROLE and the client has a one to one role to job code ratio, populate with the job code.	Short Text	ACTDIR001

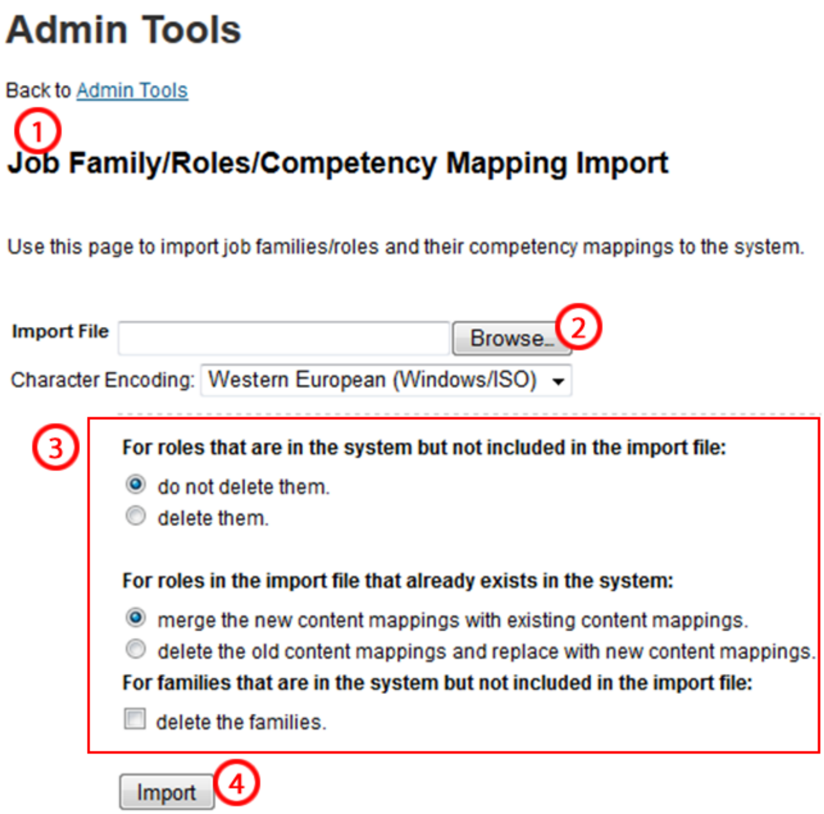
3. If the client wants to associate multiple job codes with a single role, a second file load is required. Upload the file with the additional job codes to *Import Familes and Roles* after the initial Families and Roles file is successfully imported.

Table 11:

Header	*Description of Content*	*Allowable Values*	*Sample Content*
JOBCODE	Populate with a job code. This job code may appear multiple times in the file if it is associated with different families and roles, but can only appear once within a given family and role combination.	Short Text	ACTDIR001
FAMILY	Populate with the Family associated with this job code. The same family can appear multiple times in this file.	Text	Accounting

ROLE	Populate with the role name associated with this job code. The same role can appear multiple times in this file.	Text	Senior Director, Accounting
MODULE	For the purposes of Recruiting, always declare this as Default		Default

4. Select the appropriate data management options.
5. Click *Import*.



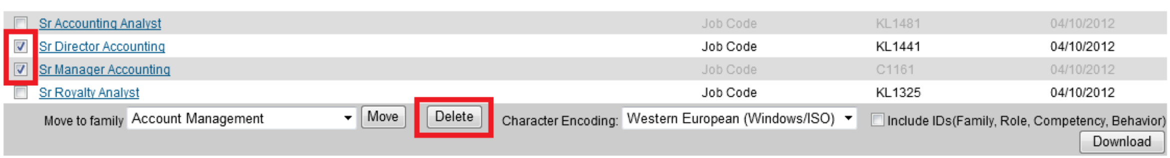
6. To schedule Family and Role imports, navigate to *Provisioning* > *Manage Scheduled Jobs* > *Create New Job*.
7. Select the *Family And Role Mapping Import* Job Type.
8. Complete the rest of the scheduled job setup fields.
9. Click *Create Job*.

5.4.2 Delete Families and Roles

Context

Procedure

1. Navigate to *Admin Tools* > *Managing Competencies and Skills* > *Families and Roles* .
2. Open the family that contains the role you want to delete.
3. Check the box next to the role.
4. Click *Delete*.



Deleting a Role

5. Navigate to *Admin Tools* > *Managing Competencies and Skills* > *Families and Roles* .
6. Open the family you want to delete.
7. Check the boxes next to all the roles.
8. Click *Delete*.

5.5 Dynamic Groups

Candidate profiles use XML fields, with associated visibility and permission configuration. You can configure editing permissions so recruiting users in a dynamic group have write access to fields and background elements on the candidate profile. Otherwise, only candidates have write permissions for fields and background elements.

Groups are associated only with the user who creates the group. Therefore, when creating groups the creator should proxy using a dedicated user account that will never be deactivated, so the group persists, can be located, and managed through personnel turnover.

To use dynamic groups, navigate to *Username menu* > *Options* > *Groups* .

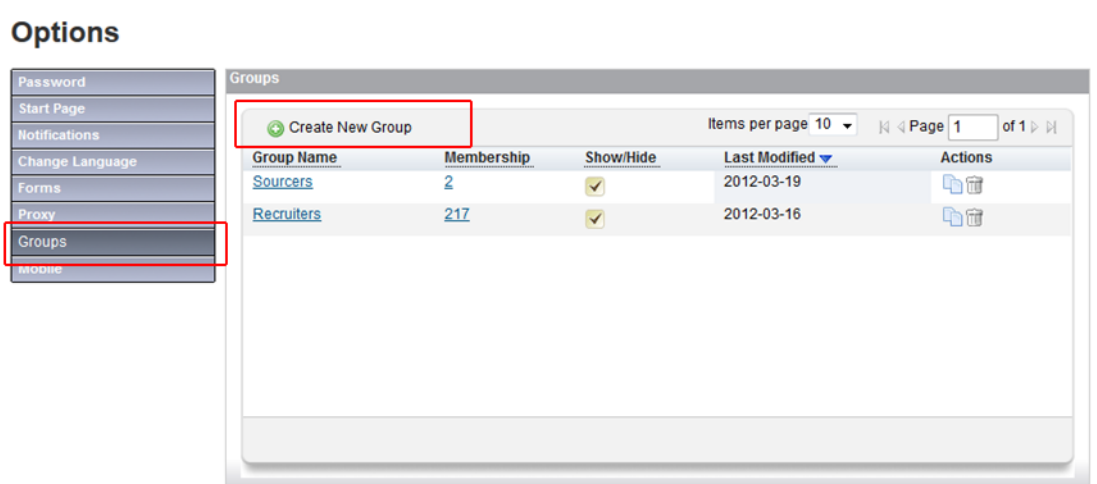
5.5.1 Create a Dynamic Group

Prerequisites

Enable Provisioning > *Enable Dynamic Groups V2 (My Groups)*

Procedure

1. Proxy as an admin user who will manage this group going forward.
2. Navigate to *Username menu* > *Options* > *Groups*.
3. Click *Create New Group*.
4. Select your inclusion and exclusion categories per *People Pool*.



Create a New Dynamic Group

Related Information

http://confluence.successfactors.com/login.action;jsessionid=C45CE0A8A3C2876FF33C5F927D38A4BC?os_destination=%2Fpages%2Fviewpage.action%3Ftitle%3DDynamic%2BGroups%2BV2%2B%2528My%2BGroups%2529%2BConfig%2BGuide%2Band%2BFAQ%26spaceKey%3DPRODINFO

5.6 Recruiting Groups

Recruiting Groups allow you to limit the users who can be selected in the requisition operator fields. Administrators can also use Recruiting Groups to automatically associate multiple users with requisition records using Team Recruiting functionality.

People Pools limit groups by their filtering criteria. For instance, a People Pool can include users whose Recruiting Groups are visible only to the user who created them, so you should always use a proxy admin user account when creating or managing groups. Without this step, a Recruiting Group associated with a real user could become inaccessible for future edits.

Related Information

Manage Recruiting Groups [page 508]

5.7 Recruiting E-mail Templates

Use Recruiting E-mail templates to create automatic status-triggered responses and on-demand emails from a recruiting user.

To configure Recruiting e-mail templates, use *Admin Tools* > *Manage Recruiting* > *Manage Recruiting Email Templates*.

Recruiting e-mail templates support the use of CC and BCC functionality. This allows a set of users, operators, or e-mail addresses to be specified on an e-mail template.

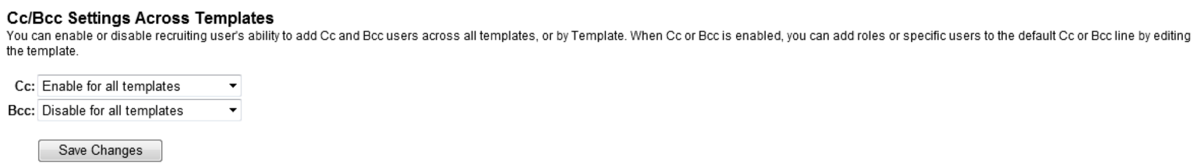
5.7.1 Create Recruiting E-mail Templates

Context

- Some hard-coded recruiting-related e-mail triggers are configured in *E-Mail Notification Templates Settings* or *Recruiting Email Triggers* instead of the Recruiting Emails section in Admin Tools
- Some fields, such as `[[CANDIDATE_FULL_NAME]]`, exist as tokens, regardless of whether they are configured in the XML file, but only populate a token with the appropriate value when the field is configured.
- You cannot delete email templates, since they may be part of the applicant compliance records.

Procedure

1. Navigate to *Admin Tools* > *Manage Recruiting* > *Manage Recruiting Email Templates*.
2. Click the *Create New Template*.
3. Enter the template name.
4. Set the template to *Enabled*.
5. Create a *Subject* for the e-mail.
6. Write the e-mail body, using tokens where appropriate.
7. Tokens are placeholders for information that you can specify in the body of an e-mail template. View the available tokens by clicking *Show Tokens*.
8. Copy and paste the token you need in the appropriate place in the e-mail body. For example, to thank a candidate for applying, you might use:
   Dear [[CANDIDATE_FIRST_NAME]], We have received your application for [[JOB_REQ_ID]], [[JOB_REQ_TITLE]] and are excited to review your qualifications against this position! We will keep you updated by e-mail and you can check the progress of your application on our career site. Please feel free to apply for other roles that interest you.
9. You can enable CC and BCC for all recruiting e-mail templates. If you enable CC and BCC, you may configure those settings differently, or leave them blank on each template.



   a. Select from the list of primary operators (roles) on the requisition. Each selection is listed as a CC or BCC user on the Recruiting Email Template. When an e-mail is sent and the template called, the user listed in the operator field is looked up and included as a CC or BCC user. Select the option type for CC/BCC recipients. The options are: by role on the requisition, by employee name, and by e-mail address.
   b. To select by employee name, type the name or username of an active user and select the user. Each selection is listed as a CC or BCC user on the Recruiting Email Template. When an e-mail is sent and the template called, the user listed in the operator field is looked up and included as a CC or BCC user.
   c. To select by e-mail address, manually enter an e-mail address. Each selection is listed as a CC or BCC user on the Recruiting Email Template. When an e-mail is sent and the template called, the user listed in the operator field is looked up and included as a CC or BCC user.

Related Information

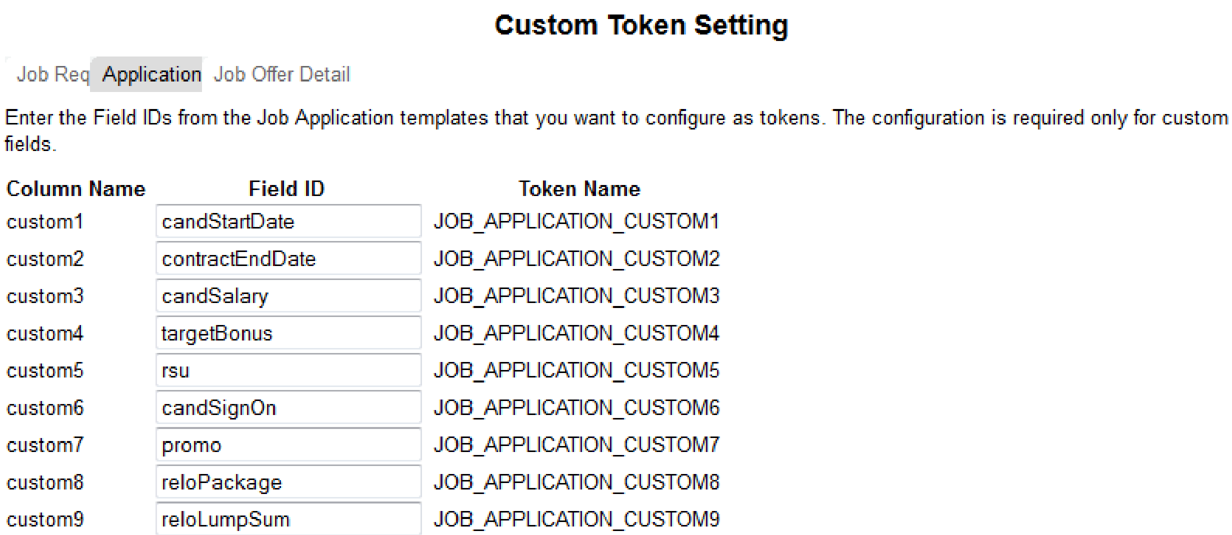
Manage Recruiting Email Templates [page 523]
Custom Tokens [page 65]

5.8 Custom Tokens

You can use tokens in offer letters or e-mail templates to reference field data; for example, relevant personalized information for each candidate when you generate the letter or e-mail. This saves you from having to manually edit the letter or e-mail each time to add the personalized information.

Custom tokens are used as placeholders in offer letters or recruiting emails to populate the data stored in a field from a related record.

To configure tokens, use *Provisioning* > *Configure Custom Tokens*. Configure custom tokens for any custom fields that require tokens in the Requisition XML template, the Application XML template, or the Job Offer Detail XML template. You might be able configure some standard fields not available as tokens by mapping them in *Configure Custom Tokens*.



Custom Token Setting

Job Req | Application | Job Offer Detail

Enter the Field IDs from the Job Application templates that you want to configure as tokens. The configuration is required only for custom fields.

Column Name	Field ID	Token Name
custom1	candStartDate	JOB_APPLICATION_CUSTOM1
custom2	contractEndDate	JOB_APPLICATION_CUSTOM2
custom3	candSalary	JOB_APPLICATION_CUSTOM3
custom4	targetBonus	JOB_APPLICATION_CUSTOM4
custom5	rsu	JOB_APPLICATION_CUSTOM5
custom6	candSignOn	JOB_APPLICATION_CUSTOM6
custom7	promo	JOB_APPLICATION_CUSTOM7
custom8	reloPackage	JOB_APPLICATION_CUSTOM8
custom9	reloLumpSum	JOB_APPLICATION_CUSTOM9

Configuring Custom Fields as Tokens

1. Navigate to *Provisioning* > *Configure Custom Tokens*.
2. Enter the fields you want to use as tokens. Be sure to select the appropriate template — Job Requisition, Application, or Job Offer Detail.

> **Tip**
>
> Changing the token mapping changes the way data populates a template. For instance, if `JOB_APPLICATION_CUSTOM1` is mapped to start date, inserted into an offer letter template, then changed to map to end date, any offer letters generated using the template with that token populates the end date value into the letter.

> **Tip**
>
> There are 150 fields available for configuration as custom tokens on the application and requisition. The candidate profile and offer details template have 45 fields available for configuration.

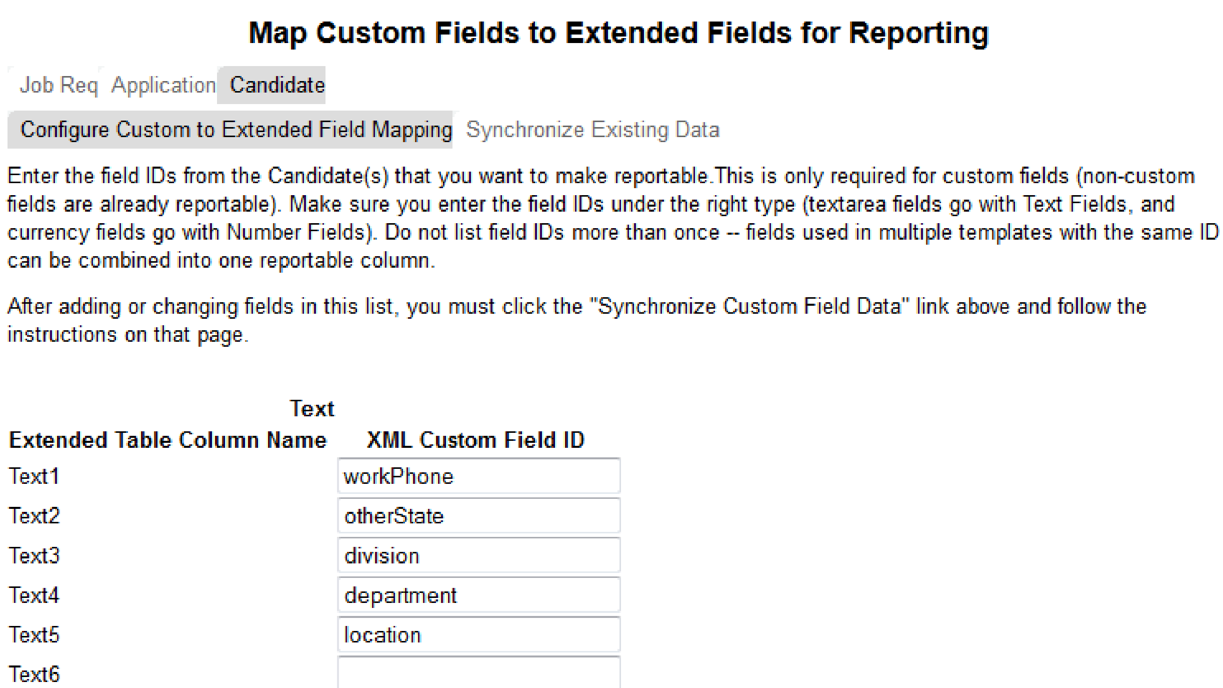
5.9 Reportable Custom Fields

When you create custom fields, especially custom picklist fields, map them as custom reportable fields. This allows them to appear in ad hoc reporting and might also have other positive downstream effects. Without custom reportable field mapping, the display options may appear blank.

- Reporting relies on field positions in reportable custom fields remaining unchanged. For example, if you create a reportable custom field, do not change it once it has been used somewhere (for example, in the Offer Details XML file, or an ad hoc report).
- Use the same labels for custom fields among all templates. The Ad Hoc report builder uses the first label for the corresponding custom ID as the report column header. Therefore, the custom fields across all offer detail templates need to be standardized.
- Do not configure standard fields as custom reportable.
- You cannot configure text area and rich text fields as reportable.
- Do not configure the same field more than once in Custom Reportable Fields.
- Misconfigured custom reportable fields can cause application errors.

5.9.1 Configure Reportable Custom Fields

After you configure fiels in the Recruting XML templates, you must map and sync the fields for reporting.



Custom Field Mapping

1. Navigate to *Provisioning* > *Configure Reportable Custom Fields*.
2. Enter the custom fields defined in the XML file.
3. Click *Save Extended Field Mapping*.

4. Click *Synchronize Existing Data*. If you have added or changed custom Candidate reporting fields, this option updates any reportable data.

You should receive an email confirmation that reports the number of records successfully synced.

Sync data does not always work on the first try, especially in Internet Explorer. Once the page refreshes upon save, refresh once more before clicking *Synchronize Existing Data*. Watch for the green confirmation message at the top of the page to confirm the sync worked correctly; if you don't see it, try again. Be wary of this issue — if you sync something, enter fields without refreshing the page, then save again, you might lose the data you entered.

Tip

Changing the configuration of reportable custom fields after records have been created may cause values to report improperly in the Recruiting and V2 Secured schemas.

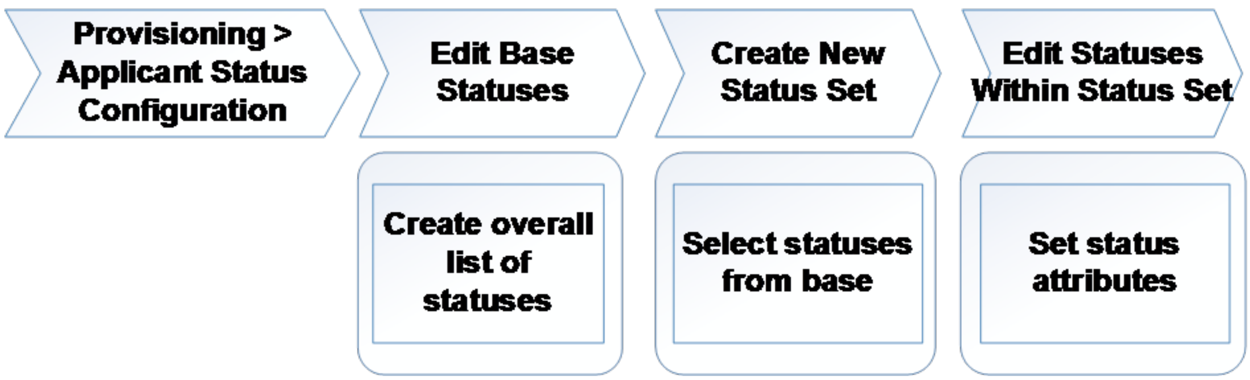
Tip

There are 30 text fields, 10 number fields, 50 picklist fields, and 20 date fields available as reportable custom fields for each XML definition- job requisition, application, and candidate profile. The number of available fields is not configurable.

6 Applicant Status

The applicant status workflow lists the steps the applicant goes through from apply to hired (or disqualified.) Most steps in the applicant status workflow are defined by clients, but several are defined by the system.

The applicant status is used in Requisitions to process the applicant through various steps in the recruiting workflow.



Process Summary Overview for Configuring Applicant Status

You can configure each step in the workflow with a unique set of attributes that dictate whether it is required or can be skipped (with or without comments), how labels appear to users, which candidates can be placed into the status, and whether activity on the status sends e-mails. Admins can manually control the order of the statuses.

The audit trail tracks applicant progress through the statuses, which is visible in the UI and reportable. This data is typically used for recruiting metrics and compliance, as well as process control.

Some Applicant Status known behavior:

- You cannot delete a status set.
- You cannot delete a status from a status set; however, you can disable it.
- Use Provisioning to create new statuses and add the status to the base status set before being used in a status set; PS sets this up and CS supports it on live clients.
- You cannot save applicant statuses unless you have enabled at least one recruiting language.
- In certain system statuses, such as Default, some settings, like *Selectable By*, are unavailable.
- Currently, no functionality supports status disqualification reasons.
- Although you can set a status for only internal or only external applicants, there is no conditionality (if/then logic) in the status workflow.
- CTRL+ click on statuses in the pipeline to see applicants in the selected statuses.
- When the late-stage application functionality is used, you cannot currently configure a hard-stop that prevents candidates from moving past a given status in the application until they complete the application.
- Users can hide the applicant pipeline on the candidate summary page and can also hide the applicant list on the left side of an application. Click a pipeline segment or *View all Candidates* to redisplay the applicant list.

Show/Hide Candidate Pipeline

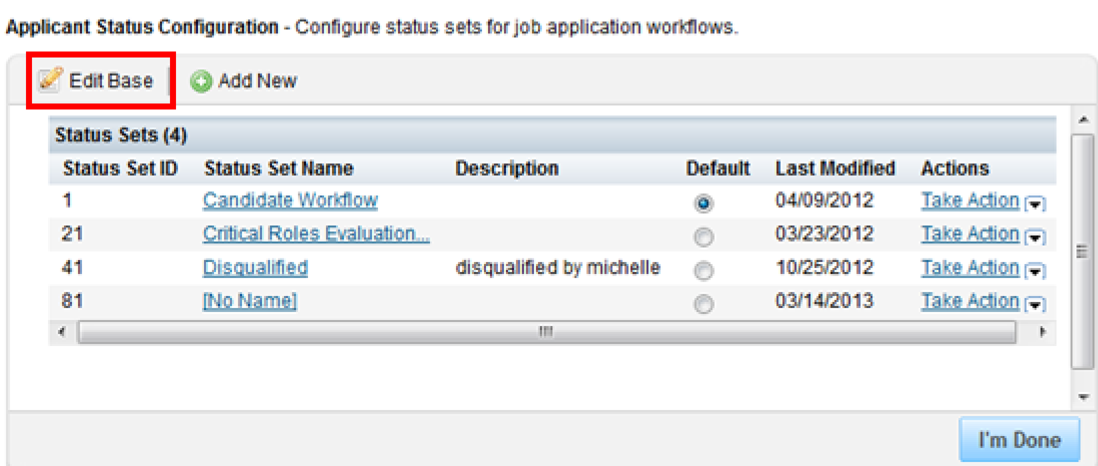
6.1 Edit Base Statuses

Prerequisites

Check *Provisioning* > *Company Settings* > *Enable Candidate Workbench (requires Dynamic Requisition List Page)*

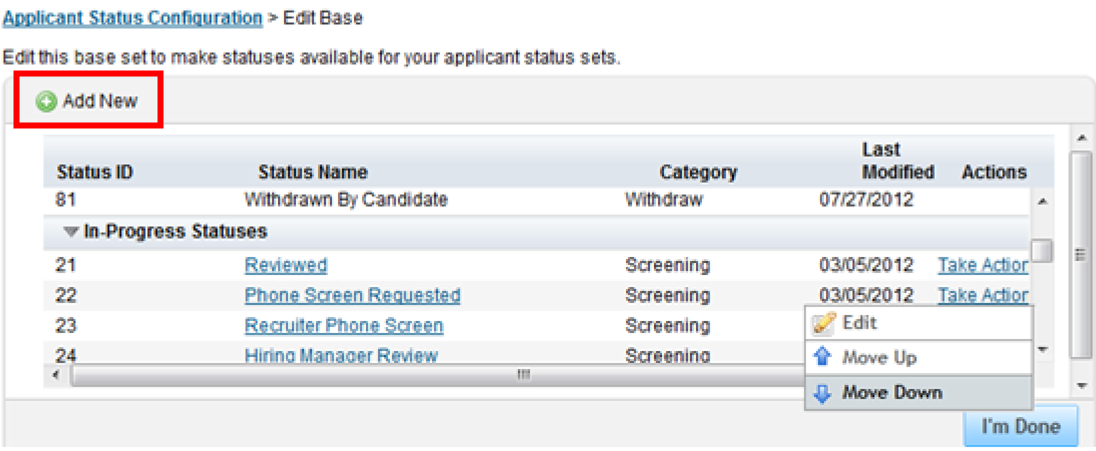
Procedure

1. Navigate to *Provisioning* > *Applicant Status Configuration* > *Edit Base*.
2. Click *Edit Base* to open the applicant status sets.

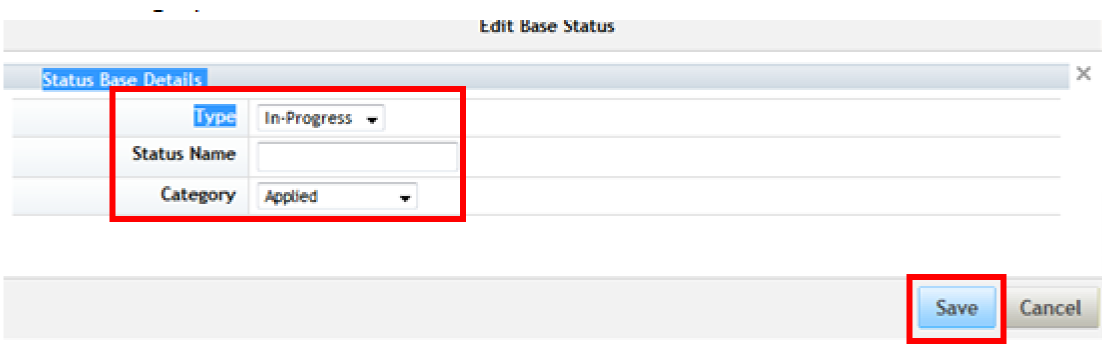


Editing Base Statuses

3. Click *Add New*. Enter the status name, select the type and category, and click *Save*.



Applicant Status Sets



Adding a Status

4. You can change the order of the statuses, or edit them, by clicking *Take Action.*.

Recommendation

Do not manually add the following statuses to the base set:

- Declined DPCS
- Deleted On Demand By Admin
- Deleted On Demand By Candidate
- Withdrawn By Candidate

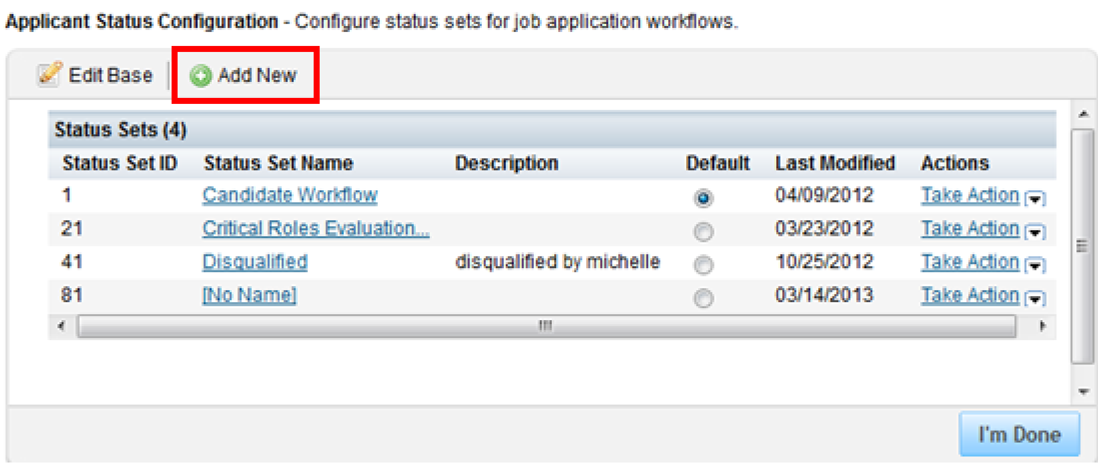
These statuses become available after enabling DPCS 2.0. If a user manually add them, then enables DPCS 2.0, the statuses conflict and require an Engineering fix to correct.

6.2 Create New Status Set

After creating statuses, combine them into status sets using *Provisioning* > *Applicant Status Configuration*.

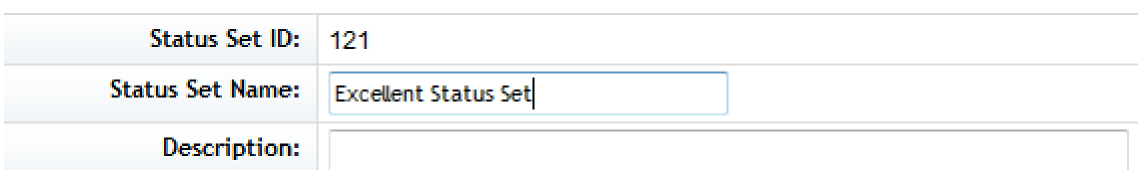
Procedure

1. Navigate to *Provisioning* > *Applicant Status Configuration or Admin Tools* > *Edit Applicant Status*. Click *Add New*.



Creating a Status Set

2. If you are working with an existing status set, select *Take Action* for the status set you want to adjust and select *Edit* or *Duplicate*.
3. Assign a name to the status set, and an optional description.



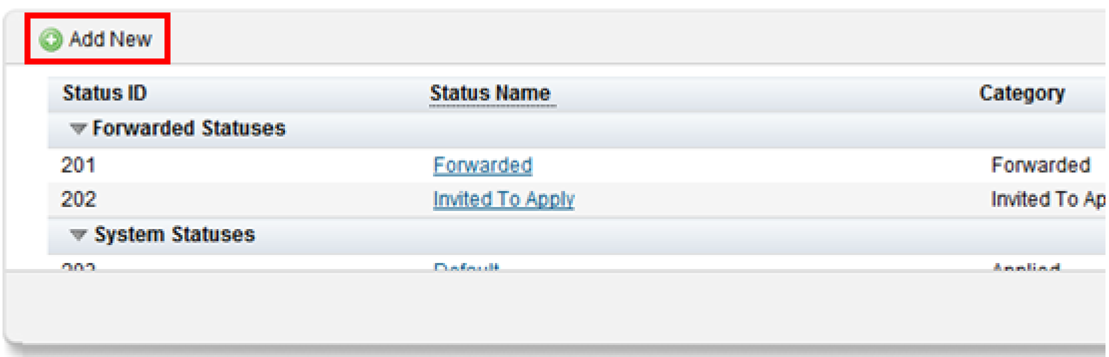
Naming a New Status Set

By defatul, the newly created status set contains certain system statuses. These system statuses are required in the applicant status set for certain product functionality.

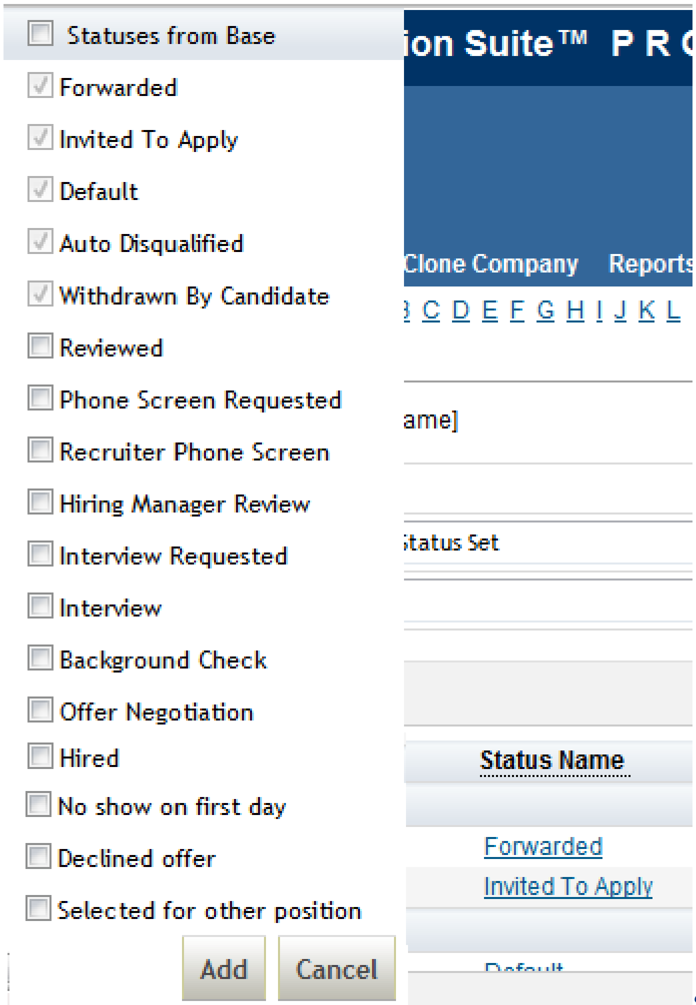
Option	Description
System Status	**Functionality**
Forwarded	Status for candidates a recruiting user has attached to a requisition
Invited To Apply	Status for forwarded candidates who have been invited to apply to a requisition by a re-cruiter

Option	Description
Default	Status for newly applied candidates. Also the status for forwarded candidates who have been added by a recruiting user via the Add to Requisition feature (available in instances with late-stage application functionality.)
Auto Disqualified	Status for candidates who are automatically disqualified by the prescreen questions.
Withdrawn By Candidate	Status for candidates who withdraw a previously submitted application.
Declined DPCS	Status for candidates who have revoked their acceptance of the data privacy consent statement after applying to requisitions.
Deleted On Demand By Admin	Status for candidates whose candidate profile was deleted by an administrator.
Deleted On Demand By Candidate	Status for candidates who have deleted their candidate profile.
Requisition Closed	Status for applicants when they are placed in an In Progress status when the requisition is closed.
Hired on Other Requisition	Status for applicants when they are placed into a Hired status on another requisition.

4. Add a status to the status set by clicking *Add New*.

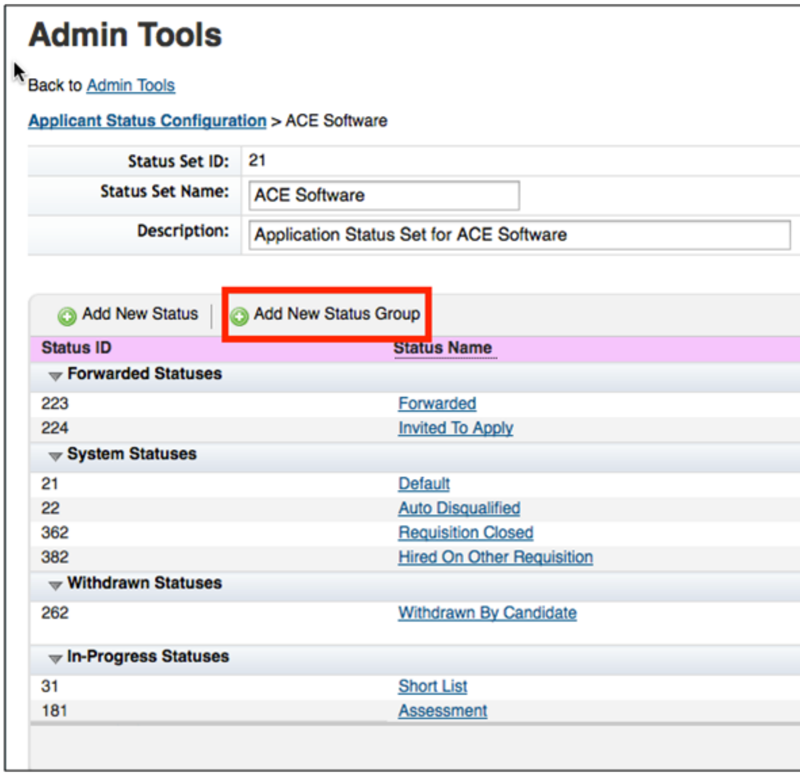


5. You see a list of checkboxes containing the base statuses and the configured statuses. Select the status IDs you want to include in the status set and click *Add*.



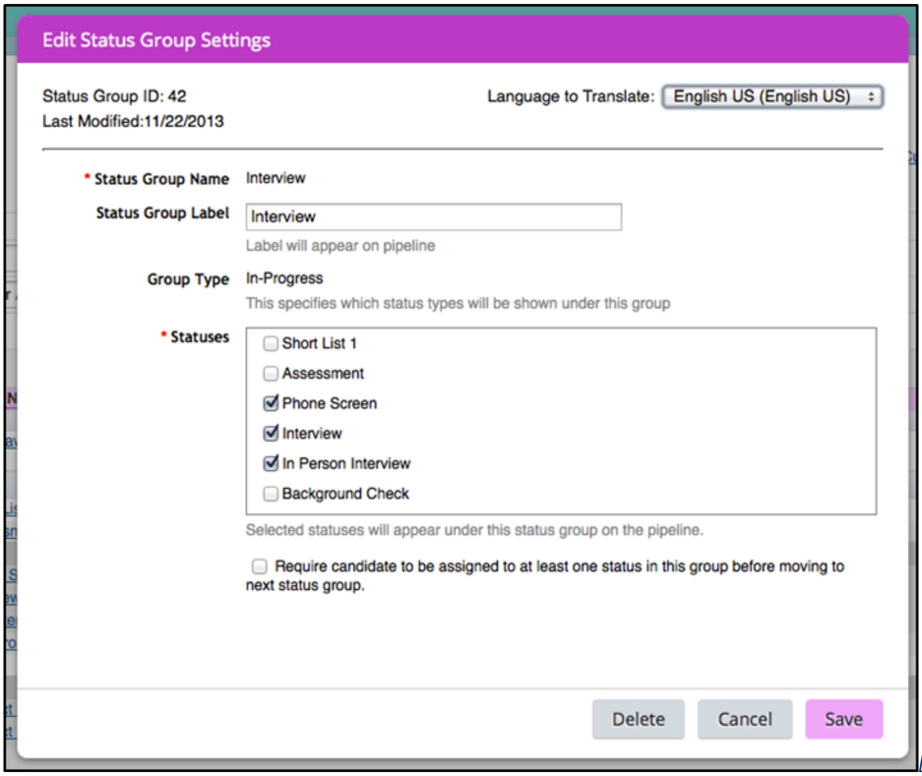
Selecting from Base Statuses

6. To add a Status Group to the status set, click *Add New Status Group*.



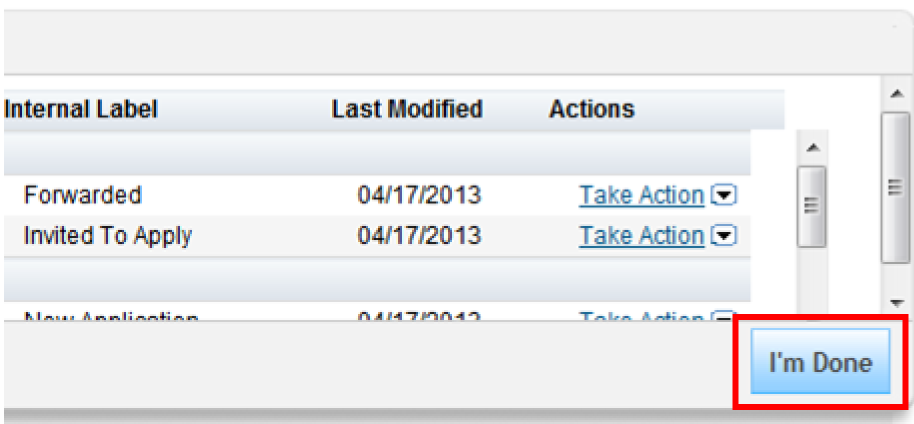
Add New Status Group

7. To edit the status group, enter a *Status Group Name* and *Status Group Label*. The *Status Group Label* appears on the Candidate Pipeline. Choose the statuses to include in the group from the list of statuses of the same type. To require a status before the candidate can progress through the pipeline, check *Require candidate to be in at least one status in this group before moving to the next group* to require the status before progressing through the pipeline. If you do not select this option, candidates can bypass the entire status group.



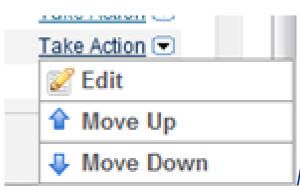
Edit Status Group Settings

8. Click *I'm Done* to save the changes made to the status set.



Saving Status Set Changes

9. After adding statuses to the applicant status set, use the *Take Action* menu to change the order of the statuses.



Reorder Statuses

Related Information

Manage Recruiting Settings [page 462]

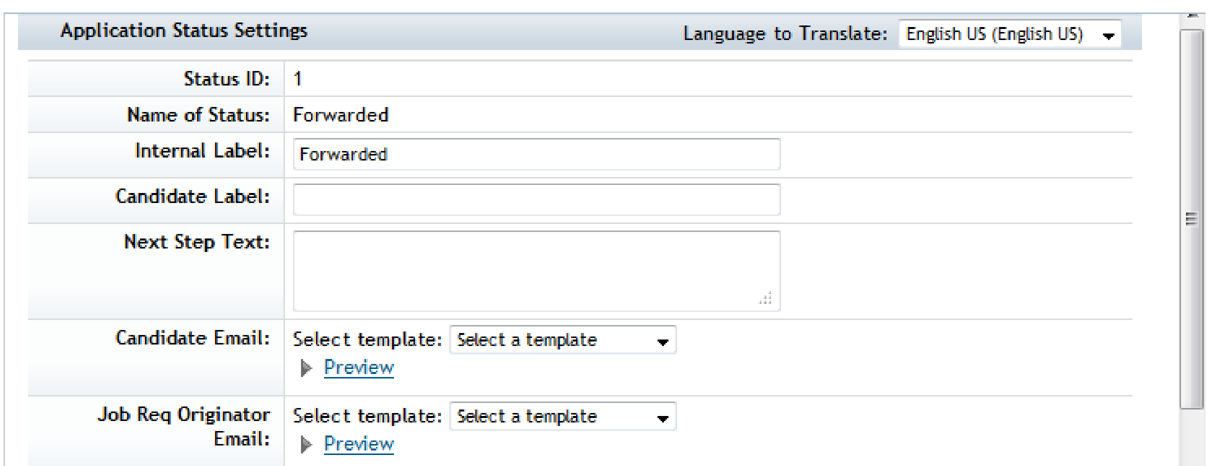
6.3 Edit Statuses within Status Set

Context

Configure the status attributes either in *Provisioning* > *Applicant Status Configuration* or in *Admin Tools* > *Applicant Status Configuration*.

Procedure

1. Navigate to the applicant status configuration in *Provisioning* > *Applicant Status Configuration* or *Admin Tools* > *Applicant Status Configuration* and open the applicable status set.
2. For each status, click the status name or *Take Action* > *Edit* to open the Application Status Settings window.



3. Set the options and complete fields. Not all options are equally applicable to all fields.

Table 12: Field Options in Applicant Status

Setting Name	*Descriptions*	*Not Applicable To*
status ID	System-generated unique ID number; cannot be changed	

Name of Status	Unique name of status, defined in *Provisioning* > *Applicant Status Configuration* > *Edit Base*. Cannot be changed while editing the applicant status set. Can be changed in Provisioning in *Edit Base* but avoid changes if possible. If you must mak changes, proceed with caution. Name of Status is used: ○ In Ad Hoc Reports —it can be saved as a filter or used by third parties who are integrating with Ad Hoc flat file exports. ○ By the SFAPI. ○ By the Requisition XML feature-permission. Any changes to Name of Status should take into account these dependencies.	

Required	When selected, place the candidate into this status before being placed into subsequent In-Progress statuses. The candidate can be disqualified at any point, even if a specific In-Progress status is required. If a status is required, the expected behavior is: On the application page in the applicant status dropdown, the status is the last visible In-Progress status until placing the applicant there. After placing the applicant into this status, the subsequent statuses become visible, up through the next status marked “Required.” On the application list page, if one or more applicants are selected and the recruiting user attempts to use *Action* > *Move* to progress these applicants to a status that one or more of the selected applicants are not already in or past the Required status, the affected applicants appear grayed out and are not placed into the desired status.	◦ Forwarded ◦ Invite to Apply ◦ Auto Disqualified ◦ Withdrawn by Candidate ◦ Declined DPCS ◦ Deleted on demand by Admin ◦ Deleted on demand by Candidate ◦ Requisition Closed
Internal Label	How the Status column appears to internal recruiting users in all areas of the Recruiting tab	
Candidate Label	This is how the contents of the Status column appear to candidates viewing their progress in the requisition table of the *Careers* > *Job Management* or *external career site* > *Jobs Applied tabs*.	
Next Step Text	How the contents of the Next Step column appear to candidates viewing their progress in the requisition table of the *Careers* > *Job Management* or external career site > Jobs Applied tabs.	
Options		

Collect comment if this status is skipped	This option is grayed out if the status is required; there is no way to skip the status. If this option is selected, when the recruiting user progresses an applicant to a status beyond this one without first placing the applicant in this status, the recruiting user must add a free text comment to explain why they are bypassing this step. There is no way to replace the free text comment with a predefined picklist of reasons, or add rich text editing, spell-check, or a legal scan.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate ○ Requisition Closed
Enable this status for internal candidates	This option enables a status for only internal candidates. If it is selected along with *Enable this status for external candidates only* the status is visible to both internal and external candidates. If neither option is selected, the status is disabled. Applicant statuses cannot be deleted. Unselecting both *Enable this status* options disables a status, preventing recruiting users from seeing it in the pipeline or in any status dropdowns, and from placing applicants in the status. Before disabling a status, advise clients to run a report on all applicants currently in the status, then move the applicants to another status. If a status is disabled while it contains applicants, the applicants become inaccessible to recruiting users in the user interface, neither visible nor selectable. However, the requisition count of total applicants still includes applicants in this disabled status; such applicants also remain reportable through Ad Hoc Reports.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate

Enable this status for external candidates	This option enables a status for only external candidates. If checked in combination with “Enable this status for internal candidates only” the status will be visible to both internal and external candidates. If neither box is checked, the status is disabled. Applicant statuses cannot be deleted. Unselecting both *Enable this status* options disables a status, preventing recruiting users from seeing it in the pipeline or any status drop downs, and from placing applicants in the status.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate
Hireable Options ○ Hireable ○ Hired ○ None	If the client is using both Recruiting Management and Employee Central, set these options on certain statuses to manage the transfer of candidate data from RCM to EC. Candides with an approved Offer Approval in the *Hireable* status appear in the *Manage Pending Hires* workflow. Designating a status as *Hireable* creates an intermediate step for review before the candidate moves to a *Hired* status.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate ○ Requisition Closed
External Candidate	Stores a selected e-mail template to be sent to external candidates whenever the applicant enters this status.	
Do not send if agency candidate	Select this option to prevent the system from sending e-mail to any external candidates currently owned by an agency.	
Internal Candidate	Stores a selected e-mail template to be sent to internal candidates whenever the applicant enters this status.	
Internal Candidate’s Current Manager	Stores a selected e-mail template to be sent to an internal candidate’s current manager whenever the applicant enters this status.	
Agency User	Stores a selected e-mail template to be sent to the agency user whenever the applicant enters this status. The agency user is either the user who submitted the candidate to the requisition, or the user who currently owns the candidate. This e-mail is sent only when the candidate is currently owned by an agency.	

Job Req Originator Email	Stores a selected e-mail template to be sent to the user who originated the requisition whenever the applicant enters this status.	
Hiring Manager Email	Stores a selected e-mail template to be sent to the user in this operator field whenever the applicant enters this status.	
Recruiter Email		
Sourcer Email		
Coordinator Email		
Second Recruiter Email		
Vp of Staffing Email		
Hiring Manager Team Email		
Recruiter Team Email		
Sourcer Team Email		
Coordinator Team Email		
Second Recruiter Team Email		
Vp of Staffing Team Email		
Baseline Team Email		
Selectable By	Specifies that users associated with a given operator field (and, if applicable, users associated to the related team field) may move an applicant into this status.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate ○ Requisition Closed

4. To configure a status as visible to only internal or external candidates, select the status set and the status within that set, then click either *Enable this status for internal candidates* or *Enable this status for external candidates*. Click both options to enable the status for both internal and external users.

Table 13: Status visibility settings

Hide the status from users who don't have application status Visible To privilege	When enabled, if a user does not have *Visible To* permissions, the status is hidden in the pipeline. The applicant count for that status is also hidden for users without *Visible To* permissions. This setting encompasses the *Hide applicant count from users* setting, and takes precedence if both are selected.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate ○ Requisition Closed

Hide the applicant count from users who don't have applicant status Visible To privilege	When enabled, if a user does not have *Visible To* permissions, the applicant count for that status is hidden. The number of applicants in the hidden status is als osubtracted from the overall applicant count. Users can still see the status.	○ Forwarded ○ Invite to Apply ○ Auto Disqualified ○ Withdrawn by Candidate ○ Declined DPCS ○ Deleted on demand by Admin ○ Deleted on demand by Candidate ○ Requisition Closed

5. Click *Save*.

Related Information

Employee Central (RCM to EC Integration) [page 410]

6.4 Reference the Applicant Status Set in the Requisition XML

See Set application status configuration [page 290].

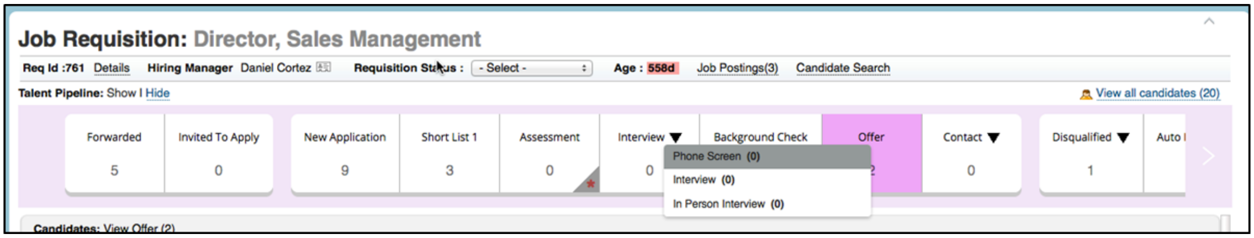
6.5 Managing Applicants in the Applicant Status Workflow

When a candidate completes an application or is forwarded to a requisition by a recruiting user, the candidate is associated with an applicant status pipeline on the requisition.

Recruiting users who have appropriate permissions can move the application through the status pipeline. All status changes are tracked for reporting and compliance purposes. You can view status change history in the application audit trail or in the Application Status Audit Trail folder in Recruiting and V2 Secured reporting schemas.

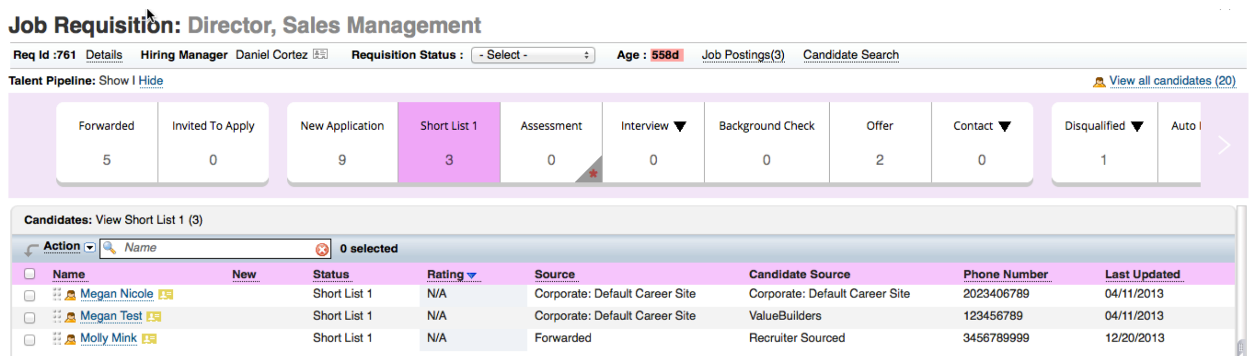
The applicant status pipeline acts as navigation for filtering the applicant list by status. A recruiting user can click a status and view only applicants in that status. To see all applicants, click *View all candidates*. Select multiple statuses by holding down the Ctrl key and selecting the desired statuses.

Grouped statuses display as a dropdown menu in the candidate pipeline. Recruiters can assign a candidate to any of the statuses in the configured group.

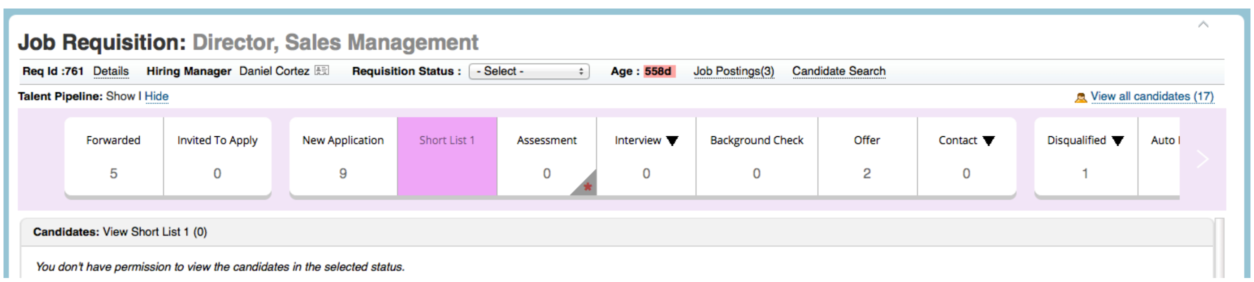


Status group in the Applicant Pipeline

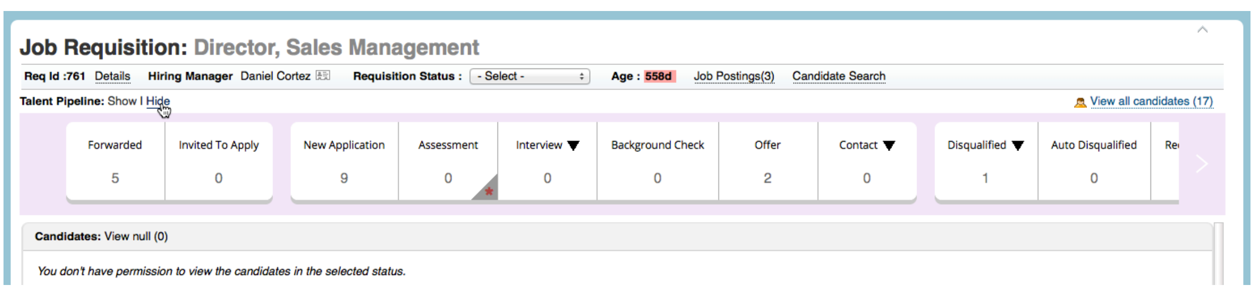
Users can view applicants only in statuses to which they have *Visible To* access.



Pipeline with full permissions

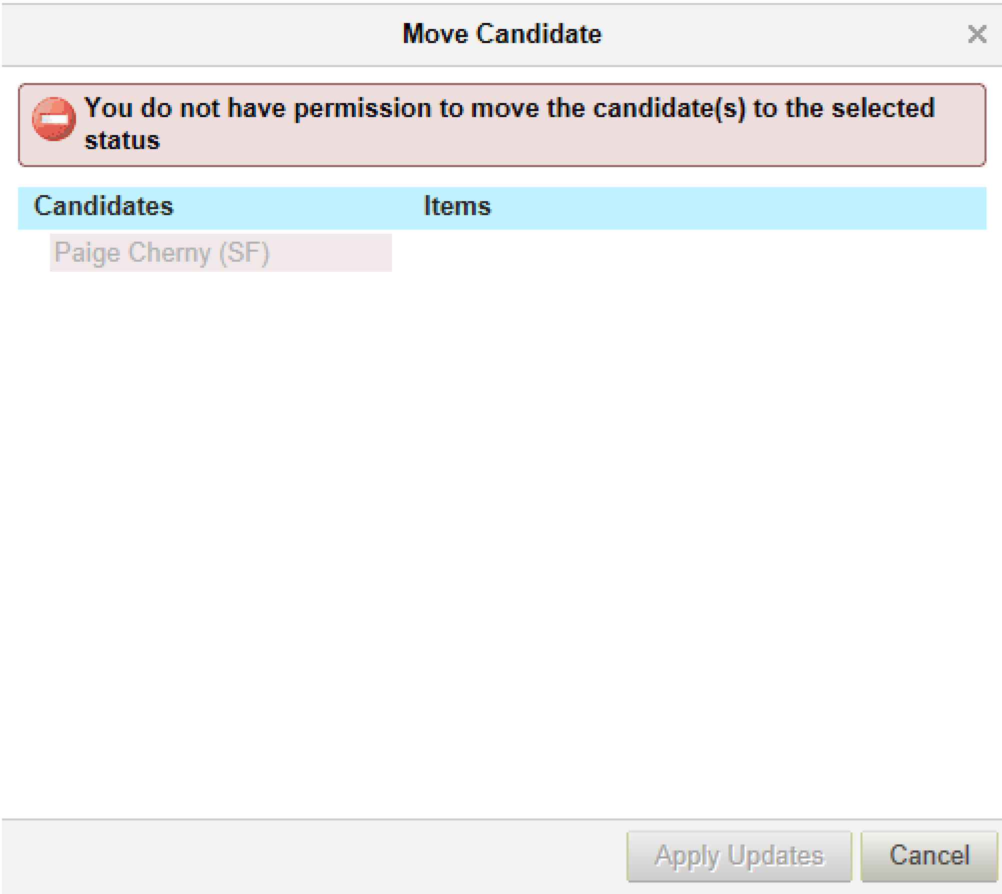


Pipeline without Visible To permission, with Applicant County hidden



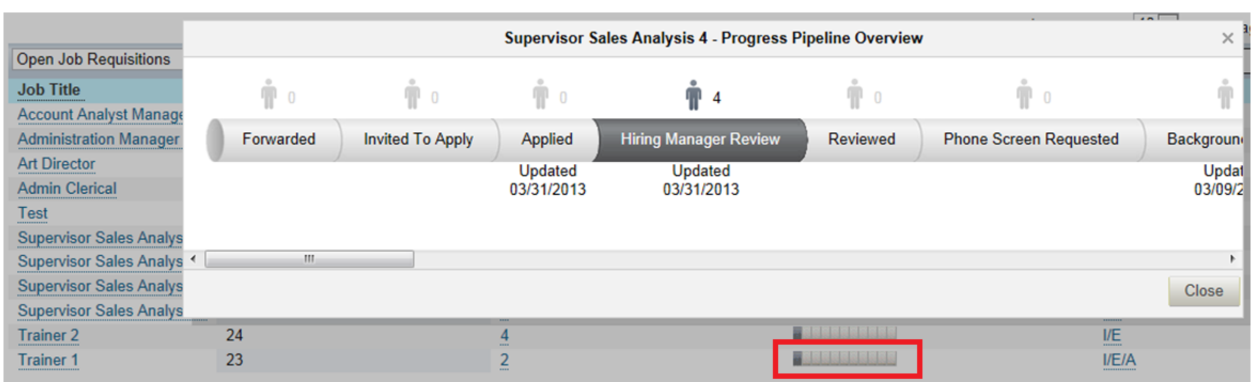
Pipeline without Visible To permission and with Applicant Status hidden

Recruiting users can place applicants only into statuses for which they have *Selectable By* access. If a user attempts to place the applicant in a status for which they do not have *Selectable By* access, they receive an error.



Applicant Status Workflow from the Requisition List Page

Recruiting users can see a quick overview the applicant status pipeline directly from the Requisition List page. Disabled statuses do not appear in the progress pipeline overview.



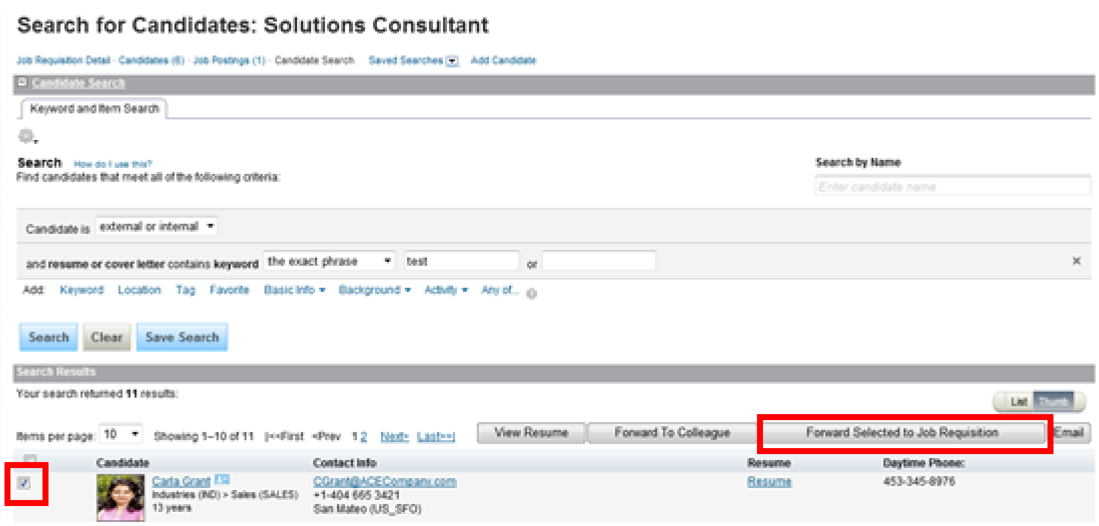
Applicant Status Workflow from the Requisition List Page

6.5.1 Forward Candidates to a Requisition

You can forward candidates to a requisition from candidate search results, the Candidate Profile record, or the Application record.

Candidate forwarding to a requisition may be restricted based on the Candidate Visibility settings for that candidate profile.

In candidate search results, click the checkbox next to the candidate name and then click *Forward Selected to Job Requisition*.

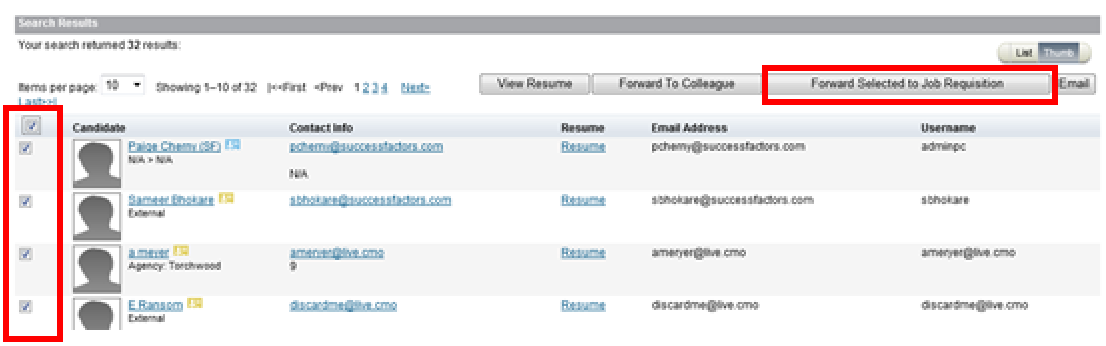


Forwarding Candidates from a Requisition-Initiated Search

- If the candidate search initiated from a requisition, the system ensures that the candidate is forwarded to the correct requisition. A confirmation prompt appears.
- After confirming, the screen refreshes and the applicant list page for the selected requisition appears.

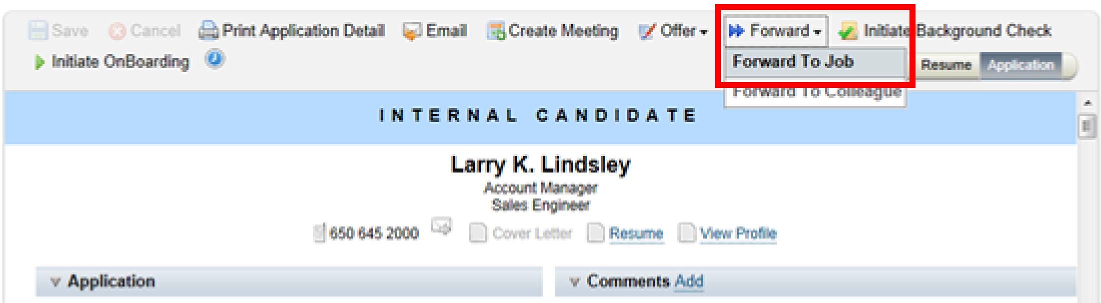
Candidates can also be forwarded to requisitions from:

- Independently initiated candidate searches



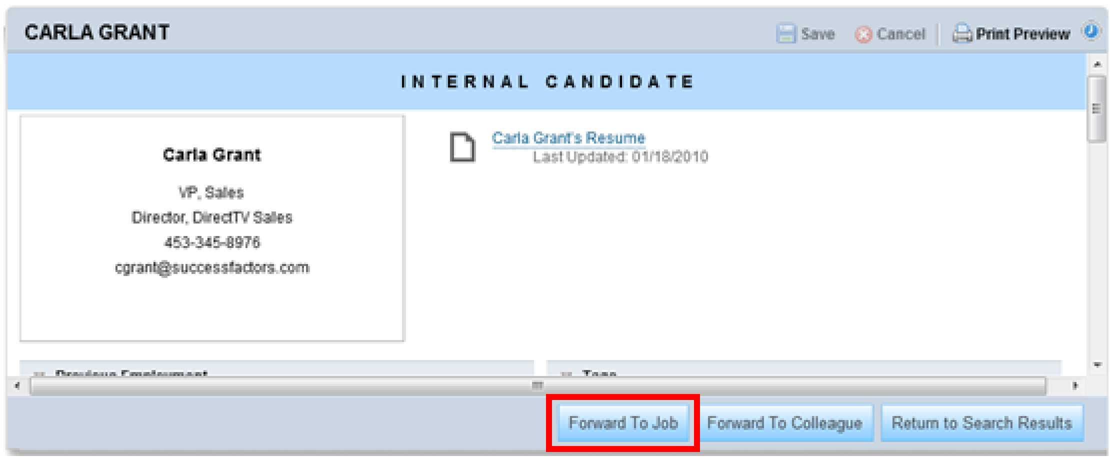
Forward Selected to Job Requisition from Candidate Search Results

- The application record

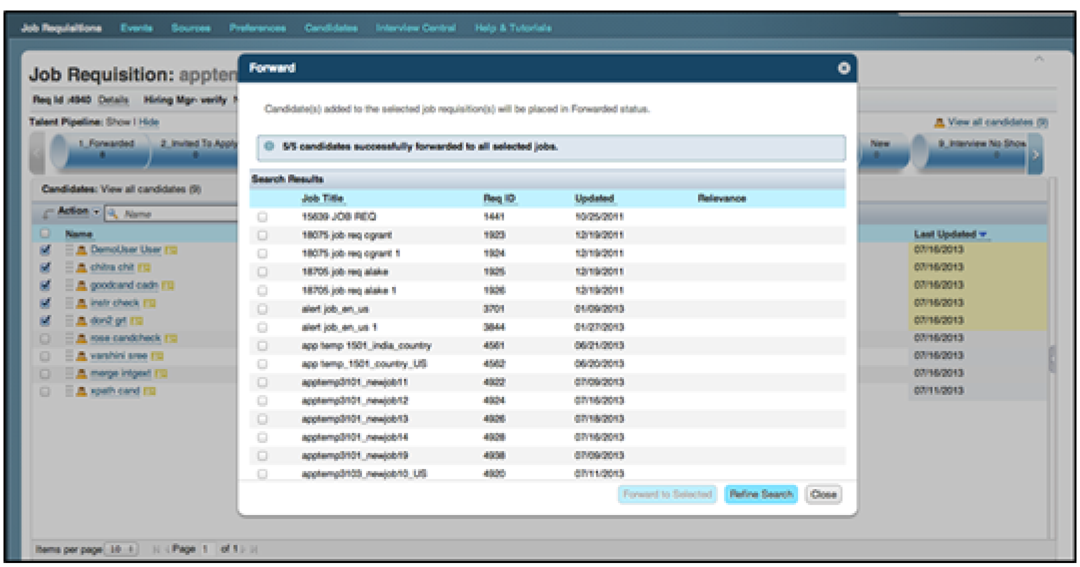


Forward to Job from Application Record

- The candidate profile record

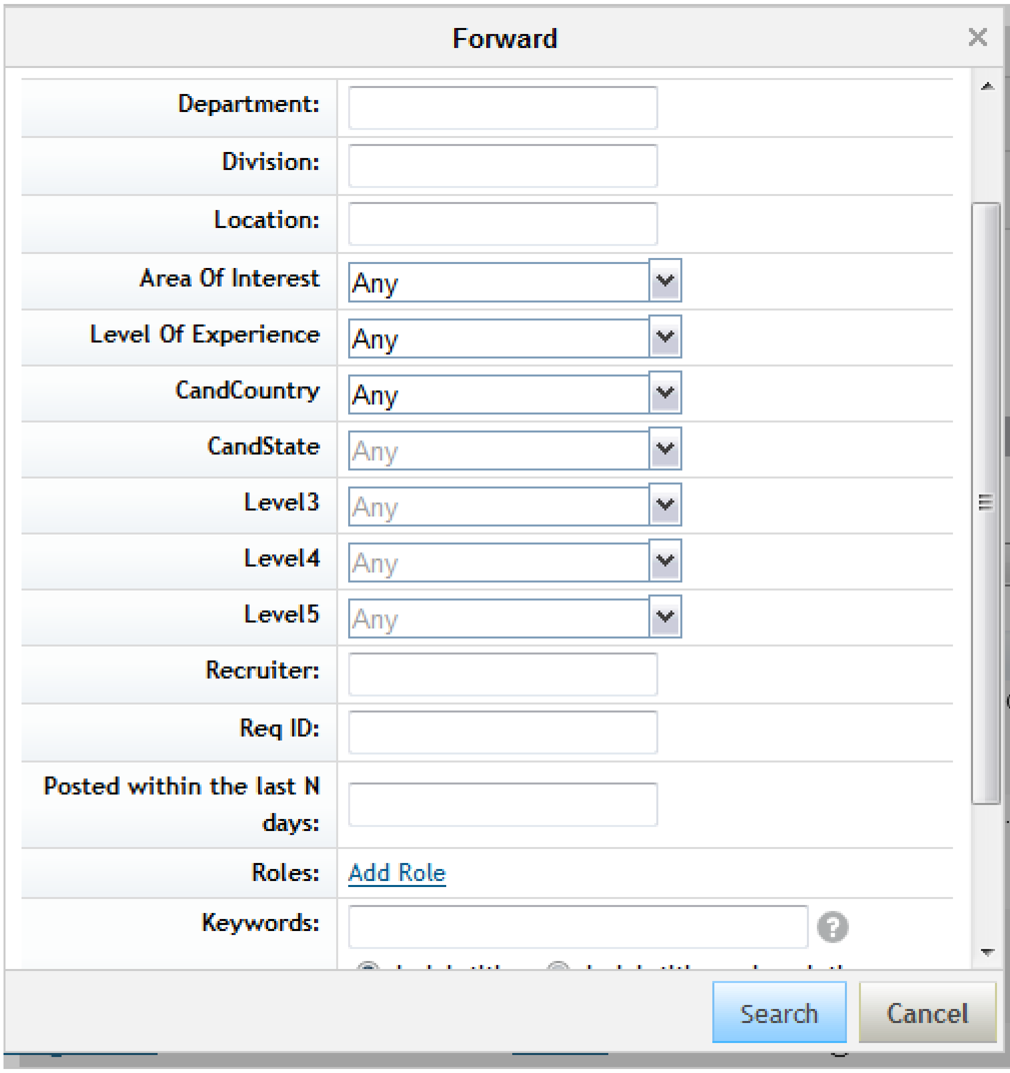


Forward To Job from Candidate Profile Record



Applicant List Page

When you select the forward action, you see a job search pop-up. Recruiting users can search for the appropriate requisitions for the candidate. You can also select more than one requisition to forward the selected applicants to.

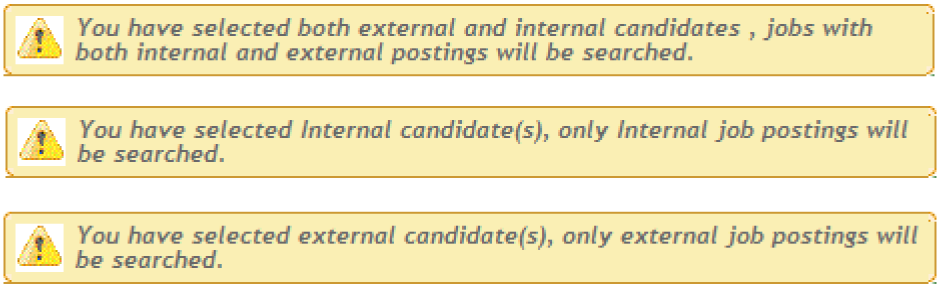


Forward job Search Pop-Up

The search filters contain a mix of standard filters and filters set up in *Provisioning* > *Internl and External Applicant Search Settings*. Additionally, certain filter options can be enabled in *Admin Tools* > *Manage Recruiting Settings*:

- You can enable or disable a role filter using the *Disable "Add Role" on Forward to Requisition* setting. This allows the user to conduct a search using the Families and Roles library, and return requisitions matching the role selection.
- You can sort on columns in the *Forward to Requisition* dialog search results.
- You can include or exclude unposted jobs from search results can be enabled or disabled using *Admin Tools* > *Manage Recruiting Settings* > *Allow forwarding of candidates to unposted jobs*. If this setting is disabled,you can only forward internal candidates to internally posted jobs, and external candidates to externally posted jobs.

The system ensures that job search results are relevant only to the types of candidate you are presently forwarding, and displays a message to that effect at the top of the job search pop up.

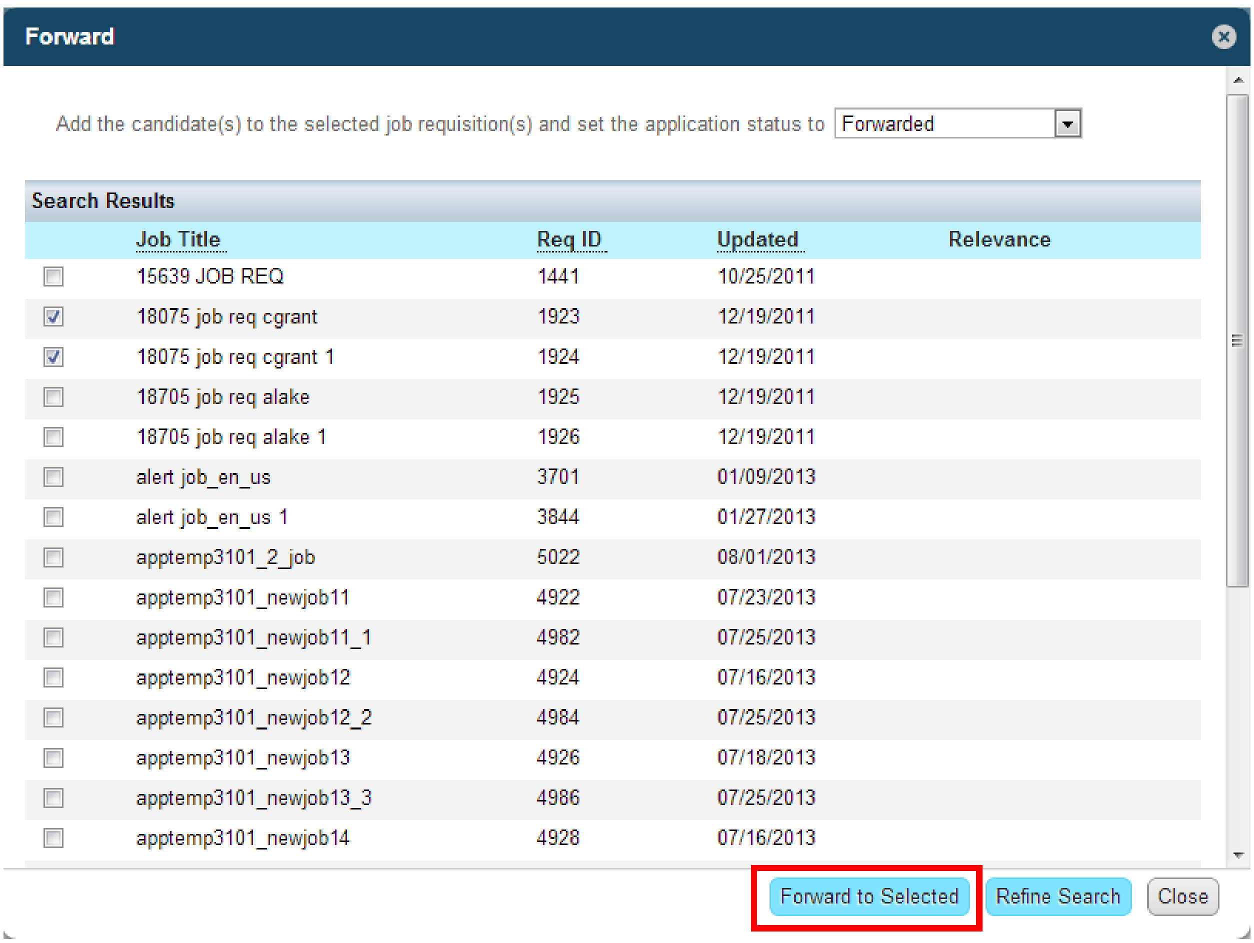


Forward Job Search Posting Warnings

The forward to requisition job search produces the 10 results that best match the search criteria. If you do not see the requisition you want in search, click *Refine Search*, and specify additional filtering criteria.

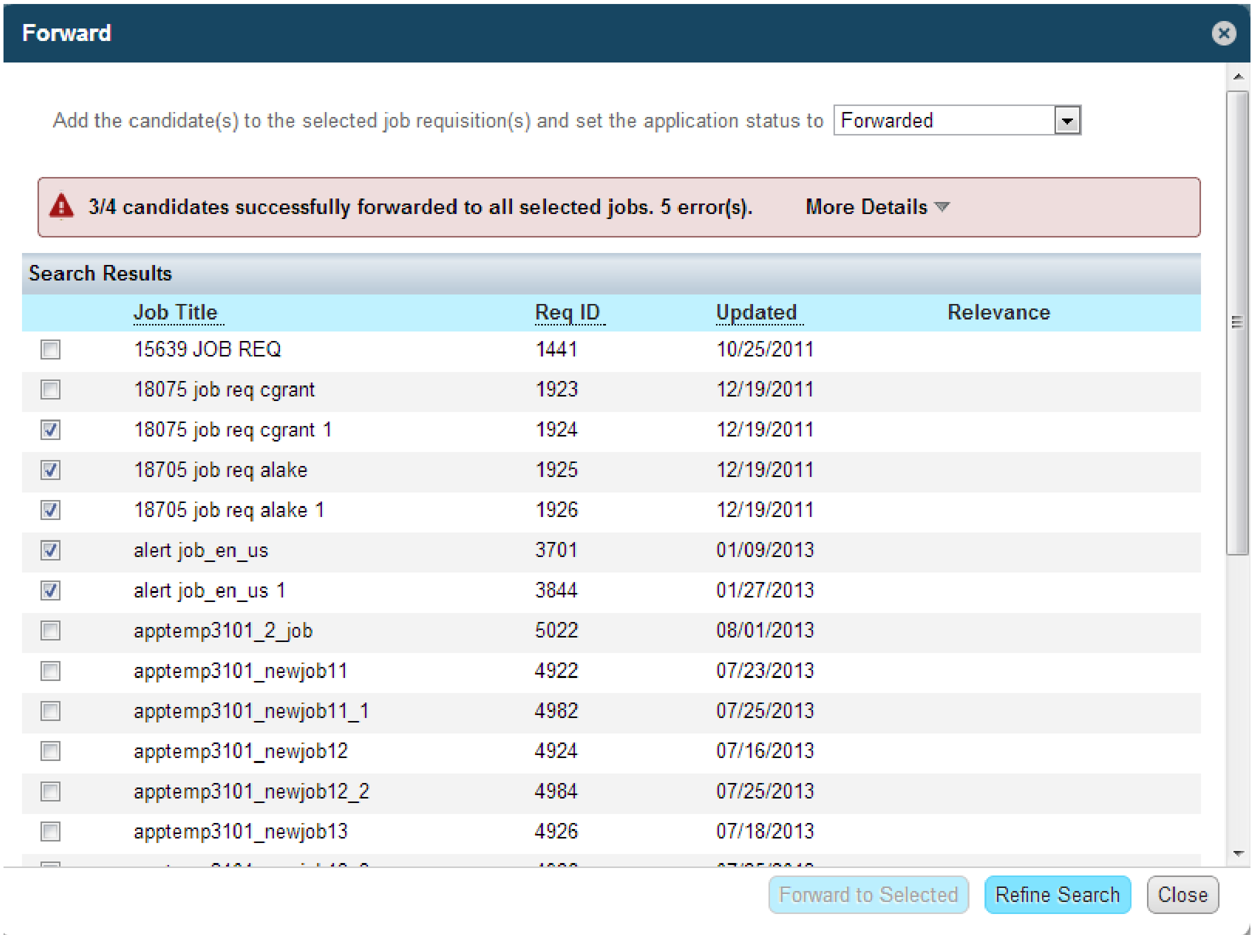
Locate the desired requisition, select it, and click *Forward to Selected*.

- Forwarding from candidate search allows the user to select multiple requisitions.
- Forwarding from the application record or candidate profile record allows you to select multiple checkboxes for the requisition(s).



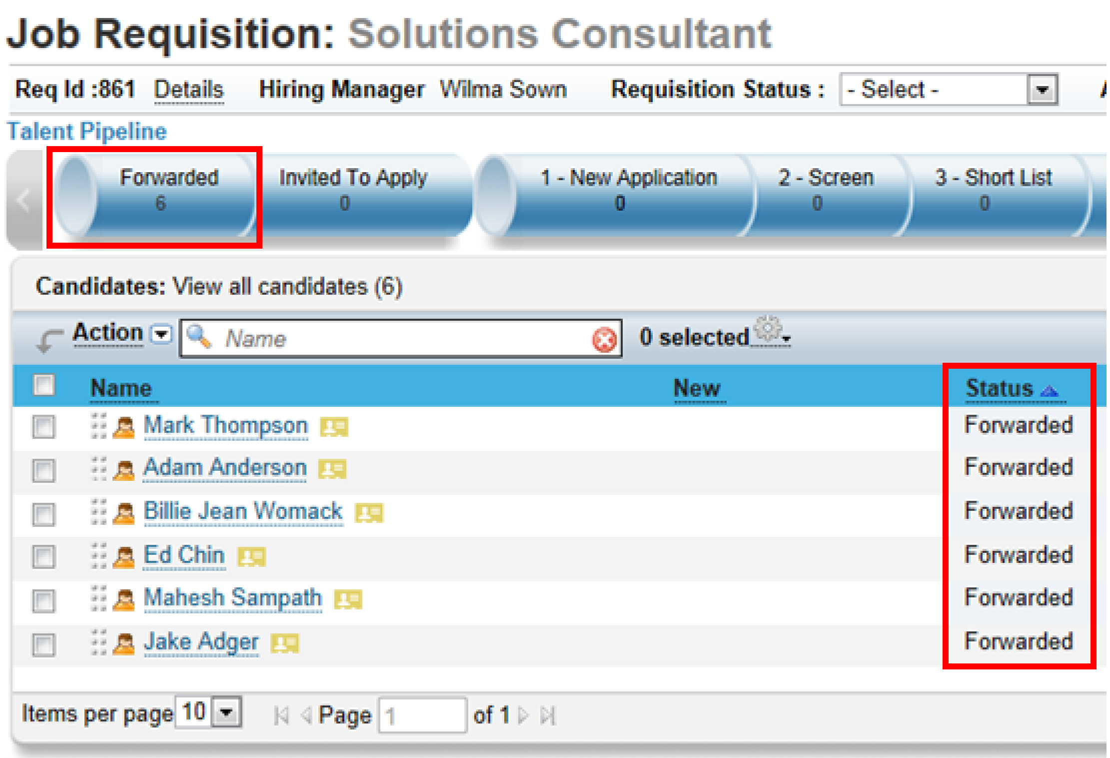
Forward to Job from Candidate Profile Record

If failures occur, the confirmation message you receive includes a detailed listing of the failure reasons. for example, attempting to forward an internal candidate to an externally posted requisition or attempting to forward a candidate to a requisition that violates his or her privacy settingss.



Forward to Job Confirmation Message and Failure Details

When candidates are successfully forwarded to a requisition, the candidate is associated with the requisition in the Forwarded status.



Forwarded Candidates on a Requisition

Candidates do not receive e-mail notifications when they are forwarded to requisitions. Forwarded candidates are not considered applicants; therefore certain functionalities are limited. For instance, only candidate profile data (not application data) is available on the application record, no data is reportable, the requisition does not appear in the candidate's Jobs Applied portlet, and candidates cannot be dispositioned.

A warning message appears at the top of the application record for forwarded candidates, reminding recruiting users the candidate has not yet completed the application.

Forwarded Candidate Warning Message

6.5.1.1 Forwarding Candidates with Application Data Intact

To enable forward candidate with application data intact:

- Late-stage applications must be enabled to forward candidates with application data intact.

  Recommendation

  If late-stage application is not enabled, the option to enable forwarding with application data intact is not available in *Admin Tools*.

- Navigate to *Admin Tools* > *Manage Recruiting Settings* > *Applicant Profile Setting* > *Enable forwarding with application data intact* and select the checkbox.
- Profile data for candidates in the *Forwarded* status is populated into their application snapshot. If a candidate is later moved into the *Default* status via Add to Requisition, previous application data is forwarded intact.
- If the candidate is forwarded directly to the *Default* status, data missing from the candidate's most recent application (if any) prepopulates from the current candidate profile. Candidate profile data populated onto an application always comes from the current candidate profile.

  Note

  Required fields on the application do not apply to forwarded candidates. Forwarded candidates can move through the pipeline without completing required application fields.

Table 14: Field Data Forwarding Behavior

Field	Forwarding Behavior
jobTitle	Does not forward with data intact
averageRating	
applicationDate	
lastmodified	
source	
questionsResponse	
statusId	
id	
interviewResult	
overdueInterviews	
reviewDate	Only forwards if defined as forward-intact="true"
comments	
referralSource	
bkgrndChkStatus	
bkgrndChkAttachment	
formerEmployee	
startDate	
currentTitle	
currentCompany	
country	

Field	Forwarding Behavior
contactEmail	Forwards with data intact from the candidate profile if present. If not, fields arecopied from the application if defined as forward-intact="true"
firstName	
lastName	
middleName	
gender	
ethnicity	
race	
address	
availability	
cellPhone	
homePhone	
faxNumber	
city	
state	
zip	
dateOfBirth	
disabilityStatus	
minAnnualSal	
preferredLoc	
ssn	
veteranStatus	
resume	
coverLetter	

Related Information

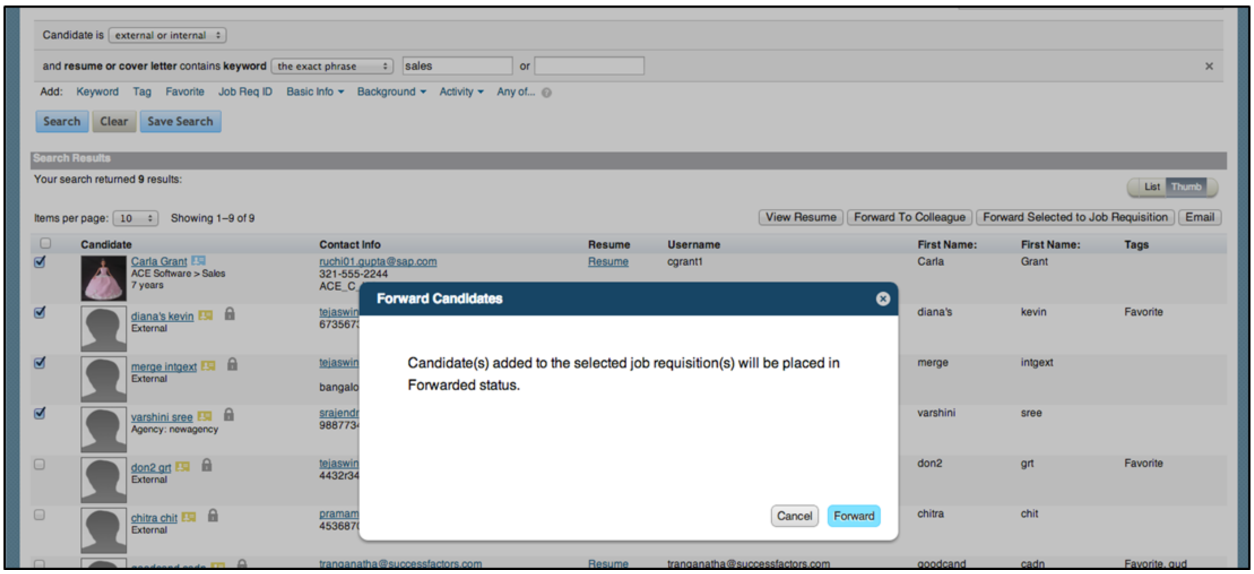
Late Stage Application [page 105]

6.5.1.2 Working with Forwarded Candidates

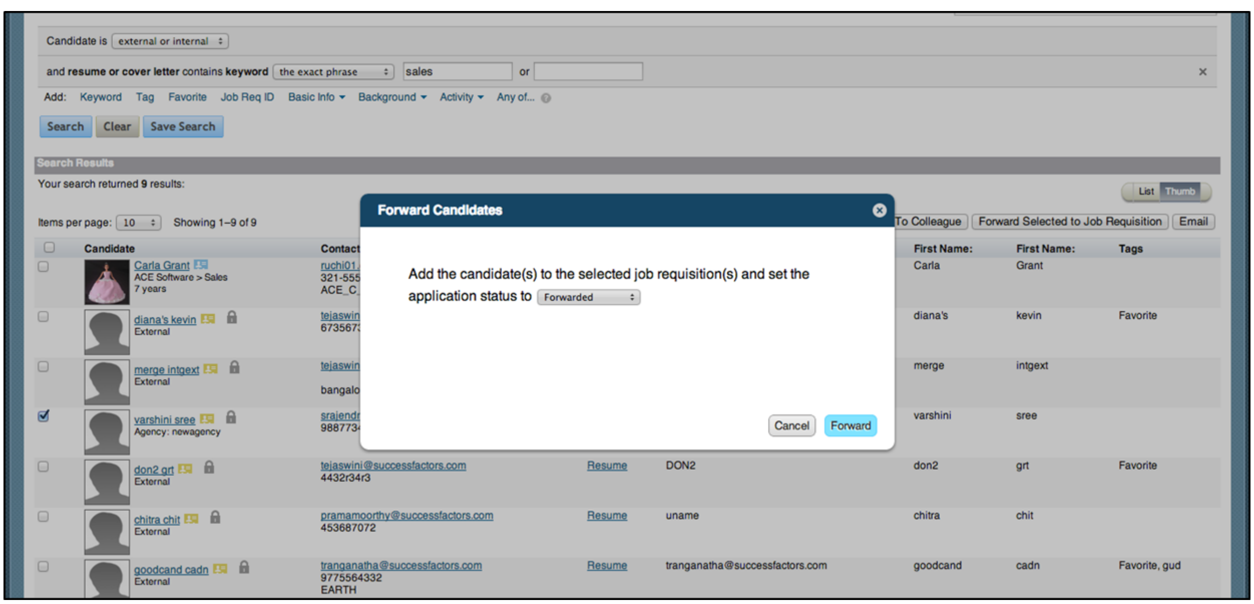
- The system distinguishes between forwarded candidates and actual applicants, despite the continuation of the data, so clients can follow legal best practices.
- For requisitions that are configured with override fields, a candidate sees only the fields dictated by the override. For example, if a candidate applies for a job in the United Kingdom that asks for personal

information, and then the candidate is forwarded to a US requisition, they will not see the personal information fields if the US requisition does not require them.

- Forwarded data populates to fields, regardless of the stage where the candidate sees the fields in a multistage application environment.
- Forwarding candidates using a combination of synchronous and asynchronous processes. Data syncs immediately for new applications when a recruiting user is completing 20 actions or fewer. This can be any combination of candidates and requisitions; for example, forwarding 2 candidates to 10 requisitions, 1 candidate to 20 requisitions or 20 candidates to 1 requisition. Once the 20-action threshold is reached, a scheduled job runs to forward the data.
- The recruiting user can select which status the applicants will be placed into: Forwarded or Default. To place applicants into the *Default* status, you must have late-stage applications enabled. If *Forwarded Candidate only* is enabled, all candidates are placed into the forwarded status.



Status Confirmation when Late Stage is not Enabled



Select Status for Forwarded Candidates

6.5.2 Invite Forwarded Candidates to Apply

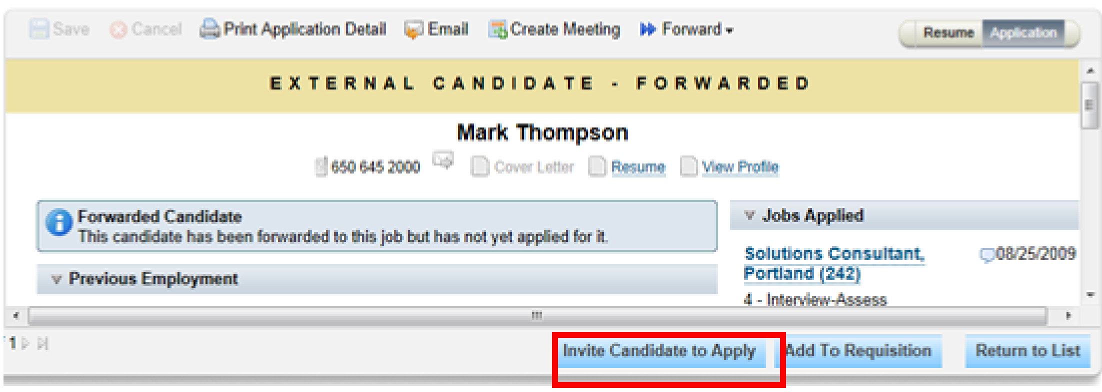
Prerequisite:

- Select *Admin Tools* > *Recruiting Email Triggers* > *Enable Invite Candidate to Apply*

> **Recommendation**
>
> Do not use status triggered emails with Invite to Apply. Only use the *Enable Invite Candidate to Apply* email trigger.

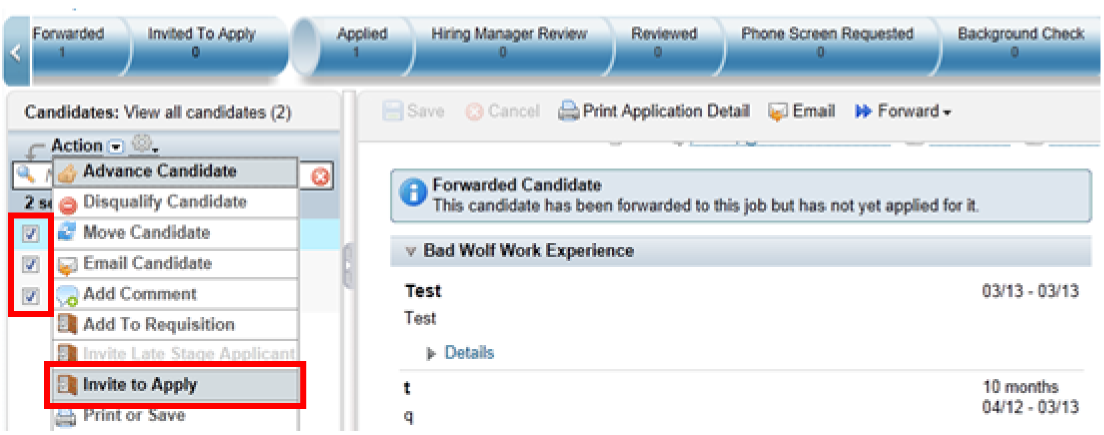
Forwarded candidates can be invited to apply to a requisition in one of two ways:

- *Select candidate checkbox* > *Action* > *Invite Candidate to Apply*.

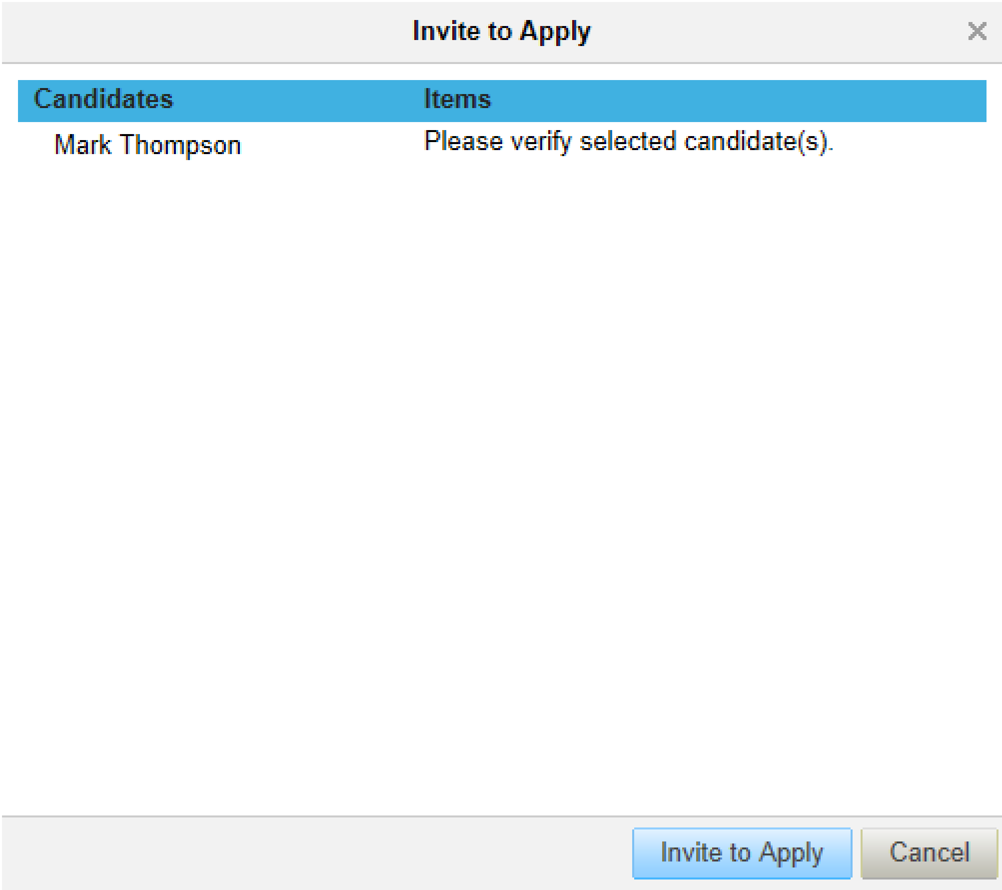


Invite Candidate to Apply from Application Record

- *Select candidates (checkboxes if selecting multiple candidates)* > *drag and drop into Invited to Apply status*.



You will receive a confirmation prompt screen as shown below.



Invite to Apply Confirmation Screen

When candidates are invited to apply they receive an e-mail notification that uses the *Invite Candidate to Apply* e-mail template. This e-mail informs the candidate of the invitation and includes a link to apply to the job. An invited candidate cannot apply to a requisition unless it is posted.

If a candidate has been invited to apply, but has not completed the application, a recruiter can re-invite them to apply by clicking *Re-Invite Candidate to Apply* on the Application. The recruiter can continue to initiate the *Re-Invite to Apply* until the candidate completes the application.

No further action can be taken on the candidate by a recruiting user until the candidate applies to the requisition, unless the client has chosen to enable the Late Stage Application feature.

6.5.3 Multistage Application

Each client instance can be set up in one of two ways.

- *Single-stage application environment:* Candidates complete s the application data at the initial application point and cannot change or add to their data later. Recruiting users can see all fields in all application statuses.
- *Multistage application environment:* The fields available to a candidate or recruiting user vary, depending on the current status of the application. That is, the candidate completes a set of application data at the initial application and can be granted permissions to edit that data, or access other fields depending on the status of

the application. Recruiting operators can view and write to different fields depending on the status of the application.

A single client instance cannot include both single-stage and multistage applications.

Multistage applications require:

- Select *Provisioning* > *Company Settings* > *Recruiting V2 Application* > *Enable Multi Stage Application*
- Configure the Application and Requisition XML files

When the multi-stage application setting is enabled in Provisioning, remove all fields from the field-permission elements in the Application XML. Instead, define the fields in the Requisition XML, underneath the `<application-status-config>` element, referencing the appropriate statuses.

> **Tip**
>
> The `statusId`, `resume,` and `coverLetter` fields must remain defined in the Application XML field-permission elements when multi-stage application functionality is enabled, even though all other field permissions are defined in the Requisition XML.

In a multistage environment, all required fields for all status operators must be filled out before a recruiting user can successfully change the applicant's status to any *In Progress* status. An applicant can be moved to a disqualification status at any point, regardless of whether or not required fields are completed.

Related Information

field-permission Elements [page 281]

6.5.4 Default Status

All applicants must pass through the Default status at least once. This status is labeled New Application, Applied, or similar, according to the client's preference.

We recommend onfiguring a *Thank you for applying* e-mail that is sent to the candidate recipient upon entry to this status.

6.5.5 Auto-Disqualified Status

If a recruiting user has established a set of prescreening questions on the requisition that have disqualifying questions or a passing score requirement, applicants who fail the prescreen are automatically placed into the Auto-Disqualified status.

There is presently no way to auto-disqualify applicants based on application data, when another applicant is hired, or when the requisition is closed. Disposition those applicants manually.

6.5.6 Withdrawn By Candidate Status

Applicants may choose to withdraw their application. A withdrawn application is automatically moved to the *Withdrawn By Candidate* status.

Candidates can choose to resubmit their application after withdrawing.

- In a single-stage application environment, the application is immediately resubmitted, without allowing changes by the applicant.
- In a multi-stage application environment, the applicant can modify the applicantion and then confirm the resubmission.

In either case, the prescreen question responsesare re-evaluated and the application is placed in the *Default* status or the *Auto-Disqualified* status accordingly.

A candidate can withdraw and resubmit the application, even if the original application was disqualified. There is no way to disable the withdraw and resubmit functionalities.

6.5.7 Hired Statuses

Statuses in the *Hired* category have special characteristics. For example, when an applicant is placed into a hired category status the `number of openings` field subtracts an opening. Every applicant status set should include at least one status in the *Hired* category. You designate a status in the *Hired* category when you create or add it to the base status set. This is a different setting than the status's Hireable options. To a view a category's status, navigate to *Provisioning* > *Applicant Status Configuration* or *Admin Tools* > *Applicant Status Configuration* and choose the appropriate status set.

6.5.8 Manage Applicant Status

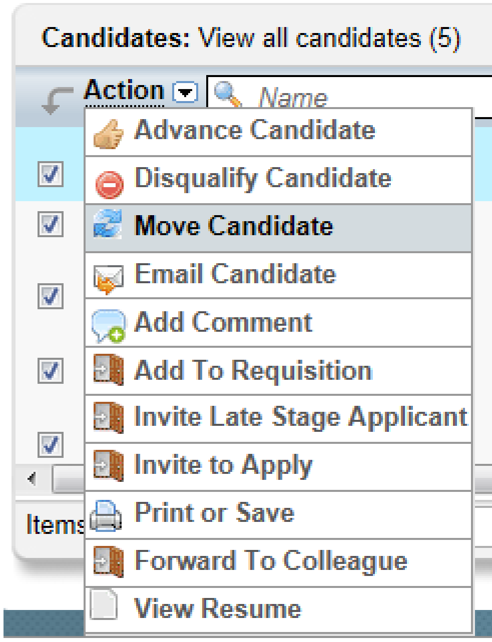
Prerequisites

- Select *Application XML* > *statusID field permissioned to the appropriate operators*

> **Tip**
>
> Enable this setting even in multistage application environments, even though the other field permissions are configured in the Requisition XML.

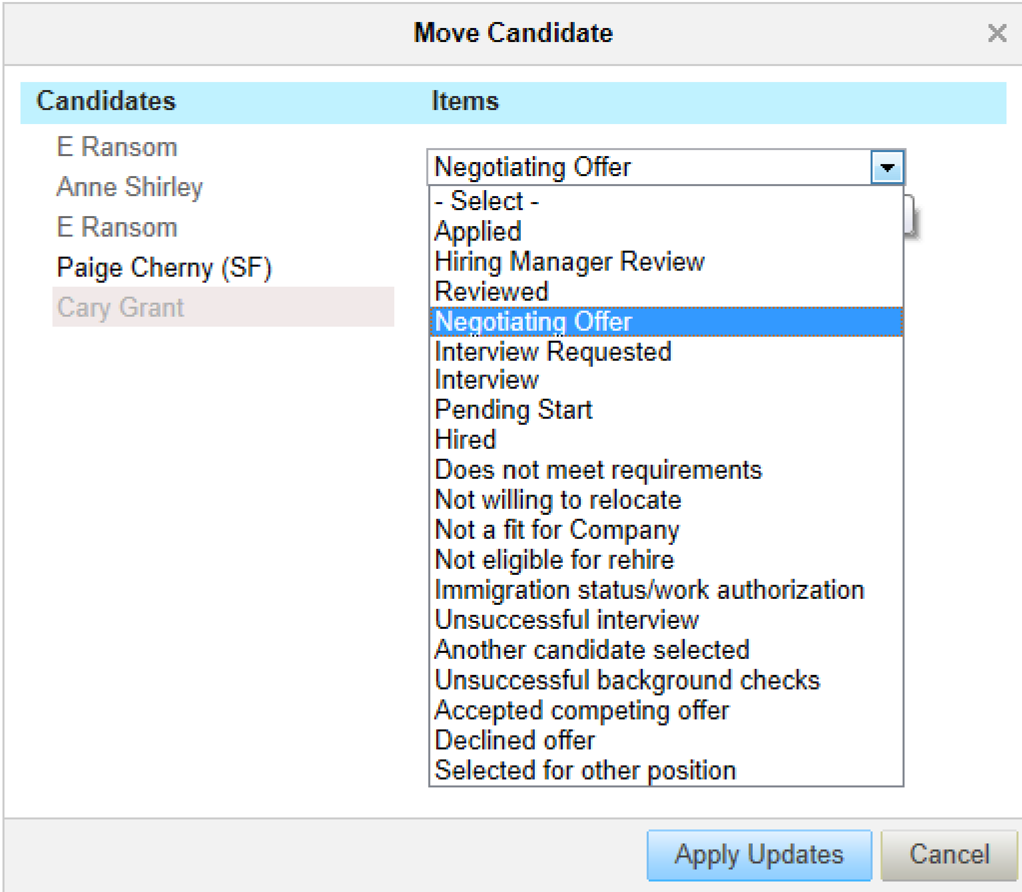
Procedure

1. Navigate to *Candidate Summary page* > *Select Applicants* > *Actions* > *Move Candidate* > *Select Status*



Move Candidate

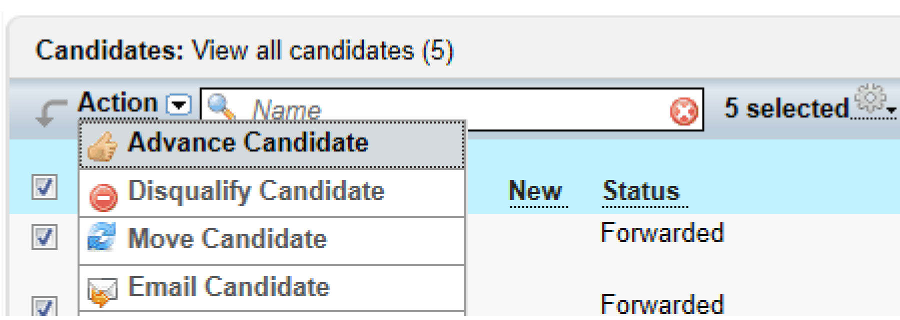
2. Select the desired status.



Move Candidate to Selected Status

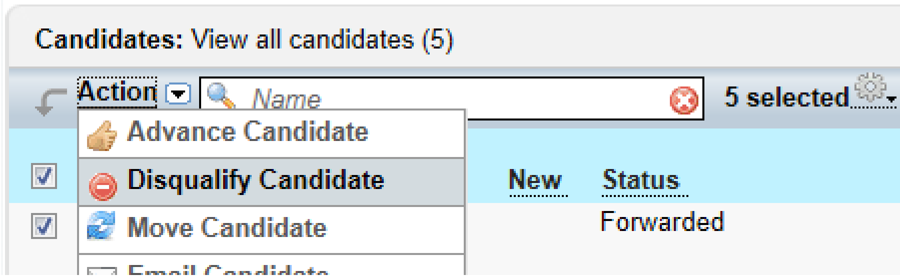
> **Tip**
>
> In Progress statuses include only the most advanced status a candidate is eligible for (that is, you will only see the In Progress statuses up until the next required status in the pipeline for the candidate who is already furthest in the pipeline.)
>
> Candidates who cannot be moved into the selected status because they have not yet passed through the prerequisite required statuses, appear grayed out in the candidate list.

3. *Check* › *Actions* › *Advance* › *Automatically selects next status*.



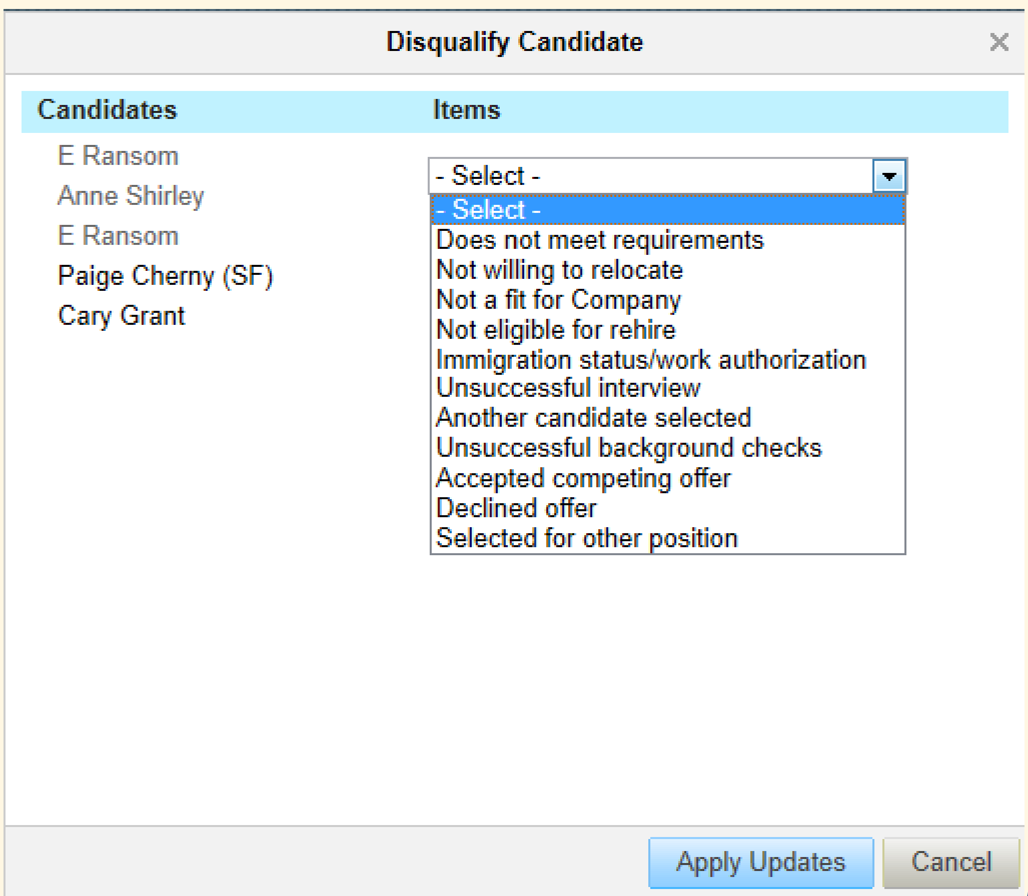
Advance Candidate to the Next Status

4. Check › *Actions* › *Disqualify* › *Select disqualification status*

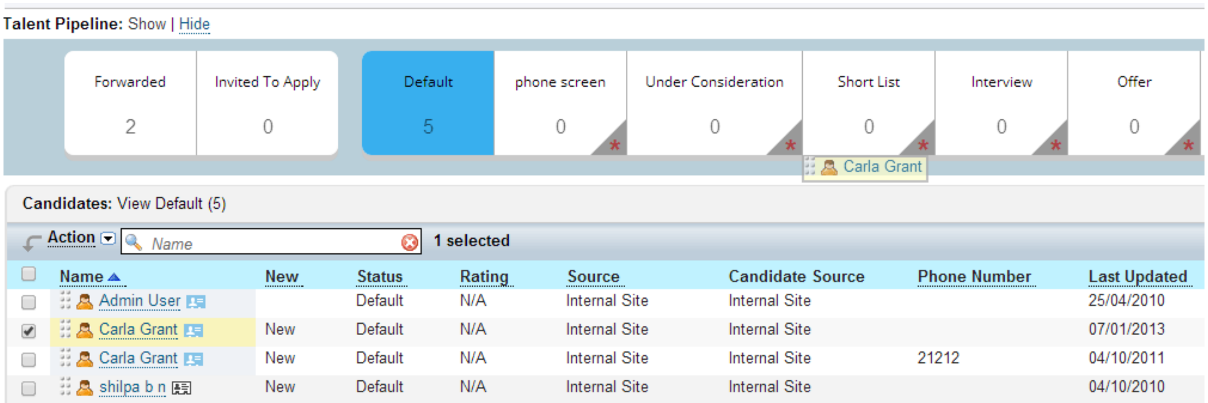


Disqualify Candidate

5. Select the desired status.

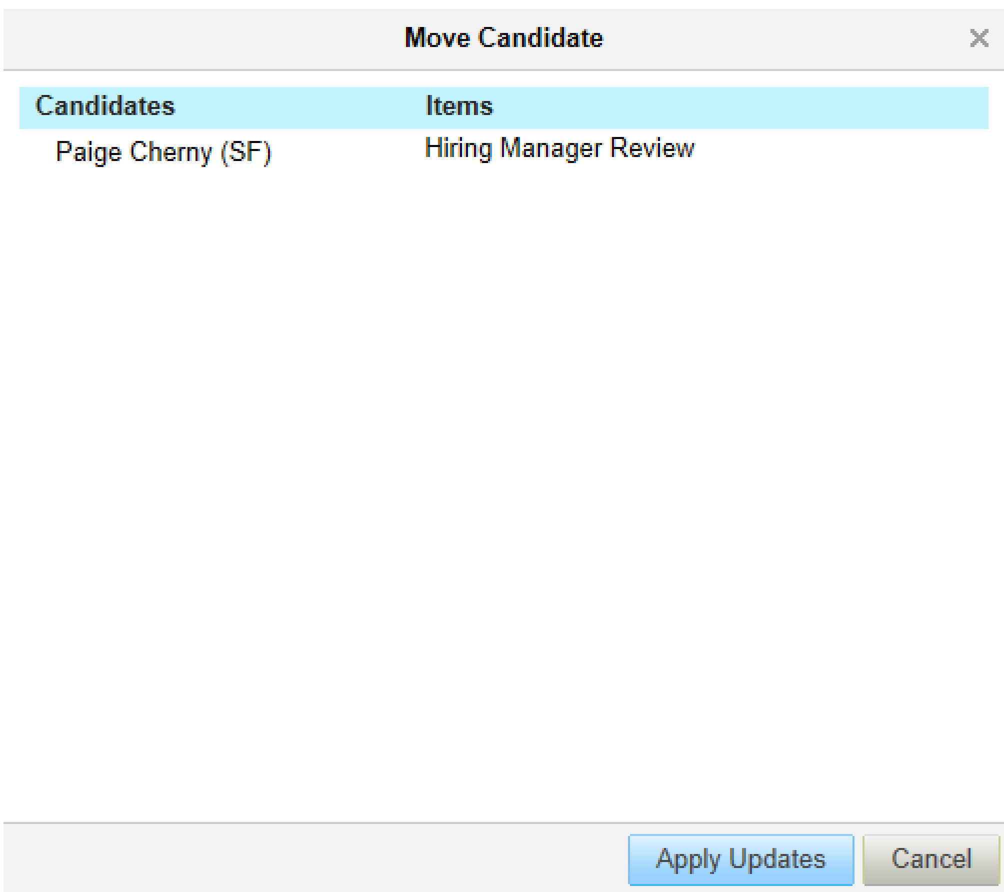
> **Tip**
>
> You see only disqualification statuses. This is useful for clients who want to have a single disqualification stage with multiple disqualification statuses.
>
> 
>
>
> *Disqualify Candidates*

6. Drag and drop a single applicant using the drag handles (six little dots to the left of the applicant's name).



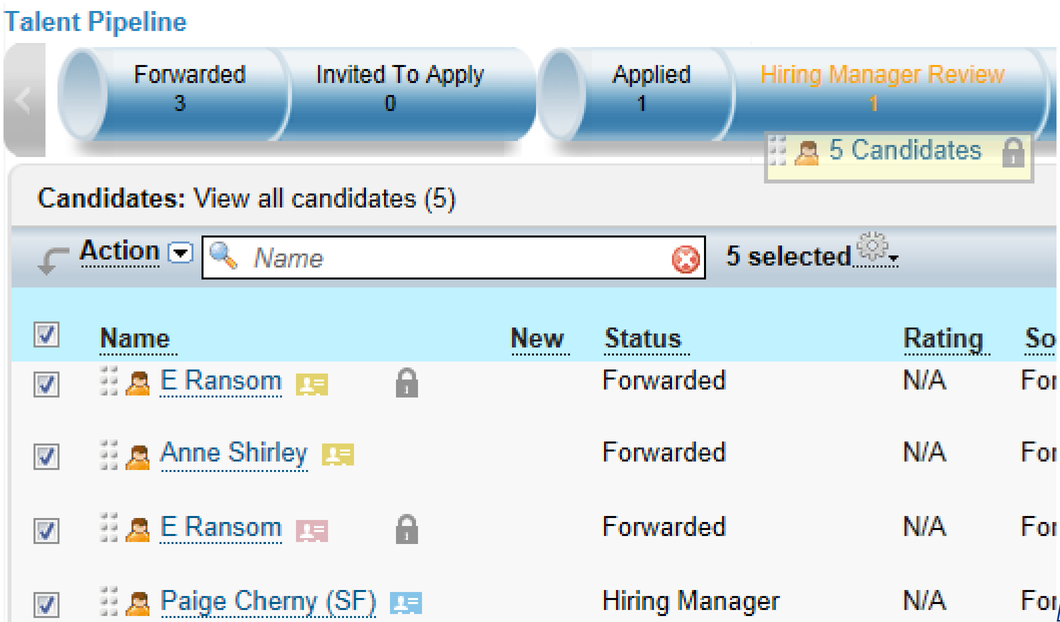
Drag and Drop Candidates in the Pipeline

7. Confirm the application status change.



Confirm Application Status Change

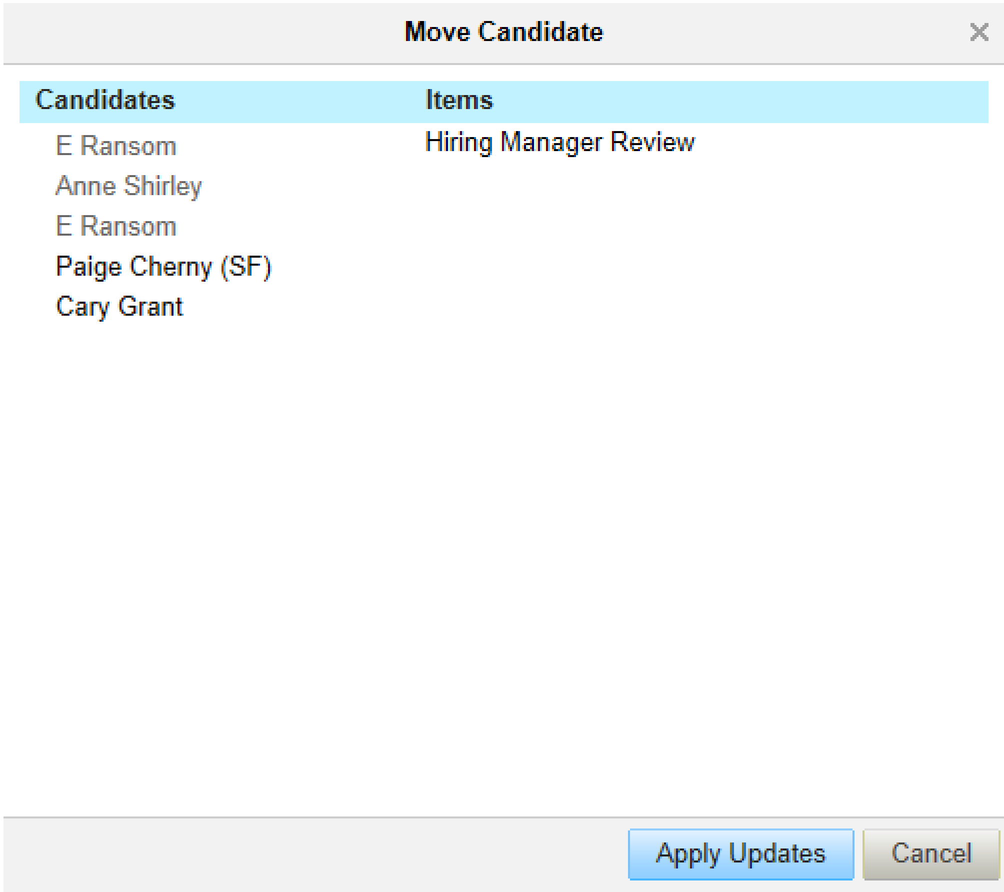
8. Check multiple desired applicants, then drag and drop using the drag handles (six little dots to the left of the applicant's name.



Drag and Drop Multiple Candidates

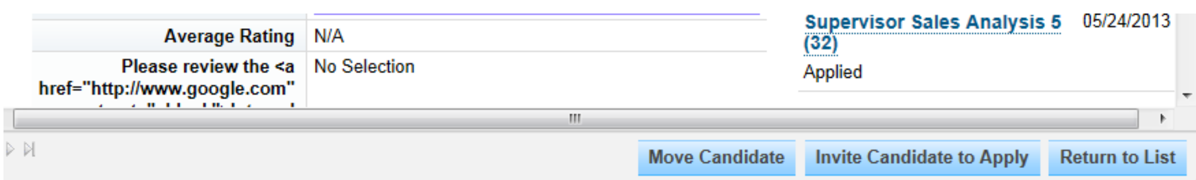
9. Confirm the application status change.

   Candidates who cannot be moved into the selected status because they have not yet passed through the prerequisite required statuses, appear grayed out in the candidate list.



Confirm Application Status Change

10. *Open record* > *change status drop down* > *Save*. Changing an applicant status in this way requires all required fields on the application visible to this operator in this status to be filled in.
11. Open a candidate record and click *Move Candidate*.



12. Select the desired status.

6.5.9 Status-Triggered Emails

A candidate entering a status might trigger e-mail notifications to various operators. Set up these e-mail notification triggers and associated templates in *Admin Tools* > *Edit Applicant Status Configuration*.

To track status-triggered emails sent to candidates, use the *Application Correspondence* portlet. You cannot track status-triggered emails sent to other operators in the *Correspondence* portlet. Status-Triggered Emails do not work with Candidate Profile e-mail tokens. Only Job Application and Job Requisition tokens are supported in status-triggered emails.

Recommendation

Status-Triggered emails are sent when a status changes. You cannot configured a delay in sending status-triggered emails, except for those to disqualified candidates.

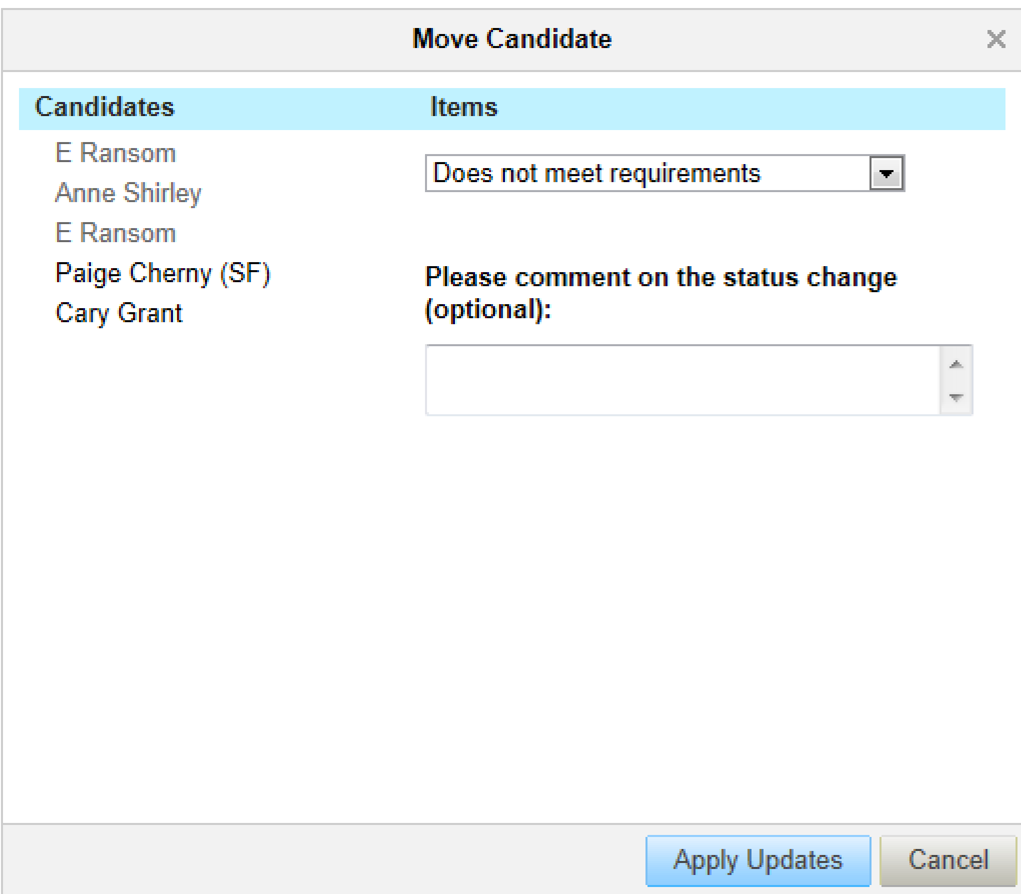
6.5.10 Status Change Comments

You can configure a free text comment box that allows recruiting users performing the status change to capture additional information.

Status change comments require Professional Services configuration in Provisioning.

Enable or disable this feature in *Provisioning* > *Company Settings* > *Allow users to optionally provide comments on application status change*.

This comment box is optional and cannot be made required. No additional fields can be added to this page. Spell checking, legal scans, and rich text editor features are not supported in this comments box.



Status Change Comment Box

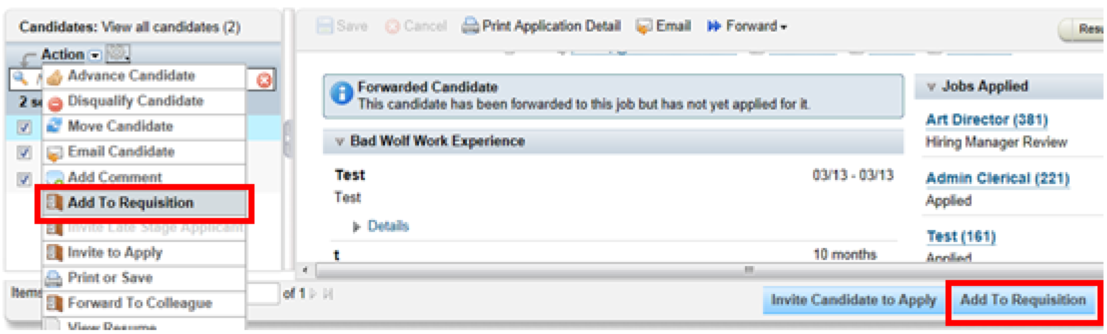
6.5.11 Late Stage Application

Some clients may ant to allow recruiting users to place a candidate in the main applicant status pipeline, even if the candidate has not yet completed an application. The late stage application feature supports this need.

6.5.11.1 Configuration

1. Select *Provisioning* > *Company Settings* > *Enable Late Stage Applications*
2. Select *Admin Tools* > *Recruiting Email Triggers* > *Enable Invite Candidate to Apply*

When late stage application is enabled in Provisioning, an *Add To Requisition* option becomes available in the *Actions* menu and as a button on the applicant record of forwarded candidates.



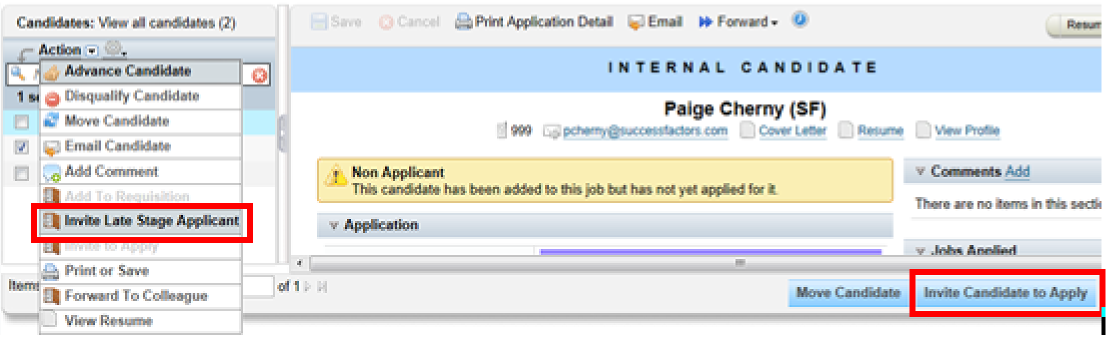
Add to Requisition Action Option on Forwarded Candidates

Select *Add to Requisition* to move a candidate out of the Forwarded or Invited to Apply status and into the Default status. If any e-mail is set up to be sent to applicant when they enter the Default status, an exception exists for forwarded candidates who are added to the requisition. These candidates do not receive the e-mail configured for candidates in the Default status.

At this point, certain additional functionalities like comments, status-triggered emails, and other application status features become available. However, the candidate is still not considered an applicant. The forwarded candidate warning message still appears on the application.

The client should design a business process that ensures all candidates complete an application before an offer is extended. This is important for technical, functional, and compliance reasons.

To prompt the candidate to complete the application, the recruiting user clicks *Invite Candidate to Apply* on the application, or selects the checkbox next to the candidate in the applicant list and selects *Action* > *Invite Late Stage Applicant*.



Late Stage Application Invite to Apply Options on Forwarded Candidates

Add the following content to the feature-permissions section of the Requisition XML file to define which operators can access the *Invite to Apply* capability and in which applicant status.

```
<feature-permission type="lateStageApp">
      <role-name><![CDATA[S]]></role-name>
      <role-name><![CDATA[T]]></role-name>
      <role-name><![CDATA[R]]></role-name>
      <role-name><![CDATA[W]]></role-name>
      <status><![CDATA[Default]]></status>
    </feature-permission>
    <feature-permission type="lateStageApp">
      <role-name><![CDATA[S]]></role-name>
      <role-name><![CDATA[T]]></role-name>
      <role-name><![CDATA[R]]></role-name>
      <role-name><![CDATA[W]]></role-name>
      <status><![CDATA[Reviewed]]></status>
    </feature-permission>
```

Unlike the Invite to Apply functionality available in the Forwarded status, the late stage application Invite to Apply can be selected multiple times. Both Invite to Apply features use the same e-mail template.

If late-stage application is used with multistage application, a candidate who responds to the invitation to apply sees all fields exposed in all statuses up to and including the status they are in.

6.6 Applicant Status Frequently Asked Questions

Can I require either status A or status B, and prevent applicants from progressing through the pipeline until they have passed through one of those statuses?

This is not supported.

Can I configure a conditional applicant status workflow?

This is not supported, but you can set a status as external or internal only.

How do I configure a different status workflow for requisitions in different countries, departments, and so on?

Requisitions and applications have a one-to-one relationship; set up a different requisition template for every application. The recruiting must then open the correct type of requisition based on the applicant status workflow.

Can I prevent an applicant from moving forward in the status workflow until there is an approved offer?

Assign *Selectable By* privileges to the user for the status you are attempting to move the applicant to.

Conifigure the statusId field in the Application XML file (**Not** the Requisition XML file, even if you are using multistage application) for the operator you are using

Configure all required fields for all operators for the status to which the applicant is currently assigned (even if you cannot see the fields when logged in as one user; there may be required fields that are visible to another user that need to be populated with data in that status.)

Can I prevent an applicant from moving forward in the status workflow until a forwarded applicant has completed their application?

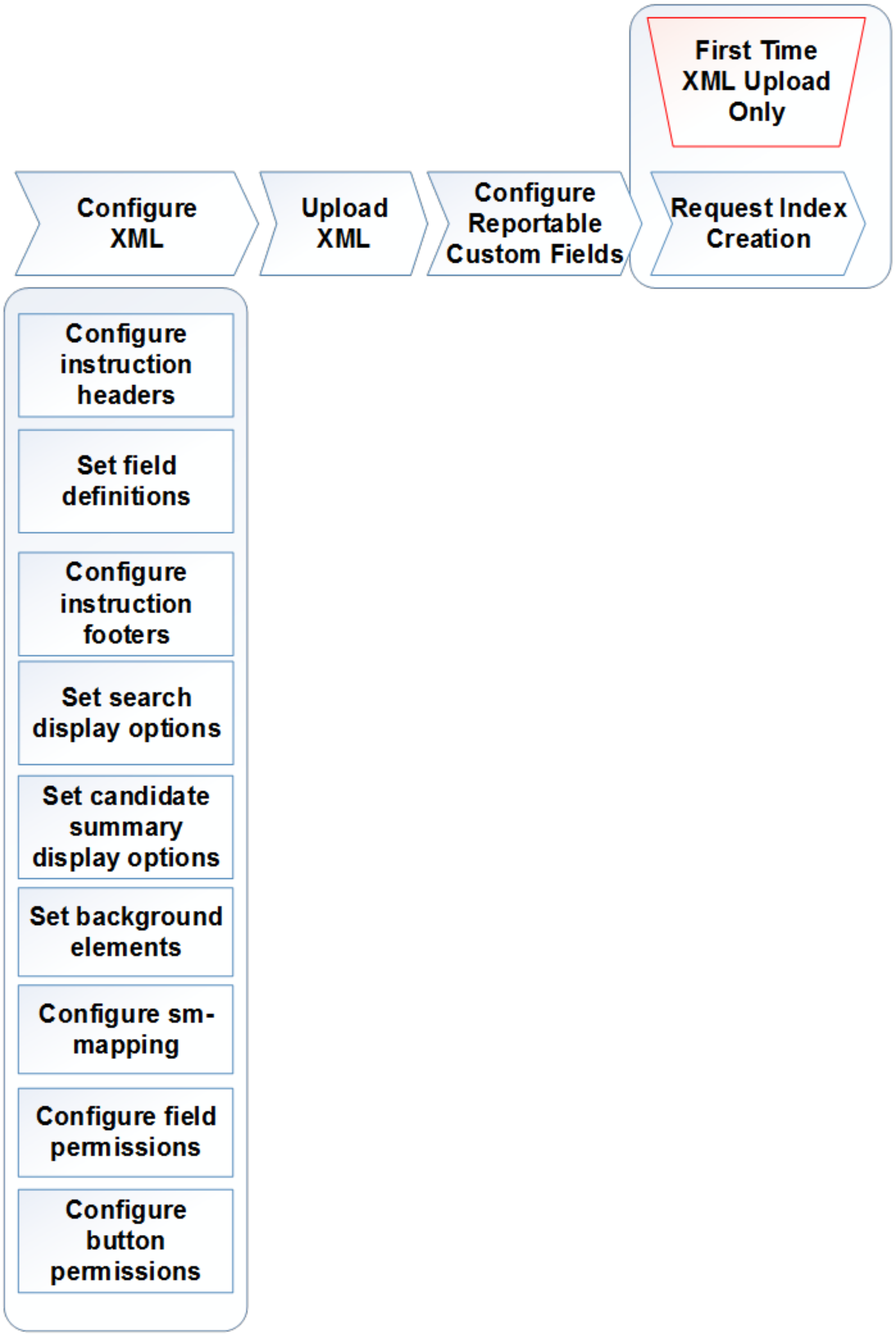
If late-stage application is enabled, there is no support for a hard stop status. If late stage application is not enabled, the applicant cannot progress beyond *Invite to Apply* without completing the application.

7 Candidate Profile

The Candidate Profile is the record of the candidate’s data in the searchable candidate database. It is often described as the candidate’s online resume, although the Candidate Profile usually contains more data than just the resume attachment.

Both internal and external candidates have a Candidate Profile. Not all employees are candidates by default. Depending on the client’s data privacy consent statement settings, the employee may have to opt in to becoming an internal candidate.

Candidate Profiles are used for multiple purposes. Clients might want to capture candidate data for future use, even when the candidate hasn't found a job to apply for. If a candidate does apply to a posted requisition, the candidate profile data is appended to the Application. Recruiting users can search candidate profile records to locate potential matches for job requisitions. If a good match is found, the candidate profile record may be forwarded to one or more applicable job requisitions.



Process Overview for Configuring the Candidate Profile

Configure the candidate profile in the Candidate Profile XML template, which you can save in *Provisioning* > *Edit Candidate Profile Template* > *Paste Candidate Profile XML template* > *Save Form*. Only one Candidate Profile XML template per instance is supported.

Recruiting user write permissions for the candidate profile can be defined based on the type of candidate (internal or external) and on the country of the candidate.

Candidate profiles are unaffiliated with requisitions; that is, they are standalone searchable records in the database. A candidate completes basic details such as name and contact information, resume, and cover letter as well as more detailed information such as work experience, education, and anything else the client wants to include on the template. This data makes up the basis of the candidate search and since it is discretely stored is discretely searchable. You cannot configure the layout, sizing, and spacing of the Candidate Profile.

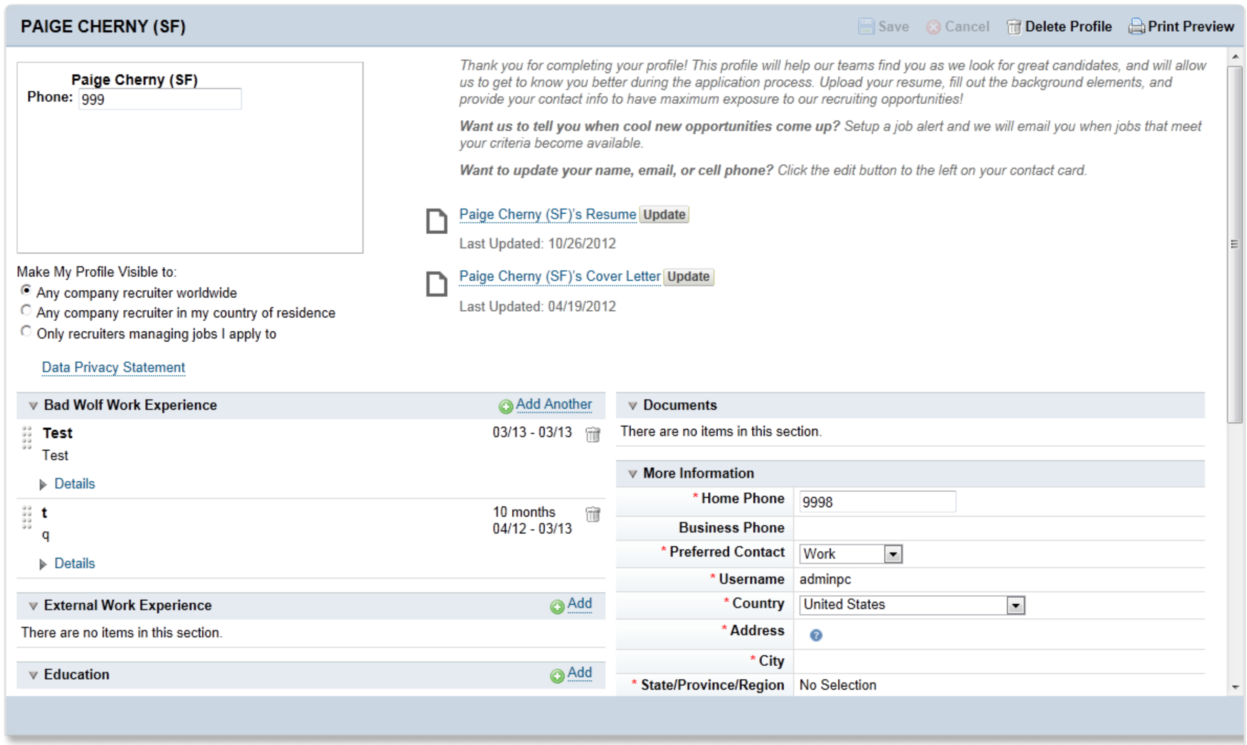
After you initially define the Candidate Profile XML template, request an instance reindex. The instance must be reindexed before candidate search can function and candidate profile records can be saved. Changes to the candidate profile might require a reindex of the search index, but often the reindex is not required.

The Candidate Profile record contains the following sections:

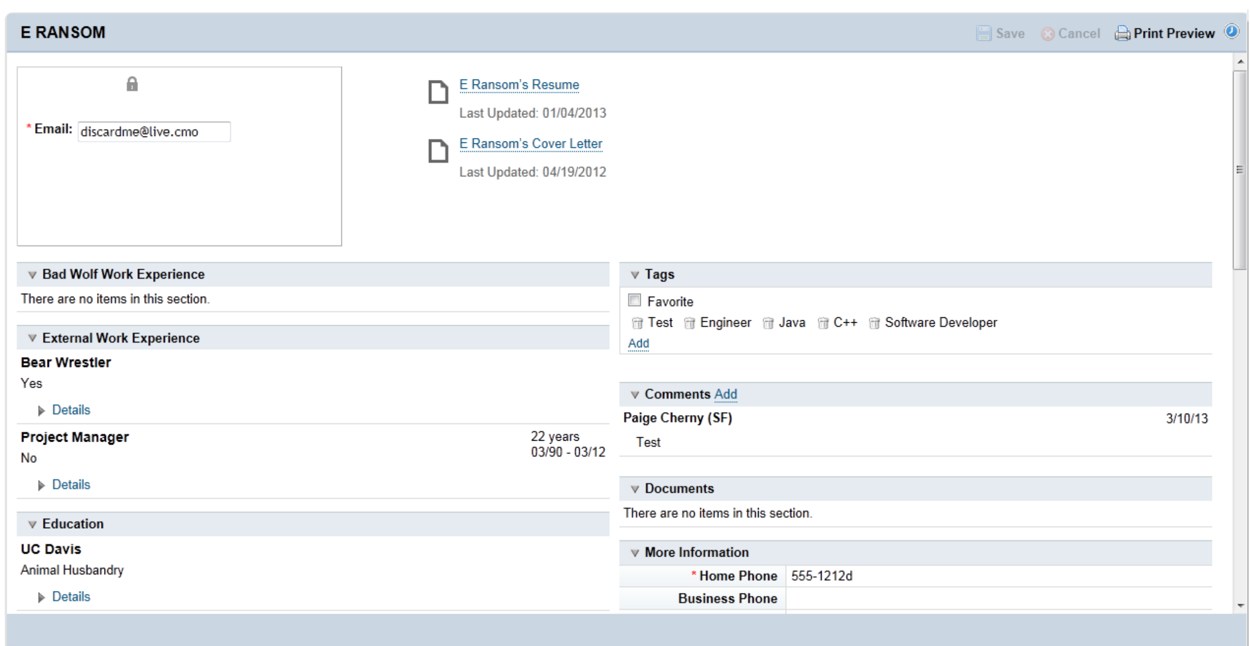
- *Header instructional text:* Shows a welcome message, images, and instructions to candidates, or recruiting users. Can be hidden or shown based on configuration.
- *Business card:* The candidate's name, e-mail address, and mobile phone. The business card always shows, and you cannot add or move fields that appear.
- *Resume and cover letter:* Resume and cover letter attachment fields always display regardless of configuration but should be explicitly configured anyway. Accepted file types for resume and cover letter uploads are Microsoft Word, PDF, HTML, PPT, XLS, CSV, image, and text. Media files, such as .wav and .mp3 are not supported. Any other files types are not supported.
  You cannot attach protected or secured .pdfs. Attempted to attach a secured .pdf produceds the error message, *An exception was encountered while uploading the Attachment.*
  All attachments and candidate data are scanned for viruses by the SuccessFactors platform. If any viruses are found, the documents will not be sent to the server.

  > **Tip**
  >
  > Save text documents (.txt) with Unicode Encoding Type, not ANSI, or another type of encoding.

- *Data Privacy and Visibility:* Radio buttons displaying the candidate's current visibility setting and alternate options, and a link to the current version of the data privacy consent statement for the candidate's country. Can be hidden or shown based on configuration.
- *Documents:* Attachments Portlet that stores attachment fields other than resume and cover letter when the client wants to collect additional attachments. Cannot be hidden.
- *More Information:* Stores single-value fields, which are often used for personal information data fields such as name, phone number, and e-mail address. Cannot be hidden.
- *Background elements:* Enables a candidate to create data sets that consist of multiple entries, for example education information where each line of data can contain multiple fields such as school name, or degree experience where each line of data can contain multiple fields like employer, title, and dates. Can be hidden or shown based on configuration.
- *Comments (Recruiting user view only):*Shows any comments previously added to the record, and allows recruiting users with appropriate permissions to add new comments.
- *Tags (Recruiting user view only):*Shows tags previously added to the record to increase searchability, and allows recruiting users with appropriate permissions to add new tags.
- *Jobs Applied Portlet (Recruiting user view only):* Displays the requisition ID, job requisition title, recruiter name, and the last modified date of the candidate pipeline status. If an internal recruiting user has access to the requisition listed in the Jobs Applied Portlet, the job requisition title appears as a link to that job requisition. Displays to users with appropriate permissions.
- *Footer instructional text:* Often used to display compliance notification messages and instructions to candidates, or recruiting users (may be configured to display)



Candidate View of Candidate Profile



Recruiting User View of Candidate Profile

7.1 Configuring the Candidate Profile XML

Before working with the Candidate Profile XML file, you must complete the configuration prerequisites.

- Enable Recruiting in *Provisioning* > *Company Settings*
- After loading the Candidate Profile XML template for the first time, go to *JIRA* and create a COSR ticket requesting index creation for the instance.
- The Candidate Profile XML may depend on the Succession Data Model XML. Some Candidate Profile data can be synced to the Employee Profile data. If data is being sm-mapped, the Succession Data Model XML must be configured and loaded before you can load the Candidate Profile or an error displays.
  `Error: The field-id <fieldX> in sm-mapping does not exist in SM data model.” The sm-mapping tag must exist in the Candidate Profile XML in order for data to be synced with the Employee Profile.`
- Load any picklists referenced in the Candidate Profile before loading the Candidate Profile XML. If a picklist referenced in the Candidate Profile XML does not exist in the instance when the Candidate Profile XML is uploaded in Provisioning, an error message displays.
  `The system encountered error(s) when importing the template. Errors Validating Recruiting Template: Error: Picklist id does not exist in system for field "<fieldname>".`

Before configuring any other settings, configure the Candidate Profile XML template. Include the following declaration at the top of every Candidate Profile XML document.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE candidate-profile-data-model PUBLIC "-//SuccessFactors, Inc.//DTD
Candidate Profile
Data Model//EN" "candidate-profile-data-model.dtd">
<candidate-profile-data-model>
```

7.1.1 Defining the template name

In the XML, the `<template-name>` tag defines the template name. Use a descriptive name to define the template. You can also add a <template-desc> element to define a description of the template.

Both the `template-name` and `template-desc` elements must immediately follow the candidate-profile-data-model element. You can change the CDATA content; it does not appear anywhere in the instance or in Provisioning, is not referenced by any other XML, and is invisible to the client.

7.1.1.1 Candidate Profile XML Sample

This is an example for reference purposes, not a recommended configuration.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE candidate-profile-data-model PUBLIC "-//SuccessFactors, Inc.//DTD
Candidate Profile Data Model//EN" "candidate-profile-data-model.dtd">
<candidate-profile-data-model>
```

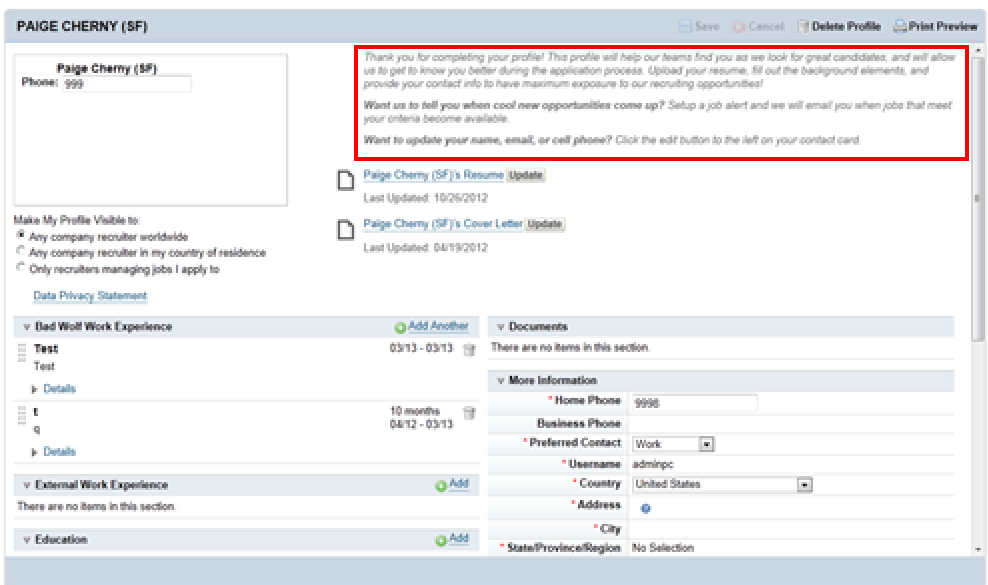
```
<template-name><![CDATA[Candidate Profile Template]]></template-name>
<template-desc><![CDATA[This defined candidate profile fields.]]></template-desc>
```

Related Information

Candidate Profile Blueprint XML

7.1.2 Configuring instruction headers

The instruction headers appear to provide guidance for completing the profile. There are two types of headers: operator instruction headers for recruiting users and instruction headers for candidates.



Instruction Header

Internal and external candidates both see the same header. You cannot configure separate headers based on candidate type.

Setting the header for candidates

1. Modify the XML to customize the header. A sample header configuration is shown below. This XML element must immediately follow the <template-desc> element.
2. HTML is supported in the instructional text as long as the <mime-type> attribute is set to text-html.

```
<instruction-header>
  <label mime-type="text-html"><![CDATA[<i>Thank you for completing your profile!
This profile
will help our teams find you as we look for great candidates, and will allow us to
get to know
```

```
you better during the application process. Upload your resume, fill out the
background elements,
and provide your contact info to have maximum exposure to our recruiting
opportunities!<p><p><b>Want us to tell you when cool new opportunities come up?  </
b>Setup a job
alert and we will email you when jobs that meet your criteria become
available.<p><b>Want to
update your name, email, or cell phone?  </b>Click the edit button to the left on
your contact
card.</i>]]></label>
</instruction-header>
```

Setting the header for recruiting user’s view

You can configure a different header for the recruiting user’s view by using the <operator-instruction-header> tag.

1. Modify the XML to customize the header. A sample header configuration is shown below. This XML element must immediately follow the <field-definition> elements.
2. HTML is supported in the instructional text as long as the <mime-type> attribute is set to text-html.

```
  <operator-instruction-header>
<label mime-type="text-html"><![CDATA[<font size="2" color="black">This text is
viewed by a
recruiting user.</font><p><p>]]> </label>
</operator-instruction-header>
```

You can configure the CDATA content within the label element to contain any text specified by the client. There is no technical character limit; however, a very long message pushes the Candidate Profile data fields down on the screen, making it difficult for the candidate to see which fields require input.

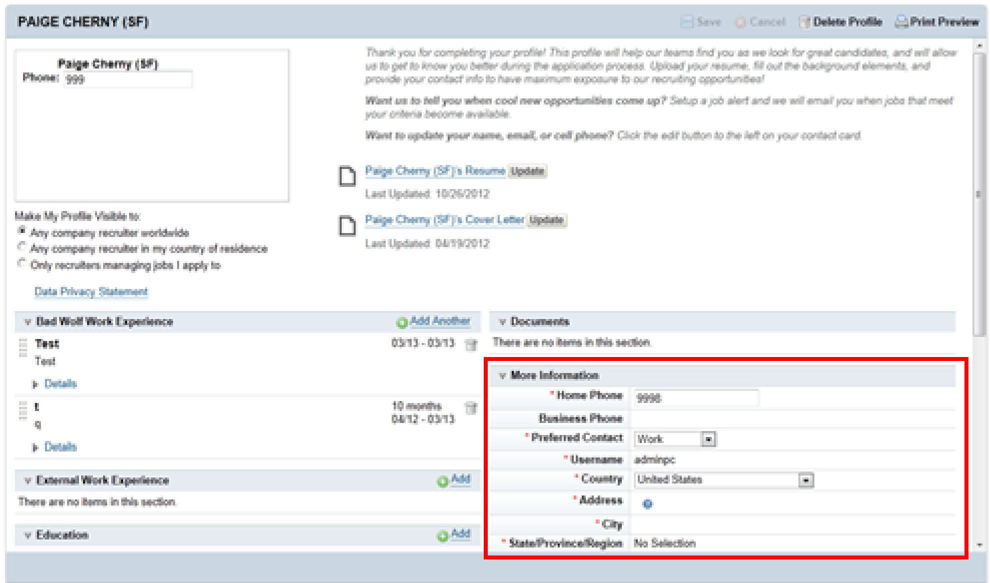
The instruction-header always shows at the top right of the candidate profile record; you cannot configure the candidate profile record layout. You can define multiple label elements on the instruction-header if the client has purchased multiple language packs. Typically these elements are defined during the translation phase of a project, after the rest of the configuration is tested and signed off.

Related Information

Translation [page 652]

7.1.3 Setting field definitions

Field definitions for a candidate profile immediately follow the instructional header in the XML of the candidate profile template. The field-definition elements define the data fields on the candidate profile record that appear in the *More Information* section.



Field Definitions on the Candidate Profile

7.1.3.1 Candidate Profile XML Element Structure

The XML that defines fields in the *More Information* section of the Candidate Profile contains the following elements:

- <field-definition> Internal identification of the field in the system. Must contain at least one field-label element.
- <field-label> The visible portion of the field, which appears the same to all internal and external candidates, recruiters, and all other users. The only reason to include multiple labels is to support multiple languages, which requires the client to purchase corresponding language packs.
- <field-description> Description of the field is an optional element within the field-definition elements. In some browsers the field-description element appears as hover text in the system user interface.

For example, the definition of the first name field consists of the following:

```
  <field-definition id="firstName" type="text" required="false" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
  <field-description><![CDATA[First Name]]>
  </field-description>
```

7.1.3.1.1 field-definition Element

The field-definition element must contain: id, type, required, custom, and anonymize attributes. In addition to these required attributes, the Candidate Profile XML template can contain as many fields as the client desires.

You need not use all standard fields in the XML, only those the client requires. You need not configure the field IDs in the same way as the field IDs in the Succession Data Model, even if the fields are sm-mapped to the Employee Profile.

The field-definition element uses the following sample structure.

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```

id Attribute

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```

The id must be unique within the Candidate Profile XML template. Certain field-definition ids are predefined in the product as standard.

Click here for a full list of candidate profile standard field ids. Partners can access the list here.

Some standard field ids have special functionality.

Tip

You cannot define default values for any fields in the Candidate Profile XML.

Table 15: Candidate Profile Standard Fields with Special Functionality

Standard Field ID	Field Type	Special Functionality
contactEmail	text	• All email sent from the system to the candidate is sent to this email address. • Appears on the user account creation page for external candidates. The field is required on the account creation page unless *Use email as external applicant userId* is not selected. • Appears in the Candidate Profile business card instead of the normal field listed. • For internal candidates, this field automatically syncs to the Employee Profile. • Appears as a standard column / part of the Contact Info on the candidate search results. • Required

Standard Field ID	Field Type	Special Functionality
firstName	text	• Appears on the user account creation page for external candidates. • Appears in the Candidate Profile business card instead of the normal field list. • For internal candidates, this field automatically syncs to the Employee Profile. • Appears as a part of the clickable link in the Candidate column in the candidate search results. • Required.
lastName	text	• Appears on the user account creation page for external candidates. • Appears in the Candidate Profile business card instead of the normal field list. • For internal candidates, this field automatically syncs to the Employee Profile. • Appears as a part of the clickable link in the Candidate column in the candidate search results. • Required
middleName	text	• Appears on the user account creation page for external candidates. • Appears in the Candidate Profile business card instead of the normal field list. • For internal candidates, this field automatically syncs to the Employee Profile. • Appears as a part of the clickable link in the Candidate column in the candidate search results. • Required
gender	derived	Do not configure in the Candidate Profile; configure in the Application instead.
ethnicity	text or picklist	Do not configure in the Candidate Profile; configure in the Application instead.
race	text or picklist	Do not configure in the Candidate Profile; configure in the Application instead.
cellPhone	text	Appears in the Candidate Profile business card instead of the normal field list
homePhone	text	Appears in the Candidate Profile search results as the default phone number.

Standard Field ID	Field Type	Special Functionality
state	text or picklist	• Configure as a picklist if possible; to improve duplicate candidate checking reliability • Required.
country	picklist	Required.
zip	text or picklist	• Used as part of Radial Candidate Search • Required
dateOfBirth	date	Do not configure in the Candidate Profile; configure in the Application instead.
disabilityStatus	text or picklist	Do not configure in the Candidate Profile; configure in the Application instead.
ssn	text	**This field is not encrypted and should not be used.**
veteranStatus	text or picklist	Do not configure in the Candidate Profile; configure in the Application instead.
resume	richText	Appears as an attachment field, even though it is configured as a richText field. Always appears in the user interface, even if not explicitly configured in the Candidate Profile XML. Used in the candidate search keyword functionality.
coverLetter	richText	Appears as an attachment field, even though it is configured as a richText field. Always appears in the user interface, even if not explicitly configured in the Candidate Profile XML. Used in the candidate search keyword functionality.

type Attribute

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```


The type attribute defines the data that the system accepts in the corresponding field. It consists of the following options:

- text a single line of alphanumeric text with a 100-character limit (character limit and display are nonconfigurable).
- textarea alphanumeric text with a 256-character limit, shown as a 100-character-wide box (character limit and display are non-configurable).
- date a date that is manually entered or selected from a calendar. Displays mmddyyy or ddmmyyyy according to user's chosen language pack.
- percent a percent value with one decimal place.
- bool true or false (shown as a check box); if you make this attribute required because if must always be checked.
- enum an enumerated type (shown as a pull-down list) where values are defined in the XML.
- number a number value with two decimal places, formatted by locale.
- currency a currency value, where currency symbol is determined by the field id "currency."
- picklist field options from a picklist defined in admin (shown as a pull down list).
- derived a pull-down or "find value" field (depending on length of list) where values are automatically determined from another area of the system
- instruction a non-editable field that stretches left-to-right across the screen, used to display messages to users. Cannot be made reportable or writable; if reportability or writability is configured, error messages will result
- multiattachmentselection A field that can have multiple documents uploaded and attached. Acts as a mini library where all documents uploaded are stored for later reuse. This means that there is an additional check box next to all uploaded files and that checkbox must be selected to attach the document to the record.

  > **Recommendation**
  >
  > multiattachmentselection is the only attachment field supported on the Candidate Profile

- richText alphanumeric lines with no character limit
- hyperlink field that stores a URL and text to show instead of the URL

required Attribute

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```

This attribute defines whether a field is required for a candidate profile record to be completed.

Required fields are required for both candidates and recruiting users when completing a Candidate Profile. Allowable values for required fields are **`true`** or **`false`**. You cannot make fields conditionally required on the candidate profile; that is, a required field displayed to both internal and external candidates is required for both candidate types. For this workflow, create two separate fields with the same label, where one is set to `required="trie"`, and the other as `required="false"`. Use field-level permissions to show the required field to one audience and the optional field to the other audience. Advise the client that this workaround has a reporting impact and they must add both fields separately to reports.

You cannot make a field required for candidates and optional for a recruiting user who is entering a candidate manually using the *Add Candidate* functionality. The recruiting user must complete every required field a candidate has to complete. For this reason, clients may choose to configure fewer required fields, add a special value (such as N/A or Picklist) to picklists for internal recruiting users to select when adding a candidate without knowing the correct value (such as N/A or Pending), and advise recruiting users about the appropriate values to use in fields without picklists.

You cannot hide, show, or make a field required, based on the answer to an earlier field. For example, you cannot ask, “Have you ever been convicted of a felony?” and then show a “Please explain” field if the candidate selects yes for the first question. The suggested workarounds are:

- Make the “Please explain” field optional and name it something like “If yes, please explain.”
- Make the “Please explain” field required and name it something like “If yes, please explain (enter N/A if not applicable).”

custom Attribute

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```

Some field id attributes are reserved as standard fields. They do not necessarily need to be included in the XML configuration but if used, they must have the appropriate corresponding field type and be marked as `custom="false"`. All other field ids should be marked custom="true".

anonymize Attribute

```
<field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
```

The anonymize attribute identifies whether a given field contains personally identifiable information and should be purged.

Related Information

Candidate Profile Standard Field Guide

Candidate Profile Standard Field Guide - Partner Access

7.1.3.1.2 field-label Element

The field-label element usually controls the appearance of a field name in the user interface. However, not all UI field labels are controlled by this element. On certain fields, the Succession Data Model controls the field label; on other fields Provisioning settings control the label used throughout the system.

The label element is not conditional;that is, a single field cannot show one label to internal candidates and a different label to external candidates. By the same token, a single field cannot show one lable to candidates, and another to recruiting users.

The field-definition element must contain at least one field-label element.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

mime-type Attribute

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

Mime-type determines whether or not the system renders HTML tags defined in the CDATA content. The two supported mime types are:

- text-plain: Plain text, unformatted.
- text-html: HTML-formatted text.

CDATA Content

The CDATA content can be configured to contain any client-defined text.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

7.1.3.2 Candidate Profile Field XML Sample

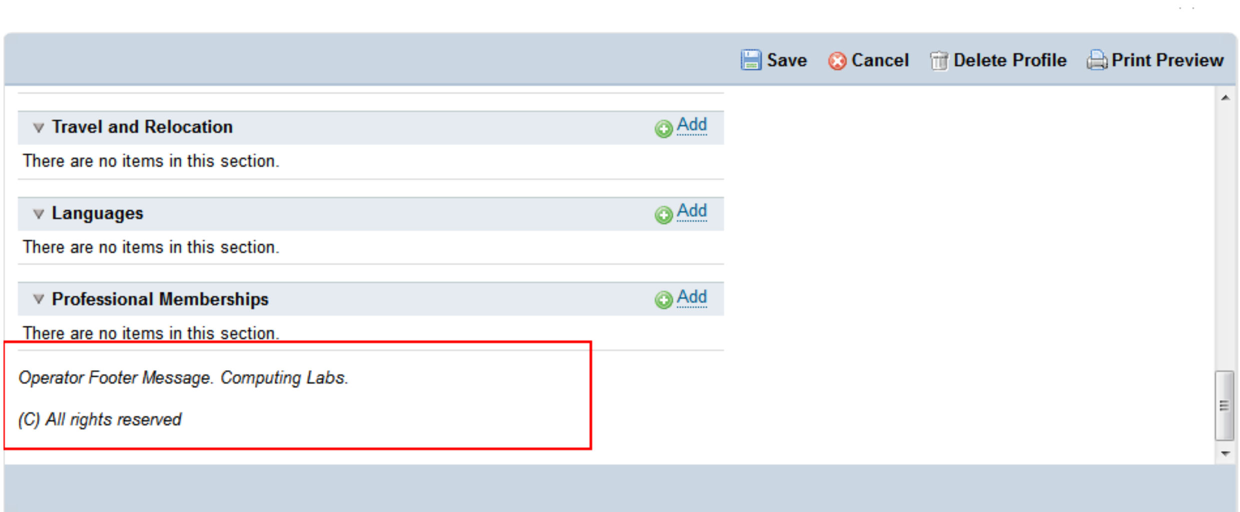
This example is for reference purposes only, and is not a recommended configuration.

```
<field-definition id="firstName" type="text" required="true" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[First Name]]></field-
label>
  </field-definition>
  <field-definition id="lastName" type="text" required="true" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Last Name/Surname]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Last Name/Surname]]></
field-label>
  </field-definition>
  <field-definition id="cellPhone" type="text" required="false" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Cell Phone]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Mobile Phone]]></field-
label>
  </field-definition>
  <field-definition id="contactEmail" type="text" required="true" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Email Address]]></field-label>
```

```
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Email Address]]></field-label>
  </field-definition>
  <field-definition id="primaryEmail" type="text" required="true" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Username]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Username]]></field-label>
  </field-definition>
  <field-definition id="country" type="picklist" required="true" custom="false"
anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Country]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Country]]></field-label>
    <picklist-id>country</picklist-id>
  </field-definition>
```

7.1.4 Configuring instruction footers

Instruction footers are similar to instruction headers, but appear at the bottom of the candidate profile.



Instruction footer

The footer appears the same to both internal and external candidates. You cannot configure it differently based on candidate type.

Setting the footer for candidates

1. Modify the XML to customize the footer. This XML element must immediately follow the <template-desc> element.
2. HTML is supported in the instructional text as long as the mime-type attribute is set to text-html.

```
<instruction-footer>
   <label mime-type="text-html"><![CDATA[<font  size="2" color="black">Operator
Footer Message.
Computing  Labs.<br><br>(C) All rights reserved  </font><p><p>]]></label>
```



```
</instruction-footer>
```

Setting the footer for recruiting user’s view

You can configure a different footer for the recruiting user’s view than for the candidate’s view using the <operator-instruction-footer> tag.

1. Modify the XML to customize the footer. This XML element must immediately precede the <field-definition> elements.
2. HTML is supported in the instructional text as long as the mime-type attribute is set to text-html.

```
<operator-instruction-footer>
   <label mime-type="text-html"><![CDATA[<font  size="2" color="black">Operator
Footer
Message. Computing  Labs.<br><br>(C) All rights reserved  </font><p><p>]]></label>
</operator-instruction-footer>
```

The CDATA content within the label element can show any client-defined text. There is no character limit.

The instruction-footer always appears at the bottom of the candidate profile record; you cannot configure the candidate profile record layout.

You can define multiple label elements on the instruction-footer if the client has purchased multiple language packs. Typically these elements are defined during the translation phase of a project, after the rest of the configuration is tested and signed off.

Related Information

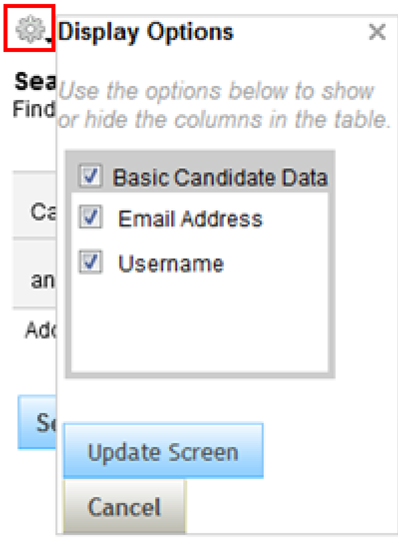
Translation [page 652]

7.1.5 Setting search display options

The search-display-options-config element is an optional element. If it is included in the Candidate Profile XML template, it adds a gear icon to the Candidate Search screen and enables recruiting users to select additional columns of data to include in their candidate search results.

You cannot remove, replace, or change the standard display options that appear on the page, such as breaking apart the name into first/last name.

You can use any standard or custom field, or background element field as a display option. If you use a custom field, it must be made reportable in Provisioning and successfully synchronized; otherwise the display option content appears blank.



Search Display Options

Configuring search display options

1. Set the category element, which requires an id and a name attribute. You muts define at least one category, and can define an unlimited number of categories. You may include fields in the categories any way the client wants.

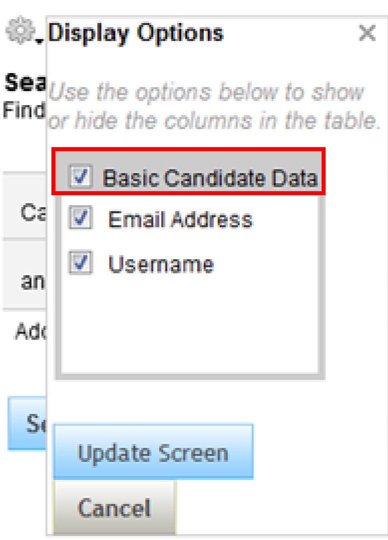
   ```
   <category id="candidateProfileData" name="candidateProfileData”>
   ```

   The category id and name attributes consist of alphanumeric values and must be unique.

   ```
   <category id="candidateProfileData" name="candidateProfileData">
   ```
2. Set the label for the category.

   ```
   <label><![CDATA[Basic Candidate Data]]></label>
   ```

   The label appears in the user interface as the category header, shown below.



Display of CDATA Information

The CDATA content within the label element can be configured with any client-defined text.

```
<label><![CDATA[Basic Candidate Data]]></label>
```

3. To add a field to the display options category, set at least one column element. There is no limit to how many column elements you can set.

```
<column field-ref="cellPhone" bge-ref="none" select-by-default="false"
gridOrder="1"/>
```

The column element uses the following attributes:

- *field-ref* The field-ref attribute may point to either the ID attribute from a field-definition element, or the ID attribute of a data-field element from a background element. Whatever IDs are defined as field-refs become selectable fields to include in the candidate search result Display Options.

```
<column field-ref="cellPhone" bge-ref="none" select-by-default="false"
gridOrder="1"/>
```

- *bge-ref* This stands for background element, and must be filled out if the column element ID attribute is pointed to a data-field element from a background element. In that case, the bge-ref attribute must contain the background-element id. If referring to a field-definition this attribute must be present but set to “none”.

```
<column field-ref="cellPhone" bge-ref="none" select-by-default="false"
gridOrder="1"/>
```

- *gridOrder* The grid-order attribute determines the order of the fields in the search results table.

```
<column field-ref="cellPhone" bge-ref="none" select-by-default="false"
gridOrder="1"/>
```

- *select-by-default* This can be set to true or false. If true, the end user conducting a search will not need to click the display options gear to add the data to their search results. The data will automatically appear on the search results but it could be hidden by a user.

```
<column field-ref="cellPhone" bge-ref="none" select-by-default="false"
gridOrder="1"/>
```

4. Include candidate tags as a display option, if desired.
There is a special configuration to include candidate tags in display options, even though tags are not set up as a field in the Candidate Profile XML.
Pre-requisites:

- Set up Candidate Tags. For more information, see the Tagging a Candidate [page 150] section of this guide.
Configuration:
Add the following XML to the display options, exactly as-is.

```
<category id="tag" name="tag">
   <label><![CDATA[Tags]]></label>
  <column name="tags" select-by-default="true" gridOrder="1999">
   <label><![CDATA[tags]]></label>
  </column>
</category>
```


XML Sample

```
<search-display-options-config>
    <category id="candidateProfileData" name="candidateProfileData">
      <label><![CDATA[Basic Candidate Data]]></label>
      <label xml:lang="en_US"><![CDATA[Basic Candidate Data]]></label>
      <column field-ref="contactEmail" bge-ref="none" select-by-default="false"
gridOrder="1"/>
      <column field-ref="primaryEmail" bge-ref="none" select-by-default="false"
gridOrder="3"/>
    </category>
    <category id="tag" name="tag">
       <label><![CDATA[Tags]]></label>
      <column name="tags" select-by-default="true" gridOrder="1999">
       <label><![CDATA[tags]]></label>
     </column>
    </category>
  </search-display-options-config>
```

7.1.6 Setting candidate summary display options

The candidate-summary-display-options-config element is an optional element that functions in a similar way to the search-display-options-config element. Instead of working on the candidate search results screen, it specifies what candidate profile fields are available as display options on the candidate summary (applicant list) page on the requisition.The candidate-summary-display-options-config element does not support background elements.

7.1.6.1 XML Sample

XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<candidate-summary-display-options-config>
    <category id="candidateContactData" name="candidateContactData">
      <label xml:lang="en_US"><![CDATA[Candidate Contact and Application Data]]></
label>
      <column field-ref="cellPhone" select-by-default="true" gridOrder="1"/>
      <column field-ref="contactEmail" select-by-default="true" gridOrder="2"/>
      <column field-ref="country" select-by-default="false" gridOrder="3"/>
    </category>
    <category id="candidateTravel" name=" candidateTravel">
      <label xml:lang="en_US"><![CDATA[Travel and Relocation]]></label>
      <column field-ref=" willingToTravel" select-by-default="true" gridOrder="4"/>
    </category>
  </candidate-summary-display-options-config>
```


7.1.7 Configuring background elements

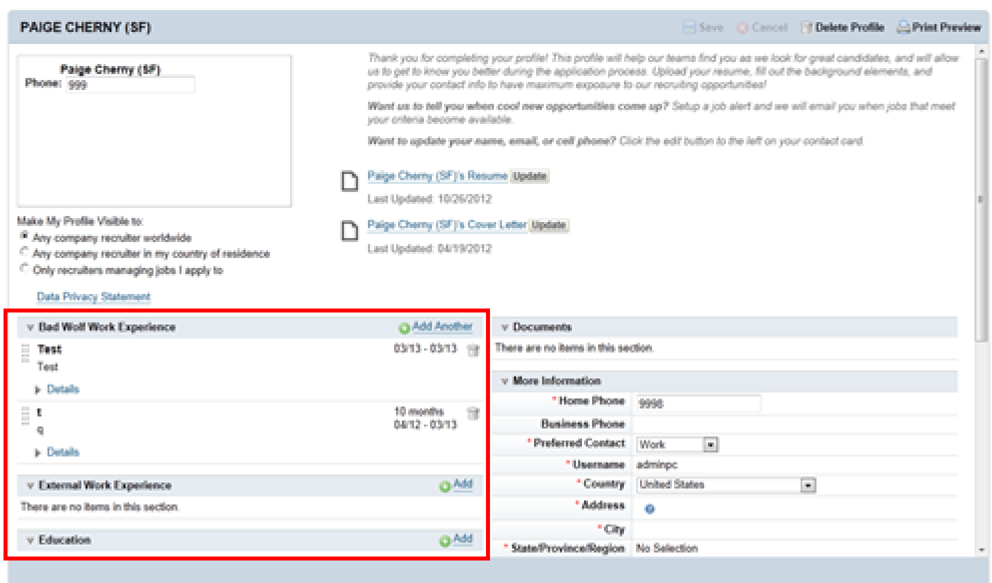
Background elements describe candidate background information. In the XML, the background-element must appear after the field-definitions (or search or candidate summary display options, if configured).

```
<background-element id="mobility" type-id="7">
```

The background-element appears to the end user as a section where multiple entries of data may be captured.

Background elements in the Candidate Profile Template must be configured identically to the background elements in the succession data model. If fields between the candidate profile and success data model are not identical (for example, if a field is required in one place but not the other) the sync for that row of data will fail, but correctly configured fields with adequate data will still sync. The background-elements are ordered in the candidate profile record in the order they appear in the Candidate Profile XML template. The integer defined as the type attribute does not control the order of display for background elements.

Within background-element, you must configure the label and data-field elements, and if applicable, picklists.



Background Element Example

id Attribute

The id attribute may be any alphanumeric string, without spaces or special characters. The value of the id attribute must be unique within the Candidate Profile XML template.

```
<background-element id="mobility" type-id="7">
```

If an id attribute on a background element is not unique, an error occurs:

```
Attribute value "<idName>" of type ID must be unique within the document.
```

type-id Attribute

The type-id attribute must be an integer, and the same type attribute cannot appear twice in the Candidate Profile XML template.

```
<background-element id="mobility" type-id="7">
```

If a type-id is on a background element is not unique within the Candidate Profile XML, an error occurs:

```
Field "outsideWorkExperience" has invalid type: "3", should be Unique Type.
```

Be sure that you check to make sure the id and type-id are unique even when you take the succession data model into account as well. Do not re-use any of the ids or type-ids from that XML for non-matching background elements on the Candidate Profile XML in case you later need to sm-map the background elements together.

required Attribute

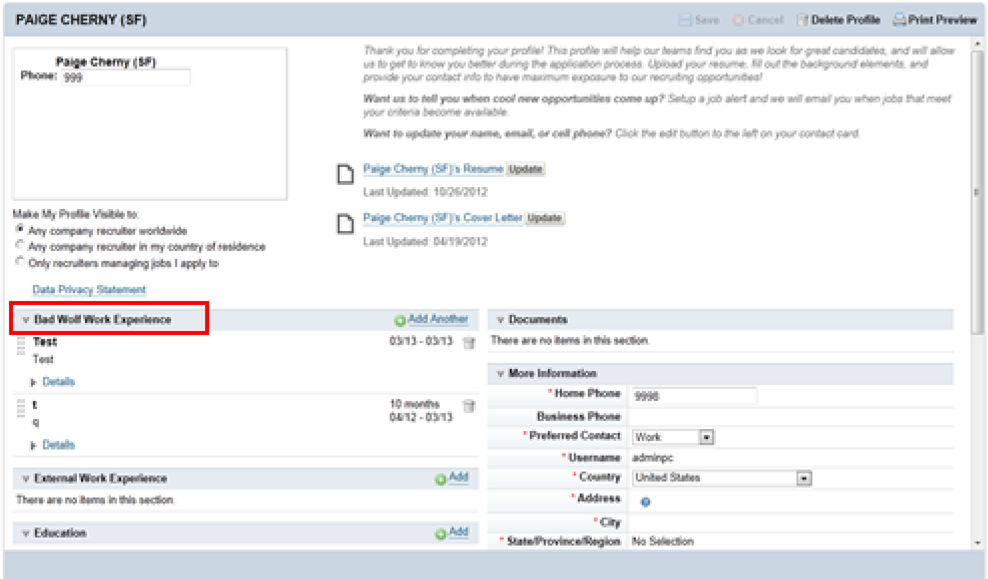
```
<background-element id="mobility" type-id="7" required="true">
```

The required attribute must be set to either true or false. If a background element is made required, at least one line of data must be added to that background element in order to allow the candidate profile to be saved.

It is not presently possible to specify a minimum number of entries in a background element. Either no entries are required or one entry is required. Additional entries are optional.

label Element

The content in the label element tags is configurable to contain the client's preferred text that displays the background element header (such as Skills, Work Experience, etc.).



Background Label Element Example

The label element is not conditional; it is not possible for one field to display one label to internal candidates and a different label to external candidates. It is not possible for one background element to display one label to candidates and a different label to internal recruiting users.

```
<label>Bad Wolf Work Experience</label>
```

Multiple label elements may be defined on the background-element if the client has purchased multiple language packs. For more information, see the Translation [page 652] section.

The label value is contained in between the element tags.

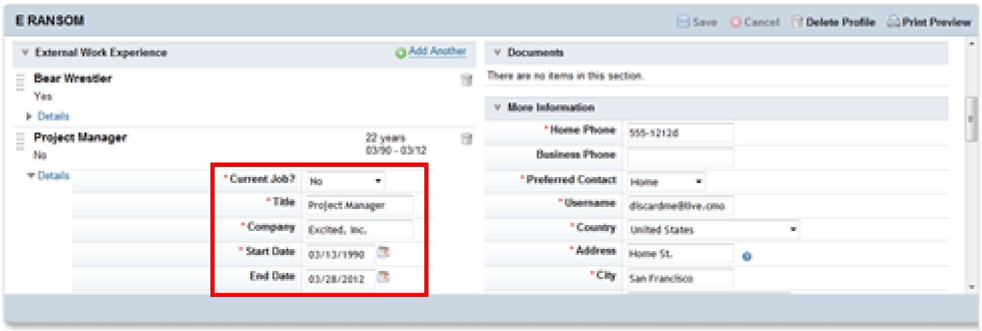
```
<label>Bad Wolf Work Experience</label>
```

data-field Element within a Background Element

Every background-element must contain at least one data-field element.

```
<data-field id="travelOrRelo" field-name="vfld1" required="true" max-length="4000">
```

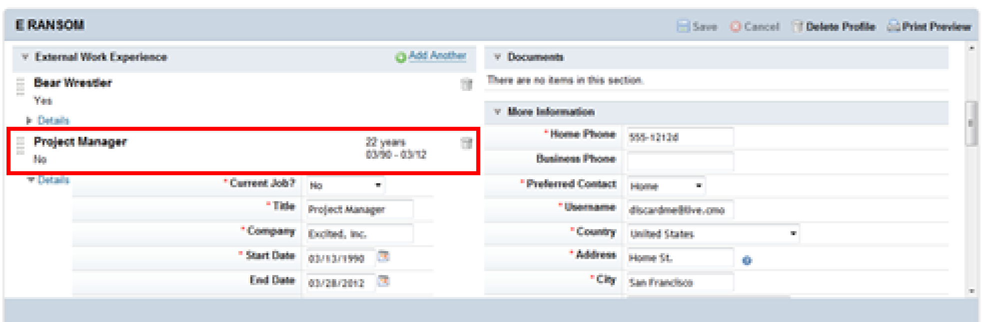
Each data-field element appears as a field to the end user, and all the fields within a background-element appear to the end user as a record within the background-element.



Data-Fields within a Background Element

You can only configure a limited number of data-field elements for each field-name type(for example, 15 vfld fields.) The client should consider how much data a candidate will realistically provide without getting frustrated, and what the user experience will be with a large number of fields on screen.

The first few data fields configured appear as the headers on the entry when the entry is collapsed. This is not configurable; it depends solely on the order of the fields.



Background Element Showing the Top Data Fields as Headers

The data-field element must contain the following attributes: id, field-name, required. It may also contain a max-length element.

id attribute within data-field element

The id attribute allows any alphanumeric value, without spaces or special characters, but that value must be unique within the background-element. The alphanumeric value maybe used as the id attribute for a data-field within a different background-element, and/or can be used as the id attribute of a field-definition. There are no standard data-field ids.

```
<data-field id="travelOrRelo" field-name="vfld1" required="true" max-length="4000">
```

field-name attribute within data-field element

The data-field element must contain a field-name attribute. The field-name attribute defines the type of data the user is allowed to enter in the field.

```
<data-field id="travelOrRelo" field-name="vfld1" required="true" max-length="4000">
```

There is no “type” attribute on background element fields. This field-name attribute replaces the usual “type” attribute.

- ifld: field contains integer values (no decimals). Possible to have up to 5
- ffld: field contains decimal or boolean values. Possible to have up to 4
- dfld: field contains dates values. Possible to have up to 3
- vfld: field contains alphanumeric text values. Possible to have up to 15
- startDate and endDate: both fields contain date values validated against each other (where start date must precede end date). The startDate and endDate field-name values may only be used once per background-element.

The ifld, ffld, dfld and vfld must have an integer added to the end of the attribute value, such as vfld1, ffld2, etc. The integers do not need to be in order (it is possible configure a vfld2 before vfld1 in the background-element), do not need to be consecutive (it is possible to configure vfld1 and vfld3 without configuring vfld2) but they must be unique within the background-element (that is, vfld1 may not appear twice in a single background-element.)

vfld can be configured as a picklist as well. The element format is

```
    <data-field id="degree" field-name="vfld4" required="true" max-length="4000">
      <label xml:lang="en-US">Degree Completed</label>
      <picklist id="degree"/>
    </data-field>
```

required attribute

The data-field element must contain a required attribute.

```
<data-field id="travelOrRelo" field-name="vfld1" required="true" max-length="4000">
```

Allowable values for the required field are "true" or "false". Fields cannot be made conditionally required. The requirement attribute applies equally to any user editing a line of data within a background element, whether they are an internal candidate, external candidate or recruiter.

max-length attribute

The data-field element must contain a max-length attribute.

<data-field id="travelOrRelo" field-name="vfld1" required="true" *max-length="4000"*>

The max-length cannot be greater than 4000 or less than 1. The max-length acts as a character limit on the field. If the max-length is 4, the end user can enter more than four characters in the field but if the end user attempts to save when the content of the field exceeds the max-length, the system will display an error message.

Be cautious about configuring a max-length in combination with a picklist, as doing so may produce an error message.

7.1.7.1 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<background-element id="areasOfInterest" type-id="100">
  <label xml:lang="en_US"><![CDATA[Areas of Interest]]></label>
  <data-field id="areaOfInterest" field-name="vfld1" required="true" max-
length="4000" anonymize="false">
    <label><![CDATA[Area Of Interest]]></label>
    <picklist id="areaOfInterest"/>
  </data-field>
  <data-field id="yrsExp" field-name="vfld2" required="true" max-length="4000"
anonymize="false">
    <label><![CDATA[Years of Experience in this Area]]></label>
    <picklist id="yearsOfExp"/>
  </data-field>
</background-element>
<background-element id="mobility" type-id="7">
  <label xml:lang="en_US"><![CDATA[Travel and Relocation]]></label>
  <data-field id="travelOrRelo" field-name="vfld1" required="true" max-
length="4000" anonymize="false">
    <label xml:lang="en_US"><![CDATA[Willing To]]></label>
    <picklist id="travelOrRelo"/>
  </data-field>
  <data-field id="reloCountry" field-name="vfld2" max-length="4000"
anonymize="false">
    <label xml:lang="en_US"><![CDATA[Global Location]]></label>
    <picklist id="country"/>
  </data-field>
  <data-field id="reloUS" field-name="vfld3" max-length="4000" anonymize="false">
    <label xml:lang="en_US"><![CDATA[Specific Location]]></label>
    <picklist id="candState"/>
  </data-field>
  <data-field id="travelPercent" field-name="vfld5" required="true" max-
length="4000" anonymize="false">
    <label xml:lang="en_US"><![CDATA[Travel Percentage]]></label>
    <picklist id="travelRequired"/>
  </data-field>
  <data-field id="comments" field-name="vfld4" max-length="4000" anonymize="false">
    <label xml:lang="en_US"><![CDATA[Comments]]></label>
  </data-field>
</background-element>
<background-element id="languages" type-id="9">
  <label xml:lang="en_US"><![CDATA[Languages]]></label>
  <data-field id="language" field-name="vfld1" required="true" max-length="250"
anonymize="false">
    <label xml:lang="en_US"><![CDATA[Language]]></label>
    <picklist id="language"/>
  </data-field>
  <data-field id="speakingProf" field-name="vfld2" required="true" max-length="250"
anonymize="false">
```



```
    <label xml:lang="en_US"><![CDATA[Speaking Proficiency]]></label>
    <picklist id="languageSkillLevel"/>
  </data-field>
  <data-field id="readingProf" field-name="vfld3" required="true" max-length="250"
anonymize="false">
    <label xml:lang="en_US"><![CDATA[Reading Proficiency]]></label>
    <picklist id="languageSkillLevel"/>
  </data-field>
  <data-field id="writingProf" field-name="vfld4" required="true" max-length="250"
anonymize="false">
    <label xml:lang="en_US"><![CDATA[Writing Proficiency]]></label>
    <picklist id="languageSkillLevel"/>
  </data-field>
</background-element>
```

7.1.8 Configuring sm-mapping

Fields on the Candidate Profile can be related to fields on the Employee Profile. When you define a field or background element in the Candidate Profile XML, you may also correlate it to an Employee Profile standard-element field, ensuring updates made to one record will automatically update the other record via a bidirectional sync. This is the purpose of sm-mapping. Note that userinfo-element fields on the succession-data-model are not supported in sm-mapping.

When creating sm-mapping entries, make sure the fields you are mapping have the same field type — for example, text to text and picklist to picklist. Make sure both fields are defined with the same picklist id when sm-mapping picklist fields. The field id itself does not need to match between templates in order to map successfully, unless you are working with a background element.

Background elements can be mapped. If mapping background elements, the definitions of the background elements have to match exactly (except for the parts that are intrinsically different in the XML layout, like display-size and max-file-size-KB attributes in the Employee Profile XML that are not supported in the Candidate Profile XML).

Both Candidate Profile data-fields and background-elements can be synced to corresponding fields on the Employee Profile. The sync is effectively real-time but the synced data is subject to the regular candidate indexing process, meaning that updates to synced data may not be available via search for up to an hour.

Synchronized data is set up by defining an sm-mapping element in the Candidate Profile XML template after the last background-element.

```
<sm-mapping field-id="firstName" map-to="firstName"/>
   <sm-mapping field-id="outsideWorkExperience" map-to="outsideWorkExperience" />
```

Any Candidate Profile field-definition or background-element can be mapped in the sm-mapping element.

Candidate Profile background-elements will sync if the Candidate Profile XML template and Succession Data Model XML templates background-element configuration matches. Labels may differ but all other configuration of the background-elements must match exactly or the Candidate Profile XML template will display an error when attempting to save the XML in Provisioning.

Fields with sm-mapping will reflect the permissions specified in the Employee Profile XML (succession data model) for internal candidate profiles, regardless of how they are permissioned in the Candidate Profile XML.

The sm-mapping element must contain a field-id attribute and a map-to attribute:

- *field-id attribute:* must reference either an existing Candidate Profile field-definition id or Candidate Profile background-element id.

```
<sm-mapping field-id="firstName" map-to="firstName"/>
```

- *map-to attribute*:The map-to attribute must reference either an existing Employee Profile standard-element id or background-element id.

```
<sm-mapping field-id="firstName" map-to="firstName"/>
```

Tip

When mapping fields from the Candidate Profile to the SM datamodel, certain “person” fields will only render the userID value on the Candidate Profile, rather than a name. This is true of the Manager (M), Matrix Manager (X), HR Rep (H), and Custom Manager (C) designators. For example, if the user defines a manager id field in the Candidate Profile XML and attempts to map it to the sm-mapping field “managerID” only the manager’s userID will display, not the manager’s first and last name.

7.1.8.1 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<sm-mapping field-id="profMemberships" map-to="profMemberships" />
<sm-mapping field-id="middleName" map-to="mi" />
<sm-mapping field-id="lastName" map-to="lastName" />
<sm-mapping field-id="zip" map-to="zipCode" />
<sm-mapping field-id="insideWorkExperience" map-to="insideWorkExperience" />
<sm-mapping field-id="location" map-to="location" />
<sm-mapping field-id="outsideWorkExperience" map-to="outsideWorkExperience" />
<sm-mapping field-id="certifications" map-to="certifications" />
<sm-mapping field-id="address" map-to="addressLine1" />
<sm-mapping field-id="workPhone" map-to="businessPhone" />
<sm-mapping field-id="firstName" map-to="firstName" />
<sm-mapping field-id="mobility" map-to="mobility" />
```

7.1.9 Configuring field permissions

Clients can permission the visibility for each field in the profile. Fields can be hidden, read or write for candidates, and can be read or write for recruiting users. Clients may specify whether only a candidate can write to specific fields or whether defined recruiting users who are part of a dynamic group can also write to the field. Permissions can be defined based on the type of candidate (internal vs external) and on the country of the candidate. If field-permission tags do not exist in the Candidate Profile XML, the default behavior is write permission for all the fields to the candidate, and read permission for recruiting users.

7.1.9.1 Pre-requisites

- To give write permissions on one or more fields to internal recruiting users:
  - *Enable Provisioning* › *Dynamic Groups V2 (My Groups)*
  - In the client instance, set up *Dynamic Groups* defining the users who will have write permissions to the *Candidate Profile* fields.

7.1.9.2 Configuration

field-permission Element within Candidate Profile Field Permissions

To configure field level permissions on the Candidate Profile, at least one field-permission element must appear below the sm-mapping section of the Candidate Profile XML template. Multiple field-permission elements can be configured within the Candidate Profile.

```
<field-permission type="write">
```

type Attribute

The field-permission element must contain a type attribute to define the level of access.

```
<field-permission type="write">
```

The type attribute supports “read” or “write” values. Candidate Profile fields and background elements may be hidden from candidates by omitting them from all candidate-facing field-permission elements. Candidate Profile fields and background elements cannot be hidden from internal recruiting users at the present time.

role-name Element within Candidate Profile Field Permissions

The field-permission element must contain a single role-name element to define which users will be granted access.

```
<role-name><![CDATA[Candidate]]></role-name>
```

Multiple role-name elements are not supported within a single field-permission element, but will not cause an error during Provisioning validation.

CDATA Content

The allowable CDATA values for the role-name attribute are "Candidate" or "Dynamic Group". Capitalization and spacing matter; if the CDATA value is incorrect, the end users affected by the permission will not have the permission applied to them.

```
<role-name><![CDATA[Candidate]]></role-name>
```

or

```
<role-name group-name="Recruiters"><![CDATA[Dynamic Group]]></role-name>
```

Configuring the role-name element with a CDATA value of "Candidate" defines the field and background element permissions for candidates. Configuring the role-name element with a CDATA value of "Dynamic Group" defines fields and background element permissions for users defined in a Dynamic Group enabled in the client’s instance.

group-name Attribute

When setting up a Dynamic Group, the role-name element must also contain a group-name attribute defining the group the role is tied to.

```
<role-name group-name="Recruiters"><![CDATA[Dynamic Group]]></role-name>
```

country Element within Candidate Profile Field Permissions

The field-permission element must contain at least one country element. Multiple country elements are supported.

```
<country><![CDATA[*]]></country>
```

CDATA Content

The country element must contain a two-digit ISO code for the applicable country or an asterisk to denote all countries, such as US, DE, UK or *.

```
<country><![CDATA[*]]></country>
```

The country element defines the field and background element permissions for candidates in a particular country, where the candidate’s country is determined by the country field on the Candidate Profile.

For this feature to function properly, the Candidate Profile must contain a field-definition with the id="country" type="picklist" where the picklist-id="country". The country picklist loaded into the instance must be the ISO standard country values . The system converts this behind the scenes into the two-character ISO country code, such as US, DE or UK. Do not tie the country field to the ISOcountry picklist; this picklist is reserved for Employee Central.

> **Recommendation**
>
> Add Taiwan instead of the ISO value, “Taiwan, Province of China.” This is the only exception to the general rule about using ISO values.

Source Element within Candidate Profile Field Permissions

Source element determines the type of candidate who will receive the permissions defined in the field-permissions element.

```
<source><![CDATA[Internal]]></source>
```

Allowable CDATA values for the source element are Internal, External and *. Capitalization matters — if the CDATA value is incorrect, the users affected will not have the permission applied to them.

The asterisk applies the permission settings to both internal and external candidates. Internal recruiting users will view all fields on the candidate profile even if the source element CDATA is set to Internal or External only.

field and bg-element Elements within Candidate Profile Field Permissions

Once the field-permission, role-name, country and source elements are configured, the fields and background elements affected by the permission should be added. Fields are defined using the field element, and background elements are defined using bg-element.

```
<field refid="homePhone"/>
<bg-element refid="outsideWorkExperience" data-field-id="*"/>
```

Field elements contain a refid attribute that can point to any field-definition id attribute that already exists on the Candidate Profile XML template.

```
<field refid="homePhone"/>
```

The bg-element contains both a refid attribute and a data-field-id attribute. The refid attribute can point to any background-element id attribute that already exists on the Candidate Profile XML template.

```
<bg-element refid="outsideWorkExperience" data-field-id="*"/>
```

The data-field-id attribute refers to a specific data-field within the selected background element. Typically all data-fields within a single background element are permissioned identically so the data-field-id attribute in that circumstance will be set as ="*".

```
<bg-element refid="outsideWorkExperience" data-field-id="*"/>
```

The refid attribute for both field and bg-element must point to a field-definition or background-element id attribute that exists higher up in the Candidate Profile XML template. If the refid points to an id attribute that does not exist, an error will display upon validation:

```
A field with the identifier "fieldName" must appear in the document.
```

If a field should be hidden from a candidate, do not include the field underneath the field-permission element and it will not appear to the candidate. To hide a field, do not list it underneath the field-permission element. Fields cannot be hidden from recruiting users.

Bg-element fields cannot be conditionally hidden/displayed or set with read/write permissions.

Creating dynamic and recruiting groups with same name can cause issues. In this case the Find User lookup appears as a blank white page and the system may not select the right group when applying permissions.

7.1.9.3 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<field-permission type="read">
  <role-name group-name="Recruiters"><![CDATA[Dynamic Group]]></role-name>
  <country><![CDATA[*]]></country>
  <source><![CDATA[*]]></source>
  <field refid="firstName"/>
  <field refid="middleName"/>
  <field refid="lastName"/>
  <field refid="homePhone"/>
  <field refid="cellPhone"/>
  <bg-element refid="insideWorkExperience" data-field-id="*"/>
</field-permission>
<field-permission type="write">
  <role-name group-name="Recruiters"><![CDATA[Dynamic Group]]></role-name>
  <country><![CDATA[*]]></country>
  <source><![CDATA[*]]></source>
  <field refid="comments"/>
  <field refid="contactEmail"/>
  <bg-element refid="talentPool" data-field-id="*"/>
</field-permission>
<field-permission type="write">
  <role-name><![CDATA[Candidate]]></role-name>
  <country><![CDATA[*]]></country>
  <source><![CDATA[Internal]]></source>
  <field refid="division"/>
  <field refid="department"/>
  <field refid="location"/>
  <bg-element refid="insideWorkExperience" data-field-id="*"/>
</field-permission>
<field-permission type="write">
  <role-name><![CDATA[Candidate]]></role-name>
  <country><![CDATA[*]]></country>
  <source><![CDATA[External]]></source>
  <field refid="formerEmployee"/>
  <bg-element refid="outsideWorkExperience" data-field-id="*"/>
</field-permission>
```

Before configuring field permissions, you must enable Dynamic Groups. For more information see the Dynamic Groups [page 61] section of this guide.

7.2 Uploading Candidate Profile XML

Procedure

1. Navigate to *Provisioning* > *Candidate Profile Template*.
2. Before you change the existing XML, save the current version to your local computer.
3. Make your changes.
4. Copy the new version you have configured and paste in Candidate Profile Template.
5. Click *Save*.

7.3 Configuring reportable custom fields

Navigate to *Provisioning* > *Configure Reportable Custom Fields* and configure your fields. See the Reportable Custom Fields [page 66] section of this guide.

7.4 Requesting re-index

Index creation is only required when the Candidate Profile is first created.

Context

Changes to the candidate profile will rarely require a reindexing of the search index. File a COSR ticket to have the instance reindexed. Only the following changes to the candidate profile require a r-index:

- Adding new fields
- Changing the field type of a field.

> **Tip**
>
> Do not change the field type of a field; this can cause application errors on existing records storing data that do not match the new field type.

- Removing a field. Engineering and QA have tested all scenarios and have not found a scenario of XML change where reindexing is needed, except when a field type is changed (like from text to picklist). Many other issues

are caused by a field type change, so if you need a field type change, retire the old field, and create a new field with the new type
- If you add, remove, or change a field type, the index does not match the XML definition anymore and so a reindex is needed. Any other changes (label changes, adding sm-mapping, reordering fields, adding permissions, and so on) do not change how the indexes read the XML and so do not need a reindex ticket.

```
Do not request re-indexing from COSR unless the conditions above are met or you are
approved by RCM Triage Manager or Engineering in an RCM JIRA.
```

Procedure

Steps to request a reindex:
1. Log in to JIRA.
2. Open a support ticket with COSR.
3. Request reindex of the instance, including the reason for the reindex, or approval from the RCM Triage Manager or Engineering.

7.5 Working with Candidate Profiles

7.5.1 Creating a Candidate Profile

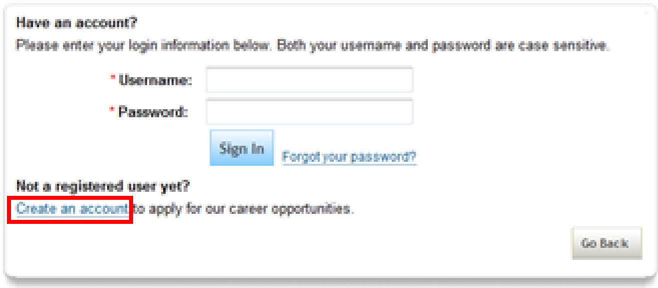
You can create candidates in several ways:

An external candidate comes to the career site and create a new account.

The candidate clicks the *Sign In* button on the upper right-hand corner of the career site.

Sign In Button on a Career Site

The candidate clicks the *Create an account* link on the Sign In page.



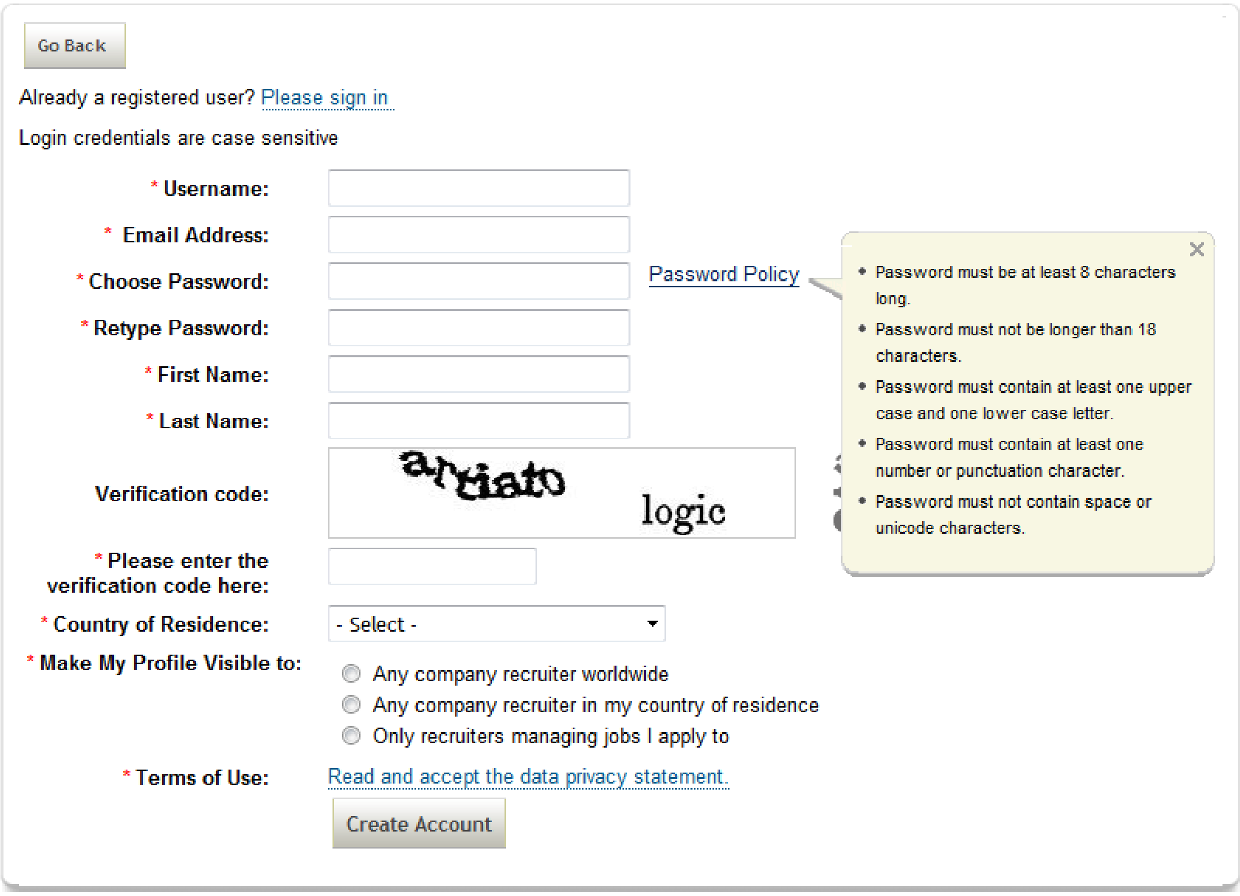
Create an account

The candidate completes all required fields on the account creation page and clicks “Create Account.” Linking directly to this page is not formally supported.

The fields that appear on this page are not configurable but may vary based on Provisioning settings.

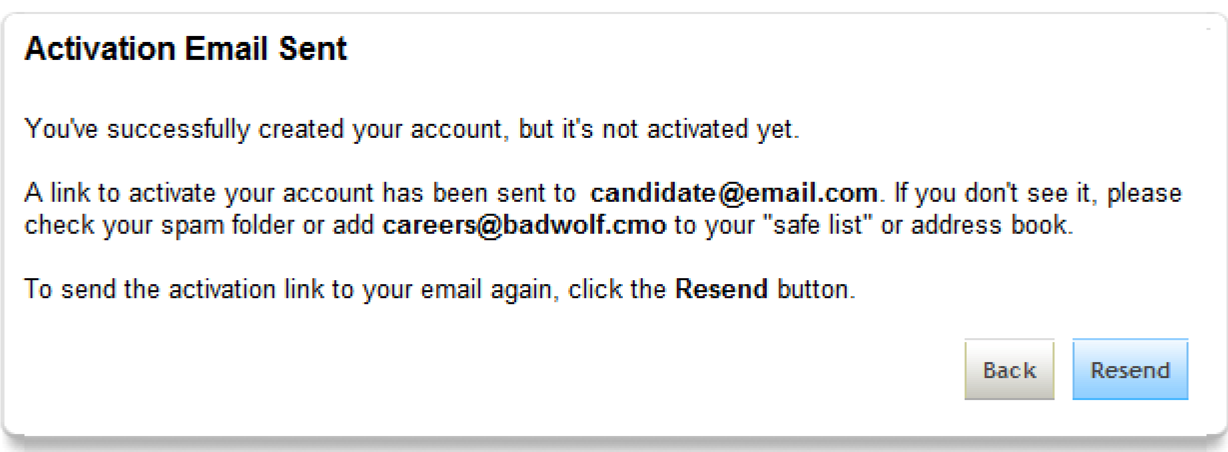
Table 16:

Variable Field	*Appears When*
Username	*Provisioning > Company Setting > Use email as external applicant userId is unchecked* Checking this field uses the candidate’s e-mail address as their username and both the primaryEmail and contactEmail fields contain the same value. Unchecking this field splits the candidate’s log in username and the candidate’s e-mail address into two separate fields: primaryEmail and contactEmail. If this field is unchecked, be sure to configure the primaryEmail field in the Candidate Profile XML so the candidate’s login username is visible to recruiting users. Note that if this field is used there is no method for candidates who forget their username to retrieve it unless a recruiting user looks it up on their candidate profile.
Password	Always appears but the content validation in this field may be set up to be configurable by clients. *Provisioning > Company Settings > Enable Separate Password Policy for External Candidates* *Admin Tools > External Password Policy*
Verification Code	*Provisioning > Company Setting > Disable CAPTCHA for external candidate account creation is unchecked*
Make My Profile Visible To	*Provisioning > Edit Candidate Privacy Options > Ask external candidates whether they want to be found across borders is checked*



"Create Account" on the Career Site

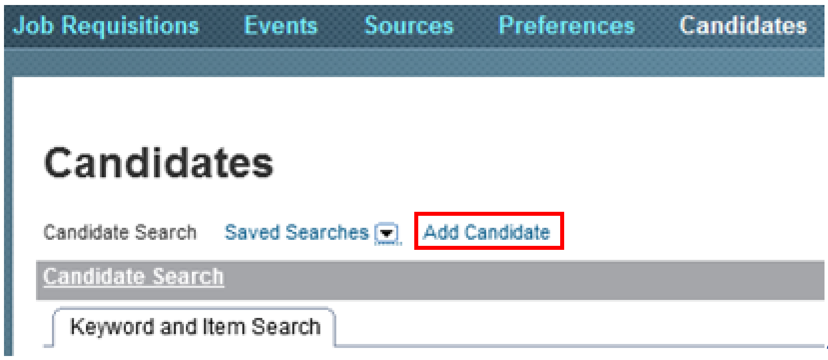
If *Provisioning* > *Company Settings* > *Enable E-Mail Verification for Career Site* is enabled, the candidate may be prompted to log in to their e-mail address and validate that it is their active e-mail account.



Activation Email confirmation

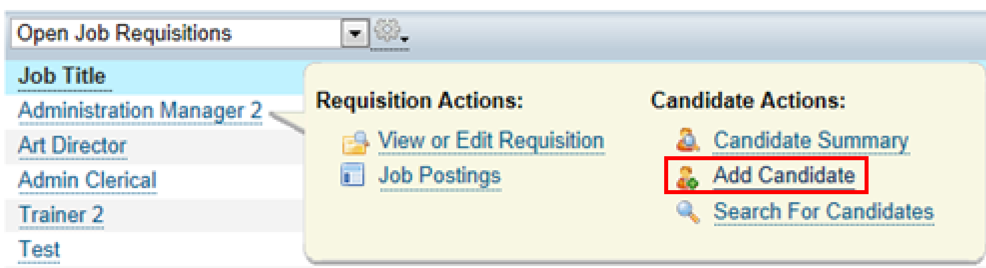
A recruiting user creates an external candidate using the Add Candidate feature.

A recruiting user who has candidate search permissions clicks *Add Candidate*.



“Add Candidate” from Candidate Search

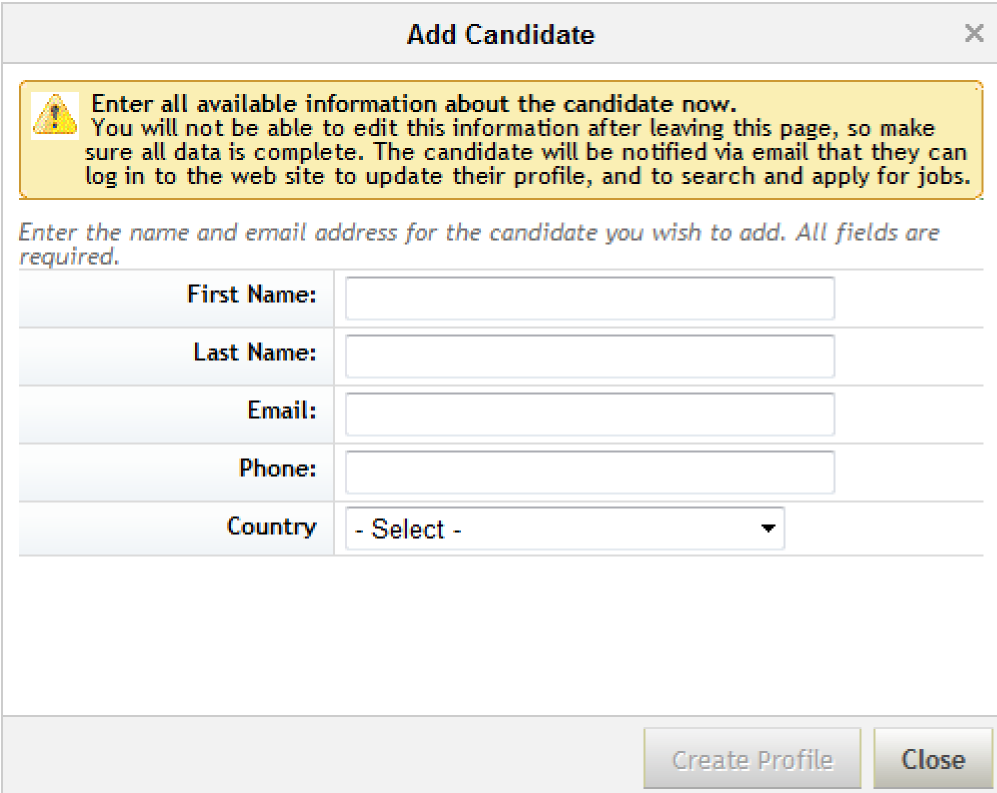
A recruiting user who has candidate search permissions and an open requisition can also click *Add Candidate* from the requisition. If a candidate is added by this link, the completed candidate profile will automatically be associated to the requisition in the Forwarded status.



Add Candidate from a Requisition

The recruiting user completes the required user account information and clicks Create Profile. This screen is not configurable.

> ➜ Tip
>
> If these fields are not explicitly configured or configured correctly in the Candidate Profile XML they may not work correctly. For example, if the country field picklist is configured with non-ISO country values, those picklist items will be missing from the country drop down on this screen.



Creating a Candidate Profile

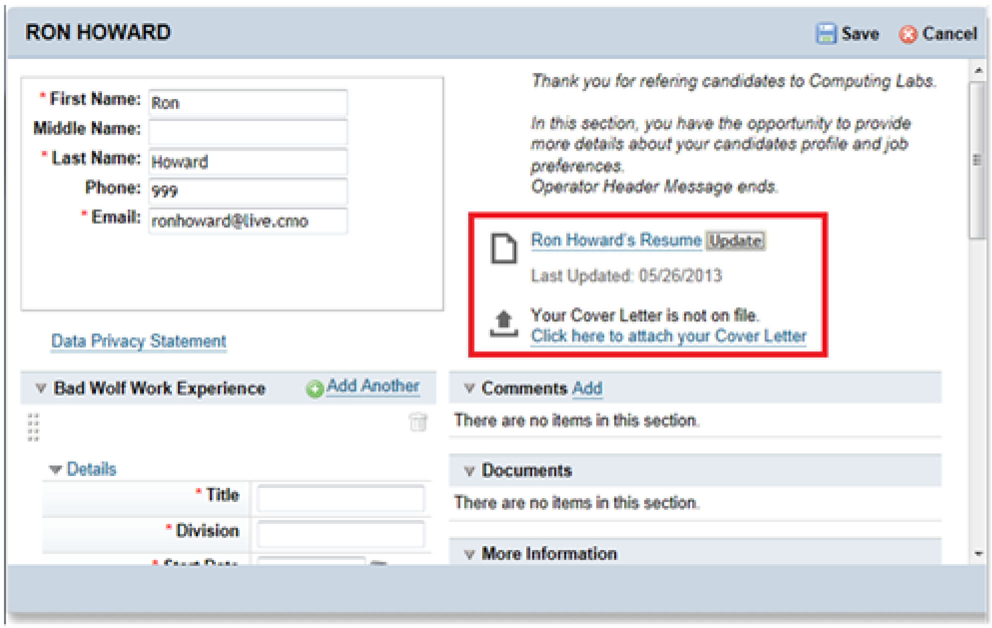
Candidates added into the system through this method receive an e-mail notification informing them they have been added, and providing information about how to reset their password and access their account to manage or delete their data.

This e-mail template can be configured, or the e-mail trigger can be disabled in *Admin Tools* > *E-Mail Template Notifications Settings* > *Recruiting Manual Candidate Creation Notification*.

Tip

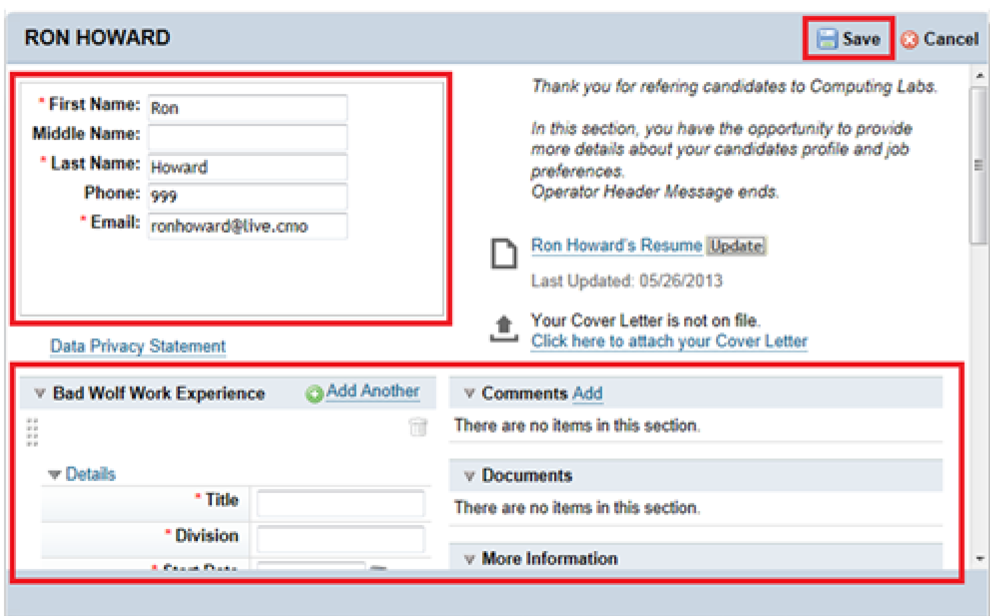
In some countries, particularly in EMEA region, recruiters are required by law to notify candidates when their personal data is stored and provide them the option to edit, or delete their data. Remind clients to check with their legal department that disabling this e-mail will not be in violation of data privacy laws.

At this point, the candidate account is created but contains little data. The recruiting user can attach a resume and cover letter. Attachments are immediately saved to the record even if no additional required fields are filled out and saved. In this way a recruiting user can create a searchable candidate profile with little data entry.



Saving Attachments to the Candidate Record

The recruiting user can also input field and background element data into the candidate profile record. In this case the recruiting user must input all required fields before saving changes. If the recruiting user has no write permissions to the candidate profile, this is the only opportunity for them to input data into the record.



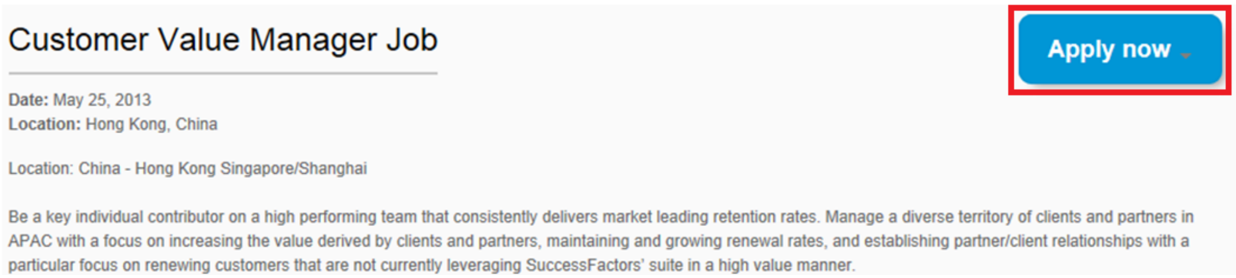
Field & Background Data on the Candidate Profile Record

The Recruiting Marketing system creates the external candidate and passes the candidate over to the Recruiting Management.

The Recruiting Marketing system creates the external candidate and passes the candidate over to the Recruiting Management.

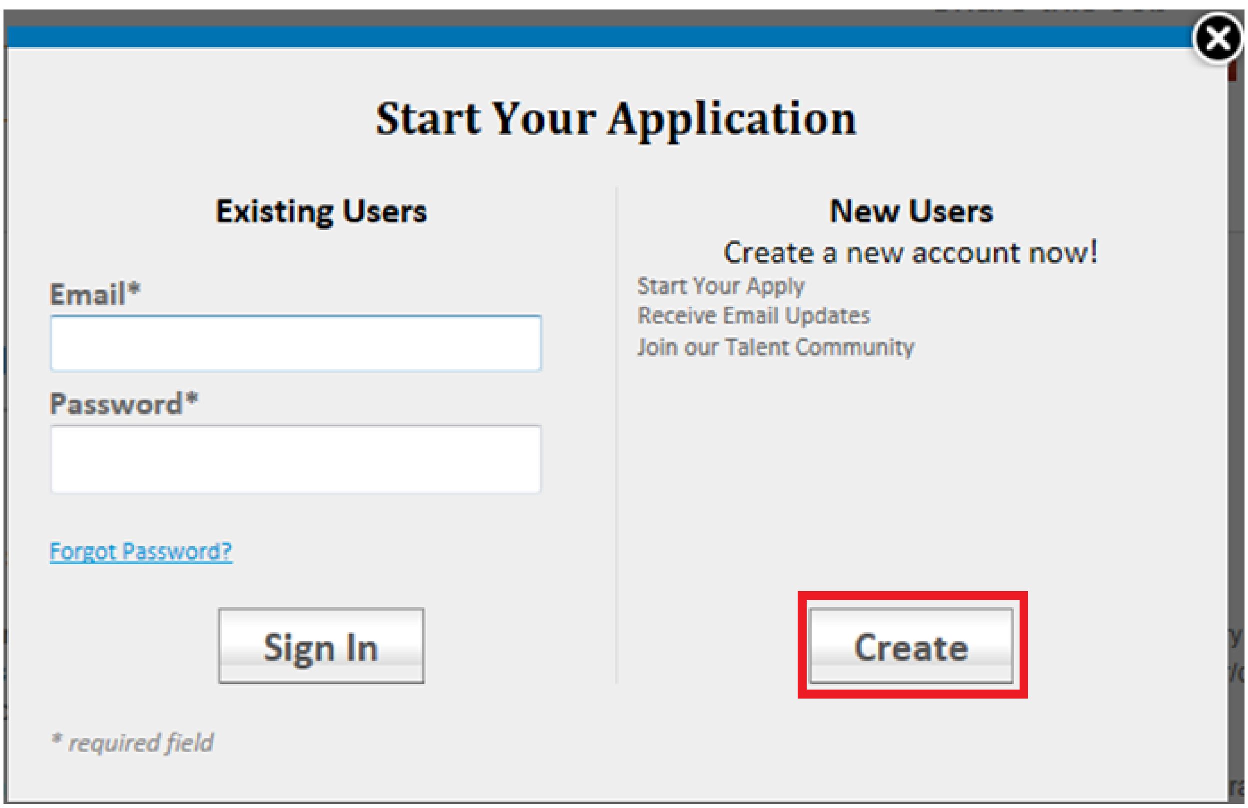
If configured, the candidate is directly connected into their Recruiting Management user account with Single-Sign On. See the section of this guide for more information.

A candidate clicks *Apply Now* on a job they are interested in.



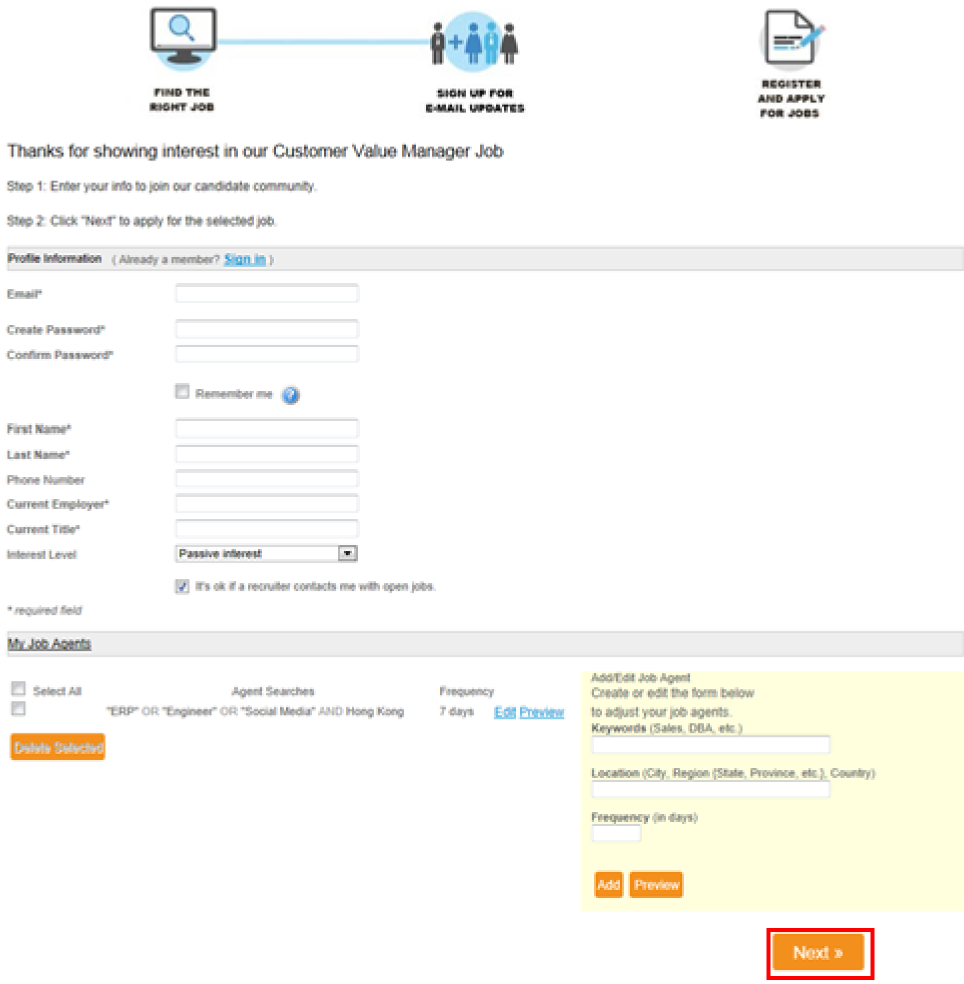
"Apply Now" on a Job Page

The candidate clicks *Create*.



Create a New User Account

The candidate completes the required information on the Recruiting Marketing signup page and clicks *Next*.

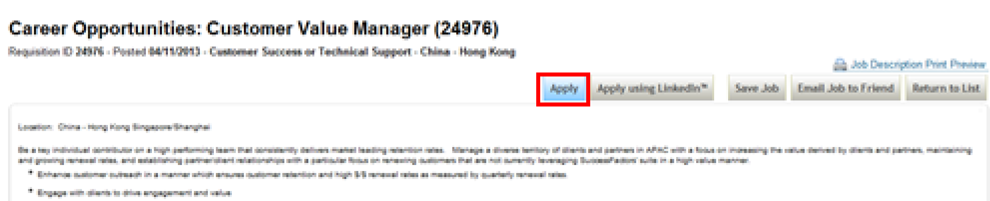


Recruiting Marketing Signup

The candidate is transitioned to the Recruiting Management job posting page and clicks *Apply*.

Depending on the instance settings, the candidate may be required to first input their country data and agree to the data privacy consent statement.

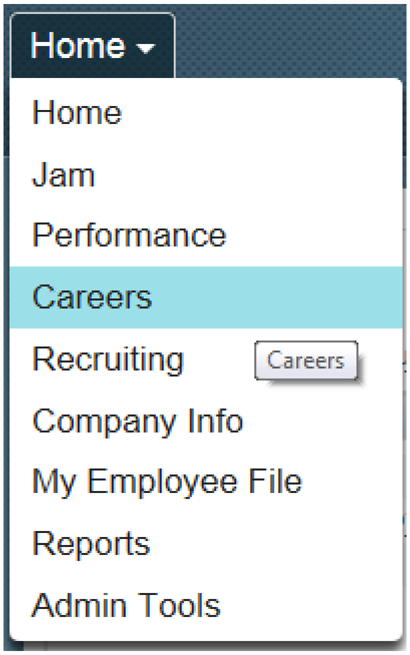
If Single-Sign On is not enabled, the candidate must separately create a Recruiting Management account.



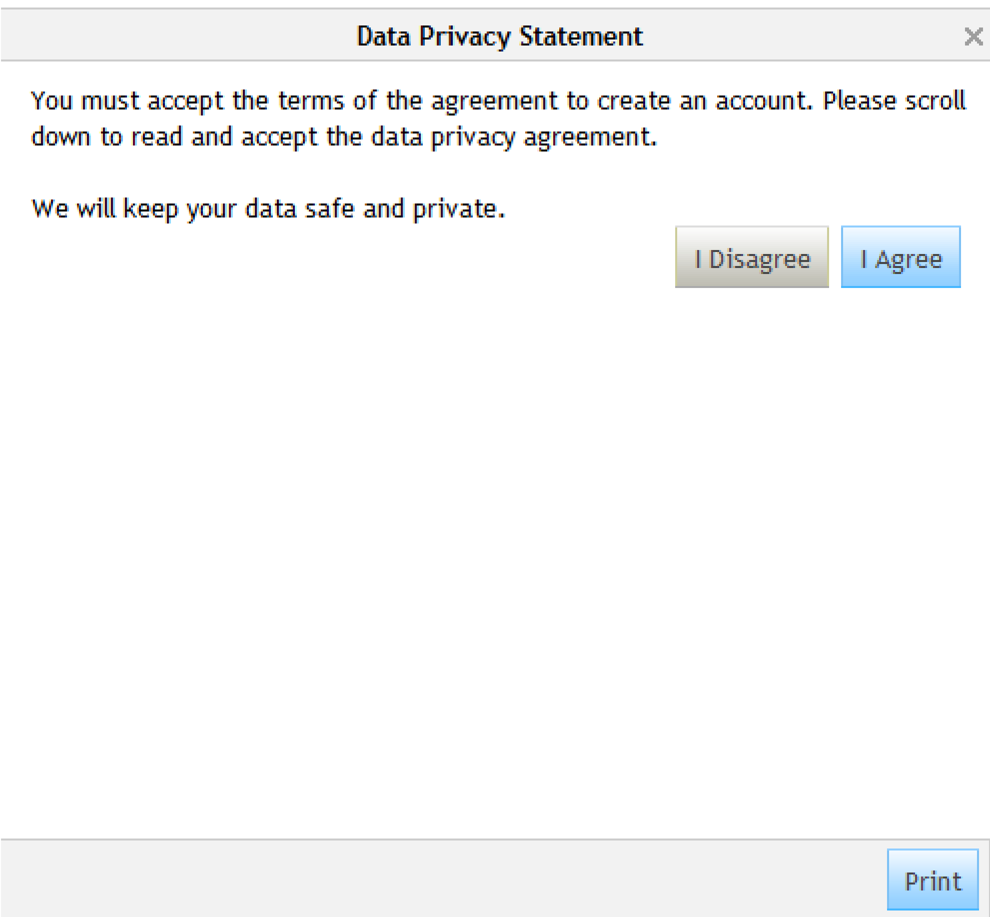
Apply After Creating an Account

A configuration consultant loads external candidates into the instance during data migration. See the Legacy Data Migration [page 591] section of this guide for more information.

An internal candidate can be created instantly when a new user account is created (depending on the data privacy consent settings for the instance). An internal candidate can come to the Careers tab and accept the data privacy consent statement, as show below (depending on the data privacy consent settings for the instance).



Careers Tab



Data Privacy Statement

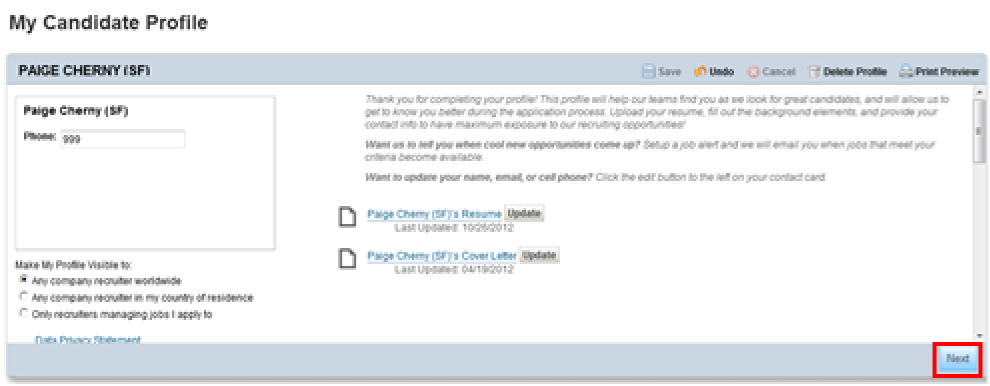
7.5.2 Accessing and Managing a Candidate Profile

After an external candidate creates or logs into their account, or an internal candidate accesses the Careers tab, the candidate can click their canddiate profile and populate it with data, on the *My Candidate Profile* sub tab.

My Candidate Profile Sub-Tab

Candidates may also be prompted to complete their candidate profile when applying for a job, before they see the application page. This occurs when the *Provisioning* > *Company Profile* > *Complete Profile before Application setting is checked*.

In this case the candidate will see a *Next* button on the bottom right of the candidate profile, since completing the profile is step one of two in the application process.



“Next” Button on the candidate profile

Candidates can delete the standard cover letter and resume attachments from their canddiate profile by clicking the trash can icon next to the resume, as long as the cover letter and resume fields are not required.

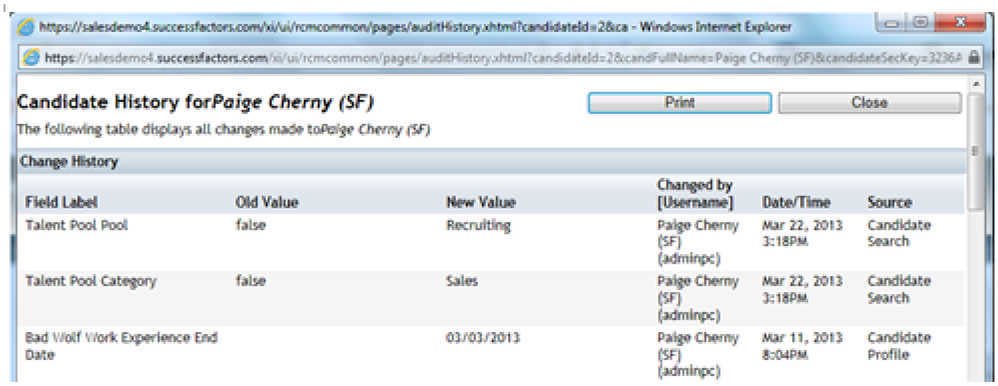
When the candidate applies for a job, they may Apply with LinkedIn. If the candidate chooses to use this option, some data from the candidate's LinkedIn profile will populate on the candidate profile. See the LinkedIn [page 626] section of this guide.

7.5.3 Candidate Profile Audit

Changes made to the candidate profile record by recruiting users can be automatically captured by the system in an audit trail accessible to the recruiting user. You can access the audit trail by clicking the blue clock icon in the upper right-hand corner of the candidate profile record.

Access the Audit Trail from the Candidate Profile Record

The audit trail shows changes made on the field level.



Audit Trail

Prerequisites:

- *Provisioning* ▸ *Company Settings* ▸ *Recruiting Application*
- *Provisioning* ▸ *Candidate Profile XML is configured*
- Indexes created for the instance

7.5.4 Tagging a Candidate

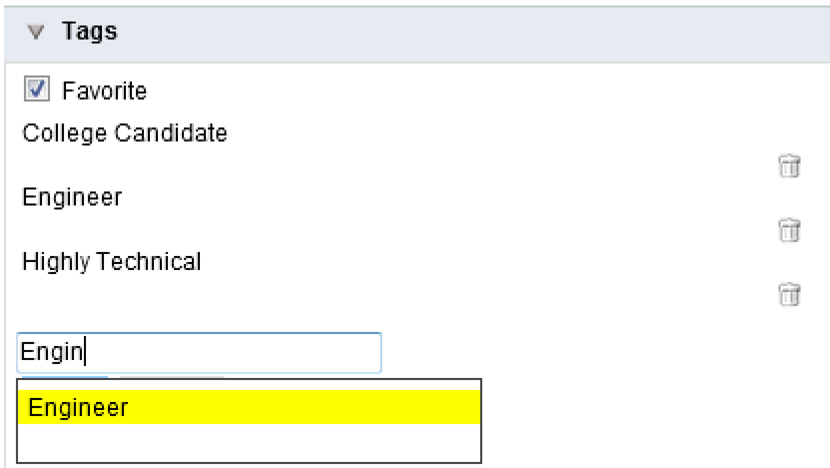
When a recruiting user reviews a candidate they may wish to add more information to the candidate's profile to increase that candidate's searchability in the future. This can be accomplished by using tags and tag searches.

Prerequisites:

1. *Provisioning* ▸ *Company Settings* ▸ *Recruiting Application*
2. *Provisioning* ▸ *Candidate Profile XML is configured*
3. Indexes created for the instance

Tag a candidate:

A recruiting user with candidate permission opens a candidate profile or application record, clicks "Add" in the Tags portlet and types in the desired tag. As the user types, the system prompts the user with possible tag matches based on tags previously entered into the system. Note that tags and type-ahead are case-sensitive, which is not configurable.



Tag Matching

The system will only suggest tags entered in the locale of the user tagging the candidate. This is intuitive, but may be less intuitive when working with the en_US and en_UK language packs where users may expect tags to be available across multiple locales.

Candidate tags become searchable content. For more information about searching on candidate tags, see the Conducting a Candidate Search [page 154]Conducting a Candidate Search section.

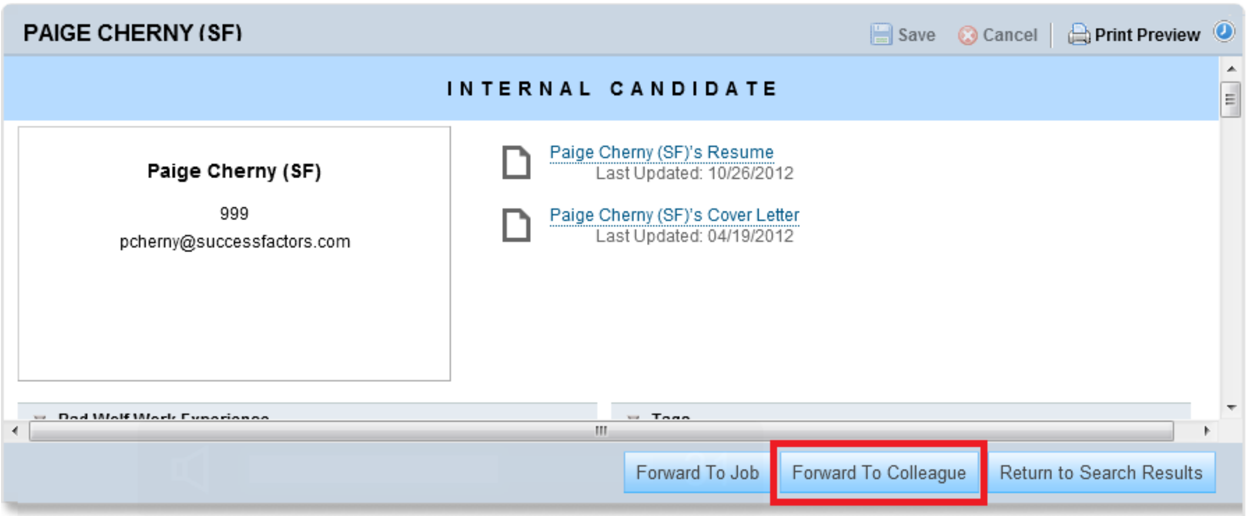
There is no way to restrict users to selecting tags only from a predefined list, although it is possible for Professional Services to support a pre-load of tag definitions to pre-build the type-ahead prompts. For more information, see the Legacy Data Migration [page 591] section of this guide.

As an alternative to restricting users to selecting from a list of predefined tags, clients may consider configuring a custom background element on the Candidate Profile XML that includes picklists of their desired searchable options.

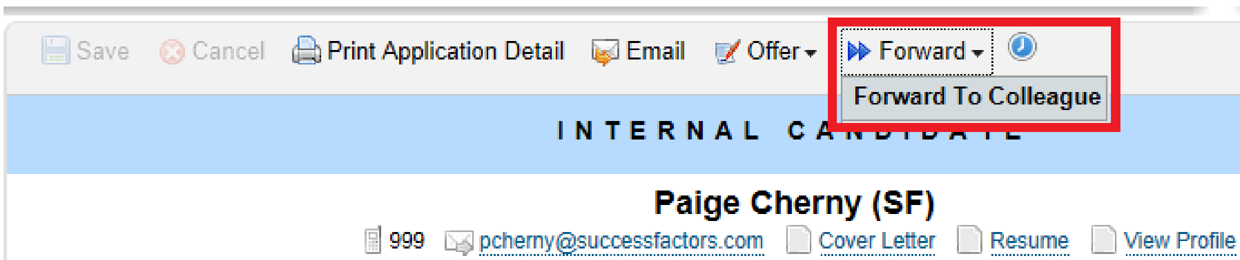
7.5.5 Forward to Colleague

When a recruiting user reviews a candidate, they may wish to share that candidate with another user. This functionality allows the recruiting user to click the *Forward to Colleague* button on the search results, candidate profile record, or application record pages. Candidate forwarding to a colleague may be restricted based on the Candidate Visibility settings for that candidate profile.

Forward To Colleague from Search Results

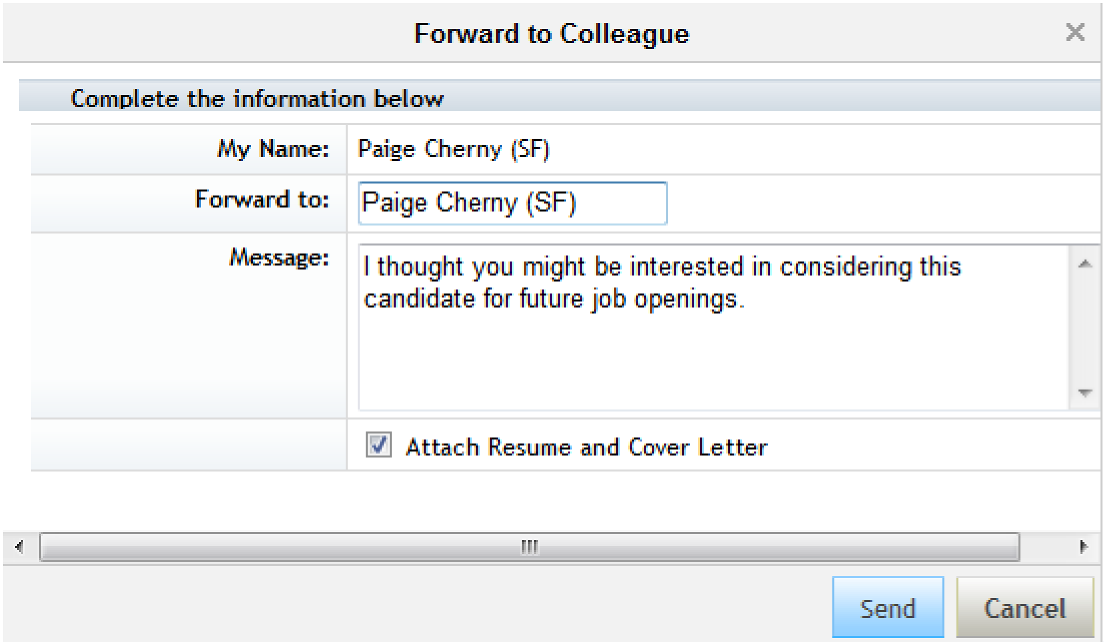


Forward To Colleague from Candidate Profile Record



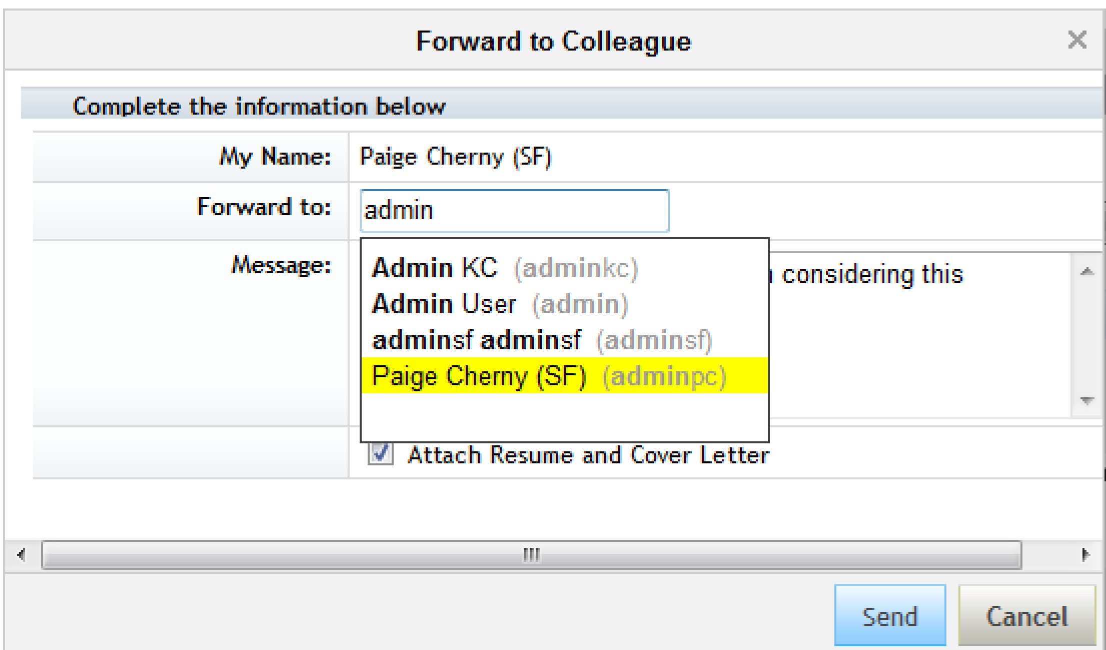
Forward To Colleague from Applicant Record

The *Forward To Colleague* button produces a dialog box where the recruiting user can select a single recipient and add some explanatory text. The recipient receives an e-mail notification with the candidate's name and the explanatory text. Optionally, the client can choose to enable the user to select the resume and cover letter as attachments to the e-mail notification.



Forward To Colleague Message and Attachment Selection

The default message text is not configurable. Only the resume and cover letter documents are supported as e-mail notification attachments. The attachments are included as a zip file and there are no other file type options.



Forward To Colleague Recipient Selection

Only a single recipient can be selected and there is no CC or BCC functionality on Forward To Colleague.

Prerequisites:

1. Provisioning > Company Settings > Recruiting Application
2. Provisioning > Candidate Profile XML is configured
3. Indexes created for the instance

Configuration:

1. Provisioning > Company Settings > Enable Forward Candidate to Colleague for Internal Employees
2. Provisioning > Company Settings > Allow Attach Resume and Cover Letter

7.5.6 Conducting a Candidate Search

Candidate search enables a user to search through the candidate profile database. The client may choose to provide candidate search access to any user in the SuccessFactors HCM Suite. Users who do not have candidate search permissions do not have access to candidate search.

All clients should have the maximum search capability enabled for their instance.

The candidate search feature searches candidate profile information, NOT candidate application information, or pre-screen questions. Additional record types such as Application cannot be configured to be searchable.

Recruiting users can search directly for a specific candidate using the candidate's name or choose to put together a complex search using multiple criteria.

Quick Facts

- Candidate Search only searches through Candidate Profile and resume data. Additional information such as application data, prescreen question responses, and interview content is not presently searchable
- Depending on data privacy consent statement settings (DPCS) internal candidates may not be returned in the candidate search until they accept the data privacy statement on the career tab.
- Candidate Search results may be limited by Candidate Visibility options.
- If Advanced Relevancy is enabled, when toggling from Thumb View to List View and back there is a column alignment issue because the Match Score stars are missing.
- Expected functionality includes a 'How do I use this?' link that contains instructional help text for the user, this cannot be configured.
- Special characters in the Candidate's name, including apostrophes, are not properly encoded and show as ASCII code. Example: ' (Windows apostrophe) will show as '
- Fields synced from Employee Profile are not searchable unless they are appropriately permissioned in Employee Profile as '*'

- Candidate search results pagination supports displaying 10, 20, 50 or 100 candidates per page. View All candidates in the list is not supported, due to the impact on system speed when displaying a large number of candidate profiles on a single page

Prerequisites

- *Provisioning* > *Company Settings* > *Recruiting Application*
- *Provisioning* > *Candidate Profile XML is configured*
- Indexes created for the instance

Configuration

1. *Provisioning* > *Company Settings* > *Recruiting* > *Advanced Candidate Power Search*
2. *Admin Tools* > *Recruiting Permissions* > *apply Candidate Search permissions to the appropriate users*
3. Verify that the Candidate Profile XML elements that are sm-mapped to the Employee Profile XML must be set up with at least read permissions to all (*) users in the succession-data-model

> **Tip**
>
> All clients should enable the Advanced Candidate Power Search. If it is not enabled, the client will be missing the following functionalities:
>
> - Support for boolean operators between fields used to build complex searches
> - Search by Name
> - Save Search and Share saved searches
> - Activity search
> - Tag search
> - Favorite search

Related Information

Recruiting Candidate Search Logic

7.5.6.1 Search by Name

Context

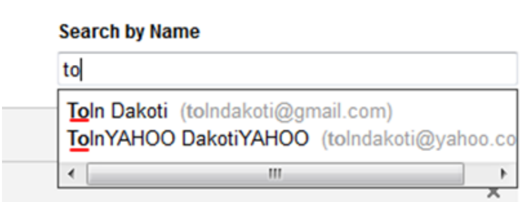
Recruiting users can choose to do a simple Search by Name to find a specific candidate.

Procedure

1. Navigate to Candidates tab.
2. Start typing in the search by name box. The autocomplete suggests names.
3. Select a name.

Results

The selected candidate's profile will open.

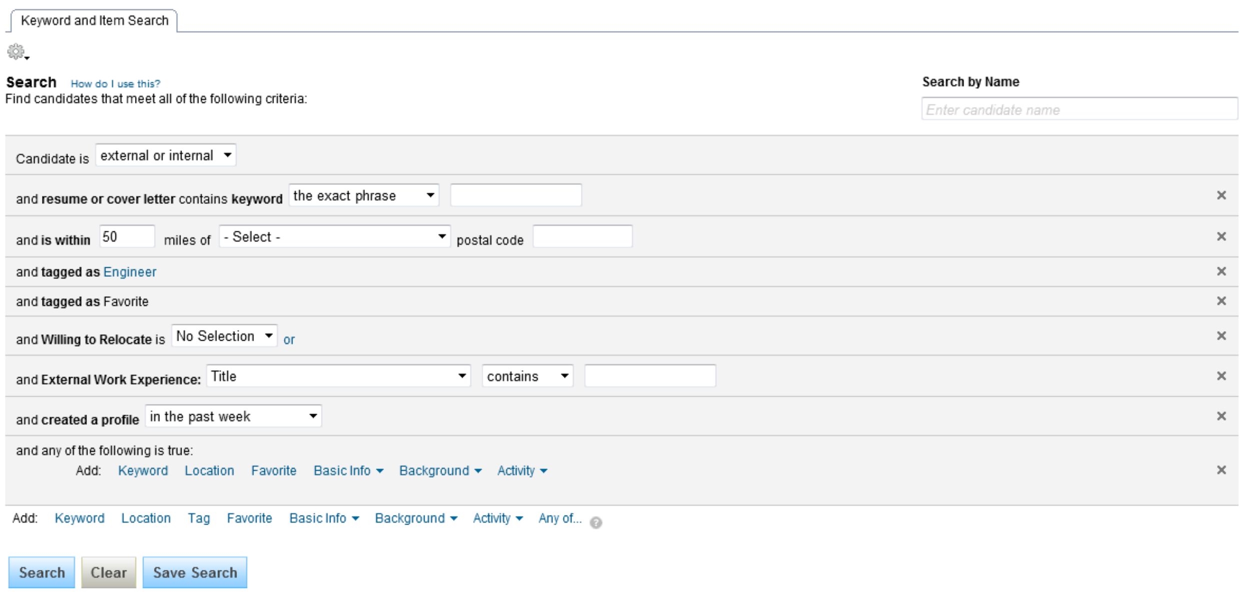


Candidate Search

7.5.6.2 Keyword and Item Search

Context

Recruiting users can select from multiple criteria to build complex searches.



Candidate Search Criteria

- *Candidate is:* Restricts search by candidate type (internal, external or both). Agency candidates are external. Note that the “contains” search is a whole word search, not a partial word search.
- *Keyword:* Searches the text in the resume and cover letter only. Does not search additional attachments. The system will use OCR to make all uploaded resumes searchable, including PDF documents. Note that some resumes may not be searchable because of how the content was put together (notably MS Word templates that store the data oddly such as containing information in Content Control boxes.)
- *Basic Info:* User can select any field defined in the Candidate Profile XML to use in search. Fields cannot be removed, hidden, or permissioned; all fields defined on the Candidate Profile will appear.
- *Background:* User can select any background element fields defined in the Candidate Profile XML to use in search. Fields cannot be removed, hidden, or permissioned; all background elements and fields defined on the Candidate Profile always appear.
- *Activity:* User can restrict search results to only candidate profiles created in a particular period of time, candidates who have applied to a job in a particular period of time or candidates who have not applied to a job but created their profile in a particular period of time.
- *Any of:* Same list of options as the above but assumes an “OR” operator between conditions instead of an “AND” operator.
- *Job Requisition ID:* Recruiting users can restrict search results by requisition ID. This is an autocomplete field, and a user can only search using the full requisition ID. It is not presently possible to restrict a recruiting user from searching the entire candidate database while still allowing them to search only candidates who applied to a specific requisition. Requisitions will only show up in the autocomplete display if they meet the following criteria:
  - Job requisitions must be in the *approved* state
  - Job requisitions for which the user is an operator
  - Job requisitions that have a job description
  - Job requisitions in the user's locale

Procedure

Users add search criteria and click *Search*.

7.5.6.3 Tag Search and Favorite Search

If the client is using the maximum possible search functionality in their instance and has enabled candidate tagging, the recruiting user can include tags or favorite candidates in the search. For more information about enabling candidate tags, see the Tagging a Candidate [page 150] section of this guide.

Candidate Tag and Favorite Search Criteria

- *Tag:* Allows the user to select tags from a Tag Cloud in their current locale and return candidates who have been tagged with that phrase.
- *Favorite:* Allows the user to limit their search results to only candidates marked as personal Favorites. Additional configuration is required; for more information see the Tagging a Candidate [page 150] section of this guide.

The interface for selecting tags is a Tag Cloud. This is a common interface on the internet that shows highest traffic tags by size and placement in the group of tags.

Select Tags from Tag Cloud

7.5.6.4 Radial Search

Radial search allows recruiting users to search for candidates using a zip/postal code and mile/kilometer radius.

Quick Facts

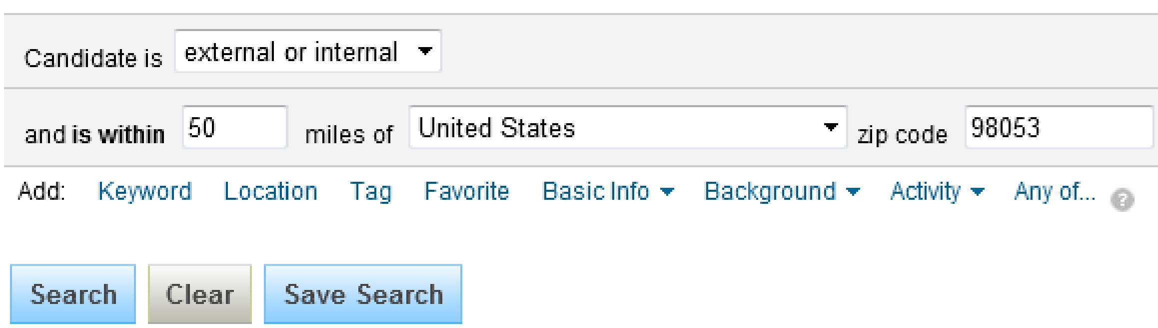
- Candidate search results are returned in distance order and the results cannot be sorted by other columns.
- Candidates who do not have a country or zip/postal code on their candidate profile will not be returned in the Radial Candidate Search results. Configure these fields as required.

Prerequisites

- Configure the country picklist with only ISO values for country names.

Configuration:

1. *Provisioning* > *Company Settings* > *Recruiting* > *Enable Radial Candidate Search*
2. Configure the following field ids in the Candidate Profile XML as required fields:
   a. zip
   b. country
3. Request a reindex. See the Requesting re-index [page 139] section of this guide



Location Radial Search

- *Location:* Uses the zip or postal code to do a search for candidates within a particular distance from a central point. Additional configuration is required; for more information, see the Radial Search [page 159]section of this guide.

> **Tip**
>
> When searching for postal codes in Canada, enter the post code in all caps and in the following format- XXX XXXX, or three characters, followed by a space, followed by four characters.

7.5.6.5 Conceptual Search

Conceptual Search is used to match a large quantity of text to other large quantities of text.

Conceptual Candidate Search matches candidates to the selected match criteria based on their resume. Only the resume is presently used in conceptual search matching; other attachments and record data are not supported.

Presently, English is the only supported language - other languages will be supported in a future release. Conceptual Candidate Search runs in languages other than English but since these languages are not formally supported, inform clients that the results will not be accurate. Stop words (the, it, and so on) are only in place for the English language.

Prerequisites:

- Client instance is in DC4 or DC12 datacenter. Conceptual Candidate Search is not supported in other datacenters

Configuration:

1. Enable Candidate Conceptual Search. Navigate to *Provisioning* > *Company Settings* > *Recruiting* > *Enable Candidate Conceptual Search*.
2. After enabling Candidate Conceptual Search, open a COSR using this ticket as a template. When you open the ticket, be sure to replace the Customer Name (RHI in the ticket) with the customer's instance name.
3. After resolving the COSR ticket, confirm the search is working, then alert the customer.

Working with Conceptual Candidate Search features from Candidates tab

1. Search candidates against a Job Requisition's Job Description.
    a. Only approved job requisitions display in the auto-complete list.
    b. Only job requisitions the user is an operator on will show in the auto-complete list.
    c. Only job requisitions that have a job description will show in the auto-complete list.
    d. Only job requisitions in the user's locale will show in the auto-complete list.
2. Search candidates against another candidate's resume.
    a. Only candidates in the user's locale will show in auto-complete list.
    b. If candidate visibility options are enabled, auto-complete list takes candidate visibility options into account.
3. Search candidates against a pasted block of text.
    a. There is no character limit.

Working with Conceptual Candidate Search features from Job Requisition page

1. Search candidates against a Job Requisition's Job Description from Job Requisition page.
    a. Upon clicking Candidate Search from the Job Requisition page, Job Requisition number auto-fills.
    b. Search criteria cannot be edited or updated because a candidate can be forwarded to the selected job and if we allow users to update the search criteria, there may be confusion around which job the candidate is being forwarded to.

Working with Additional Search Filters

1. Internal and External
2. Keyword
    a. exact phrase
    b. any of the keywords
    c. all of the keywords
    d. the boolean string

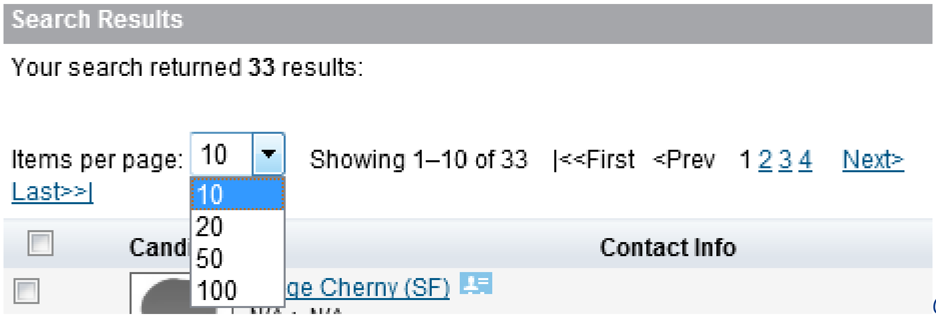
Working with Conceptual Candidate Search Results

1. Results are returned based on relevancy and listed from highest relevancy to lowest relevancy
2. If additional filters are used, the relevancy score does not take these filters into account — Relevancy score is based solely on the search criteria

7.5.7 Candidate Search Results

Results include a listing of all candidates matching the search criteria. The number of candidates per results page can be adjusted by using the items per page dropdown at the top of the results. Options include: 10, 20, 50 or 100 candidates per page.

The items (candidates) per page dropdown is not configurable. If more than 100 candidates appear in the search results, you cannot view all candidate search results on one page. This preserves page load time performance.

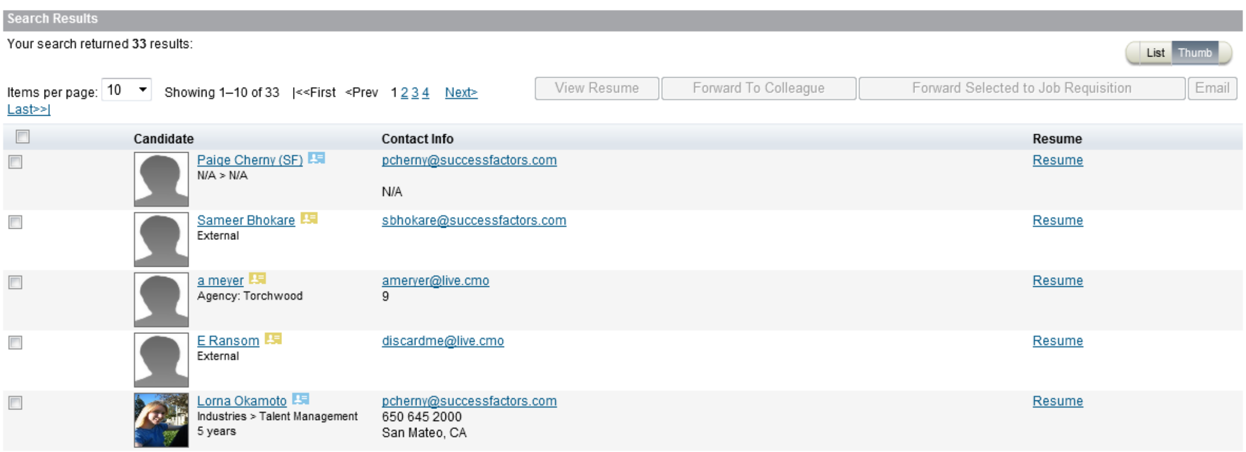


Candidate Search Results Pagination and Navigation

The search result page includes a quick link to the resume, default columns, and optional configurable columns. Search results can be viewed in either List or Thumb format.

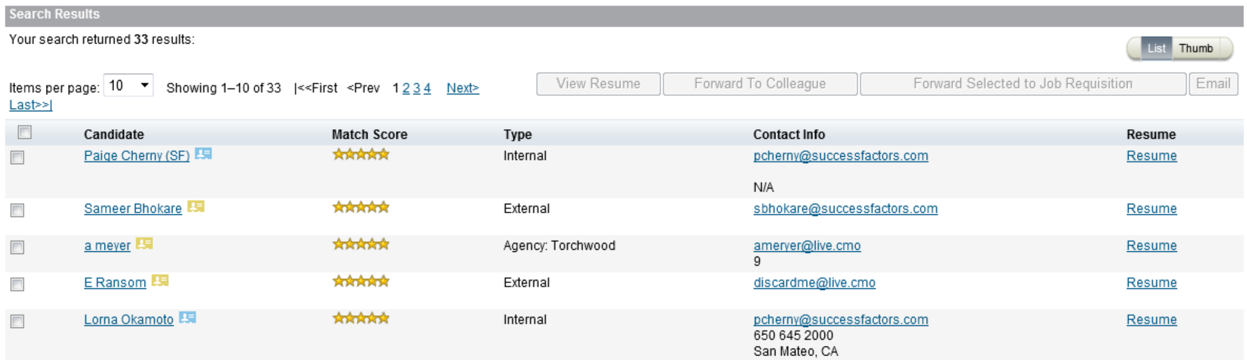
The candidate search results page defaults to the Thumb View; this is not configurable.

Thumb view



Thumb View of Candidate Search Results

List view



List View of Candidate Search Results

The data displayed in the Candidate and Contact Info columns is preset and cannot be configured.

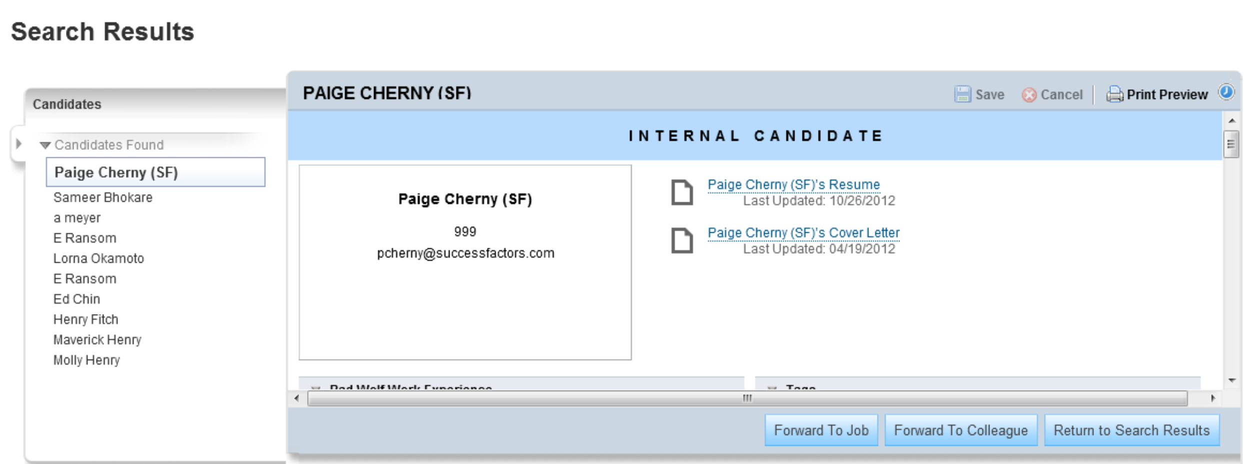
The Candidate column contains:

- For internal candidates: (From employee profile) Thumbnail picture, First & Last Name, Quick card link, Standard department, division, and location fields, Tenure calculated from Hire Date
- For external candidates: (From candidate profile) Blank Thumbnail Picture, First & Last Name, External

The Contact Info column contains:

- Internal candidates: From employee profile, standard e-mail field, standard home phone field, standard cell phone field, standard location field
- External candidates: From candidate profile, standard e-mail field, standard home phone field, standard cell phone field

The recruiting user can click a candidate name from the search results list to open the candidate profile. This page will include the selected candidate's profile, and a *Candidates Found* navigation bar (on the left) that continues to display candidate search results. The items per page drop down from the Candidate Search Results defines the number of candidates displayed in the Candidates Found navigation bar. To change the items per page, the user must return to the Candidates Search Results page.



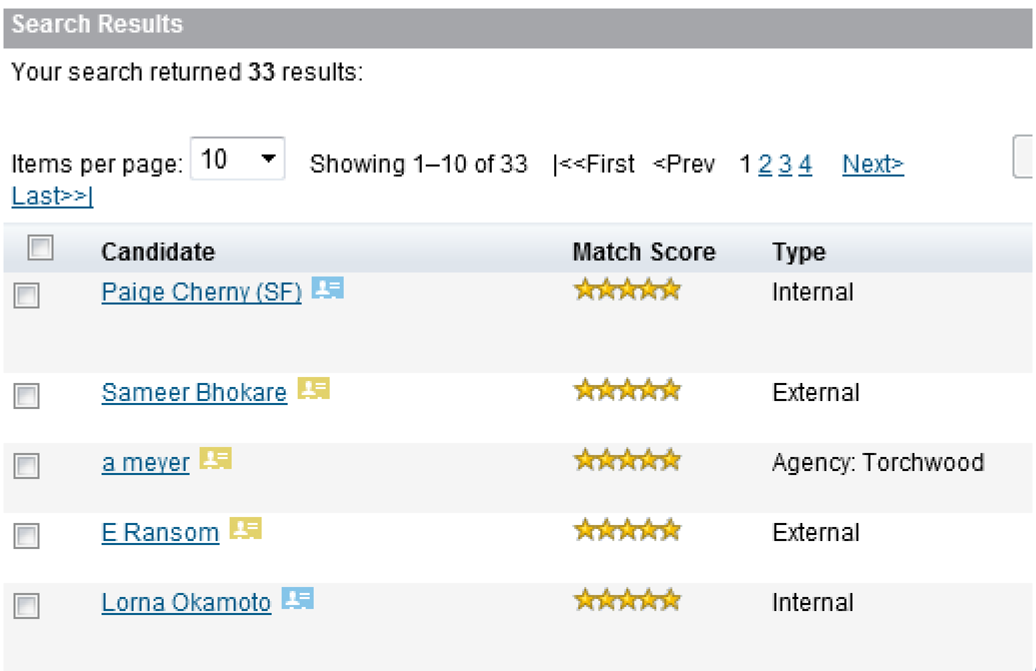
Profile View of Candidate Profile in Search Results

Optional Features Include:

- Candidate Search OFCCP compliance warning and auditing. For more information, see the OFCCP and VETS100 [page 619] section of this guide
- Display Options to refine data displayed in the search results table. See the Setting search display options [page 123] section of this guide.

7.5.7.1 Match Score

Recruiting users viewing candidate search results can include a column that shows a relative ranking of the candidates. This is shown as the “cool little stars” in the Match Score column, starting at a half star and going up to five stars, in half star increments.



Match Score Relevancy Column in Search Results

Configuration

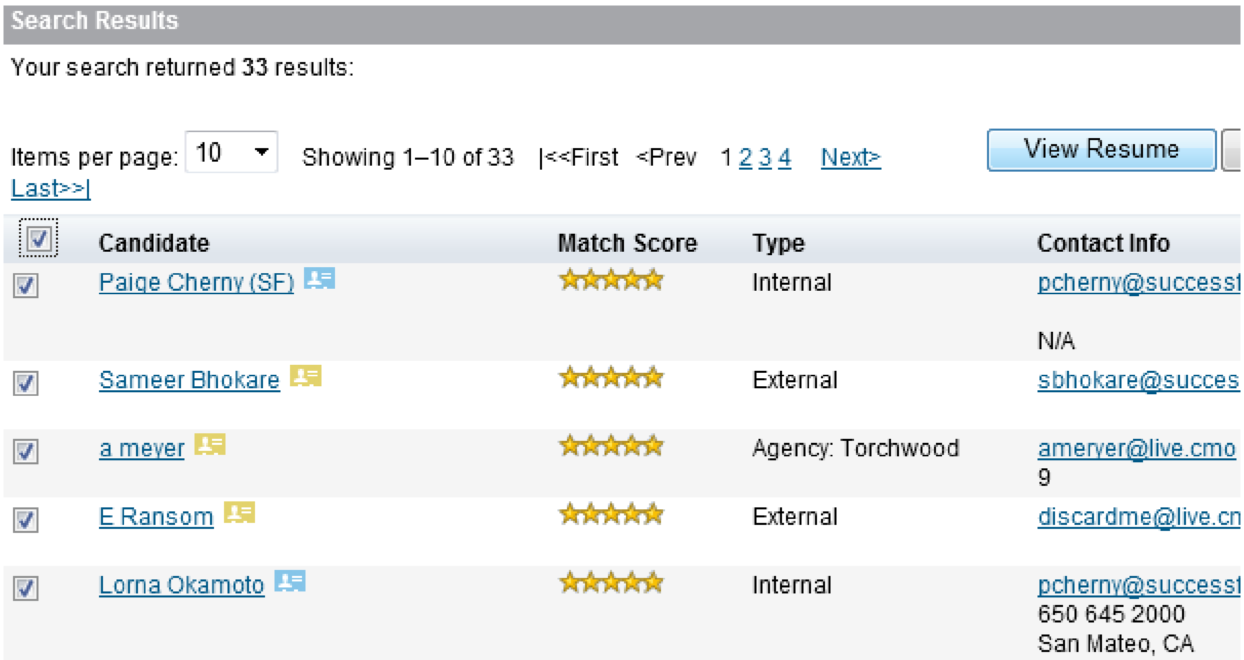
- *Provisioning* > *Company Settings* > *Recruiting Application* > *Enable advanced relevancy for candidate search*

If clients want more information about how relevancy is determined, consult this document .

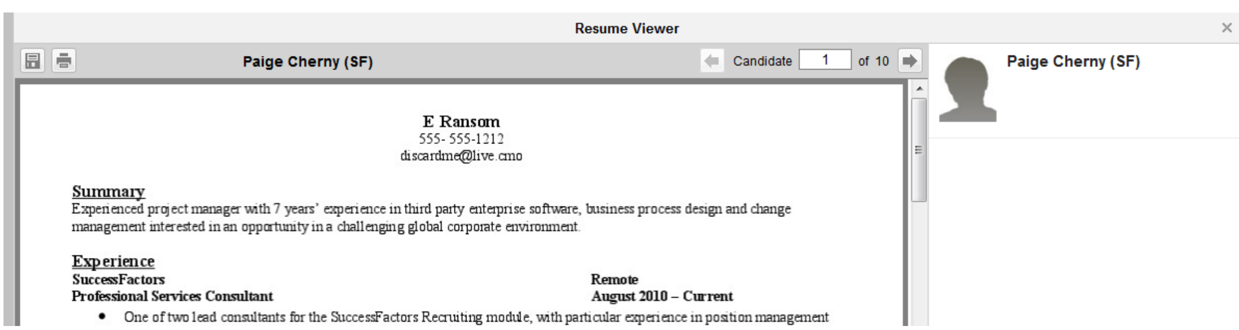
7.5.7.2 Inline Resume Viewer / Resume Carousel

Resume Carousel/Inline Resume Viewer is an opt-in functionality that allows recruiting users to view resumes in the browser without downloading the resume or opening a separate application such as Word or Adobe Acrobat, as shown below.

When a candidate adds a resume to their candidate profile, the system converts it to a JPG image viewable in the browser. Whenever a recruiting user accesses a resume via the inline resume viewer the system checks for that JPG file; if no image copy of the resume is found the system will convert the resume to an image on the fly.

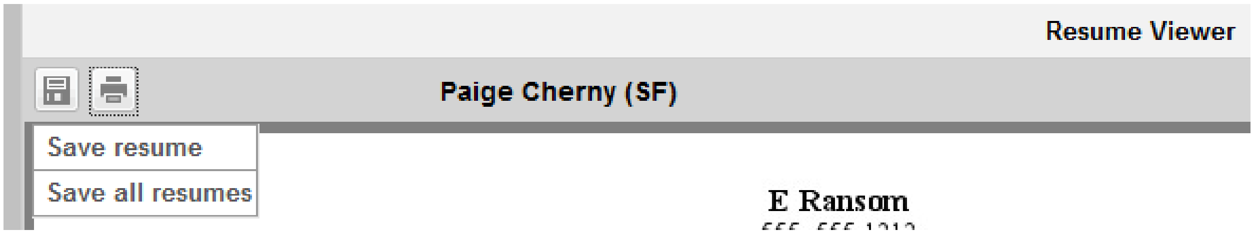


Select Candidates in Search Results and View Resume

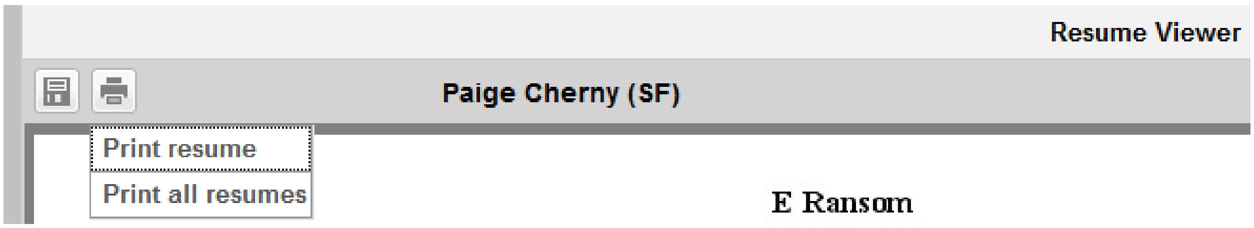


Inline Resume Viewer

The recruiting user can mass print and mass save candidate resumes and cover letters from the inline resume viewer.



Mass Save Resumes from Inline Resume Viewer

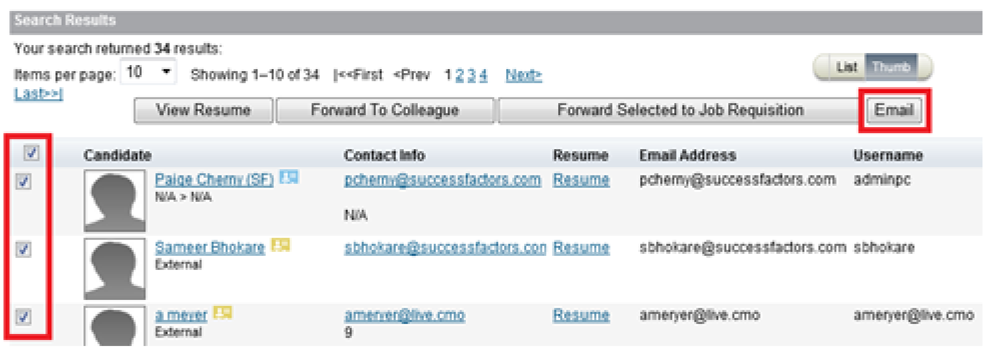


Mass Print Resumes from Inline Resume Viewer

7.5.8 Emailing Candidates

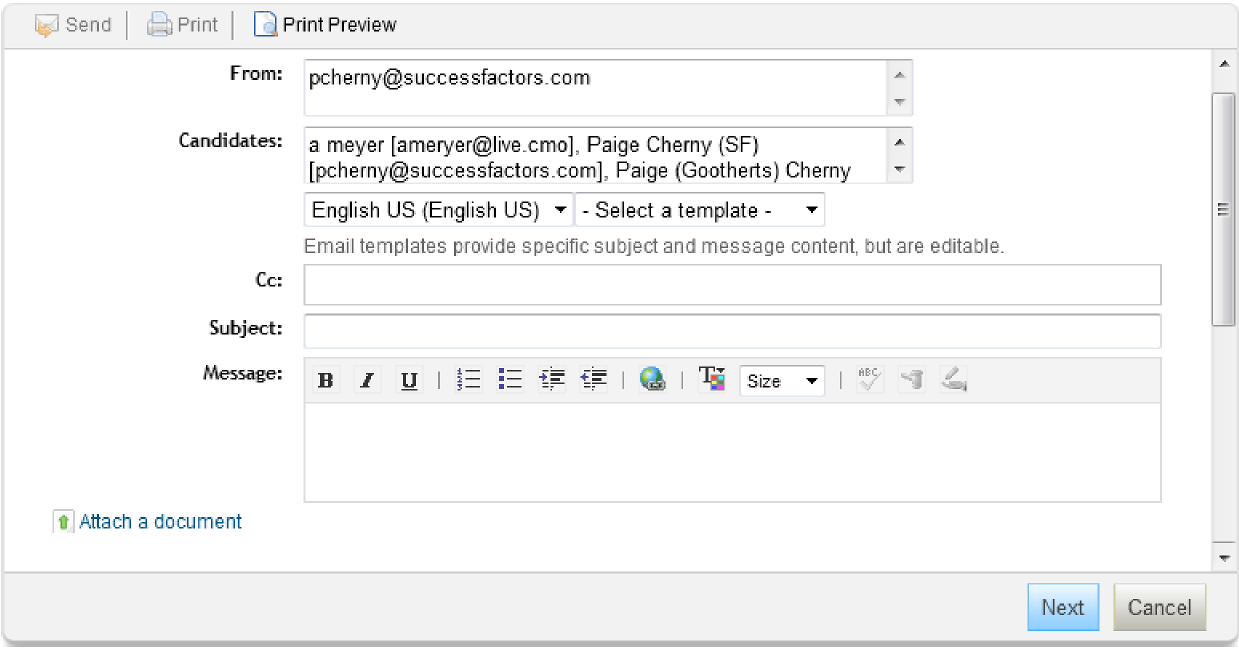
Recruiting users may initiate outgoing emails to candidates from within the product.

To e-mail en masse, check the boxes next to several candidates in the search results and click *Email*.



Mass Email Candidates from Search Results

The send e-mail screen allows the recruiting user to select from the Recruiting E-mail templates. The language field defaults to the recruiting user's language but the recruiting user can select an alternative language.



Send Email Screen

The e-mail will send as shown on screen, except tokens will render and that each user listed in the Candidates and CC field will receive an independent copy of the e-mail; candidates cannot see each other's e-mail addresses.

If desired, the recruiting user can attach one or more documents that will appear as attachments on the e-mail.

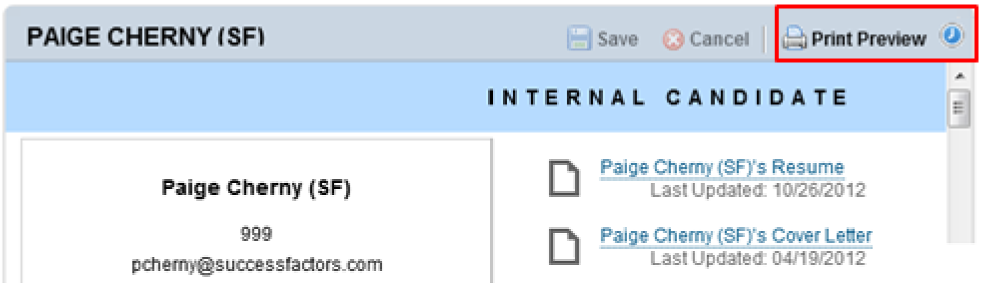
7.5.9 Printing Candidate Profiles

Quick Facts

- Candidate Profiles cannot presently be printed en masse from the candidate search results list (however, they can be printed en masse from the inline resume viewer as accessed from the candidate search results; for more information, see the Inline Resume Viewer / Resume Carousel [page 165] section of this guide.)
- While the recruiting user can choose to collapse some sections of the Candidate Profile, it is not presently possible to hide certain sections from the print view, or default the print view to hide or display different sections

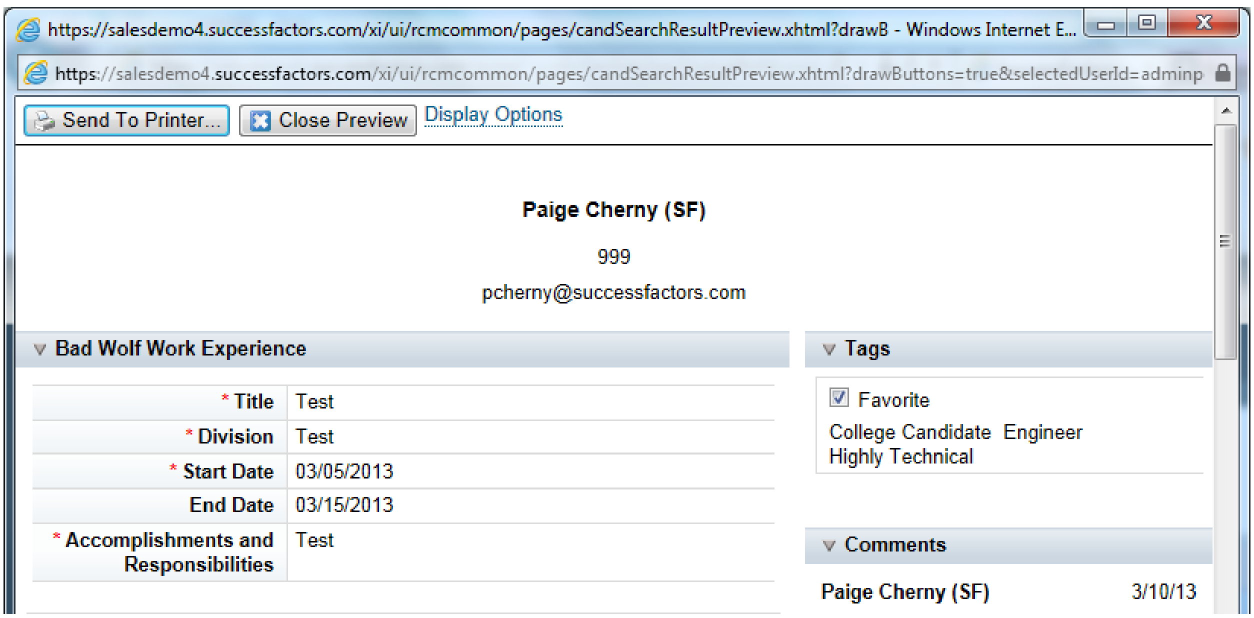
Working with Candidate Profile Printing

When viewing a candidate profile the recruiting user can click *Print Preview*.



Print Preview Option

This brings up a printer-friendly view of the candidate profile.



Printer Friendly Candidate Profile

7.5.10 Merging Duplicate Candidates

Candidates sometimes create more than one candidate profile, and in that situation clients want to merge the profiles. Managing duplicate candidates is an administrative function. For more information, see the section entitled Manage Duplicate Candidates [page 490].

7.5.11 Resume Parsing

Resume Parsing allows for a better candidate experience by taking a resume uploaded by the candidate and parsing the resume information into the designated candidate profile fields.

Recruiting users with the ability to manually add a candidate permission to write the resume field can also use the parsing capability.

> **Tip**
>
> Resume Parsing is imperfect and resume text may not parse exactly as entered. This is a known limitation.

> **Tip**
>
> Resume Parsing supports the following languages: Dutch, English, German, French, Spanish, Swedish, Danish, Polish, Romanian, Italian, Slovak, Czech, Russian, Portuguese, Chinese.

Prerequisites

- Clients must enable Standardized Background Elements [page 555] to use Resume Parsing

Configuration

1. Navigate to *Provisioning* > *Company Settings* > *Recruiting* > *Resume Parsing*
2. Configuring Resume Parsing in Admin Tools by navigating to *Admin Tools* > *Managing Recruiting* > *Configure Standardization Mapping*. Select *Candidate Standardization* from the Object drop down. The standardized data fields of standardized background fields will display. Select the Appropriate template fields and the appropriate values for the standard values for these fields. Click *Save* to save the candidate standardization mapping.
3. Configure Standardization Mapping.

> **Note**
>
> When using resume parsing, separate candidate profile XML permissions for internal and external candidates. If these permissions are not separated, the recruiting user will see the internal candidate name update with the parsed information from the resume. This could cause issues if the client is mapping to the employee profile. Example:

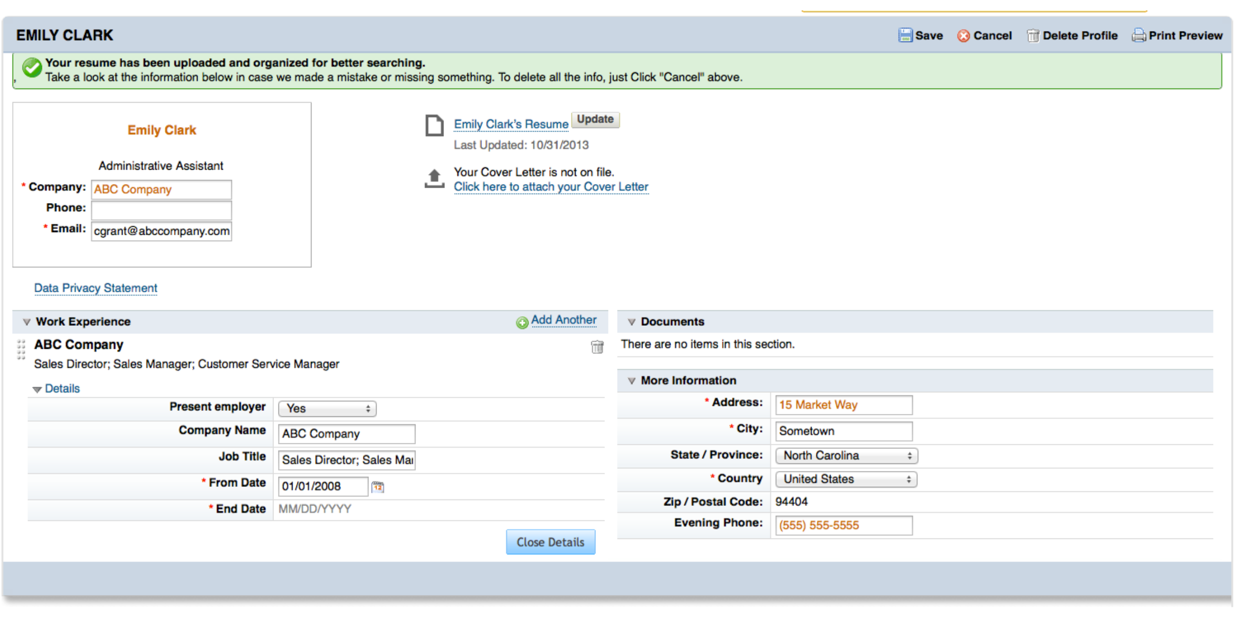
```
<field-permission type="write">
        <role-name><![CDATA[Candidate]]></role-name>
        <country><![CDATA[*]]></country>
        <source><![CDATA[External]]></source>
        <field refid="customKnownAs"/>
        <field refid="firstName"/>
        <field refid="middleName"/>
        <field refid="lastName"/>
        <field refid="contactEmail"/>
        <field refid="cellPhone"/>
        <field refid="address"/>
        <field refid="customAddress2"/>
        <field refid="city"/>
        <field refid="country"/>
        <field refid="state"/>
        <field refid="zip"/>
        <field refid="customTravel"/>
        <field refid="resume"/>
        <field refid="coverLetter"/>
```

```
        <bg-element refid="outsideWorkExperience" data-field-id="*"/>
        <bg-element refid="education" data-field-id="*"/>
        <bg-element refid="certificates" data-field-id="*"/>
        <bg-element refid="languages" data-field-id="*"/>
    </field-permission>

<field-permission type="write">
  <role-name><![CDATA[Candidate]]></role-name>
  <country><![CDATA[*]]></country>
  <source><![CDATA[Internal]]></source>
    <field refid="customTravel"/>
  <field refid="resume"/>
  <field refid="coverLetter"/>
<bg-element refid="outsideWorkExperience" data-field-id="*"/>
  <bg-element refid="mobility" data-field-id="*"/>
    <bg-element refid="languages" data-field-id="*"/>
    <bg-element refid="education" data-field-id="*"/>
    <bg-element refid="certificates" data-field-id="*"/>
</field-permission>
```

Working with Resume Parsing

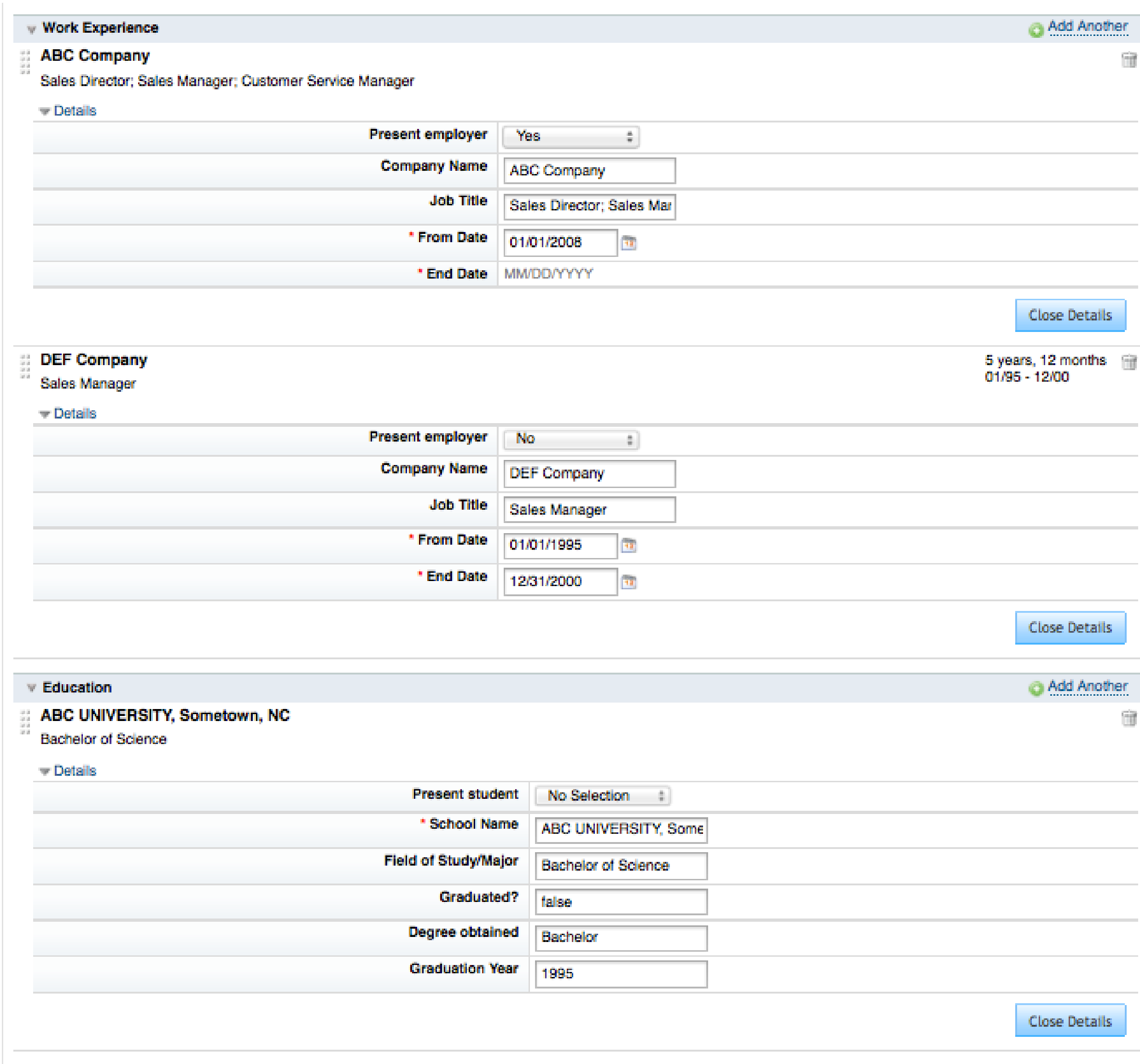
In the *Candidate Profile* > *My Profile tab*, you are prompted to upload a resume for parsing.

After selecting a file, the system uploads and processes the resume, and parses the information.. The candidate sees an acceptance message when the resume is successfully parsed.



Resume Parsing Upload

A confirmation screen is presented, to ensure that the data from the resume is parsed correctly.



Resume Parsing Results

The following languages are supported for Resume Parsing

- Dutch
- English
- German
- French
- Spanish
- Swedish
- Danish
- Polish
- Romanian
- Italian
- Slovak
- Czech

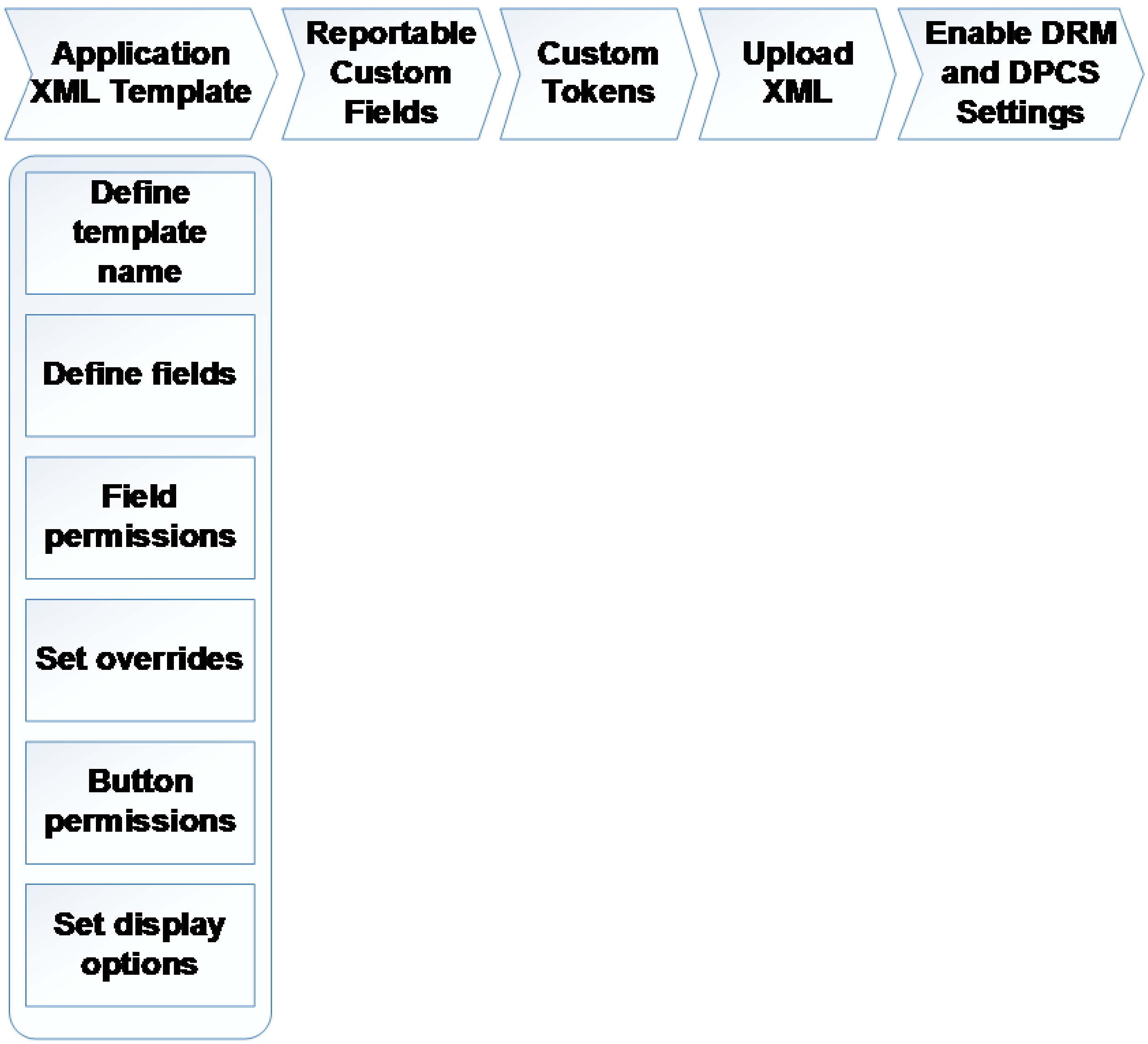
- Russian
- Portuguese
- Chinese

8 Application

The application includes data submitted by the candidate at point of application, a snapshot of the candidate's profile taken at the moment a recruiting user first views a new application, data added to the record by the recruiting user and possibly additional data added to the record by the candidate at a later date. Permissions in the application control what the candidate sees during and after applying for a job, and what a recruiting user sees when viewing candidates who have applied for a job

The application record associates a candidate to a job and includes data relevant to that particular requisition-candidate relationship and process.

The application is always associated to an applicant status pipeline and is in one status at any given time.



Configuration Process Overview for Applications

The recruiting user view of the Application record contains the following sections:

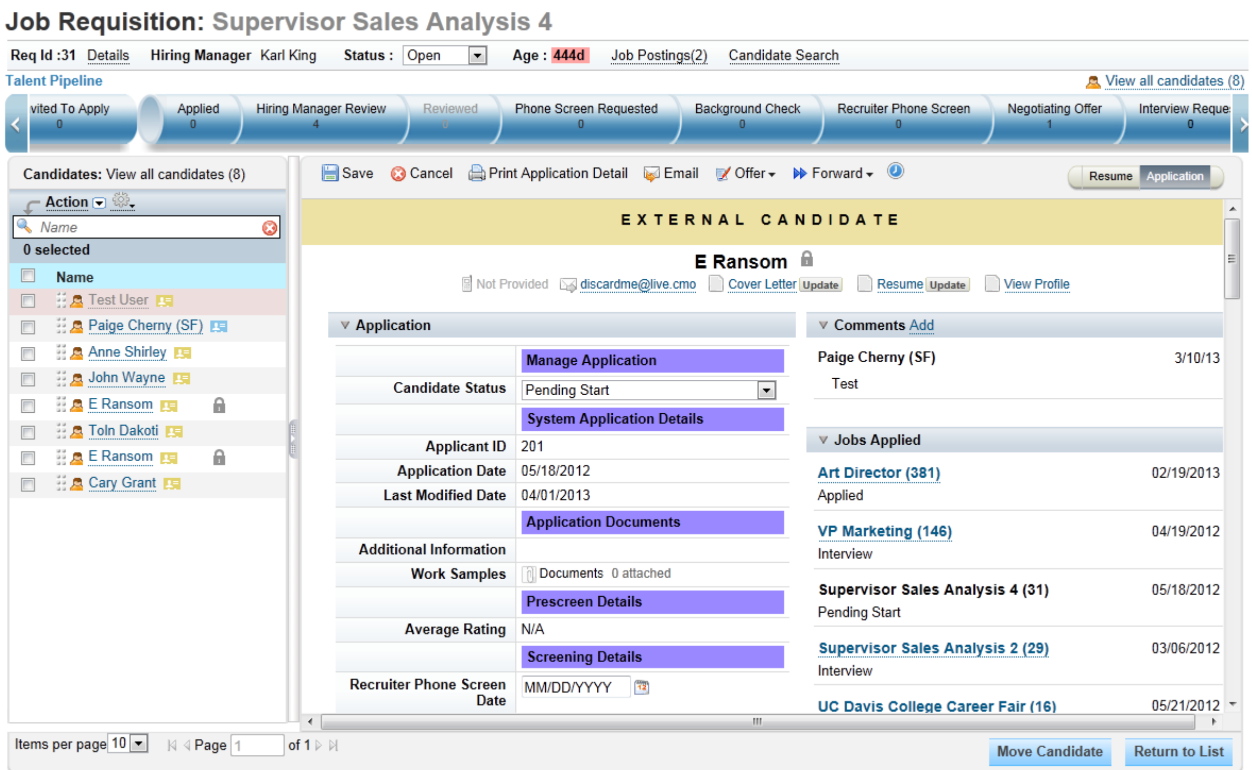
- *Banner*: Displays the candidate type (internal, external, or agency candidate with owning agency)
- *Contact Information Line:* Cell phone number, contact e-mail address, cover letter, resume, and View Profile link

Left Side Column

- *Non Applicant Warning:* Indicates the application record is forwarded and the candidate has not yet completed the application (appears based on applicant's activity)
- *Application:* Contains fields configured in the application XML (always appears)
- *Screening Details:* Contains the applicant's responses to prescreening questions (always appears; populated with data based on configuration, and recruiting user and applicant activity)
- *Background Elements:* Displays the data present on the candidate profile record at the time the recruiter first viewed the application (always appears)

Right Side Column

- *Comments:* Allows the user to view and enter comments (appears based on configuration)
- *Jobs Applied Portlet:* Displays the requisition ID, job requisition title, recruiter name, and the last modified date of the candidate pipeline status (appears based on user permissions). May allow recruiting users with appropriate permissions to view comments. For more information see the field permissions type Attribute [page 276]
- *Correspondence:* Displays the history of emails sent from the system to the applicant in relation to the application (always appears)
- *Offer Letter:* Displays the history of offer letters generated in relation to the application (always appears)
- *Application Status Audit Trail:* Displays the history of the applicant's movement within the applicant status pipeline (always appears)
- *Tags* Allows the user to view and enter tags (appears based on configuration)
- *Background Check:* Displays the status of the Verifications Inc background check (appears based on configuration)
- *Onboarding:* Displays the status of the Verifications Inc onboarding process (appears based on configuration)
- *Assessment:* Displays the status and results of the third party assessment testing (appears based on configuration)
- *More Information:* Displays the data that was present on the candidate profile record at the time the recruiter first viewed the application (always appears)



Application Record

8.1 Configuration Prerequisites and Dependencies

- Baseline settings configured in Provisioning
- Recruiting enabled
- Candidate profile XML configured

8.2 Configuring XML

You must first configure the Application XML Template. Include the following declaration at the top of every Application XML document.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE candidate-data-model PUBLIC "-//SuccessFactors, Inc.//DTD Candidate Data
Model//EN"
"candidate-data-model.dtd">
<candidate-data-model spell-check="true">
```

8.2.1 Defining template name

These elements must exist right beneath the candidate-profile-data-model element. The CDATA content may be changed if desired. The CDATA content does not appear anywhere in the instance, in Provisioning, is not referenced by any other XML, and is not visible to the client

In the XML, the `<template-name>` tag defines the name. Set this with a descriptive name to define the template. In addition to the name, you may add two more elements:

- *template-name* The unique ID of the XML template
- *template-desc* A template-desc element is used to provide descriptive text
- *template-lastmodified* The last modification date of the candidate template.

Place these elements right beneath the candidate-data-model element. The CDATA content can be changed if desired. The CDATA content does not appear anywhere in the instance, in Provisioning and is not visible to the client but the Requisition XML Template references template-name CDATA content.

8.2.1.1 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE candidate-data-model PUBLIC "-//SuccessFactors, Inc.//DTD Candidate Data
Model//EN" "candidate-data-model.dtd">
<candidate-data-model spell-check="true">
 <template-name><![CDATA[Candidate Detail Info Template]]></template-name>
  <template-desc><![CDATA[This defined candidate detail page.]]></template-desc>
  <template-lastmodified>8/16/06 12:00 AM</template-lastmodified>
```

8.2.2 Defining fields

8.2.2.1 field-definition Element

The field-definition element must contain the following attributes: id, type, required, custom, public, readOnly, and anonymize. The Application XML template can contain as many fields as the client desires.

You do not need to use all standard fields in the XML, only the standard field IDs a client requires. Configure the field IDs identically to the field IDs in the Candidate Profile XML if the client wishes to sync between records at certain points in the application process.

The field-definition element uses the following sample attribute structure.

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

id Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

The id is a field identification that must be unique within the Application XML template. Certain field-definition ids are predefined in the product as standard.

Click here to see the full list of standard field ids for the application. Partners can access the list here.

> **Tip**
>
> You cannot define default values for any fields in the Application XML template.

Table 17: Application Standard Fields

Standard Field ID	*Field Type*	*Special Functionality*
statusId	picklist	• Values auto-populate via the applicant status workflow set up in Admin Tools • If the data in this field will be managed via API, set up and associate a picklist with values exactly matching the applicant status workflow set up in Admin Tools/ • Even when multi-stage application is enabled and other field permissions are configured in the Requisition XML, configure this field permission in the Application XML
resume	richText	• Will appear in the application record contact line even if not configured in the XML • Even when multi-stage application is enabled and other field permissions are configured in the Requisition XML, configure this field permission in the Application XML

coverLetter	richText	• Will appear in the application record contact line even if not configured in the XML • Even when multi-stage application is enabled and other field permissions are configured in the Requisition XML, configure this field permission must be configured in the Application XML
contactEmail	text	• All e-mail sent from the system to the applicant is sent to this e-mail address • Appears in the Contact Info line at the top of the application instead of the normal field list or More Information section • Should be configured in all instances
candidateName	text	• Should not be made a visible or editable field • Automatically concatenates name information • If not configured, the candidate name token will not populate with data
firstName	text	• Appears in the Contact Info line at the top of the application instead of the normal field list or More Information section • Should be configured in all instances • Appears as a part of the clickable link in the Name column in the applicant list page
lastName	text	• Appears in the Contact Info line at the top of the application instead of the normal field list or More Information section • Should be configured in all instances • Appears as a part of the clickable link in the Name column in the applicant list page

middleName	text	• Appears in the Contact Info line at the top of the application instead of the normal field list or More Information section • Should be configured in all instances • Appears as a part of the clickable link in the Name column in the applicant list page
gender	derived	• Values are not configurable — only *No Selection*, *Male*, and *Female* supported. • Should not be required
country	picklist	• Must be configured in all instances
dateOfBirth	date	• Advise clients to take special care regarding data privacy regarding this data
ssn	text	*This field is not encrypted and should not be used at the present time.*
averageRating	number	• Automatically populated with the total prescreen question results rating information
applicationDate	date	• Automatically populated with the date of the candidate's initial application
lastModifiedDate	date	• Automatically populated with the date of the last change to the application data
questionResponse	text	• Should always be read to all operators • Displays the applicant's answers to prescreening questions
comments	text	• Enables and permissions the application comments feature
id	number	• Automatically populated with the system-issued unique ID for the application

type Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

Recommendation

Do not change the field type of a field; this can cause application errors on existing records storing data that do not match the new field type.

The type attribute defines the data the system accepts in the field. It consists of the following options:

- *text:* a single line of alphanumeric text with a 100-character limit (character limit and display are nonconfigurable)
- *textarea:* multiple lines of alphanumeric text with a 256-character limit, displayed as a 100-character-wide box (character limit and display are non-configurable)
- *richText:* alphanumeric lines where there is effectively no character limit
- *instruction:* a non-editable field that stretches left-to-right across the screen, used to display messages to users. Cannot be made reportable or writable; if reportability or writability is configured, error messages will result
- *date:* a date manually entered by user or selected from calendar pull-down. Displays mmddyyy or ddmmyyyy according to user's chosen language pack
- *number:* a number value
- *percent:* a percent value with one decimal
- *bool:* true or false (shown as a checkbox) — do not make required because if required, always needs to be checked
- *enum:* an enumerated type (shown as a pull-down list) where values are defined in the XML
- *multiattachment:* Indicates a field that can have multiple documents uploaded and attached to it.
- *multiattachmentselection:* A field that can have multiple documents uploaded and attached. Acts as a mini library where all documents uploaded are stored for later re-use without requiring they be uploaded again. Select the additional checkbox next to all uploaded files and to attach the document to the record. Most candidates will not be familiar with this field behavior so this field should not be used in a candidate-facing configuration. Documents uploaded to multiattachmentselection fields on the candidate profile will be automatically available in a field with the same field id on the application; the applicant can delete the attachment if desired.
- *hyperlink:* field that stores a URL and text to display in place of the URL

Recommendation

If the fields are configured identically, Candidate Profile content in multiattachmentselection fields can sync over to the Application in multiattachmentselection fields at the point when a recruiting user first views the Application. However, since the use of multiattachmentselection fields on the Application is not recommended, this is not a common configuration. Changes made to Application multiattachmentselection fields during the initial appliation are reflected on the Candidate Profile, but changes made to the application later during multi-stage applications will not sync back to the Candidate Profile.

required Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

This attribute defines whether a field is required for an application record to be completed. The field requirement is only enforced if the user editing the application can write to the field during their edit. If the field is hidden or read only to the user at the time of the edit, the fact that the field is blank will not prevent the user from saving the application.

Required fields are required whether the application record is being completed by a candidate or internal recruiting user. Allowable values for the required field are "true" or "false". Fields cannot be made conditionally required on the application record. A field cannot be made required for candidates and not required for an internal recruiting user editing the application record. Clients can choose to configure fewer required fields for this reason, or may plan to add a special value to picklists for internal recruiting users to select when adding a candidate without knowing the correct value (such as N/A or Pending) and train the internal recruiting users on the appropriate values to add in required non-picklist fields.

A field cannot be hidden, displayed, or made required based on the answer to an earlier field. It is not possible to ask a question like, “Have you ever been convicted of a felony” and then display or require a “Please explain” field if the candidate selects yes. The suggested workarounds are:

- Make the *Please explain* field unrequired and rename it something like “If yes, please explain”
- Make the *Please explain* field required and rename it something like “If yes, please explain (enter N/A if not applicable)”

custom Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

There are some field IDs reserved as standard fields. They do not need to be included in the XML configuration but if used they must have the appropriate corresponding field type and be marked as `custom="false"`. All other field IDs should be marked `custom="true"`.

public Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

Candidates cannot view or edit fields, regardless of permissions, unless the fields are first set as public. This setting is the attribute most commonly adjusted using field overrides, so even a field marked `public="false"` can, under certain conditions, be made public to certain applicants. For more information see the Defining overrides [page 189] section of this guide.

readOnly Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

The readOnly attribute specifies the field is a read-only field. This is generally a legacy attribute; read/write capability is now typically controlled via permissions and not via this attribute. In new configuration always set this attribute to false.

anonymize Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true">
```

This identifies whether a given field is considered personally identifying data and should be purged; this is used in conjunction with Data Retention Management (DRM).

forward-intact Attribute

```
<field-definition id="firstName" type="text" required="true" custom="false"
public="false" readOnly="false" anonymize="true" forward-intact="true">
```

When set to "`true`" this attribute identifies if a given field's data will be preserved when a client is using Forwarding Candidates with Application Data Intact [page 90]. For more information see the corresponding section of this guide.

8.2.2.2 field-label Element

The field-label element usually controls the appearance of the field name in the user interface. However, not all field labels in the user interface are controlled by this label element. On certain fields the succession data model controls the field label, or on other fields there are Provisioning settings that control the label used in the system.

The label element is not conditional. One field cannot display one label to internal candidates and a different label to external candidates. It is not possible for one field to display one label to candidates and a different label to internal recruiting users.

The field-definition element must contain at least one field-label element.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

mime-type Attribute

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```


Mime-type determines whether or not the system renders any html tags defined in the CDATA content. The two supported mime types are:

- *text-plain:*Plain text, unformatted.
- *text-html:*HTML-formatted text.

CDATA Content

The CDATA content is configurable to contain the client's preferred text.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

> **Tip**
>
> Use the following HTML in the CDATA value to define a table with a background color to separate sections of the requisition. Replace the background color hexcode with the client's preferred brand color, and replace the field label as appropriate to the field.
>
> ```
> <table frame="border" width="100%"> <tr><td style="background-color:#6699FF"
> valign="bottom">FIELD LABEL</td></tr> </table>
> ```

8.2.2.3 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<candidate-data-model spell-check="true">
  <template-name><![CDATA[Candidate Detail Info Template]]></template-name>
  <template-desc><![CDATA[This defined candidate detail page.]]></template-desc>
  <template-lastmodified>8/16/06 12:00 AM</template-lastmodified>
  <field-definition id="instrManageApp" type="instruction" required="false"
custom="true" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-html" lang="en_US"><![CDATA[<table frame="border"
width="100%"><tr><td style="background-color:#9988FF" valign="bottom"><b>Manage
Application</b></td></tr></table>]]></field-label>
  </field-definition>
  <field-definition id="statusId" type="picklist" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Candidate Status]]></
field-label>
    <picklist-id>appStatus</picklist-id>
  </field-definition>
  <field-definition id="comments" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Comments]]></field-
label>
  </field-definition>
  <field-definition id="id" type="text" required="false" custom="false"
public="false" readOnly="true" anonymize="false">
```

```
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Applicant ID]]></
field-label>
  </field-definition>
  <field-definition id="applicationDate" type="date" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Application Date]]></
field-label>
  </field-definition>
  <field-definition id="lastModified" type="date" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Last Modified
Date]]></field-label>
  </field-definition>
  <field-definition id="resume" type="richText" required="true" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Resume]]></field-
label>
  </field-definition>
  <field-definition id="coverLetter" type="richText" required="false"
custom="false" public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Cover Letter]]></
field-label>
  </field-definition>
  <field-definition id="workSamples" type="multiattachment" required="false"
custom="true" public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Work Samples]]></
field-label>
  </field-definition>
  <field-definition id="questionResponse" type="text" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Responses to Pre-
Screen Questions]]></field-label>
  </field-definition>
  <field-definition id="averageRating" type="number" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Average Rating]]></
field-label>
  </field-definition>
  <field-definition id="instrSelfID" type="instruction" required="false"
custom="true" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-html" lang="en_US"><![CDATA[<table frame="border"
width="100%"><tr><td style="background-color:#9988FF" valign="bottom"><b>Voluntary
Self-Identification</b></td></tr></table>]]></field-label>
  </field-definition>
  <field-definition id="eeoInstruction" type="instruction" required="false"
custom="true" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-html"><![CDATA[<font face="Arial, Helvetica, sans-
serif">
        We provide equal opportunity to all qualified individuals regardless of
        race, color, religion, age, sex, national origin, veteran status or
        disability.
        <p>Providing this information is voluntary.  We ask for this information
        to maintain records. Any information you voluntarily provide is
        confidential and will not be considered in making any employment
        decision.   If you choose not to complete this form, it will not affect
        your being considered for employment.</font></p>
        <p>
        <b>EEOC RACE/ETHNIC IDENTIFICATION CATEGORIES</b>
        <li><b>Hispanic or Latino : </b> A person of Cuban, Mexican, Puerto
        Rican, South or Central American, or other Spanish culture or origin
        regardless of race.
        <li><b>White (Not Hispanic or Latino) : </b>A person having origins in
        any of the original peoples of Europe,the Middle East, or North Africa.
        <li><b>Black or African American (Not Hispanic or Latino) : </b>A
        person having origins in any of the Black racial groups of Africa.
        <li><b>Native Hawaiian or Other Pacific Islander (Not Hispanic or
        Latino) : </b> A person having origins in any of the original peoples
        of Hawaii, Guam, Samoa, or other Pacific Islands.
```



```
        <li><b>Asian (Not Hispanic or Latino) : </b>A person having origins in
        any of the original peoples of the Far East, Southeast Asia, or the
        Indian subcontinent including, for example, Cambodia, China, India,
        Japan, Korea, Malaysia, Pakistan, the Philippine Islands, Thailand,
        and Vietnam.
        <li><b>American Indian or Alaska Native (Not Hispanic or Latino) : </b>
        A person having origins in any of the original peoples of North and
        South America (including Central America), and who maintains tribal
        affiliation or community attachment.
        <li><b>Two or More Races (Not Hispanic or Latino) : </b>All persons who
        identify with more than one of the above five races. <p><p>
        <b>VETERAN STATUS IDENTIFICATION CATEGORIES</b>
        <li><b>Armed Force Service Medal Veteran : </b>Defined as a veteran who,
        while serving on active duty in the Armed Forces, participated in a
        United States military operation for which a service medal was awarded
        pursuant to Executive Order 12985.
        <li><b>Disabled Veteran : </b>A 'Disabled veteran' refers to a veteran
        of the U.S. military, ground, naval, or air service who
        <BLOCKQUOTE> (1) Is entitled to compensation (or who but for the
        receipt of military retired pay would be entitled to compensation)
        under laws administered by the Secretary of Veteran Affairs,
        or </BLOCKQUOTE> <BLOCKQUOTE> (2) Was discharged or released from active
        duty because of a service-connected disability.  </BLOCKQUOTE>
        <li><b>Recently Separated Veteran : </b>Defined as any veteran who
        served on active duty in the U.S. military, ground, naval or air force,
        during the three-year period beginning on the date of such veteran’s
        discharge or release from active duty.
        <li><b>Other Protected Veteran : </b>Defined as any veteran who served
        on active duty in the U.S. military, ground, naval or air service in a
        war, campaign or expedition in which a campaign badge has been
        authorized under laws administered by the Department of Defense.<p>
        <p><b>DISABILITY STATUS</b>
        <li><b>Individual with a Disability : </b>An 'individual with a
        disability' is defined as a person who (1) Has a physical or mental
        impairment which substantially limits one or more major life activities,
        2) Has a record of such an impairment, or (3) Is regarded as having
        such an impairment.]]></field-label>
  </field-definition>
  <field-definition id="gender" type="picklist" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Gender]]></field-
label>
    <picklist-id>gender</picklist-id>
  </field-definition>
  <field-definition id="ethnicity" type="picklist" required="true" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Individual Race /
Ethnicity Information]]></field-label>
    <picklist-id>ethnic</picklist-id>
  </field-definition>
  <field-definition id="race" type="picklist" required="true" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Race]]></field-label>
    <picklist-id>race</picklist-id>
  </field-definition>
  <field-definition id="veteranStatus" type="picklist" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Veteran Status: ]]></field-label>
    <field-description><![CDATA[]]></field-description>
    <picklist-id>veteran</picklist-id>
  </field-definition>
  <field-definition id="disabilityStatus" type="picklist" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Are you able to perform the
essential functions of the job for which you are applying with or without
reasonable accommodation?]]></field-label>
    <field-description><![CDATA[]]></field-description>
    <picklist-id>yesNo</picklist-id>
```

```
  </field-definition>
  <field-definition id="firstName" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[First Name]]></field-
label>
  </field-definition>
  <field-definition id="middleName" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Middle Name]]></field-
label>
  </field-definition>
  <field-definition id="lastName" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Last Name]]></field-
label>
  </field-definition>
  <field-definition id="candidateName" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Candidate Name]]></
field-label>
  </field-definition>
  <field-definition id="contactEmail" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Email Address]]></
field-label>
  </field-definition>
  <field-definition id="country" type="picklist" required="true" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Country]]></field-
label>
    <picklist-id>country</picklist-id>
  </field-definition>
  <field-definition id="zip" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[Zip/Post/Postal
Code]]></field-label>
  </field-definition>
```

8.2.3 Setting field permissions

In a single-stage application instance, recruiting user and candidate access to fields is determined via field-permission elements configured in the Application XML. In a multi-stage application instance, these permissions are set in the Requisition XML instead, except for the statusId field.

Field permissions are read and applied top to bottom in the order they appear in the XML template, meaning later permissions override the former in case of conflict. For example, you may define all read permissions for all operators first and the write permissions after all read permissions are set up. That way if there are any conflicts between permissions, the greater permissions rule.

The current best practice is to set up a separate permission block for each operator, defining the appropriate permissions, even if two operators have the same permission set. This makes it easy for Customer Success to later make small changes to the permission structure at the client’s request. Permission structures that group field permission together for different operators are significantly more difficult to adjust at a later date without Professional Services.

8.2.3.1 field-permission Element

```
<field-permission type="read">
  <description><![CDATA[Write Permissions]]></description>
  <role-name><![CDATA[O]]></role-name>
  <field refid="statusId"/>
  <field refid="additionalInformation"/>
  <field refid="workSamples"/>
</field-permission>
```

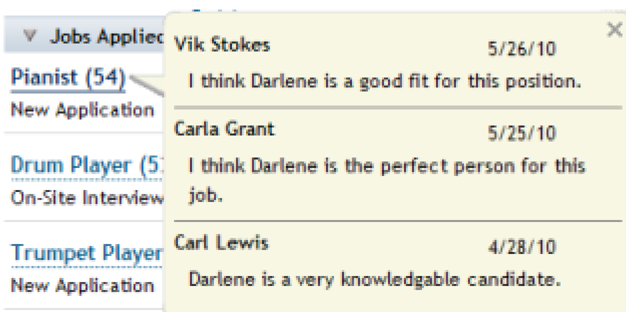
The type attribute of the field permission element determines what permissions are applied in the permissions block. An unlimited number of field-permission elements can be included in the Application XML.

type Attribute

```
<field-permission type="read">
```

The type attribute must be set to one of the following types:

- *read:* the field can be read by internal and external users in the specified roles, only applicable to open requisitions
- *write:* the user can both read and write the fields after the requisition is open
- *external-view:*should only be used for field `refid="comments"`. This is used to provide appropriately-permissioned users visibility to the comments when reviewing the application from the Jobs Applied portlet.



Comment Visibility in the Jobs Applied Portlet

There is no `"none"` or `"hide"` type; to remove a field from view, omit it from any permissions blocks.

The only conditional control available for field permissioning is via multi-stage application, where field permissions can be adjusted by applicant status. At present there you cannot change field permissioning based on internal versus external candidate type, or country.

8.2.3.2 description Element

```
<field-permission type="read">
  <description><![CDATA[Write Permissions]]></description>
  <role-name><![CDATA[O]]></role-name>
```

```
    <field refid="statusId"/>
    <field refid="additionalInformation"/>
    <field refid="workSamples"/>
  </field-permission>
```

The description element is most useful as a brief description of what the field permission block is intended to do. This is an optional element. Only one description element can be contained within the field-permission element.

8.2.3.3 role-name Element

```
  <field-permission type="read">
    <description><![CDATA[Write Permissions]]></description>
    <role-name><![CDATA[O]]></role-name>
    <field refid="statusId"/>
    <field refid="additionalInformation"/>
    <field refid="workSamples"/>
  </field-permission>
```

- The role-name element defines the operators are affected by the permission block. Each permission block supports multiple role elements The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

8.2.3.4 field Element and refid Attribute

```
  <field-permission type="read">
    <description><![CDATA[Write Permissions]]></description>
    <role-name><![CDATA[O]]></role-name>
    <field refid="statusId"/>
    <field refid="additionalInformation"/>
    <field refid="workSamples"/>
  </field-permission>
```

Specify all field ids that should be affected by the permission block.

8.2.3.5 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Application blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<field-permission type="read">
    <description><![CDATA[Write Permissions]]> </description>
      <role-name><![CDATA[O]]></role-name>
      <role-name><![CDATA[G]]></role-name>
      <role-name><![CDATA[GM+]]></role-name>
```



```
        <field refid="id"/>
        <field refid="applicationDate"/>
        <field refid="lastModified"/>
   </field-permission>
   <field-permission type="read">
     <description><![CDATEcA[Write Permissions]]> </description>
       <role-name><![CDATA[R]]> </role-name>
         <field refid="id"/>
         <field refid="applicationDate"/>
         <field refid="lastModified"/>
         <field refid="questionResponse"/>
         <field refid="averageRating"/>
   </field-permission>
   <field-permission type="write">
     <description><![CDATA[Write Permissions]]></description>
       <role-name><![CDATA[O]]></role-name>
       <role-name><![CDATA[G]]></role-name>
       <role-name><![CDATA[GM+]]></role-name>
         <field refid="statusId"/>
         <field refid="comments"/>
   </field-permission>
   <field-permission type="write">
     <description><![CDATA[Write Permissions]]></description>
       <role-name><![CDATA[R]]></role-name>
         <field refid="statusId"/>
         <field refid="comments"/>
         <field refid="recruiterPhoneScreenDate"/>
         <field refid="screeningNotes"/>
   </field-permission>
```

8.2.4 Defining overrides

The Application XML contains an override element allowing the system to alter the attributes on the field definitions. These alterations can be based on the candidate type and the country of the requisition to which the applicant has applied.

Most commonly overrides are used to alter the “public” attribute so certain fields are hidden or displayed to certain types of applicant. For example, you can use overrides to specify a specific field applies only to external candidates who apply from the US. However, some other attributes such as “required” can be altered as well.

Common mistakes include declaring overrides that restate the attribute configuration in the field definition or declaring two overrides that conflict with each other.

8.2.4.1 field-attr-override Element

```
   <field-attr-override>
     <override>
       <description><![CDATA[]]></description>
       <country><![CDATA[US]]></country>
       <field-attr attribute="public" value="true" applicant="both"/>
     </override>
     <field refid="instrSelfID"/>
     <field refid="eeoInstruction"/>
     <field refid="gender"/>
     <field refid="ethnicity"/>
```



```
    <field refid="race"/>
    <field refid="veteranStatus"/>
    <field refid="disabilityStatus"/>
  </field-attr-override>
```

The field-attr-override element defines overrides. This element contains the override conditions and the list of fields affected by the override. Multiple field-attr-override elements can be configured in the Application XML.

8.2.4.2 override Element

```
    <override>
      <description><![CDATA[]]></description>
      <country><![CDATA[US]]></country>
      <field-attr attribute="public" value="true" applicant="external"/>
    </override>
```

The override element specifies under which conditions the attribute change should take effect, and what should be changed in the attribute as a result.

The full contents of the override element can be read in natural language as: “On a US requisition, change the public attribute to be “true” if the applicant is external.”

8.2.4.3 description Element

```
<description><![CDATA[]]></description>
```

The description element is most useful as a brief description of what the field permission block is intended to do. This is an optional element. Only one description element can be contained within the field-permission element.

8.2.4.4 country Element

```
<country><![CDATA[US]]></country>
```

The country element identifies that the override takes effect when the requisition has a particular country value. For this feature to function properly, the country element CDATA must be set to a valid two-digit ISO standard country value .

Multiple country elements may be present in one override.

8.2.4.5 field-attr Element

```
<field-attr attribute="public" value="true" applicant="both"/>
```

The field-attr element declares the changes to the attribute that occur when the conditions are met.

“attribute” Attribute

```
<field-attr attribute="public" value="true" applicant="both"/>
```

value Attribute

```
<field-attr attribute="public" value="true" applicant="both"/>
```

The value item identifies how the attribute in the field-definition should be changed. For instance, if the public attribute in the field is defined as `“false”` but the conditions in the override are met, specifying “true” in the value attribute of the override will replace the field-definition public attribute value with `“true”`.

applicant Attribute

```
<field-attr attribute="public" value="true" applicant="both"/>
```

The applicant attribute declares an additional condition, based on the applicant type, that must be met for the override to take effect. The override can be set to take effect for applicants who are internal, external or both.

8.2.4.6 field Element and refid Attributes

```
<field-attr-override>
  <override>
    <description><![CDATA[]]></description>
    <country><![CDATA[US]]></country>
    <field-attr attribute="public" value="true" applicant="both"/>
  </override>
  <field refid="instrSelfID"/>
  <field refid="eeoInstruction"/>
  <field refid="gender"/>
  <field refid="ethnicity"/>
  <field refid="race"/>
  <field refid="veteranStatus"/>
  <field refid="disabilityStatus"/>
```

```
</field-attr-override>
```

Specify all field ids that should be affected by the override.

8.2.4.7 XML Sample

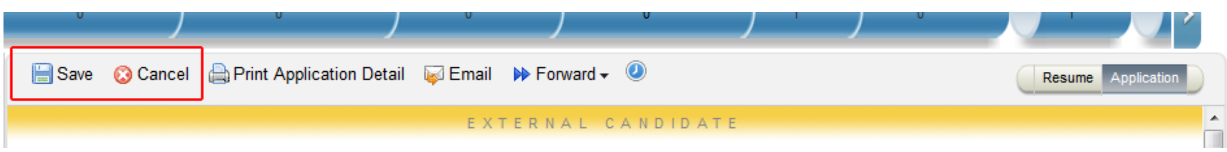
Note that this is just an example for reference, not a recommended set of configuration. For a current Application blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<field-attr-override>
  <override>
    <description><![CDATA[]]></description>
    <country><![CDATA[US]]></country>
    <field-attr attribute="public" value="true" applicant="both"/>
  </override>
  <field refid="instrSelfID"/>
  <field refid="eeoInstruction"/>
  <field refid="gender"/>
  <field refid="ethnicity"/>
  <field refid="race"/>
  <field refid="veteranStatus"/>
  <field refid="disabilityStatus"/>
</field-attr-override>
```

8.2.5 To set button permissions

Button permissions specify which operators have access to use specific buttons on the application record. For example, the figure below shows a recruiter with permissions to use Save and Cancel buttons.



View for a Recruiting User with Permissions to Save & Cancel

8.2.5.1 button-permission Element

```
<button-permission>
  <role-name><![CDATA[O]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <button-id><![CDATA[Save]]></button-id>
  <button-id><![CDATA[Cancel]]></button-id>
</button-permission>
```

Multiple button-permission elements can be declared in the Application XML.

8.2.5.2 role-name Element

```
<button-permission>
  <role-name><![CDATA[O]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <button-id><![CDATA[Save]]></button-id>
  <button-id><![CDATA[Cancel]]></button-id>
</button-permission>
```

- The role-name element defines which operators are affected by the button permission block. Multiple role elements are supported within each button permission block. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the section.

8.2.5.3 button-id Element

```
<button-permission>
  <role-name><![CDATA[O]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <button-id><![CDATA[Save]]></button-id>
  <button-id><![CDATA[Cancel]]></button-id>
</button-permission>
```

Multiple button-id elements can be declared in one button permission block.

- *Save:* The Save button permission allows the user access to the Save button on the application. This is typically granted to most or all operators.
- *Cancel:* The Cancel button permission allows the user access to the Cancel button on the application. This is typically granted to most or all operators.
- *Close:* The close button permission is legacy from the days prior to the applicant status disqualification options and generally should not be permissioned in new configuration.
- *Reopen:* The reopen button permission is legacy from the days prior to the applicant status disqualification options and generally should not be permissioned in new configuration.
- *Forward:* The forward button permission allowed the user to use the *Forward to Req* button on the application record to associate the candidate to another requisition.
- *EDIT_CANDIDATE_SNAPSHOT:* This button permission is used to grant a user permission to edit the contents of the candidate profile snapshot associated to the application. This must also be used in conjunction with candidate profile permissions that are defined by dynamic group and if those same field IDs exist on the Application XML the permissions need to match the permissions of users that are part of the dynamic group.

8.2.5.4 button-permission Element

```
<button-permission>
  <role-name><![CDATA[O]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <role-name><![CDATA[GM+]]></role-name>
```

```
    <role-name><![CDATA[GH+]]></role-name>
    <role-name><![CDATA[R]]></role-name>
    <role-name><![CDATA[RM+]]></role-name>
    <role-name><![CDATA[S]]></role-name>
    <role-name><![CDATA[T]]></role-name>
    <role-name><![CDATA[W]]></role-name>
    <button-id><![CDATA[Save]]></button-id>
    <button-id><![CDATA[Cancel]]></button-id>
  </button-permission>
```

To define button permissions, use the button-permission element. This element requires the following two inputs:

- *role-name:* this CDATA value stores the valid roles. You may list multiple `<role-name>` elements within the `<button-permission>` block.
- *button-id:* this CDATA value stores the valid buttons. You may list multiple `<button-id>` elements within the `<button-permission>` block. Valid button values are: save, cancel, forward, open, close, reopen.

8.2.5.5 XML Sample

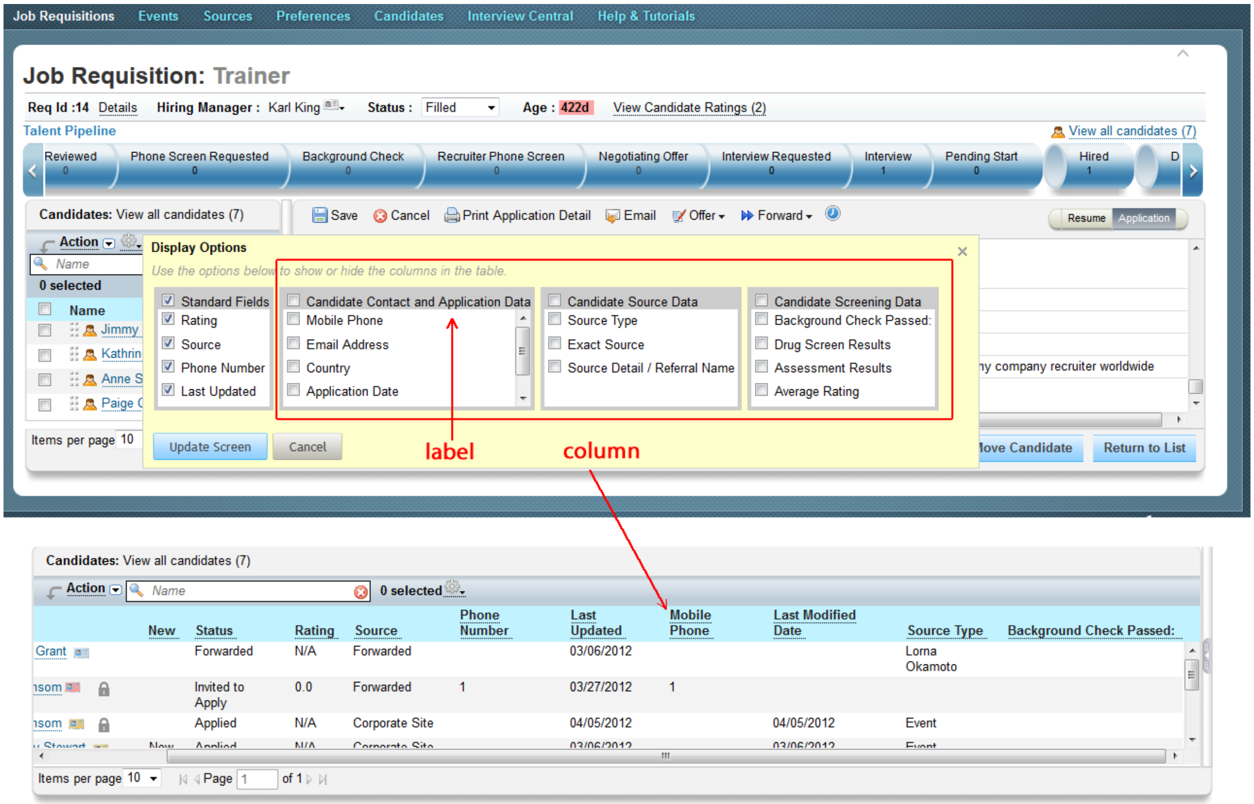
Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
  <button-permission>
    <role-name><![CDATA[O]]></role-name>
    <role-name><![CDATA[G]]></role-name>
    <role-name><![CDATA[GM+]]></role-name>
    <role-name><![CDATA[GH+]]></role-name>
    <role-name><![CDATA[R]]></role-name>
    <role-name><![CDATA[RM+]]></role-name>
    <role-name><![CDATA[S]]></role-name>
    <role-name><![CDATA[T]]></role-name>
    <role-name><![CDATA[W]]></role-name>
    <button-id><![CDATA[Save]]></button-id>
    <button-id><![CDATA[Cancel]]></button-id>
  </button-permission>
  <button-permission>
    <role-name><![CDATA[R]]></role-name>
    <button-id><![CDATA[EDIT_CANDIDATE_SNAPSHOT]]></button-id>
  </button-permission>
```

8.2.6 Setting display options

Display Options on the application allow an end user to select the columns appearing on the applicant list page.



Display Options on the Application

```
    <candidate-summary-display-options-config>
      <category id="candidateScreeningData" name="candidateScreeningData">
        <label xml:lang="en_US"><![CDATA[Candidate Screening Data]]></label>
        <column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7"/>
        <column field-ref="drugScreenResults" select-by-default="false" 
  gridOrder="8"/>
        <column field-ref="assessmentResults" select-by-default="false" 
  gridOrder="9"/>
        <column field-ref="averageRating" select-by-default="false" gridOrder="11"/>
      </category>
    </candidate-summary-display-options-config>
```

8.2.6.1 candidate-summary-display-options-config Element

<*candidate-summary-display-options-config*>

The candidate-summary-display-options-config element defines display options. This cannot be used to disable or alter the standard columns in the applicant list table.

8.2.6.2 category Element

```
<category id="candidateScreeningData" name="candidateScreeningData">
```

The category element divides the display option selections into columns in the user interface. Multiple categories are supported in the candidate-summary-display-options-config.

id and name Attributes

```
<category id="candidateScreeningData" name="candidateScreeningData">
```

The id and name specify a unique ID for the category. For simplicity these attributes should be set to the same unique made-up alphanumeric value.

8.2.6.3 label Element

```
<label xml:lang="en_US"><![CDATA[Candidate Screening Data]]></label>
```

This specifies the value for the label shown at the top of each column in the display options. It uses the text-plain or text-html mime types.

This content is translatable; for more information, see the Translation [page 652] section of this guide.

8.2.6.4 column Element

```
<column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7"/>
```

The column element equates to an item available in the display options for a user to select as an additional column in the applicant list page. Multiple columns are supported in the category element.

field-ref Attribute

```
<column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7"/>
```

The field-ref determines what field the new display option column is tied to. Note the display options may not display any data until the fields they refer to are set up as Custom Reportable Fields and synchronized successfully.

select-by-default Attribute

```
<column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7"/>
```

The select-by-default attribute determines whether the display option is unchecked by default and requires action by the recruiting user to select it, or whether the display option is checked by default and requires action by the recruiting user to de-select it.

gridOrder Attribute

```
<column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7"/>
```

The gridOrder attribute determines the order of display for the option column in the applicant list table, from left to right. All configured display options appear to the left of the standard columns in the applicant list table.

8.2.6.5 XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Candidate Profile blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<candidate-summary-display-options-config>
  <category id="candidateContactData" name="candidateContactData">
    <label xml:lang="en_US"><![CDATA[Candidate Contact and Application Data]]></
label>
    <column field-ref="cellPhone" select-by-default="true" gridOrder="1">
    </column>
    <column field-ref="contactEmail" select-by-default="true" gridOrder="2">
    </column>
    <column field-ref="country" select-by-default="false" gridOrder="3">
    </column>
    <column field-ref="applicationDate" select-by-default="false" gridOrder="12">
    </column>
    <column field-ref="lastModified" select-by-default="false" gridOrder="13">
    </column>
  </category>
  <category id="candidateSourceData" name="candidateSourceData">
    <label xml:lang="en_US"><![CDATA[Candidate Source Data]]></label>
    <column field-ref="referralSource" select-by-default="false" gridOrder="4">
    </column>
    <column field-ref="exactSource" select-by-default="false" gridOrder="5">
    </column>
    <column field-ref="sourceDetail" select-by-default="false" gridOrder="6">
    </column>
  </category>
  <category id="candidateScreeningData" name="candidateScreeningData">
    <label xml:lang="en_US"><![CDATA[Candidate Screening Data]]></label>
```

```
    <column field-ref="bkgrndChkStatus" select-by-default="false" gridOrder="7">
    </column>
    <column field-ref="drugScreenResults" select-by-default="false" gridOrder="8">
    </column>
    <column field-ref="assessmentResults" select-by-default="false" gridOrder="9">
    </column>
    <column field-ref="averageRating" select-by-default="false" gridOrder="11">
    </column>
  </category>
</candidate-summary-display-options-config>
```

8.2.7 Configuring multi-stage application

An instance is set up as a single-stage application environment or a multi-stage application environment.

When multi-stage application is enabled the majority of the application field permissioning is read out of the Requisition XML instead of the Application XML. For more information about configuring multi stage application see the field-permission Elements [page 281] section of this guide in the Requisition XML section. For more information about working with application records in a multi-stage application environment, see the Multi-Stage Application [page 95] section of this guide.

8.3 Defining reportable custom fields

Navigate to *Provisioning* > *Configure Reportable Custom Fields* and configure your fields. For more information, see the Reportable Custom Fields [page 66] section.

8.4 Configuring custom tokens

Navigate to *Provisioning* > *Configure Custom Tokens* and configure your fields. For more information, see the Custom Tokens [page 65] section of this guide.

8.5 Uploading XML

1. Navigate to *Provisioning* > *Application Template*.
2. Upload.

8.6 Applying XML changes

1. Navigate to *Provisioning* > *Edit Job Requisition Application Template*.
2. Add or update an Application Template by uploading the XML.

8.7 DRM and DPCS

Configure DRM and DPCS according to the details located in the DRM and DPCS [page 401] section.

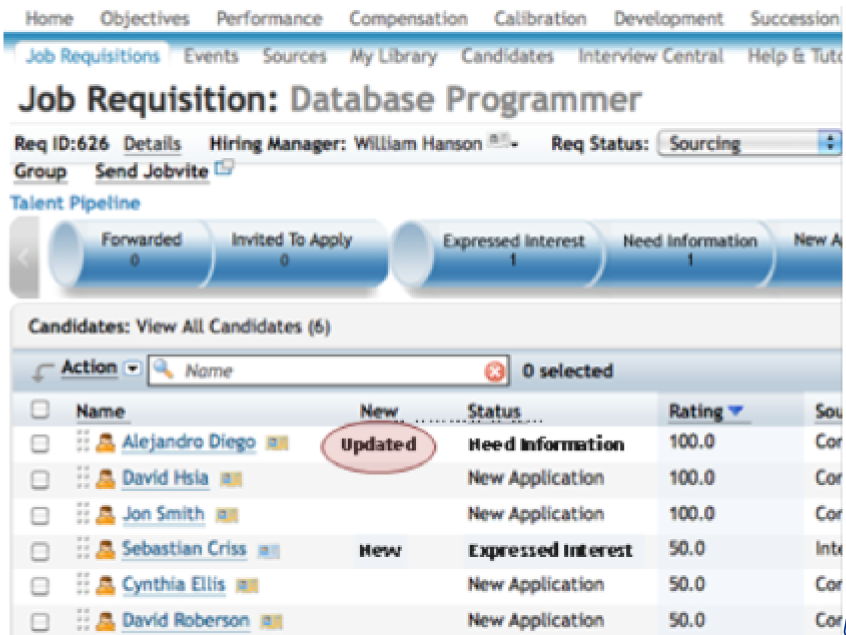
8.8 Working with Applications

For more information about moving an application through the hiring process, see the Managing Applicants in the Applicant Status Workflow [page 82] section of this guide.

8.8.1 Identifying New and Updated Applications

Recruiting users viewing the candidate summary page have a New column. This column contains one of three values:

- *New:* This appears on applicants that the recruiting user has not yet opened up. As soon as the recruiting user opens the applicant, the “New” flag disappears
- *Updated:* This is only available in environments that have multi-stage application functionality enabled. The “Updated” flag appears when the candidate has edited the application since the recruiting user last viewed the application. As soon as the recruiting user opens the applicant, the “Updated” flag disappears
- *Blank:* The applicant does not fit either of the above scenarios

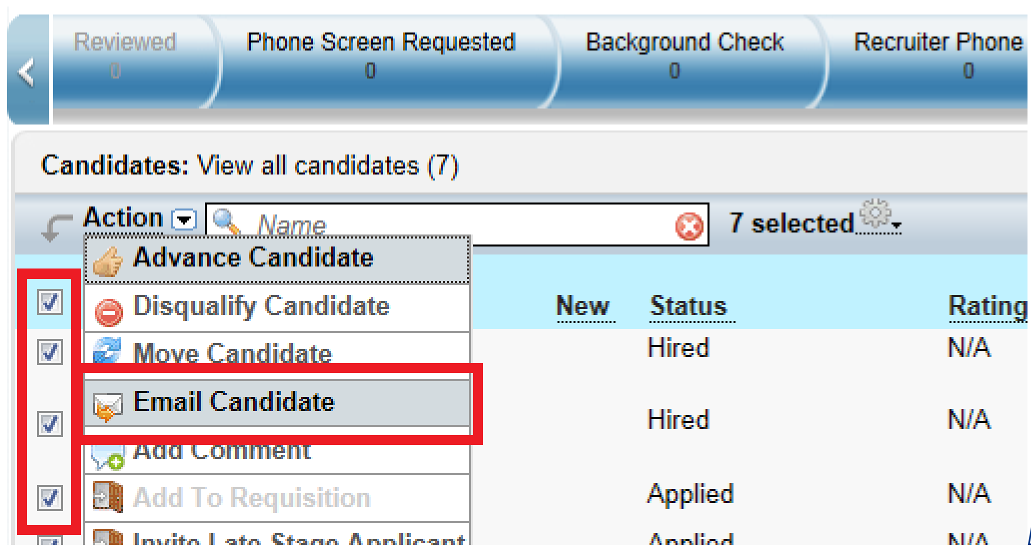


Updated Flag on an Application

8.8.2 Emailing Applicants

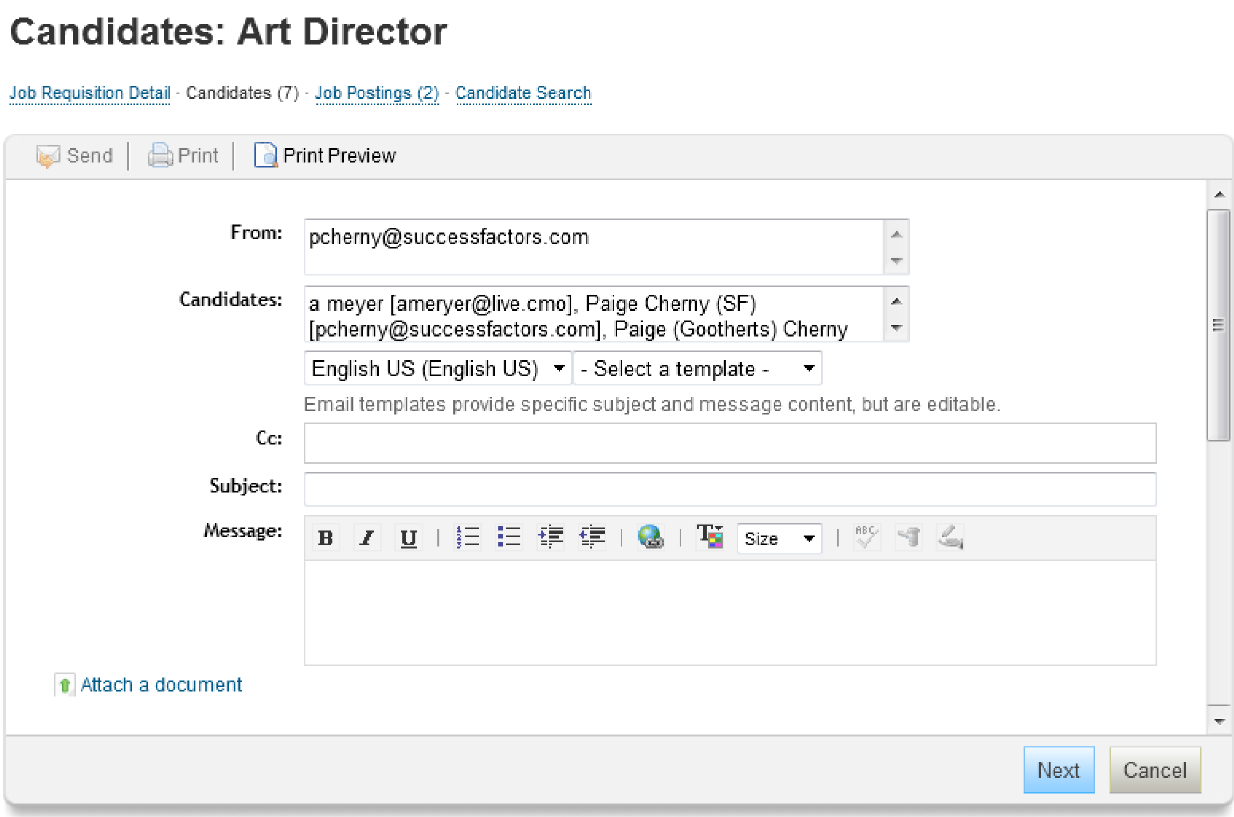
Recruiting users may initiate outgoing emails to applicants from within the product.

To email en masse, check the boxes next to several applicants in the candidate summary page on the requisition and click Email Candidate.



Email Applicants from the Candidate Summary Page

The send email screen allows the recruiting user to select from the Recruiting Email templates. The language field defaults to the recruiting user's language but the recruiting user can select an alternative language.



Applicant Send Email Screen

The email will send as shown on screen, except that each user listed in the Candidates and CC field will receive an independent copy of the email; candidates cannot see each other's email addresses.

If desired, the recruiting user can attach one or more documents that will appear as attachments on the email.

Emails sent to an applicant through the Recruiting Management product will be logged in the Correspondence portlet on the application record.

8.8.3 Printing or Saving Applications

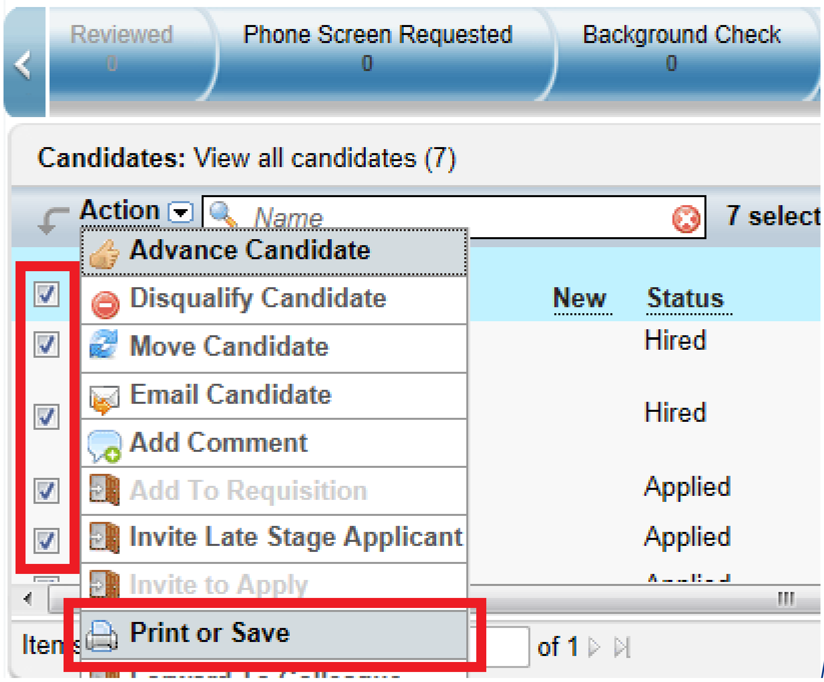
A recruiting user may wish to print the applications hard copy, or save the applications to their local computer. To facilitate this and save recruiting users from repetitive tasks, it is possible to print or save en masse from the candidate summary page.

Quick Facts

- While the recruiting user can choose to collapse some sections of the Application, it is not presently possible to default the print view to hide/display different sections
- Resumes can also be printed en masse from the inline resume viewer as accessed from the candidate summary page; for more information, see the Inline Resume Viewer / Resume Carouse [page 209] section of this guide.

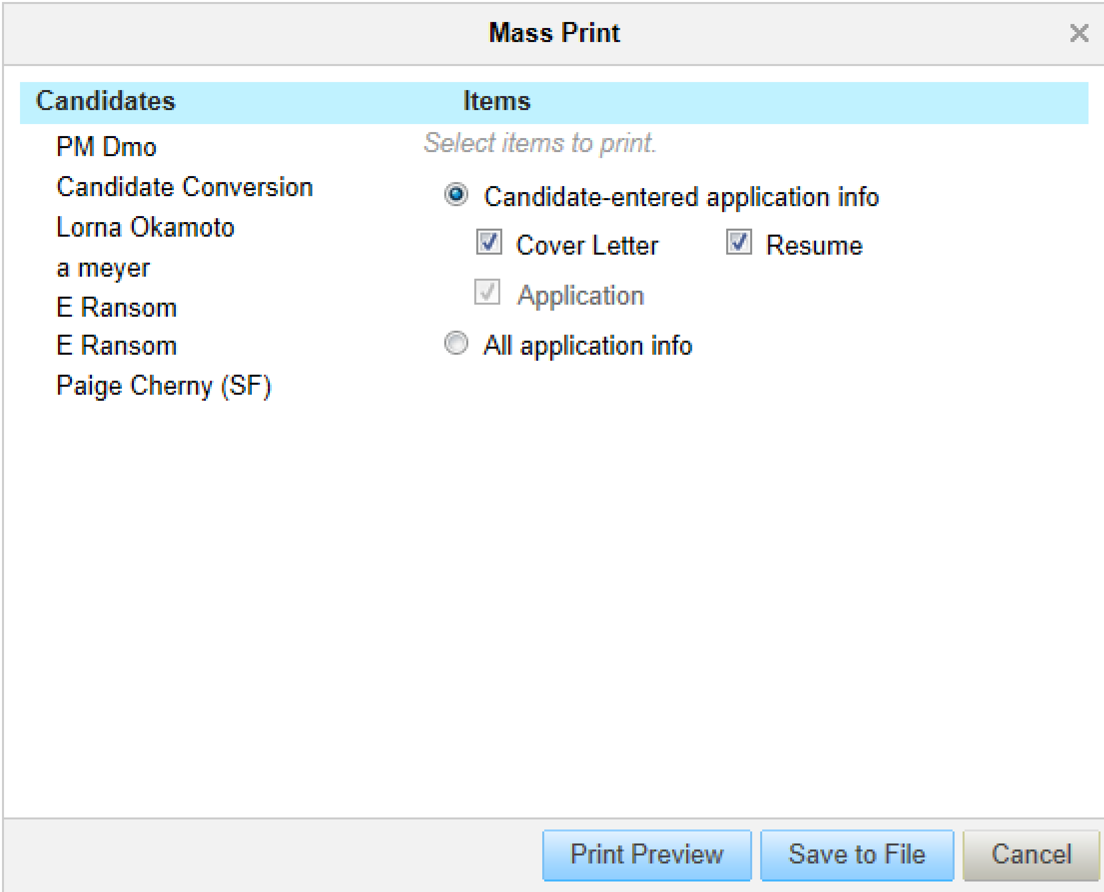
Working with Candidate Profile Printing

When viewing a candidate summary page, the recruiting user can check the boxes next to several applicants and select *Actions* > *Print or Save*.

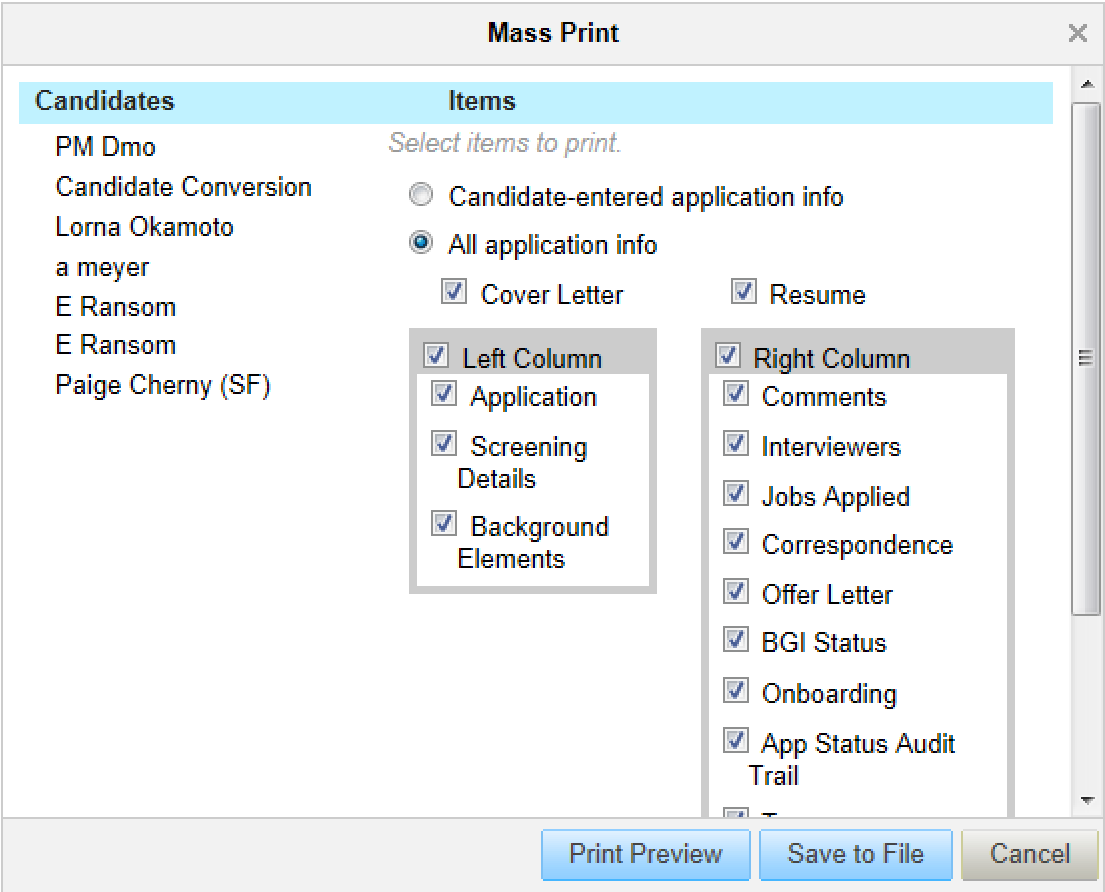


Print or Save Applicant's Candidate Summary

This brings up a pop-up window that prompts the recruiting user to select which elements of the application they wish to include in the PDF document that will be printed or saved. The recruiting user can select between only candidate-entered data, or from all data saved on the application.



Mass Print Application Options



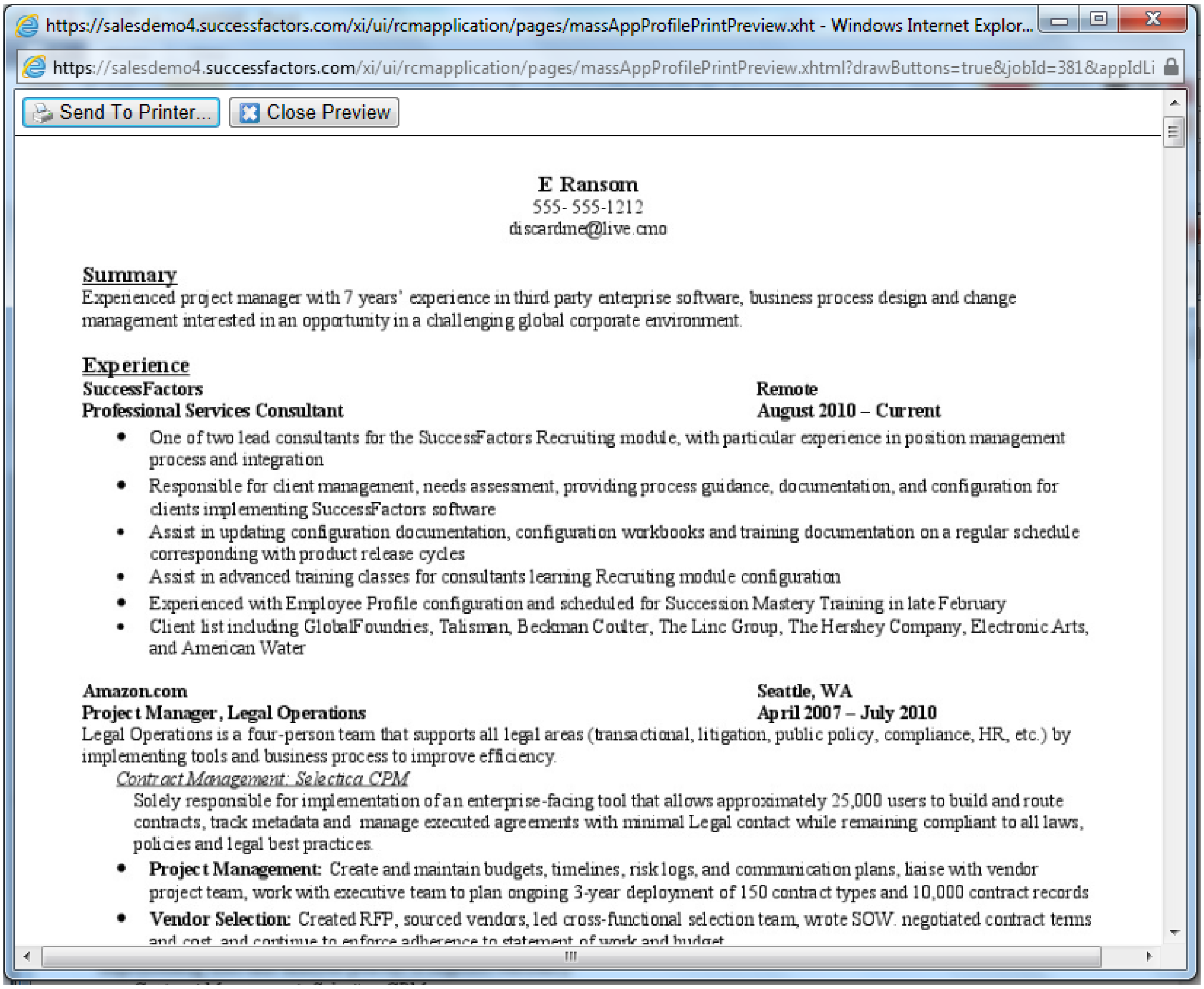
Mass Print Application Content Selection

After making appropriate content selections, the recruiting user can choose Print Preview or Save to File.

Print Preview pulls up a print-friendly PDF copy of the selected applications. The act of creating the PDF may take a few moments, during which a loading screen displays.

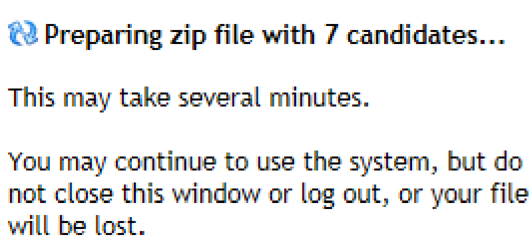
Application Print Preview Loading Screen

Once the PDF is created, the recruiting user sees a single PDF document containing all the relevant content, and can easily print in a single action.



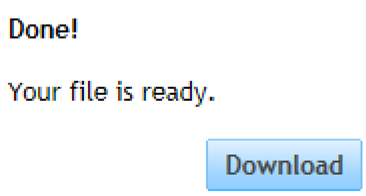
Application Print Preview

Save to File pulls up a zip file containing, for each selected applicant, a PDF copy of the application, resume and cover letter. The act of creating the zip file may take a few moments, during which a loading screen displays.



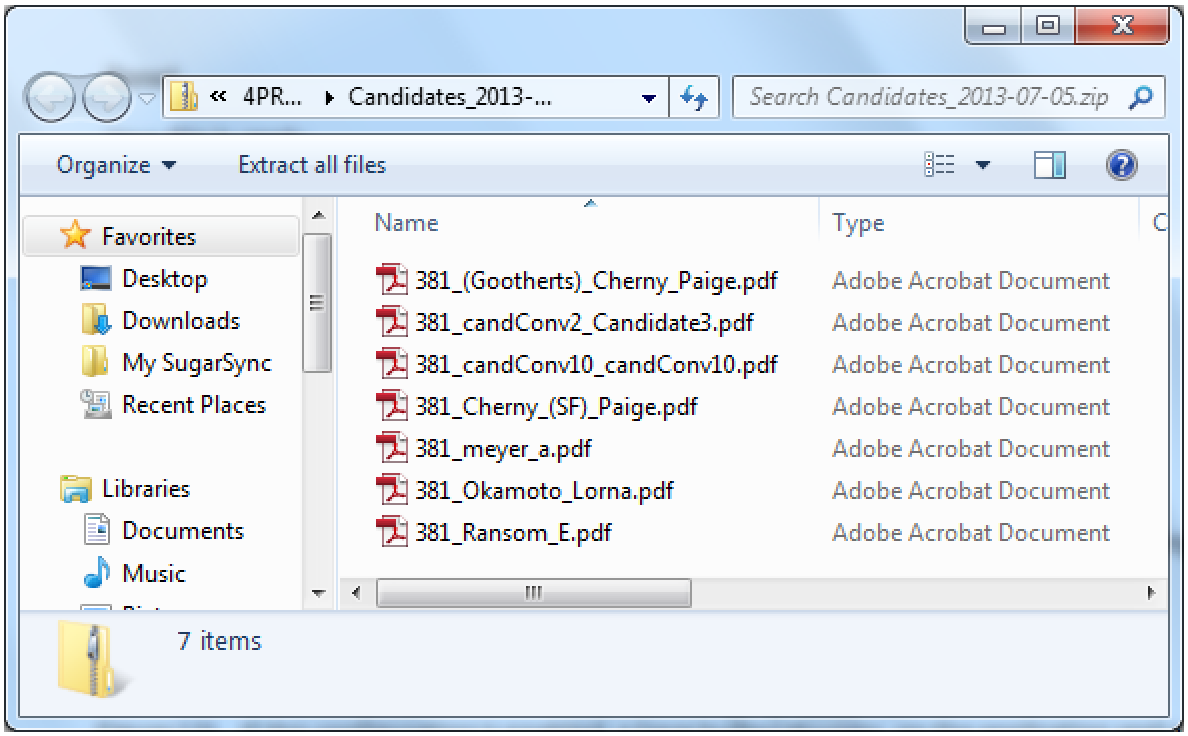
Application "Save to File" Loading Screen

When finished, the recruiting user is prompted to download the zip file.



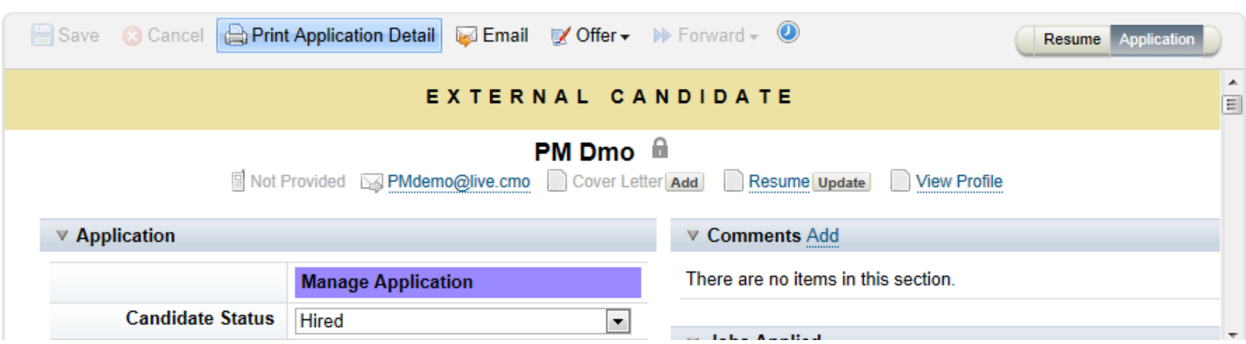
Finished "Save to File" Action

The recruiting user can then save the zip file to the desired location on their computer.



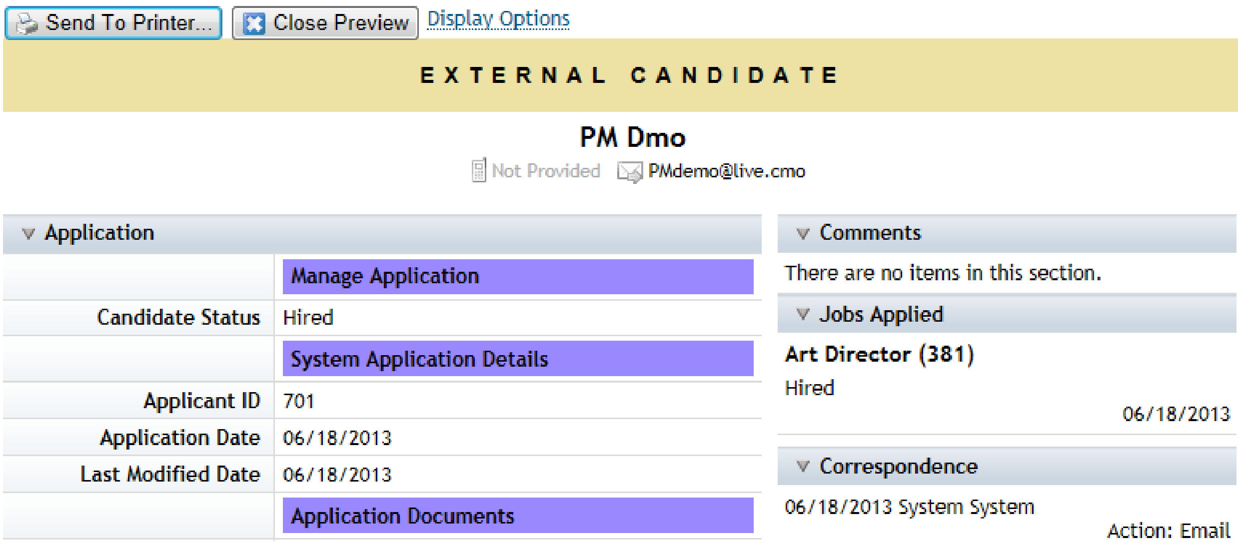
Saving the Application .zip File Locally

Alternatively, the recruiting user may choose to print one applicant at a time from within the application record using the Print Application Detail button.



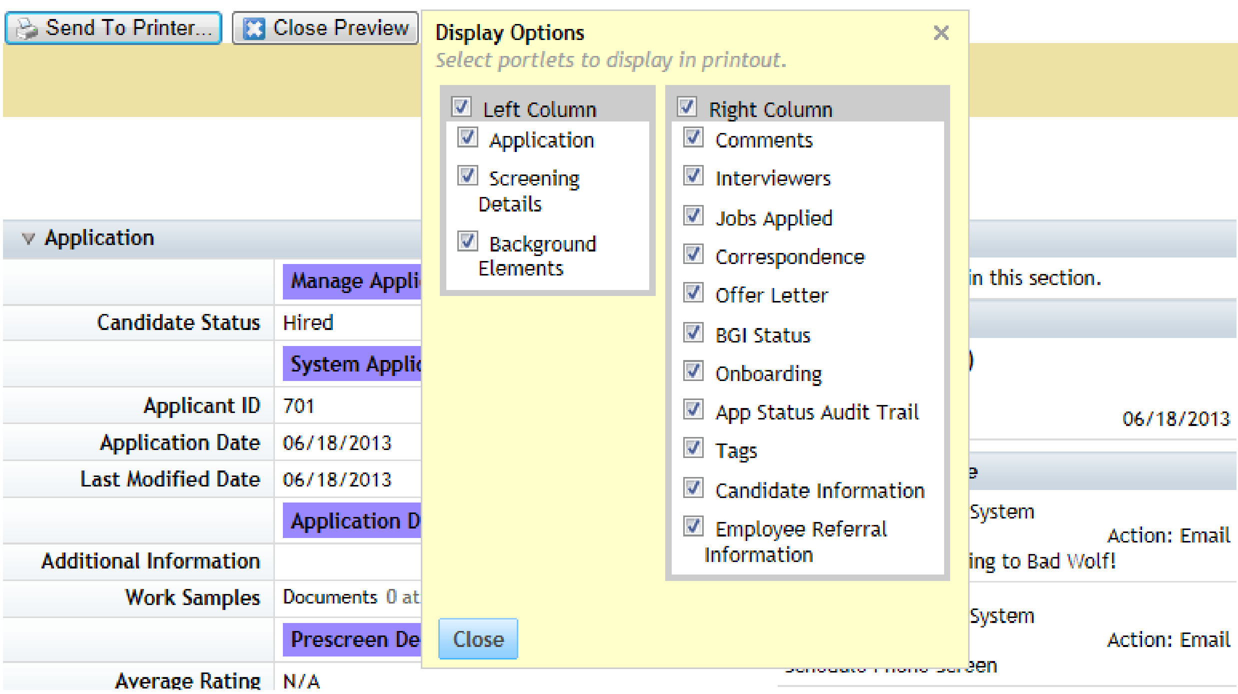
Print Application Detail

A print-friendly version of the application appears.



Printer Friendly Application

The recruiting user may choose to collapse sections of the application, leaving the section heading visible in the printed copy, or click Display Options and de-select sections of the application, which will remove them altogether from the printed copy. Resumes and cover letters cannot be included in this single-record print approach.

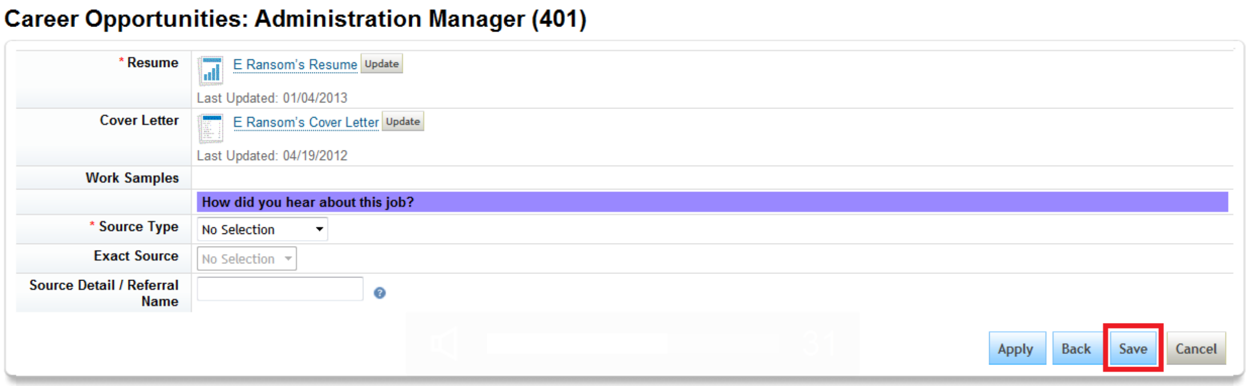


Print Application Display Options

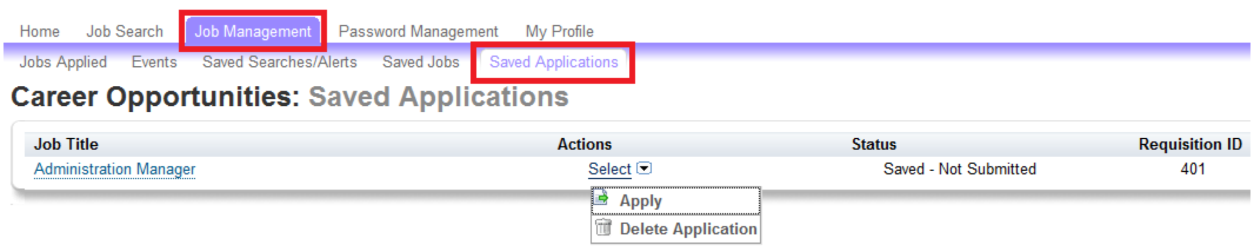
8.8.4 Saving a partially completed application

Candidates can fill in part of an application and return later to finish the remaining application and apply.

It is possible to configure the system to allow the applicant to save an in-progress application and return to complete it at a later date. When enabled, a Save button displays on the application and a Saved Applications tab is available to logged-in candidates.



Saving an In-Progress Application



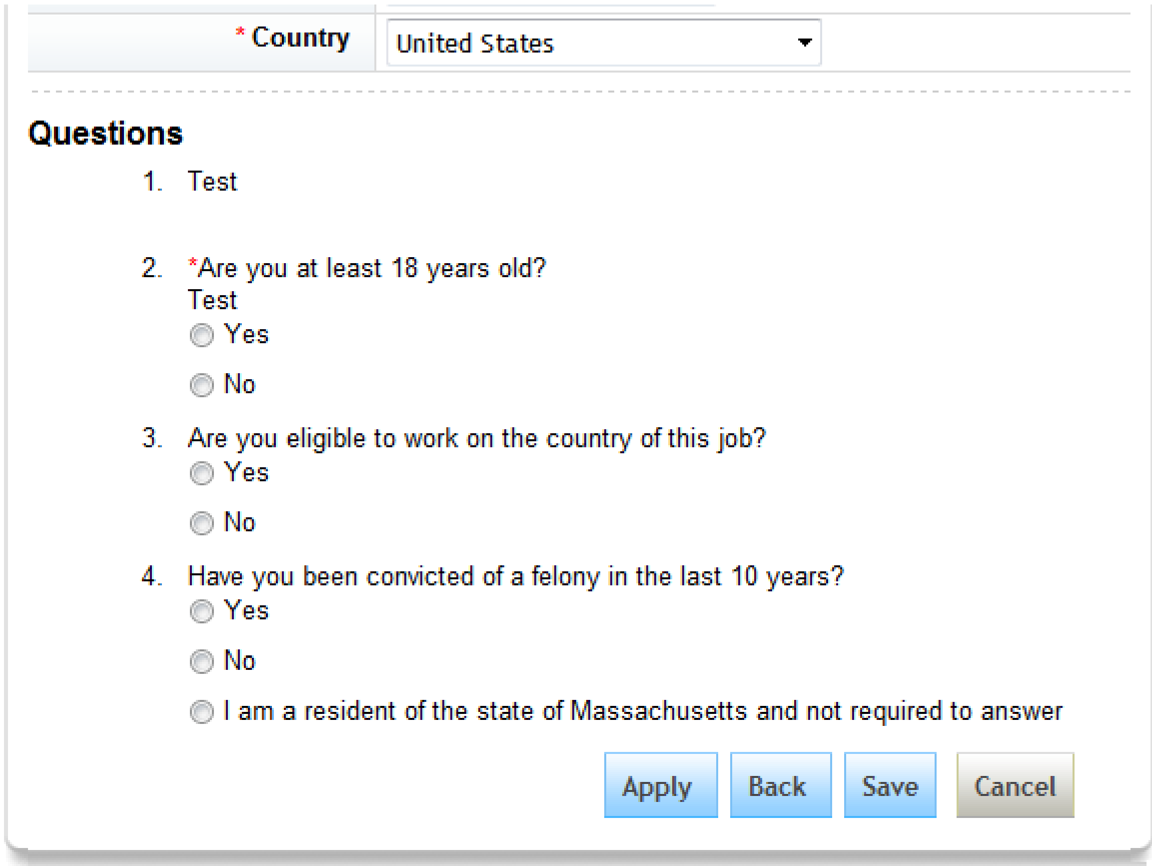
Completing a Saved Application

Quick Facts:

- It is not possible to complete a draft application after the job posting has expired or been removed.
- It is not possible to report on whether or not a candidate has a draft application, or report on data from a draft application
- There is no notification reminder or email option for candidates who have incomplete, draft applications.

8.8.5 Completing Application Pre-Screen Questions

When the requisition includes pre-screen questions, candidates applying to the job will be presented with the pre-screen questions at the bottom of the application page during their initial application. If some of the questions are set up as cascading questions, more questions may appear as the candidate completes the visible questions.



Application Pre-Screen Questions

For more information about setting up pre-screen questions on the requisition, see the Requisition Pre-Screen Questions [page 322] section of this guide.

8.8.6 Viewing Completed Application Pre-Screen Questions

Recruiting users with appropriate permissions to the `questionResponse` field will see a *Screening Details* section on the application page, listing all the applicant's responses to the pre-screen questions.

Recruiting users with appropriate permissions to the averageRating field will see an "`Average Rating`" field that contains the total sum of all points assigned to weighted questions.

Average Rating is also available in the candidate summary display options and can be used to sort applicants to find the highest rated applicants.

8.8.7 Inline Resume Viewer / Resume Carousel

The Inline Resume Viewer (also known as the Resume Carousel) allows users to view images of resumes and cover letters in the web browser without requiring the users to download the documents and open them in a separate application, such as MS Word or Adobe Acrobat. Recruiting users have the ability to mass print and mass save candidate resumes and cover letters from within the inline resume viewer.

Quick Facts

- Resumes and cover letters will be converted to image when they are uploaded by the candidate
- When a recruiting user attempts to view the cover letter or resume in the inline resume viewer, the system checks to determine whether there is an image copy available. If no image is found, the system will attempt to convert the documents to image on the spot
- No migration or additional configuration is needed for resumes already in the system before this feature is enabled.
- About 2% of resumes are formatting in such a way that causes them to fail in the image conversion process. The recruiting user can choose to download the original file in this case.
- Certain MS Word features are not readable as part of the image conversion process, notably:
  - Content stored in MS Word “Content Controls”. These Content Control Components are a proprietary technology that treats a Word document like a data entry form, but the method in which Word saves this information is not readable to all programs.
  - MS Word image cropping. An image that appears cropped in the Word document will appear in full in the converted image

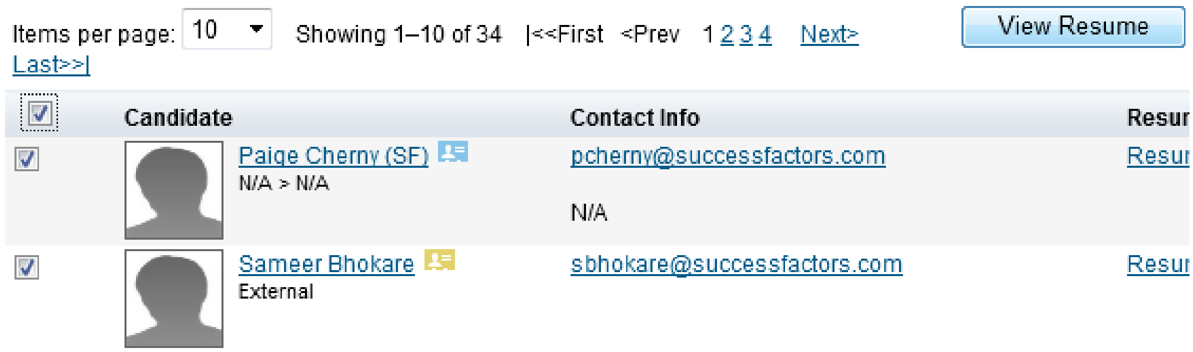
Configuration

- *Provisioning* > *Company Settings* > *Enable inline viewing or resumes*.
- Ensure that all recruiting users have permissions to the coverLetter and resume fields.
  Enabling inline resume viewer and restricting permissions to the coverLetter and resume fields concurrently is not presently supported, especially in multi-stage application environments. Doing so can cause error messages or cause perpetual loading when the recruiting user tries to view the document in the inline resume viewer.

Working with the Inline Resume Viewer / Resume Carousel

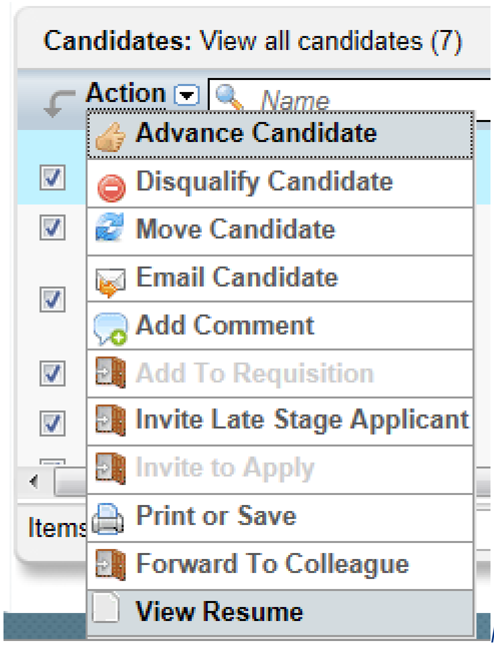
The inline resume viewer can be launched in three ways:

1. *Candidate Search Results* > *Check the boxes next to several candidates* > *View Resume button*



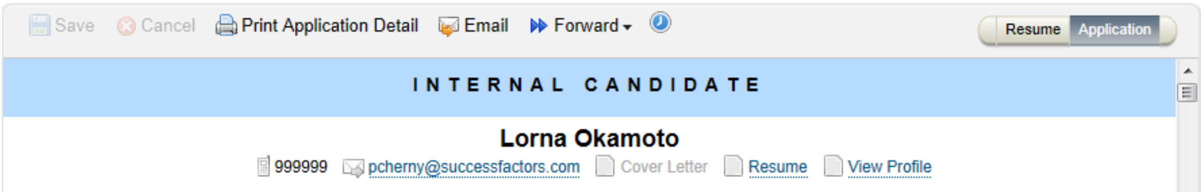
Inline Resume Viewer from Candidate Search Results

2. *Application List Page* > *Check the boxes next to several applicants* > *Action* > *View Resume*

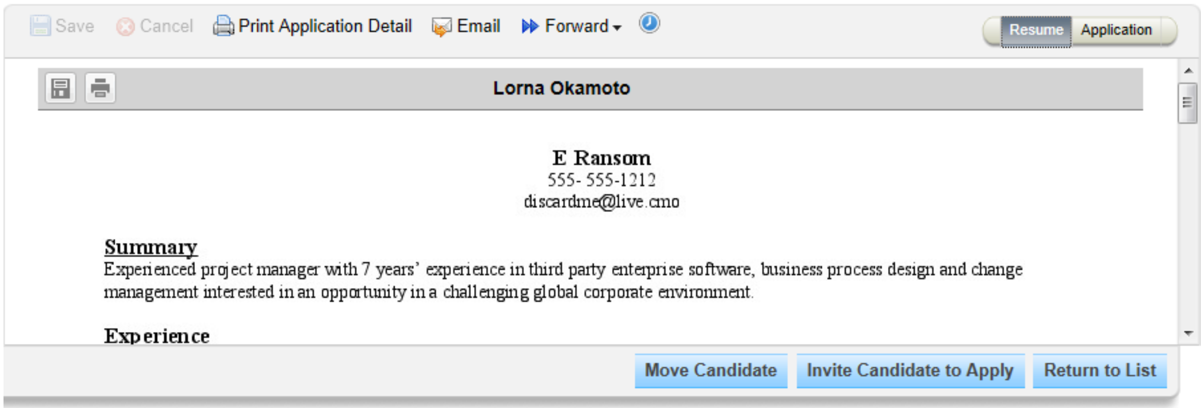


Inline Resume Viewer from Application List Page

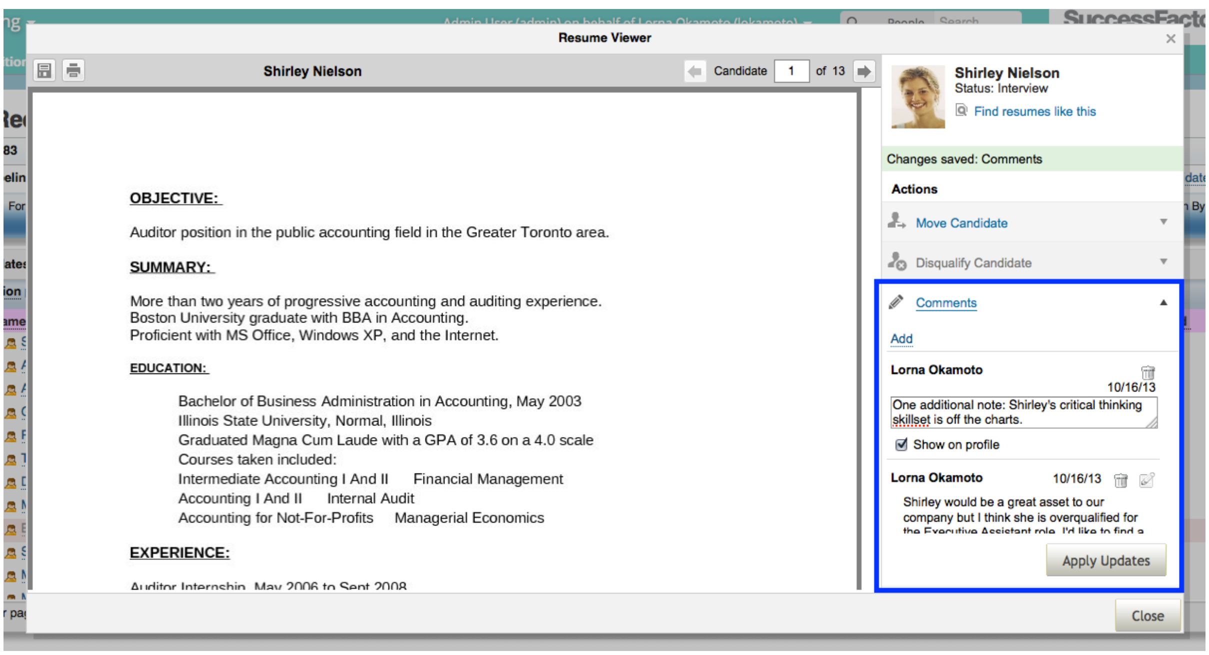
3. *Application Page* > *Resume pill*



Using the Resume Pill on the Application Page



When viewing resumes on an application, it is possible to update the applicant status from within the inline resume viewer.

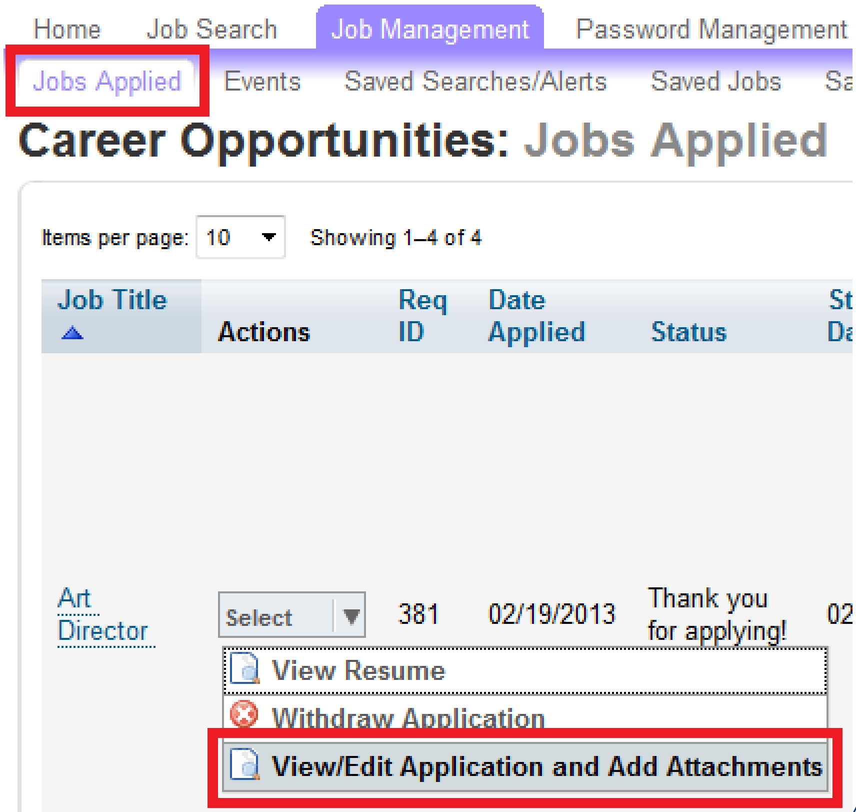


Add Application comments from the inline resume viewer

Recruiting users can add comments to the application when viewing a resume from the inline resume viewer.

8.8.8 Add Attachments to a previously submitted application

Clients may wish to allow applicants to supplement their application with more attachments after the initial apply.



Add Attachments to an Existing Application

Configuration

1. *Provisioning* > *Company Settings* > *Enable Additional Attachments Post Application*
2. *Application XML* contains one or more attachment, or multiattachmentselection fields.

Quick Facts:

- In a multistage application environment, this is best done by utilizing the multistage functionality.
- The language on this option is adjusted automatically depending on the instance settings:
  - Multi Stage and Enable Additional Attachments: View/Edit Application and Add Attachments
  - Single Stage and Enable Additional Attachments: View Application and Add Attachments
  - Multi Stage and disable Additional Attachments: View/Edit Application
  - Single Stage and disable Additional Attachments: View Application
- Candidates can delete the standard resume and cover letter attachments from the Application. Once attachments have been deleted, they are not searchable. You can still view the file's content and it is still visible in the audit record, but the content is not editable.

8.8.9 Additional Application Configuration Options

How do I enable a recruiting user to change the contact information line/ resume/cover letter at the top of the application?

Contact info change is not supported by recruiting operators. The fields can be made editable to the applicant if multi-stage application is used. Resume/cover letter can be changed using a combination of the dynamic groups, candidate profile field permissions and edit profile snapshot feature permissions.

How do I enable a recruiting user to change the resume/cover letter at the top of the application?

Resume/cover letter can be changed using a combination of the dynamic groups, candidate profile field permissions and edit profile snapshot feature permissions.

How do I hide country-specific / candidate type specific (override) fields from a recruiting user on the application?

When a field is configured for override and public=true, the recruiting user will see the field, if they are in the country specified. If the field is set to public=false, the recruiting user will not see the field. If the field is not configured for override, the fields are displayed to the recruiting user based on read/write permissions.

For candidates, if the field is set to override and the attribute is public=true, the field is displayed to the candidate for the country specified in the override. If public=false, the field is not displayed to the candidate.

How do I hide or permission portlets on the application page?

- The Working with Interview Central [page 228] is controlled via Requisition XML.
- The Configure Provisioning > Company Settings [page 29] is enabled in Provisioning and permissioned in the Recruiting Permissions in Admin Tools.
- The Application, Screening, background elements, Correspondence, Offer Letter, and Applicant Status Audit Trail are not permissionable or hidable; they will always display.
- The Comments functionality and portlet is controlled in the Configuring XML [page 175] and Configuring XML [page 112].
- The Tagging a Candidate [page 150] functionality and portlet is enabled in Provisioning and permissioned in the Recruiting Permissions in Admin Tools.

How do I re-order, re-name or create new portlets on the application page?

This is not supported.

How do I get the Rating column on the applicant list page to populate data and how is it calculated?

1. Configure the *questionResponses* field in the Application XML
2. Configure the *questions* field in the Requisition XML
3. As a recruiting user, set up *prescreening questions* on the requisition record
4. As an applicant, complete the *pre-screening questions* on the application

The value in the Rating column is calculated by the *Weight* and *Score* options on the Questions section of the requisition.

How do I change the data that is displayed in the default columns (source, phone number, etc)?

This is not supported.

How do I allow a user to sort by applicant last name?

Add last name as a field in the display options; this will appear in addition to the first/last name that already exists on the applicant list. There is no way to split the first/last name value that appears as standard.

How do I add an icon for high potential candidates or candidates?

This is not supported. Consider using a custom field set up as a display option instead.

How is the "new" flag on applicants set?

This appears on applicants on the requisition that have never been clicked by the logged-in user.

Why is there a Non Applicant message on my applicant?

The applicant has been forwarded to a requisition but has not yet applied to it. Applicants should apply prior to background check, onboarding or hire.

Can the print layout of applications be configured?

This is not supported.

Can the email functionality be set up to allow emailing users other than the candidate?

This is not supported.

How do I add fields (like category) and/or configure the Comments portlet to be rich text?

This is not supported. The Comments portlet supports user-entered line breaks.

How do I display more data in the Jobs Applied Portlet?

Only the comments can be configured to hide or display on the Jobs Applied portlet. At present there are no other options to display other fields in the Jobs Applied portlet.

How can I hide the candidate status from external candidates in the Jobs Applied portlet?

This is not supported.

Can we automatically status applicants based on the application data?

The only automatic status capability supported is the ability to auto-disqualify based on pre-screen question data. It is not possible to place the qualified applicant in any status other than the Default status. It is not possible to auto-progress the applicant in the status workflow based on the application data.

Can we search candidates based on application data, or only candidates that have applied to a specific requisition?

This is not supported.

Can we support multi-select pre-screening question answers and/or application fields?

This is not supported.

What kind of internal mobility functionality is offered by RCM?

Jobs can be posted specifically for internal candidates. SuccessFactors HCM users can apply through the internal career site. If DPCS/DRM2 is enabled and no internal candidate privacy statement is set up, all employees will have an internal candidate profile based on their employee profile data.

At present there is no way to prevent an internal candidate from applying to a job based on internal mobility program criteria. There is no way to notify or get approval from the internal candidate's current manager.

Can an RMK site be used to replace or supplement the internal RCM career site?

This is not supported.

How do I pre-populate application data from the Candidate Profile and how does the sync work?

Use the same field ID and configuration on both the Application XML and Candidate Profile XML.

Data syncs from the Candidate Profile to the Application only at the point where the candidate initially applies to a job. Subsequent updates to the Candidate Profile will not update the Application.

Data syncs from the Application back to the Candidate Profile at any time if it is changed on the Application; the system assumes the most recent updates should always be fed back to the Candidate Profile.

How do I pre-populate the most recent line from a background element (like education or experience) into fields on the application?

This is not supported.

Why is a field I have tried to set up as public="false" is still showing in the applicant's view?

You have incorrectly set up the public attribute on the field and/or incorrectly set up your overrides. Check your configuration, and look for multiple overrides in particular.

How do I prevent an applicant from withdrawing and/or re-submitting their application?

Applicants can withdraw at any point and this functionality cannot be disabled. The applicant can re-submit their application as long as the job is still posted to the appropriate portal to allow the candidate to see the posting. This cannot be disabled.

Why is my translated application not showing up in the appropriate translated language?

The requisition must be posted in that language. Even if all translations are in place, the application fields will not appear translated if the applicant is applying to a requisition that is not translated in the applicant's selected language pack.

How do multi-stage and late stage applications work in combination?

All fields from all statuses up to the applicant's current status will show for the late stage applicant. For more information, see the Late Stage Application [page 105] and Multi-Stage Application [page 95] sections of this guide.

Why are uploaded documents not appearing on the application to some users?

The field should be configured as multiattachmentselection instead of multiattachment.

Does RCM support source tagging in the URLs to automatically track source?

No. This is only supported via RMK, eQuest or Jobvite. It is not possible for another third party to embed source tagging in SF URLs.

Can forwarded applicants appear in a stage other than Forwarded on a requisition?

Forwarded applicants always appear in the Forwarded status, except forwarded candidates a recruiting user adds via the Add to Requisition feature. This is only available where Late Stage Application functionality is enabled.

8.8.10 OData API for the Application

When configured, application features are supported via ODATA API, including basic application data, application attachments, question and response, and application comments. Recruiting Management now supports a number of general and application features with an OData API.

Customers, partners, and SuccessFactors/SAP engineers can use the API for external integrations. The OData API for Recruiting supports the READ (export) operation for the Application. The following application informatoin can be exported via API:

- Basic application data
- Application attachments
- Question and Response
- Comment

The OData API does not replace the SFAPI, and does not imporact existing integrations with SFAPI.

To enable the OData API;

1. Navigate to *Provisioning* > *Company Seetings* > *Web Services* > *Recruiting OData API Admin*
2. Naviage to *SuccessFactors HCM* > *Admin Tools* and create an API admin user, and assign the user the appropriate permissions.
   - **RBP**: *Set User Permissions* > *Manage Permission Roles* > *Recruiting Permissions* > *Odata API RCMApplication Export*
   - **Non-RBP**: *Recruiting Permisisons* > *OData API RCMApplication Export*

8.9 Assessment Integration

Clients can integrate with third-party vendors PeopleAnswers and SHL to perform candidate assessments.

Using this integration, customers can:

- Assign assessments to job requisitions
- Prompt applicants to fill out the corresponding assessment
- View assessment statuses and results in the assessment portlet within the application

Use of this integration requires a separate third party contract with PeopleAnswers or SHL. If the client opts-in to the assessment integration and configures it, recruiting users will see a section on the requisition that allows them to assign an assessment package to the requisition. Multiple assessment packages on one requisition are not supported.

The Recruiting integration with PeopleAnswers and SHL requires either Boomi or SAP HCI.

Related Information

Recruiting Management and PeopleAnswers/SHL Using Boomi
Recruiting Management and PeopleAnswers/SHL Using HCI

8.9.1 Quick Facts

- You cannot configure the same assessment package for different application statuses. Also, you should not edit the assessment package after the job requisition is approved. When associating a new assessment with a job requisition, make sure you fill out all the required assessment fields, or you may have trouble saving the requisition information. Do not save a job requisition.

8.9.2 Configuration

Context

Procedure

1. *Provisioning* > *Company Settings* > *Enable Assessment Integration*
2. Upload the assessment vendor packages in *Provisioning* > *Import/Export Assessment Vendor Packages*. Assessment vendor packages are provided by PeopleAnswers.
   - For the first vendor package import/export, export the CSV file to get a sample CSV file with required fields. The following fields are mandatory:
     - vendorId
     - packageCode
     - shortName
     - label for en_US
   - Only PeopleAnswers (PA) is supported for vendorId
3. Configure the assessment field id on the job requisition template. The assessment field id can also be permissioned in the same was as all other job requisition fields. The field will display on the job requisition page in the same order it is configured on the template.

   > **Tip**
   >
   > You cannot control read/write permissions for the assessment field in the job requisition template. It can be configured with read/write permissions for all stages of the requisition (pre-approved, approved, etc). But the assessment field should not be edited after the *approved* stage.

4. Grant feature permissions. For details on granting feature permissions see feature-permission Elements [page 293].
5. Grant users permissions
   1. *RBP:* *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *Recruiting Permissions* > *SFAPI Retrieve Assessment Order Permission* > *SFAPI Update Assessment Report Permission*
   2. *Non RBP:* *Admin Tools* > *Recruiting Permissions* > *SFAPI Retrieve Assessment Order Permission* > *SFAPI Update Assessment Report Permission*
6. The admin can also create an email template for assessments using the same procedure for all Recruiting Email Templates [page 63]. For more information see Manage Recruiting Email Templates.

8.9.3 XML Sample

The following XML shows two configurations.

1. Field declaration with permissions
2. Feature permission to view *Assessment Portlet* in applicant profile. In this example, Application portlet will be visible only when the application is in *Phone Screen* status.

```
<field-definition id="assessment" type="derived" required="true" custom="false">
    <field-label><\!\[CDATA\[Assessment association\]\]></field-label>
    <field-description><\!\[CDATA\[Assessmentasso\]\]></field-description>
```

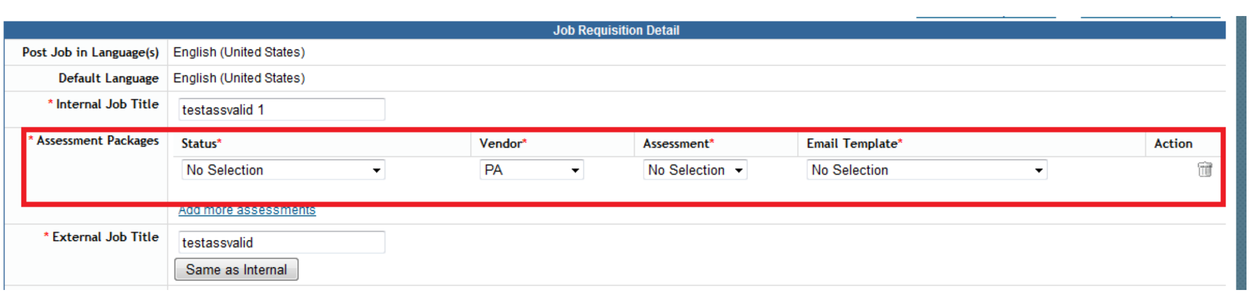
```
    </field-definition>

    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see Assessment
detail report for the applicant when the application is in Phone Screen Status\]
\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Phone Screen\]\]></status>
    </feature-permission>
    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see Assessment
detail report for the applicant when the application is in New Application
Status \]\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Default\]\]></status>
    </feature-permission>
```

8.9.4 Working with Assessment Integration

In the first phase of Assessment Integration, the applicant will be prompted to complete the assessment once they have completed the application and passed the pre-screening questions. Auto-disqualified applicants who fail the pre-screening questions will not be prompted to take an assessment.

A link to the *PeopleAnswers* assessment will appear on the screen, and the applicant will also receive an email with a link to the assessment. This process is single-sign-on and will not require additional log-in credentials.

The recruiting user can access the assessment results on the candidate summary list page or on the application page in the assessment portlet. Results on the candidate summary list page can be sorted by score, recommendation and status.



Improper Assessment/Job Requisition Configuration

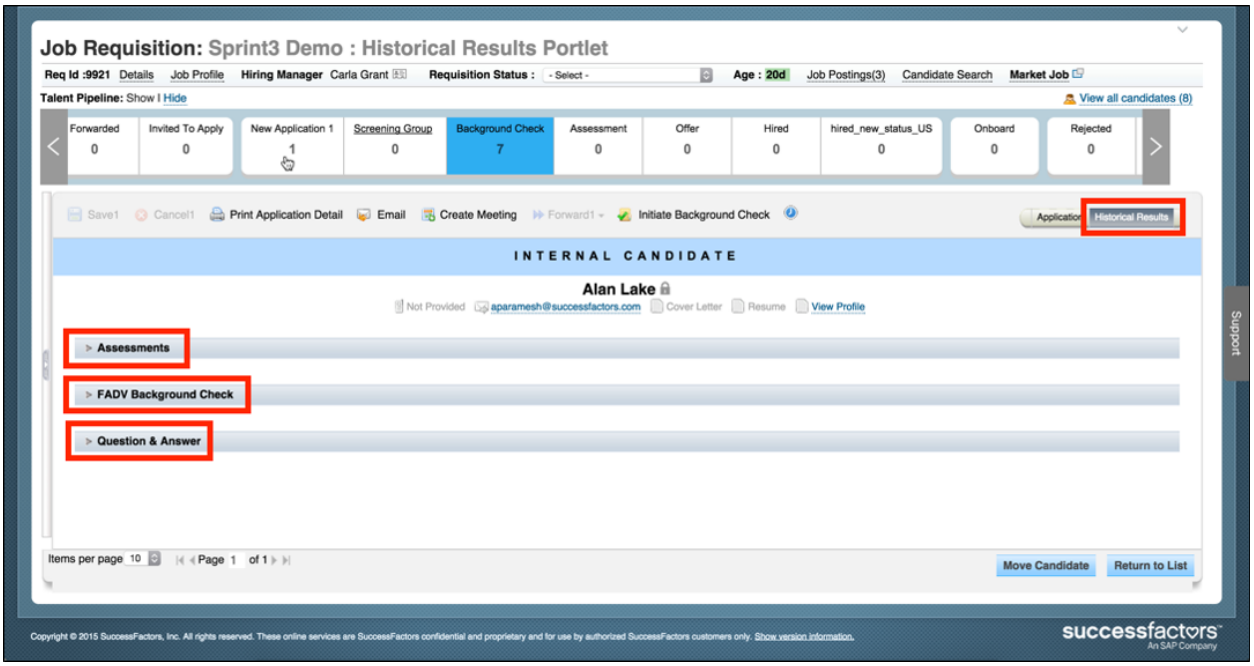
Presently, the assessment integration with *People Answers* works only for the *New application* status in the status set which is associated to the requisition. You can see other statuses in the job requisition assessment field but do not select any other than the *New application* status.

8.10 Historical Results Table

Permissioned recruiting users can access the Historical Results tab on the job application page.

On the Application page, users with the appropriate permissions see a tab called *Historical Results*. Clicking this tab displays tables of the applicant's previous results for assessments, background checks, and prescreening questions and answers. Customers using First Advantage for background checks have a *FADV Background Check* menu. Customers using Verifcations Inc see a corresponding menu, and customers migrating from VI to FADV see both menus.

Each of these tables is permissions separately in the XML.



Expanding the individual menus displays the historical results along with their associated requisition.

Assessments

Req Id	Job Title	Date	Assessment	Status	Score	Recommendation
9902	B1502_newFADV-AI	12/22/2014	Stock Associate	Completed	70	Recommended with reservations
9804	B1502-Assessment Completion_Zenith	12/22/2014	Stock Associate	Error ordering assessment		
4421	D-19282 verification	06/07/2013	ASDA	Sent		

8.10.1 How to Configure the Historical Results Table

Users must permission each of the available Historical Results tables separately in the XML.

Procedure

1. To permission the *Background Check* Historical Results table, add the appropriate feature permission block to the Requisition XML.

    ```
    <feature-permission type=”historicalBackgroundCheckResults">
          <description><![CDATA[View Background Check Results]]></description>
          <role-name><![CDATA[R]]></role-name>
          <status><![CDATA[Interview]]></status>
        </feature-permission>
    ```

2. To permission the *Assessment Integration* Historical Results table, add the appropriate feature permisison block to the Requisition XML.

    ```
    feature-permission type=”historicalAssessmentResults">
          <description><![CDATA[View Assessment Results]]></description>
          <role-name><![CDATA[R]]></role-name>
          <status><![CDATA[Interview]]></status>
        </feature-permission>
    ```

3. To permission the *Questions & Answers* Historical Results table, add the appropriate feature permission block to the Requisition XML.

    ```
    <feature-permission type=”historicalQuestionAnswers">
          <description><![CDATA[View Question & Answers]]></description>
          <role-name><![CDATA[R]]></role-name>
          <status><![CDATA[Interview]]></status>
        </feature-permission>
    ```


9 Interview Central

A recruiting user can make a list of SuccessFactors HCM users who will interview the applicant. After adding a user to the interviewer list, a new Interview Assessment form is placed on the *Interview Central* tab for the user. The *Interview Central* tab is found under *Recruiting* in SuccessFactors HCM.

Interview Assessment forms pull competencies from the requisition and allow the interviewer to provide a numeric rating and comments on each competency. Additionally the interviewer can provide an overall thumbs up or thumbs down on the applicant, add overall comments and possibly attach documents to their feedback.

9.1 Quick Facts

- Note that Interview Central [page 225] is designed to collect feedback from interviewers and is not an interview scheduling tool. There no integrated calendar solution for SuccessFactors Recruiting Management.
- Once interviewers have rated their candidates for a Job Req, changing the competencies, rating scale or reverse scale option in the Job Requisition XML will cause existing Interview Assessment forms to display incorrect data
- Interviewers can only provide one set of feedback per applicant; even if you add the same person as an interviewer twice, the Interview Assessment form will only store one set of competency ratings for that person

9.2 Prerequisites

1. *Provisioning* > *Company Settings*
    - Recruiting Application
    - Version 11 UI Framework or 12 UI Framework
    - Enable Candidate Workbench
2. Provisioning
    - Candidate Profile XML is configured
    - Requisition XML is configured
    - Application XML is configured

9.3 Configuration

Context

Procedure

1. Provisioning > Company Settings
    1. Enable Interview Central and Set up Interviewers Popup
    2. Enable Stack Ranker style Interview Assessments
2. Define the competencies field ID on the Job Requisition XML. Best practice is to make this required.:

```
  <field-definition id="competencies" type="competencies" required="false" 
custom="false">
    <field-label mime-type="text-plain"><![CDATA[Interview Competencies]]></
field-label>
    <field-label mime-type="text-plain"><![CDATA[Interview Competencies]]></
field-label>
</field-definition>
```

3. Define the assessment scale element and a valid rating scale on the Job Requisition XML.

```
  <assessment-scale reverse-scale="false">
    <scale-id><![CDATA[Interview Scale]]></scale-id>
  </assessment-scale>
```

4. Define the interviewAssessment feature-permission for the appropriate operators in the desired statuses (one feature-permission block per status) in the Job Requisiton XML.

```
    <feature-permission type="interviewAssessment">
      <description><![CDATA[description]]></description>
      <role-name><![CDATA[S]]></role-name>
      <role-name><![CDATA[T]]></role-name>
      <role-name><![CDATA[R]]></role-name>
      <role-name><![CDATA[G]]></role-name>
      <status><![CDATA[Interview]]></status>
    </feature-permission>
```

> **Tip**
>
> The client may desire to have this permission set in the interview status(es) and all statuses beyond interview because there is no difference between the access for interview setup and the access for interview results.

5. Define the Interview Guide in the Job Requisition XML.

```
<field-definition id="interviewGuide" type="multiattachment" required="false" 
custom="false">
```



```
<field-label mime-type="text-plain"><![CDATA[Interview Guide Documents]]></field-
label>
<field-description><![CDATA[Interview Guide Documents]]>
</field-description>  </field-definition>
```

6. Define the Hiring Manager note in the Job Requisition XML. When permissioning this field, make sure the Hiring Manager has edit permissions.

```
<field-definition id="hiringManagerNote" type="textarea" required="false"
custom="true">
<field-label><![CDATA[Hiring Manager Note]]></field-label>
<field-description><![CDATA[Hiring Manager Note]]>
</field-description>  </field-definition>
```

7. Application XML:
   - To display interview-related data on the application record and make some interview information reportable and tokenized, define the interviewResult and overdueInterviews fields:

```
<field-definition id="interviewResult" type="derived" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Interview Result]]></field-
label>
  <field-description><![CDATA[average rating of the interviews completed]]></
field-description>
  </field-definition>
  <field-definition id="overdueInterviews" type="derived" required="false"
custom="false" public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[overdueInterviews]]></field-
label>
  <field-description><![CDATA[number of overdue interviews]]></field-
description>
  </field-definition>
```

   - If using single stage application, permission these fields in the Application XML. If using multi stage application, permission these fields in the Requisition XML.
   - Optionally, define these field-refs in the Application XML display options:

```
<candidate-summary-display-options-config>
  <category id="invCategory" name="invCategory">
    <label><![CDATA[Interview Results]]></label>
  <column field-ref="interviewResult" select-by-default="false" gridOrder="1">
    </column>
    <column field-ref="overdueInterviews" select-by-default="false"
gridOrder="2">
    </column>
  </category>
</candidate-summary-display-options-config>
```

   When these fields are defined in the display options, the system will not respect the "Display Interview Result and Overdue Interviews in candidate summary page" switch in *Recruiting Settings*.

8. *Admin Tools* > *Recruiting Settings* :
   - To allow interviewers to access the application page of the applicant they are interviewing: *Interview Central* > *Grant Interviewers the access level of <selection>* . If interviewers should not have application access, leave this set to *No Selection*.
   - To enable interview-related display options on the applicant list page if interviewResult and overdueInterviews fields are not configured as display options in the Application XML: *Candidate Summary* > *Display Interview Result and Overdue Interviews in candidate summary page* .

9.3.1 Quick Facts

- The *interviewResult* field contains average rating of the completed interviews.
- The *overdueInterviews* field contains number of overdue interviews where overdue Interview is an interview that is incomplete, that has no start date or start date is in past.
- The *overdue interview* flag appears after the date of the interview. If there is no date, the flag will always appear.
- The *reverse-scale* option in the Requisition XML is used when lower scores should be visually portrayed as preferable on the *Interview Assessment* and *View Candidate Ratings* screens. e.g., Rating of 1 ‘Green’ – Rating of 5 ‘Red’.
- If changes are made to the competencies, scale point values or reverse scale option in the Requisition XML after the system is in use by clients, ratings on previously saved Interview Assessment forms will be inconsistent.
- Presently only competencies can be rated on the Interview Assessment form; other data elements cannot be shown.

9.4 Working with Interview Central

9.4.1 Setting Up Interview Competencies

- Add competencies to the requisition.

* Competencies

Competency	Library	Category	Expected Rating %	Weight %	Action
Budgets/Cost Control	SuccessFactors	Business	0.0	0	Select
Customer Focus	SuccessFactors	Business	0.0	0	Select
Customer Service	SuccessFactors	Business	0.0	0	Select
Global Perspective	SuccessFactors	Business	0.0	0	Select
Job Knowledge	SuccessFactors	Business	0.0	0	Select

Add more competencies

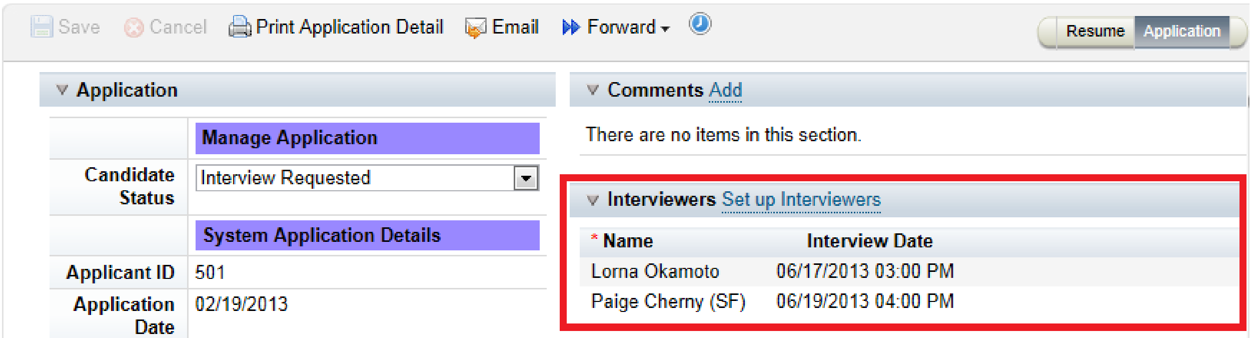
Competencies Defined on the Requisition

Technically, Interview Central will work even if there are no competencies present on the requisition but there will be an odd user experience when an interviewer opens the Interview Assessment form.

Note that the Expected Rating and Weight % columns are not used in the Interview Central functionality. There is no way to disable these unused columns.

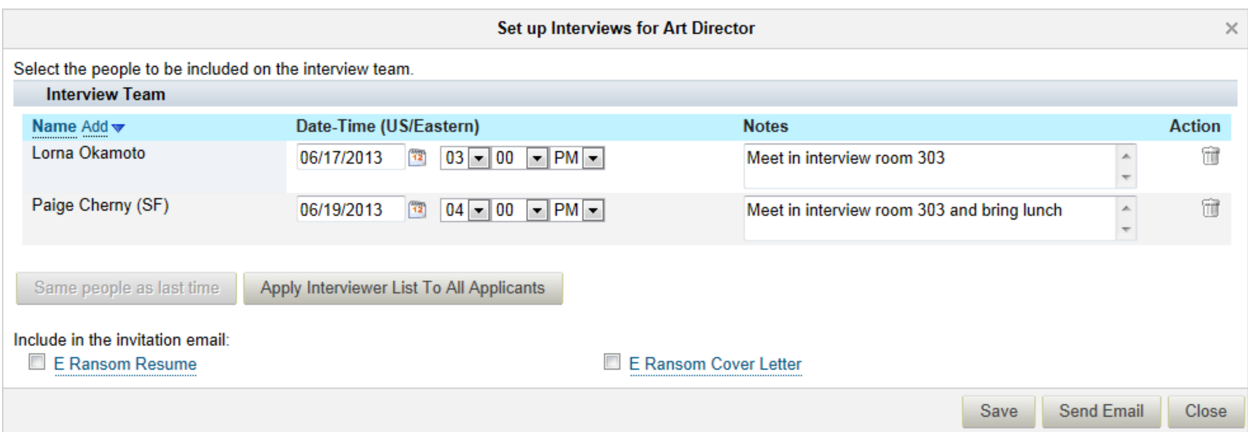
9.4.2 Setting Up Interviewer Data and Save or Send Email

Working as a recruiting user with proper feature permissions looking at an applicant in an status permissioned to see the *interviewAssessment* feature, locate the Interviewers portlet and click *Set up Interviewers*.



Set up Interviewers Portlet

Set up an Interview Team. When setting up a list of interviewers the user may specify a date and time for the interview, as well as notes. These fields cannot be made required.

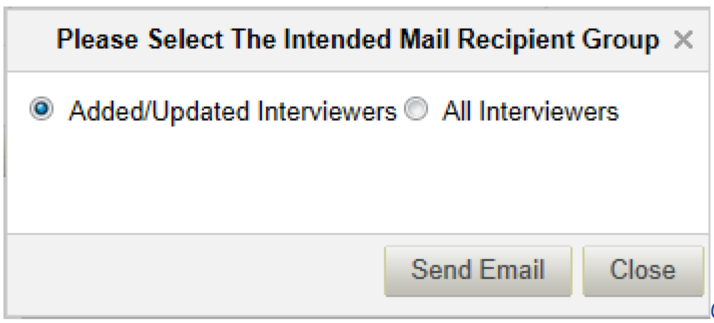


Define the Interview Team

- *Name:* Only active BizX users can be selected as interviewers.
- *Date-Time:* This field is optional and cannot be made required. There is no calendar integration so this field has no relationship to a calendar-based interview scheduling.
- Date and time display in the Employee Profile time zone of the logged in user. If another user in a different time zone views the information, it will automatically adjust to the correct date and time for the time zone in their Employee Profile. Interviewers who receive an email notification see the date and time in the time zone stored in their Employee Profile.
- *Notes:* This field is optional and cannot presently be made required. The Notes field has a 2,000 character limit
- *Same people as last time:* If an interviewer list has previously been set up on another applicant on the requisition, the recruiting user may use this button to instantly apply the same list to the applicant being viewed.
- *Apply Interviewer List To All Applicants:* This button allows the recruiting user to define the same list of interviewers for every applicant. This applies to every applicant presently in an interview status and those placed in an interview status in the future.

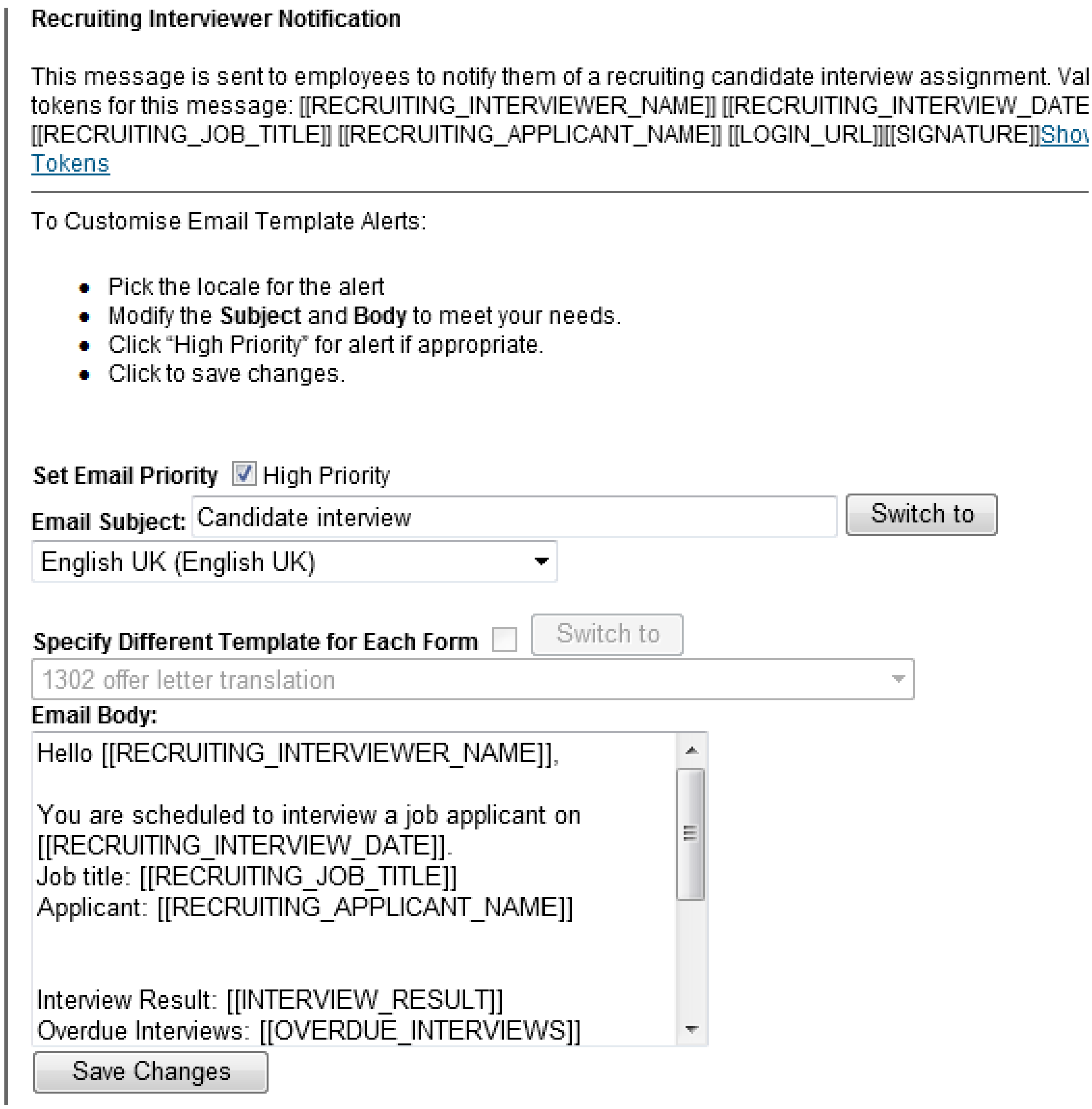
Apply Interviewer List To All Applicants only works for In-Progress statuses that have been set up with interviewAssessment feature permissions in the XML. The Default status is not supported.
If the interviewer list is being applied to a large number of applicants, then a scheduled job will be set up automatically to process adding the interviewers to all applicants it may take a few minutes to fully apply all the interviewers to all the applicants in this case. This helps maintain page load speed and user experience since the user is not waiting for the confirmation page to load.

- *Include in the invitation email:* Selects the attachments to be included in the email notification to the interviewer. Only resume, cover letter from the application record and the standard interviewGuide field from the requisition may be included in the email notification. Note the interviewGuide field can be set up as a multiattachment field if the client wishes to include many requisition-related attachments.
- *Save:* Saves the interviewer list and places Interview Assessment forms on the interviewers' Interview Central tab, without sending an email notification
- *Send Email:* Saves the interviewer list, places Interview Assessment forms on the interviewers' Interview Central tab, and sends an email notification.
  If Send Email is clicked after making a change to an existing interviewer list, the system prompts the user to select whether the email should go to All Interviewers or only Added/Updated Interviewers

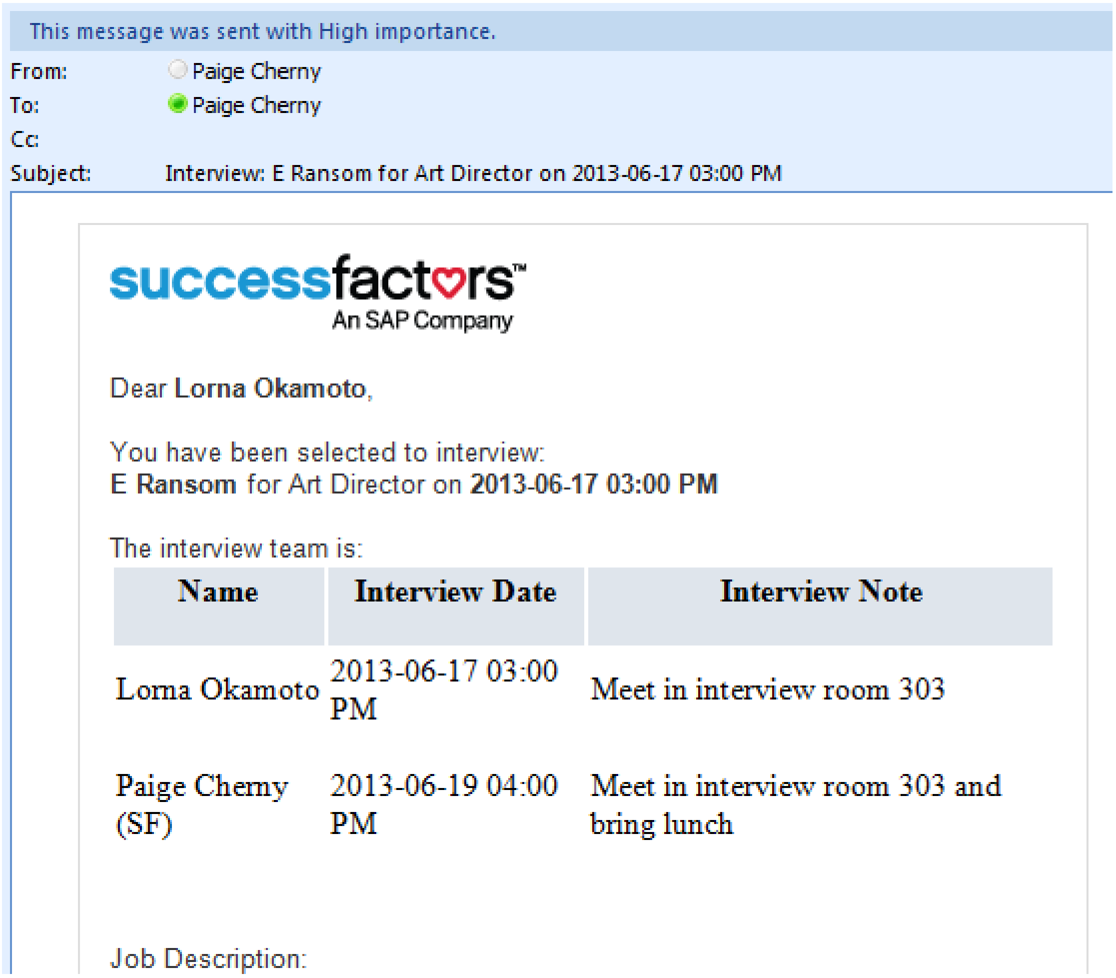


Changed Interviewer Email Prompt

The text of the interviewer email notification is defined in *Admin Tools* > *E-Mail Notification Templates Settings* > *Recruiting Interviewer Notification*. The interview email has several special tokens to allow certain interview-specific content to populate into the email.



Interviewer Email Template


This message was sent with High importance.
From: Paige Cherny
To: Paige Cherny
Cc:
Subject: Interview: E Ransom for Art Director on 2013-06-17 03:00 PM

successfactors
An SAP Company

Dear **Lorna Okamoto**,

You have been selected to interview:
E Ransom for Art Director on **2013-06-17 03:00 PM**

The interview team is:

Name	Interview Date	Interview Note
Lorna Okamoto	2013-06-17 03:00 PM	Meet in interview room 303
Paige Cherny (SF)	2013-06-19 04:00 PM	Meet in interview room 303 and bring lunch

Job Description:

Interviewer Email Notification

- *Close:* Closes the interviewer setup pop up without saving changes.

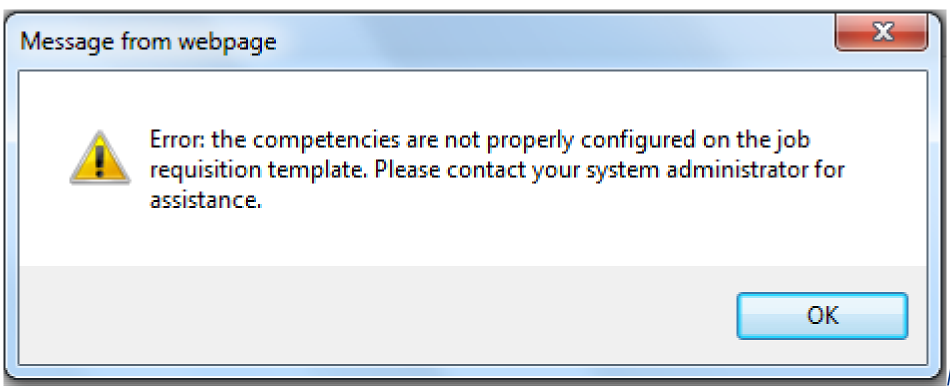
9.4.3 Completing an Interview Assessment

- On the Interview Central tab, the interviewer finds a list of the requisitions against which they are interviewing, and each requisition expands to show the list of applicants to which the interviewer has been requested to provide assessment feedback.

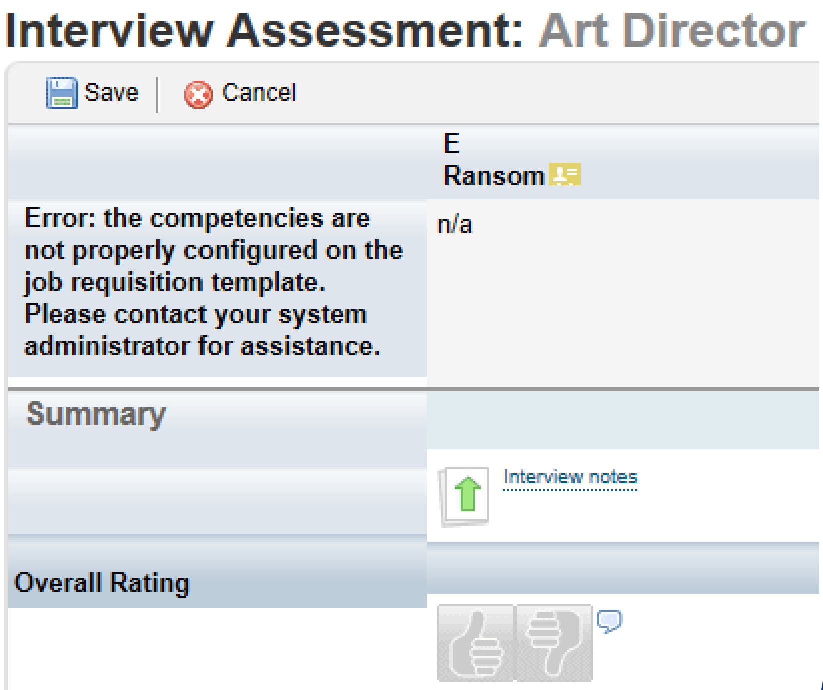
Interview Central Tab

From this page the user can view the job description, navigate to the application, view the full interviewer team list, click the *Print and Go!* pack button to view a summary of all the relevant information for the interview, view any overall rating and recommendation they already provided, and click *Rate Now* to add or change the rating and recommendation. Note that the *Print and Go* pack is not configurable.

Interview Assessment forms remain available on the user's *Interview Central* tab until the requisition is placed in a *Closed* state.

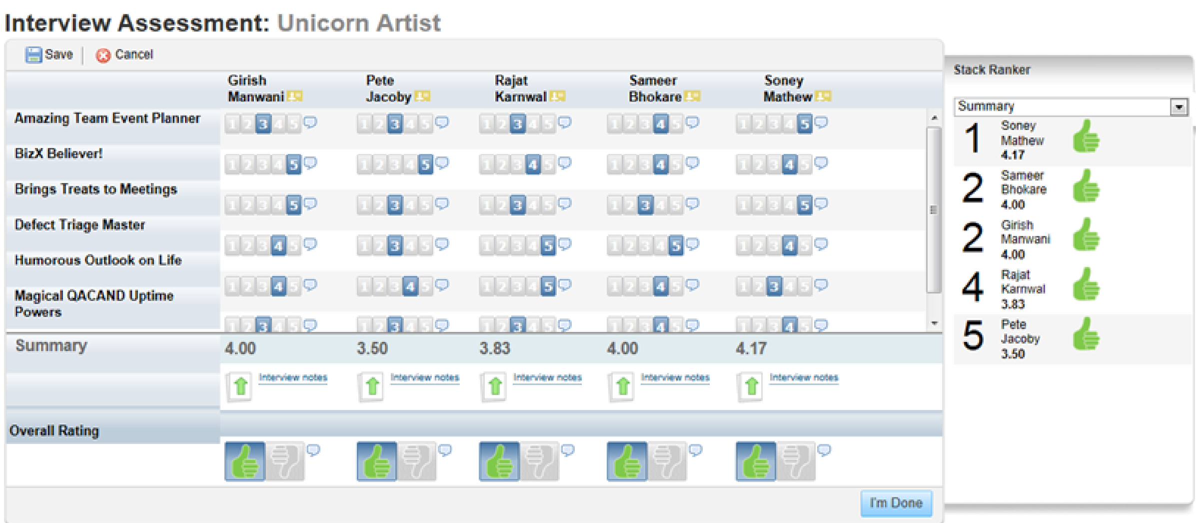
1. Click *Rate Now* to open the Interview Assessment form.
2. Complete the Interview Assessment form.
   If there are no competencies defined on the requisition, the user receives an error pop up. This error popup cannot be disabled — only the addition of competencies on the requisition will avoid this pop up.
   `Error: the competencies are not properly configured on the job requisition template. Please contact your system administrator for assistance.`
   

   Interview Assessment Form Error Message in the Absence of Competencies on the Requisition
   The interviewer can proceed and just upload notes, add comments and provide an overall rating if desired.



Interview Assessment Form Without Competencies Defined on the Requisition

If competencies are defined on the requisition, the interviewer can select ratings for each competency, which calculate the summary rating. The Stack Ranker on the right hand side can be used to compare candidates in summary or competency by competency to easily identify which candidate is top rated in each category.

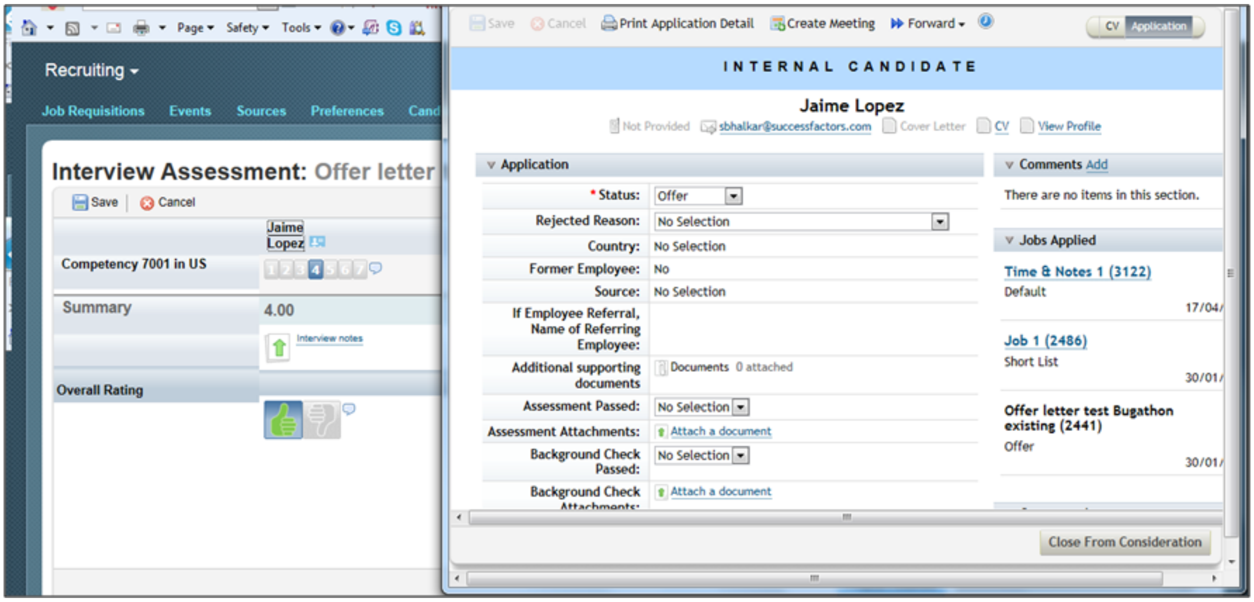


Interview Assessment Form with Competencies Defined

9.4.4 Reviewing Interview Assessment Results

On the Interview Assessment screen, interviewers can only view their own ratings.

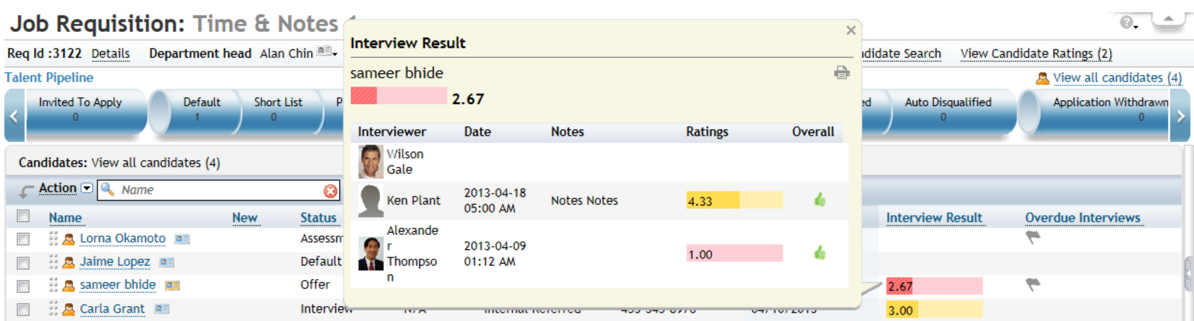
Interviewers can open and view the candidate's application record from the Interview Assessment form. The interviewer will see data on the application based on the permission level selected by the administrator.



Application Pop-Up Opened from Interview Assessment Form

The application can only be accessed from the interview assessment form. The candidate's name on the Interview Central dashboard will not launch the interview assessment form.

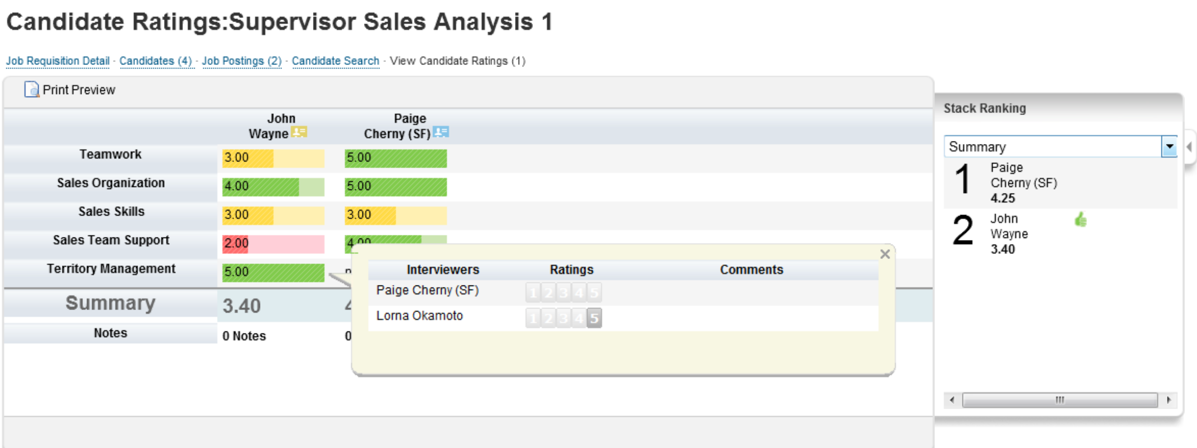
- Recruiting users views the Interview Assessment results.
  On the applicant list page: Users can see Interview Results and a flag for Overdue Interviews on the candidate summary page. Hovering over a value reveals more detailed information about the interview feedback.

  Interview Results Hover Over on Applicant List Page
  On the application: Permissioned users can view the total interview result and interview status data as fields on the application record if the interviewResult and overdueInterviews fields are configured.
  If these fields are configured on the Application XML, users with reporting access can report on this data, and administrators can use this data in Recruiting Email notifications.
  From the Interview portlet: Permissioned users can see a View Candidate Ratings link on the Interviewer portlet once Interview Assessment forms are completed. It can be beneficial to leave the interviewAssessment feature-permission set up in all statuses past interview.

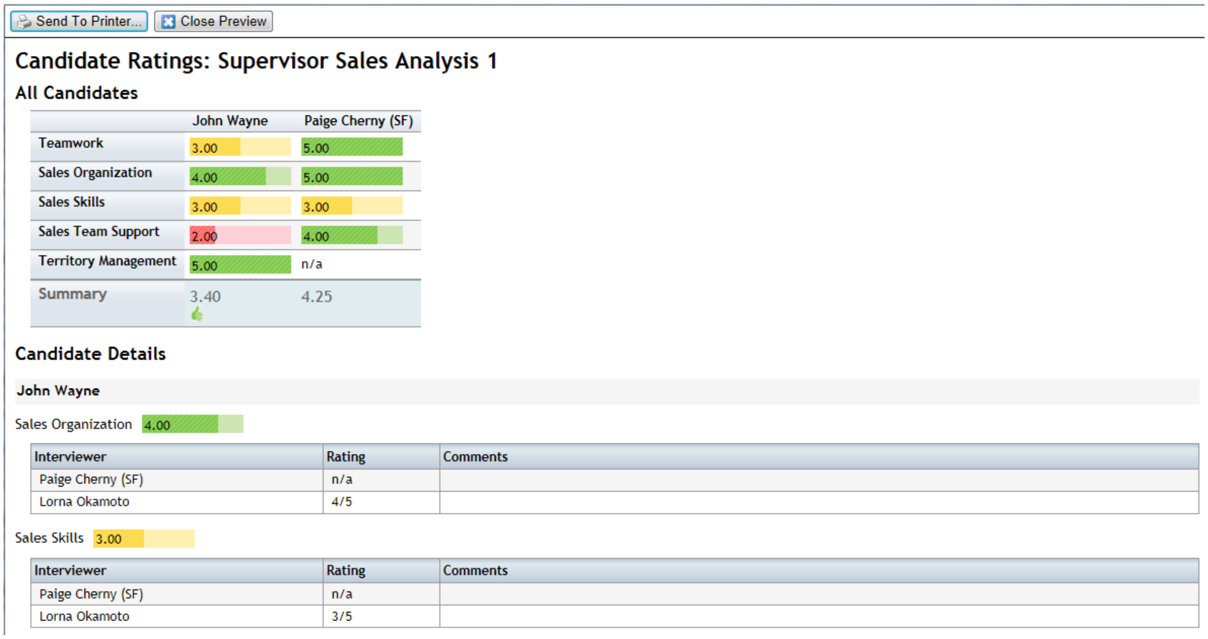
View Candidate Ratings Link on Interviewers Portlet

The Candidate Ratings page shows a summary of all interviewer ratings on each competency, and a total summary rating. Hovering over a competency allows the user to view the ratings and comments from each interviewer.



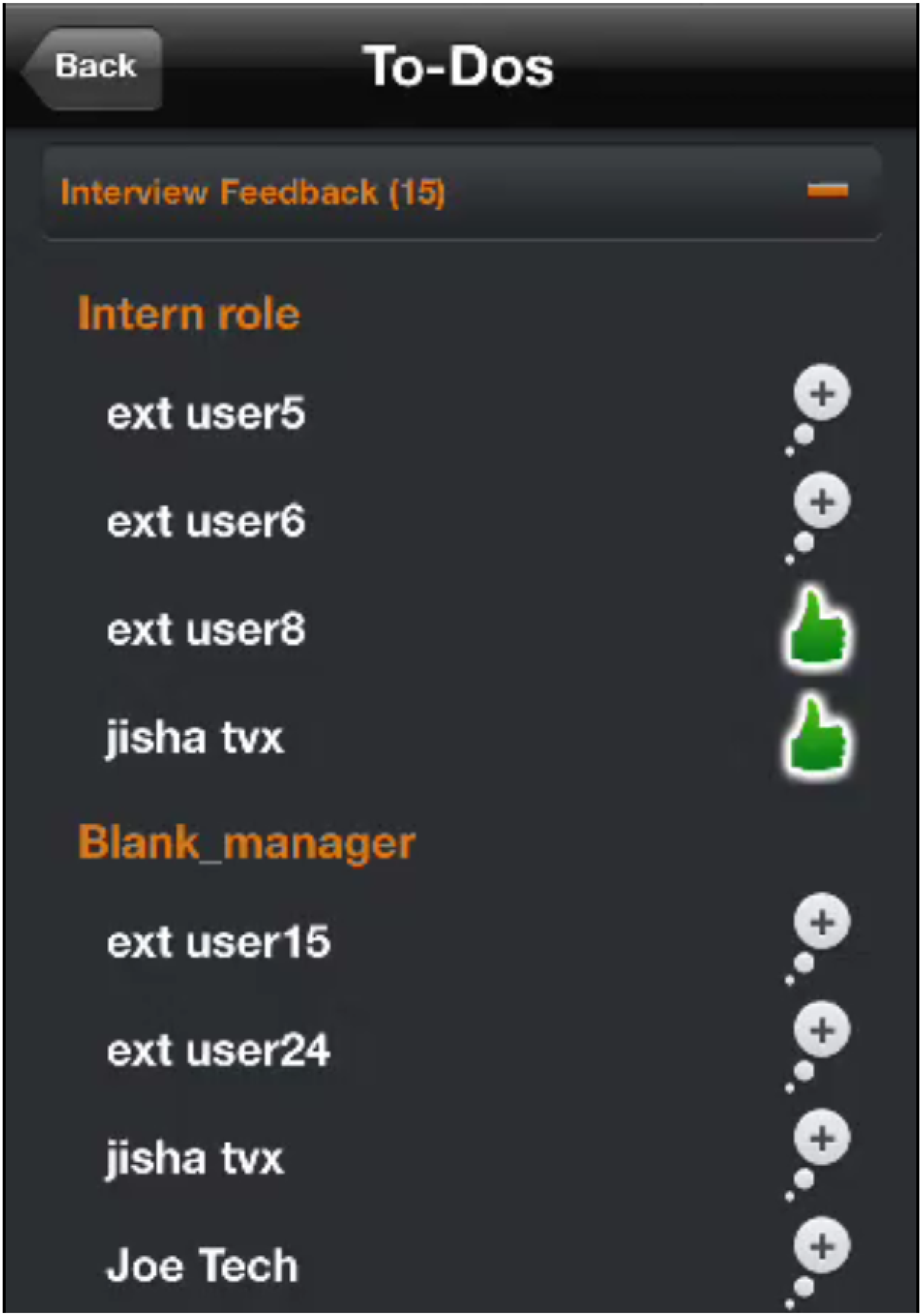
View Candidate Ratings Page

Clicking *Print Preview* on the Candidate Ratings screen or clicking the print icon on the hover over on the applicant list page produces a full overview of all interview activity.

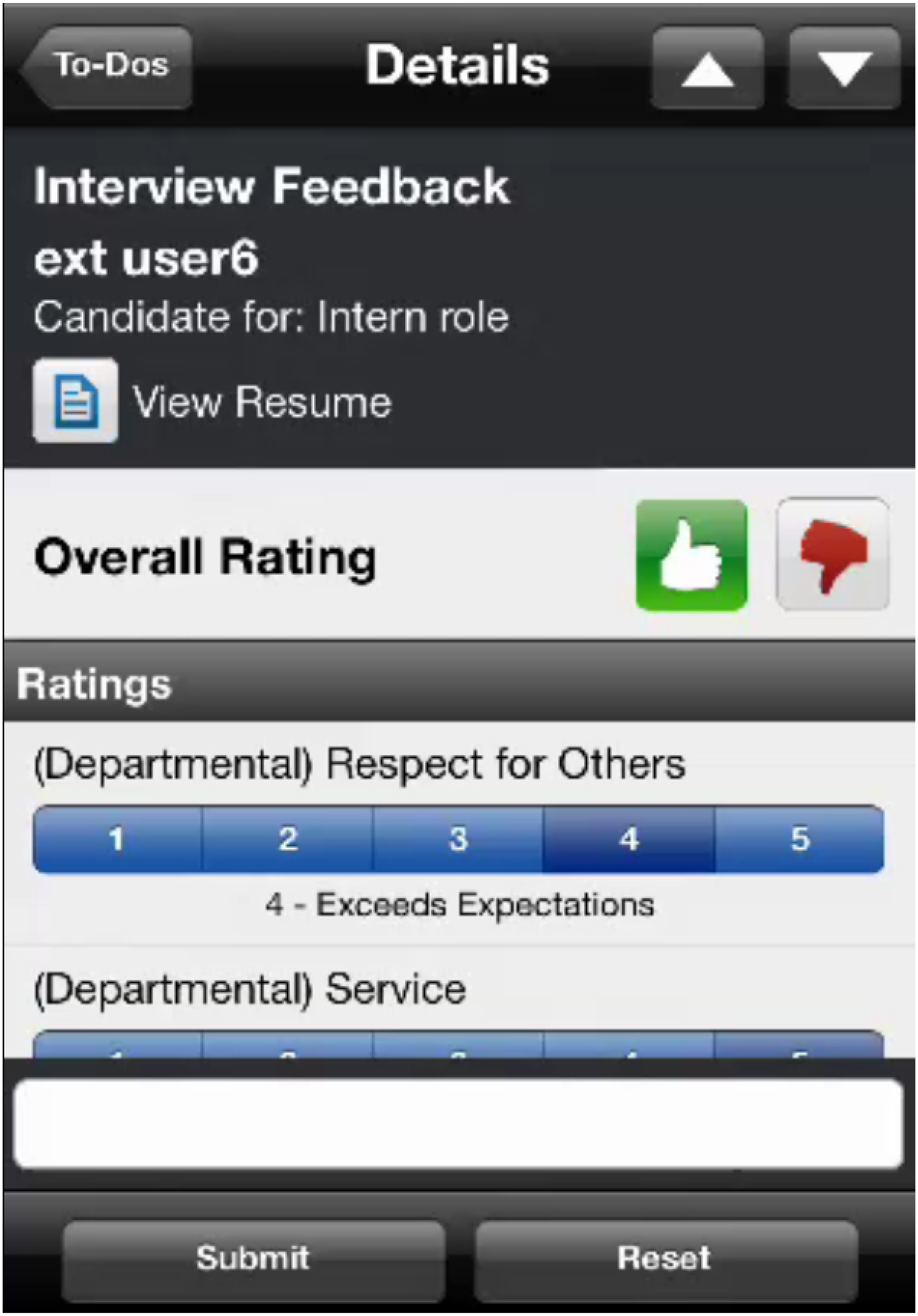


Interview Print Page

From mobile: Permissioned users can access the Interview portlet via mobile phone. Users can view overall Interview Feedback and Candidate Ratings via mobile.



Mobile Interview Feedback



Mobile Interview Candidate Feedback

9.4.5 Managing Interviewers and Options

If interviewers are removed from the list and the Mass Apply button is clicked, what happens to those interviewers on other applicants?

Absent interviewers who have not begun to provide feedback will be removed from all applicants and no longer have access to their interview assessment forms. If one of the removed interviewers had already begun to provide feedback on the interview assessment form then that interviewer will not be removed from the interviewer list for that applicant. This is done to ensure all collected data remains available.

Is it possible to manually adjust the interviewer list on a single applicant after Mass Applying an interview list?

Yes, manual adjustments will be saved. Clicking the Mass Apply button again later will override the manual adjustments.

Can I remind interviewers of their overdue interview?

Yes, if the *overdueInterviews* field is configured. Hover over the overdue interview flag to view the interviewers who have outstanding interview assessment forms. Click the email icon to automatically re-send the interviewer email. Automatic overdue interview email reminders are not supported.

How do I enable the“"Outlook integration" calendar icon?

- *Admin Tools* > *Company System and Logo Settings* > *Outlook Calendar Integration*
  Outlook calendar integration provides an icon on the application page. Clicking the *Create Meeting* icon pops up an ics file (in Outlook this appears as an Appointment) with the applicant’s name populated in the Subject line.
  This is not an interview scheduling integration. No additional data flows into the appointment record (no interviewers, dates/times, applicant data, etc.) No acceptance data is passed from the appointment into RCM.
  Disabling this feature is recommended because most clients are seeking full interview integration. This is an enhancement request and under consideration but enabling the Outlook Calendar Integration may open a conversation about this need that could lead to increased client dissatisfaction.

How do I change the content of the calendar pop up or integrate interviewing to Outlook or another email client?

This is not supported.

10 Interview Scheduling

Interview Scheduling allows recruiting users to enter their availability directly into the system so that interviews with candidates can be easily scheduled by other users, or by candidates via self-scheduling.

10.1 How to Configure Interview Scheduling

Prerequisites

- Enable at least one pipeline step with the interviewAssessment permission configured in the job requisition XML

```
<feature-permission type="interviewAssessment">
<description><![CDATA[The following roles can launch interviews]]></description>
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[T]]></role-name>
<role-name><![CDATA[W]]></role-name>
<role-name><![CDATA[Q]]></role-name>
<status><![CDATA[Interview]]></status>
</feature-permission>
```

- Enable V12 UI and V12 Career Site.
- If using Data Retention Management, DRM 2.0 is required. DRM 1.0 is not supported.
- If using requisition delete, use the Admin Job Requisition Delete, rather than requesting a requisition deletion from engineering.

Procedure

1. Navigate to *Admin Tools* > *Picklist Management*. Configure a picklist for interview virtual location and interview location.
2. Navigate to *Admin Tools* > *Manage Recruiting Settings*. Check *Enable Interview Scheduling*.
3. Map the two interview scheduling picklists – interview virtual location and interview location.
4. Navigate to *Admin Tools* > *Manage Recruiting Email Triggers*. Configure the following email triggers:
   - Candidate Self-Schedules Interview
   - Interview Confirmation to Candidate
   - Interview Confirmation to Organizers
   - Interview Confirmation to Interviewers

- Interview Delete Notification
- Interview Availability Notification
- Interview Cancellation to Organizers
- Booked Interview Cancellation to Interviewers
- Booked Interview Cancellation to Organizers
- Booked Interview Reschedule Email to Candidate
- Candidate Interview Response Reminder
- Booked Candidate Interview Update
- Cancel Interview Notification

5. Navigate to *Admin Tools* > *Permissions* > *Recruiting Permissions*. Enable *Calendar for Interviewers* permissions. If the interviewer is not explicitly granted Calendar permissions, they receive the permission if they are added to an interview and the interview is saved.

10.2 Schedule an Interview

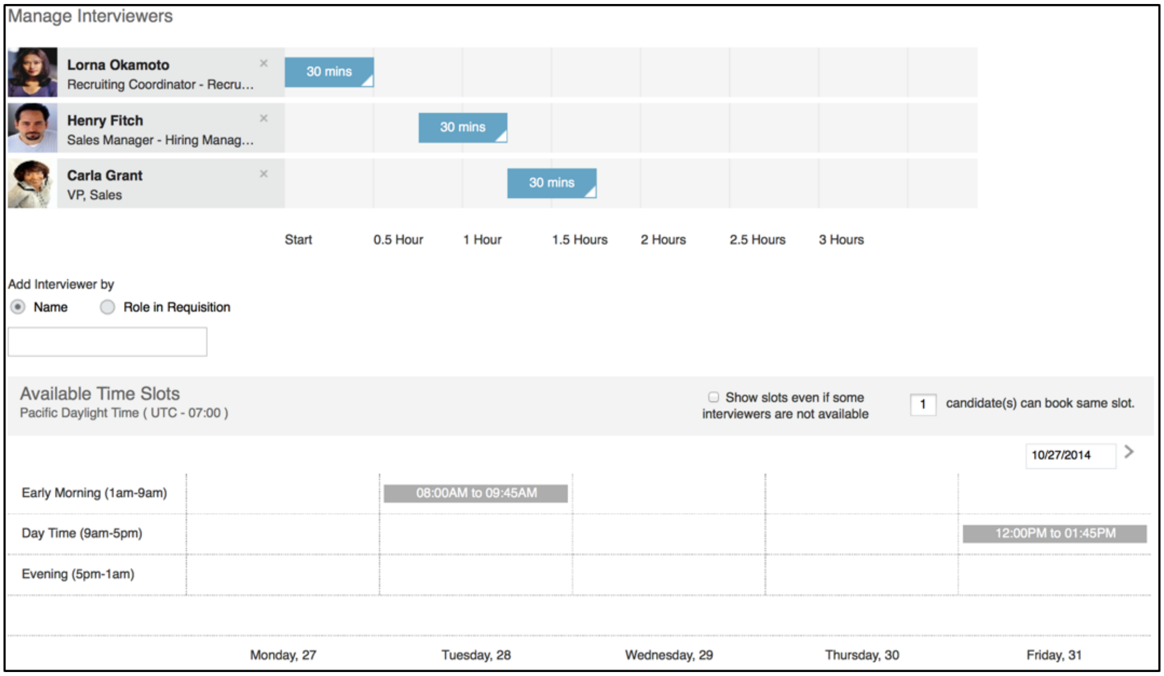
After Interview Scheduling is enabled, recruiting users can set availability for interviews, organize interviews with other interviewers, and e-mail candidates about available interview times.

Procedure

1. Navigate to *Recruiting* > *Interview Scheduling*..
2. Click *My Calendar* to open your personal calendar and set windows of availability for interviews. Note that this calendar is not integrated with any other Web calendars, including Microsoft Outlook. Interview availability can be set up on an on demand or recurring basis.
3. Once you have designated available time for interviews, recruiters can see upcoming appointments and cancel interviews from this view. If an interview is canceled, the booked candidate receives an interview to book a new interview time. If no times are available, the candidate will see a link to contact the recruiter. The ability to cancel interviews is not configurable.
4. Navigate to the *Job Requisitions* tab. Here, the recruiting user can see all job requisitions they have interviewAssessment permissions for. The recruiting user must also have VisibleTo permissions for the status set.
5. Each requisition displays the total number of candidates to interview and the number who have not started the interview process. Click *Interview Steps*to display details about where candidates are in the interview process. When interview scheduling is configured, interview setup is no longer configured via the Interviewers portlet on the application. The Interviewers portlet will be hidden
6. To schedule a new interview, click the *X not started* link for an individual job requisition. Select the candidate you would like to schedule an interview for and click *Start Scheduling*.
7. On this screen, you can give the interview a title, assign other users to help with scheduling, set the interview type (phone, virtual, or face-to-face), and choose a location for the interview, where defined. Users who are assigned to an interview can edit the schedule.
8. Interviewers can be added by name or requisition recruiting role. Recruiting teams can also be used. Once the interviewers have been selected, click *Find Availability* to find available times the interviewers have in

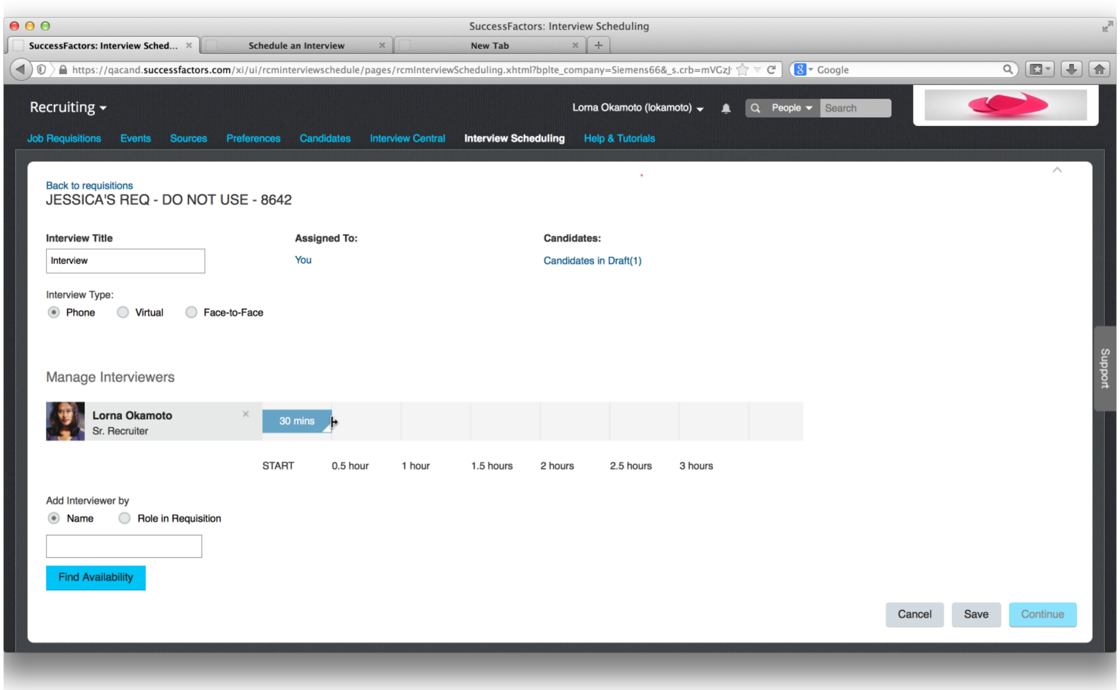
common. There is no “optional attendees” function for interviewers. You can configure back-to-back interviews where several interviewers attend the interview one after another and each interviewer has their own allocated timeslot to attend the interview

a. To create back-to-back interviews (interviews with different interviewers who are not all present at the same time), click and drag to move the bar to change the interview order, or schedule a break between interviews.

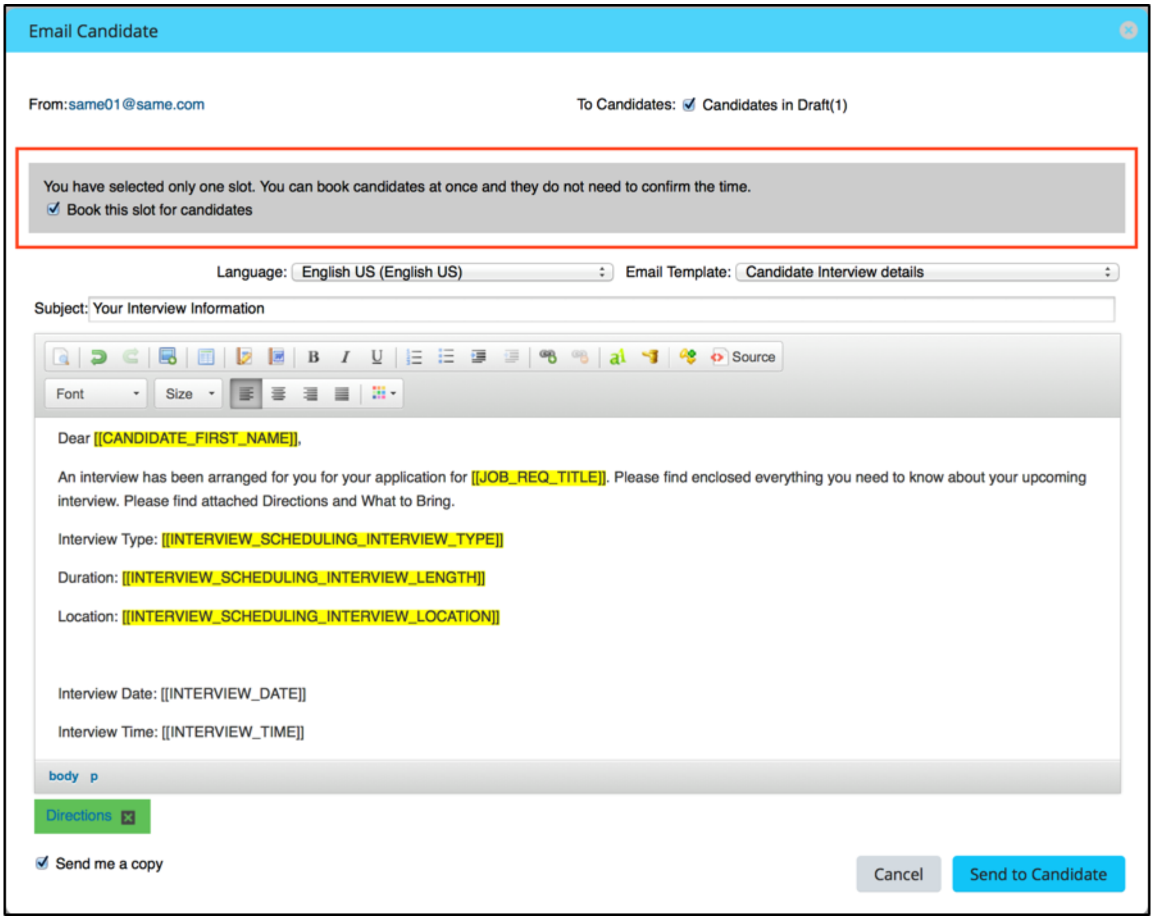


b. Two interviewers can be present at the same time, while another person is not. This is a combination of a panel and back-to-back interview.

9. Set the interview duration. Interviews are managed in 15 minute intervals and the maximum length for an interview is 12 hours and 45 minutes.To create a panel interview, select an interviewer and extend the bar to set the duration. Then add the rest of the interviewer team.



10. When looking for availability, dark gray slots are times common to both interviewers and fully available. Lighter gray slots are common to both interviewers, but have been sent for another interview, although they are not yet booked. Blue slots are slots the recruiting user has selected, or slots that have already been sent for that interview. If there are not enough available slots left to set up an interview schedule, users can choose to view slots where some interviewers are unavailable by checking *Show slots even if some users are unavailable.* The system shows who is unavailable in each case and provides a link to e-mail this person to ask if they can be available.
11. Organizers can add timeslots on behalf of an interviewer in case the interviewer is available but has not yet added their available time into the system using the *Add Custom Slot* button. Organizers can also choose a specific start time, even in the time does not show on the availability finder
12. You can also set up a group candidate interview by increasing the number of candidates who can book the same slot to greater than one.
13. If the organizer only selects one time slot for the interview, organizers can confirm this time on behalf of the candidate or candidates. A check box appears on the Send Email screen that says *Book this slot for candidates*. If this box is checked, the candidate or candidates are booked into this time.

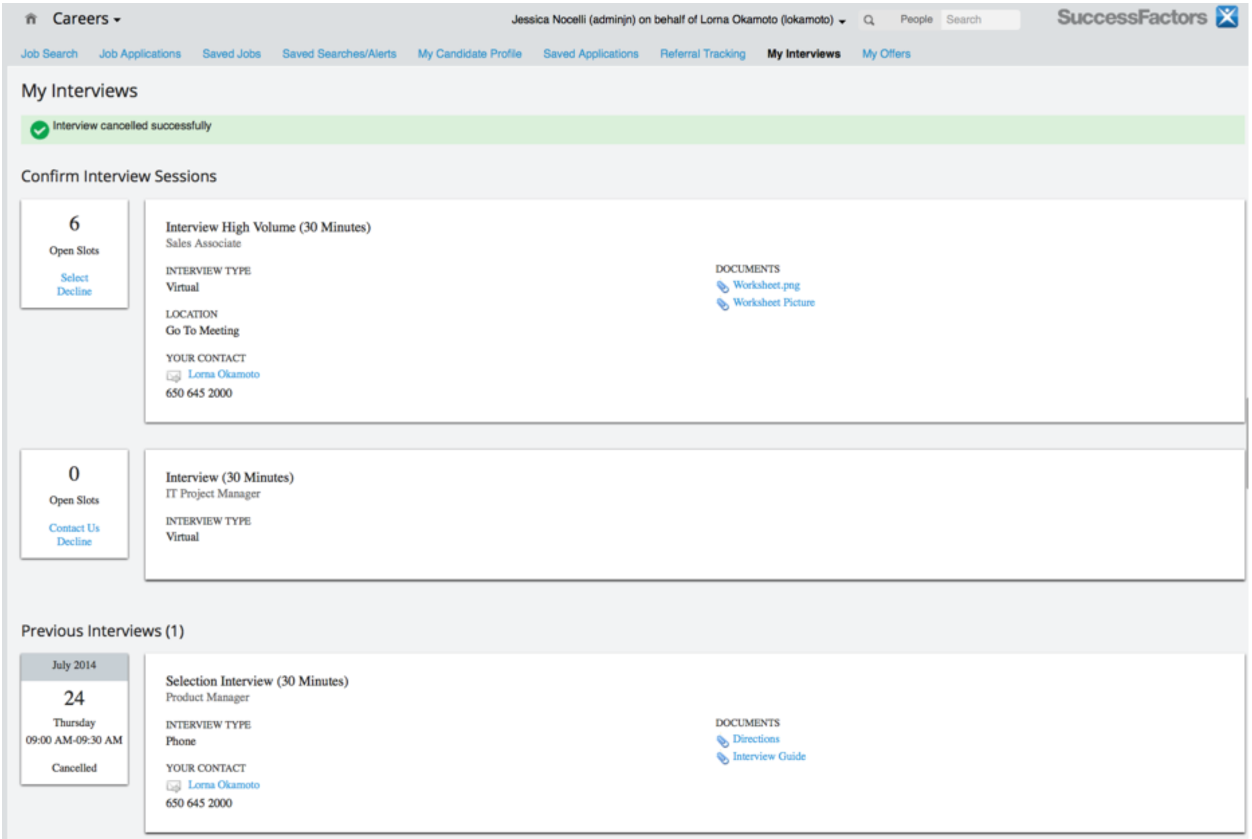


14. After the time slot is scheduled, the candidate receives an invitation e-mail, to invite them to select an interview session or confirm the appointment.
15. Select the e-mail template and language, and edit the default template if necessary, including adding any relevant attachments.
16. Once an interview has been sent, you cannot change the duration or the interviewers. If a change is necessary, the organizer must delete the candidate from that schedule and set up a new interview schedule. The candidate will be notified via e-mail.
17. The organizer can also delete the entire interview and the system notifies all relevant participants of the change via e-mail.
18. Once the candidate confirms an interview time, the interviewers receive an e-mail confirmation and a To-Do List item to complete the Interview Assessment in Interview Central. Organizers can also book a candidate into an interview time slot without forcing the candidate to login. This books the interview for all interviewers, including creating an Interview Assessment form in Interview Central.

10.3 Interview Scheduling - Candidate View

In the Careers tab, the candidate will see a new tab called “My Interviews,” which displays any scheduled interviews that need confirmation, upcoming confirmed interviews, or previous interviews.

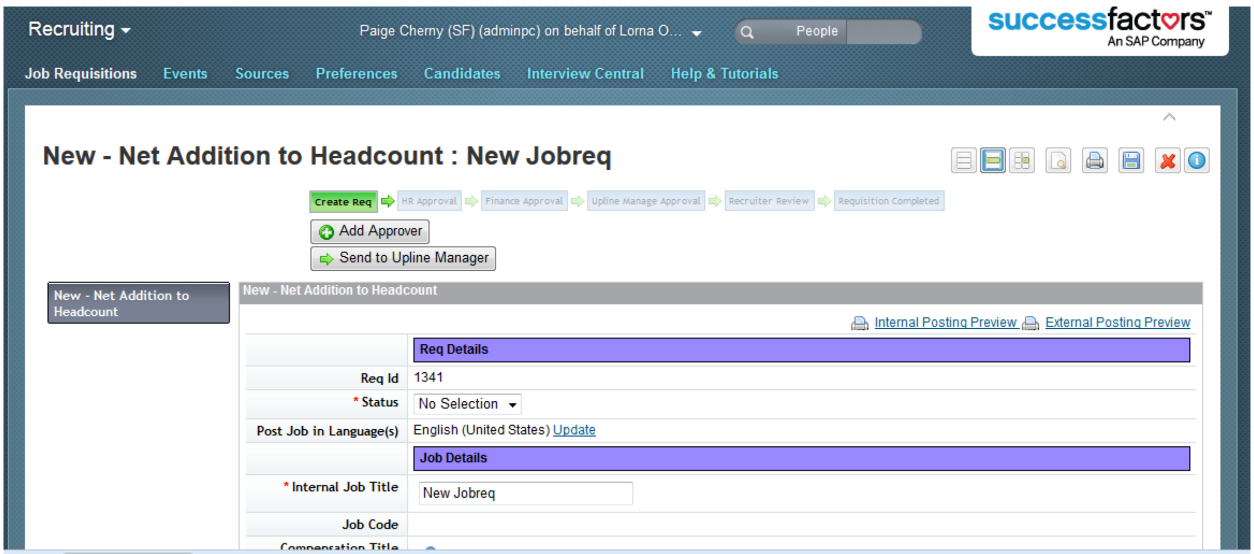
For interviews that need to be rescheduled, or that the candidate cannot attend, the candidate can choose to cancel the interview or decline and reschedule. Candidates cannot cancel or reschedule a confirmed interview within 24 hours of the scheduled interview time.



11 Requisition

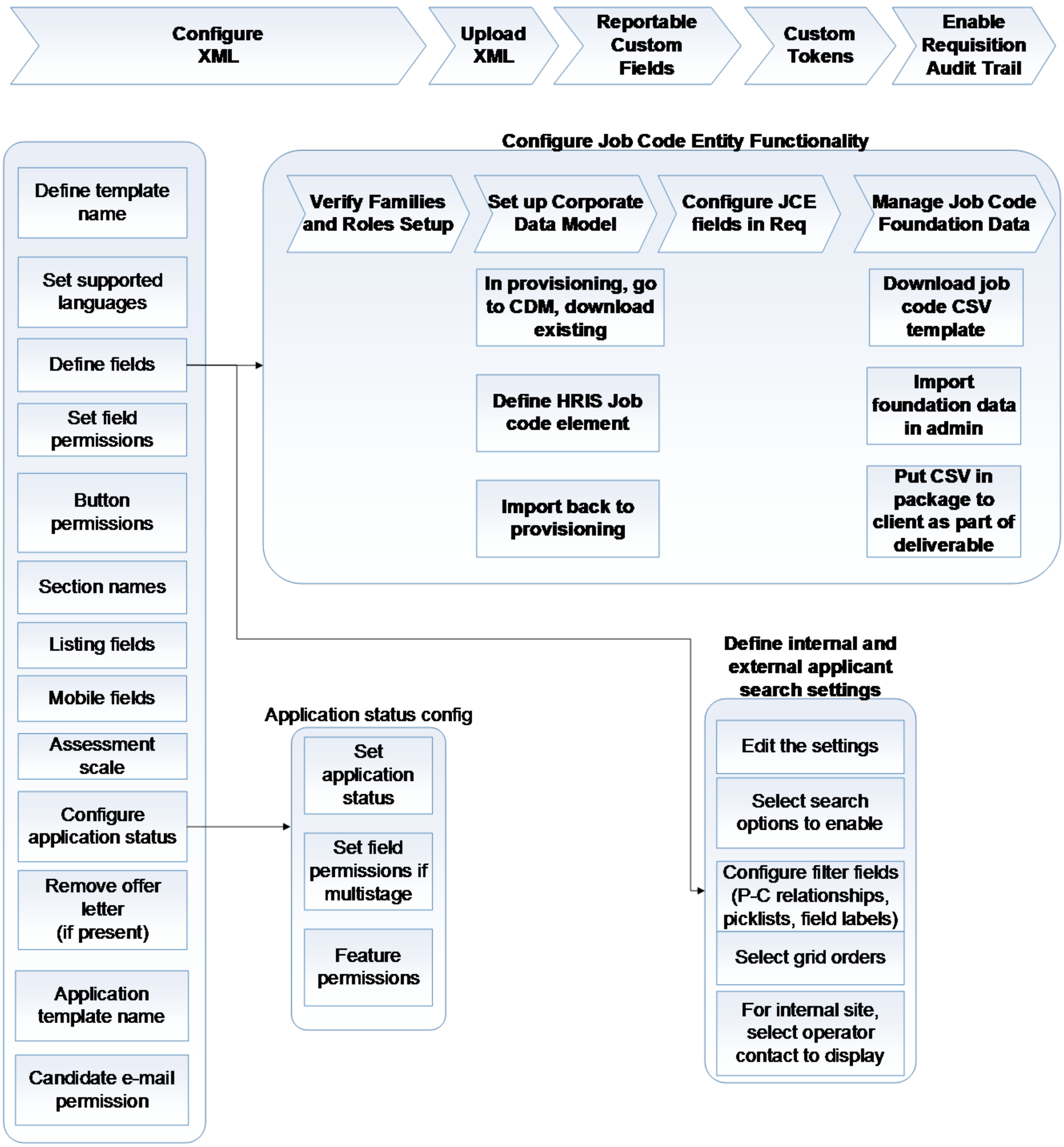
A requisition is essentially a hiring order — a request that kicks off the recruiting and hiring processes. A typical requisition describes the role to be filled, including the job description, place in the organization, physical location and other relevant detail an approver, recruiter or candidate may need to know. Most requisitions follow a business process that takes them through approval, posting, active recruiting, hiring and closure.

To configure a requisition, begin with the Requisition XML template. The Requisition XML template defines the fields, features, and permissions used in a requisition record. A record created from a Requisition XML template is shown in the RCM user interface below.



New Requisition Example

In addition to the Requisition XML template, requisitions may depend on route maps, Provisioning settings, admin libraries and other XML objects.



Configuration Process Overview for Requisitions

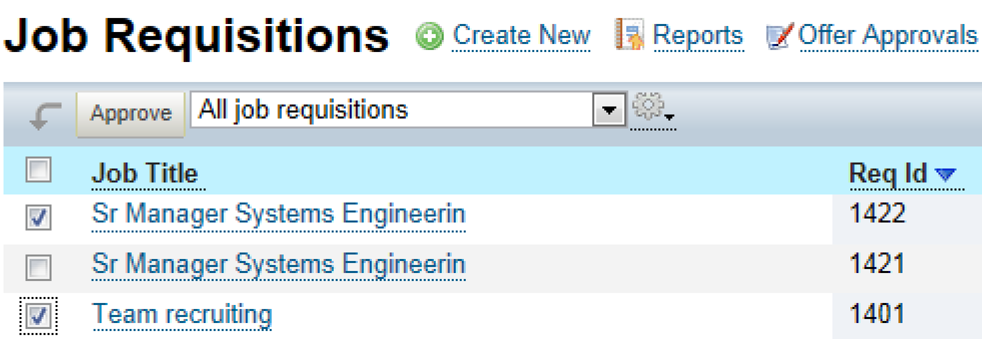
11.1 Feature Summary

The requisition includes data specified by recruiting users based on the fields defined in the Requisition XML. Field configuration and Provisioning search settings control what the candidate sees during a job search, and permissions in the requisition XML control what a recruiting user sees when viewing the requisition record.

There are three requisition “states” - preapproved, approved, and closed. The requisition displays different elements depending on the state that it is in, and states interact with the permissions model to control the fields and features available to a recruiting user. For example, a hiring manager may be able to edit the title field and provide interview feedback on applicants while the requisition is in the Approved state but not once the requisition is changed to the Closed state.

Pre-Approved Requisition

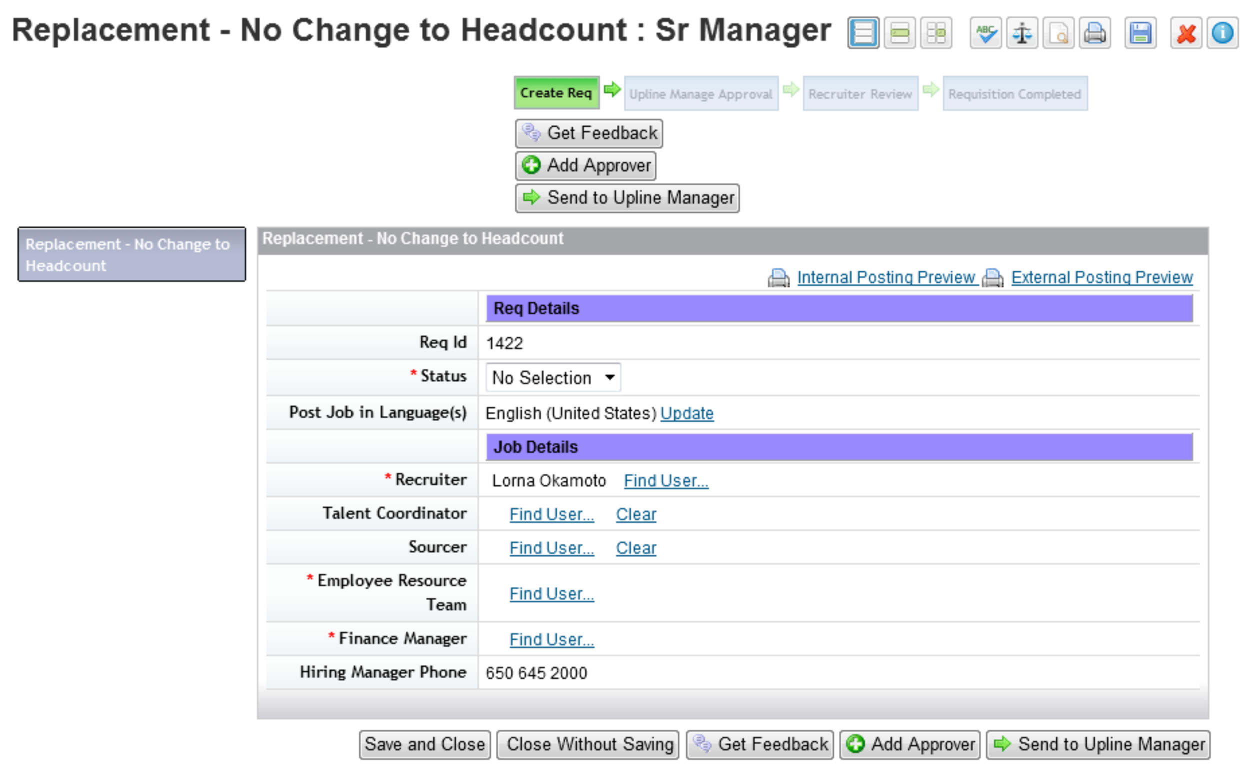
Pre-approved requisitions appear on the *Recruiting* > *Job Requisitions* tab with a checkbox to the left of the job title. For more information on approving requisitions, see the Working with Route Maps [page 457] section of this guide.



Pre-Approved Requisitions on the Job Requisitions Tab

The recruiting user view of the pre-approved requisition record contains the following sections:

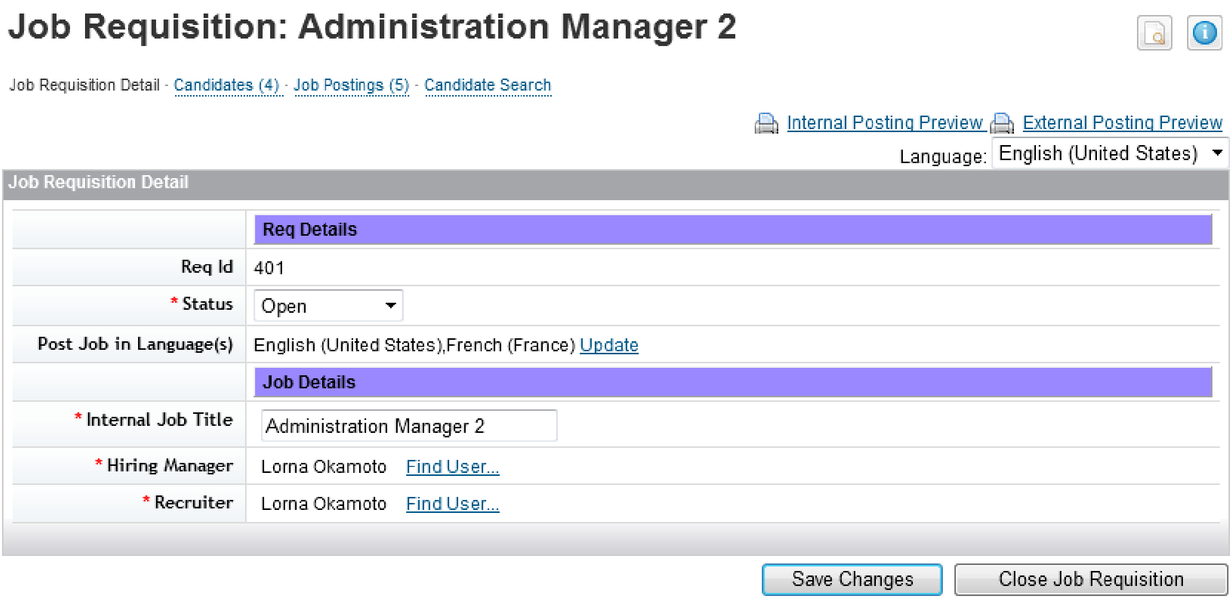
- *Requisition form type and title:* Displays the requisition form template name, a colon and the internal title of the requisition
- *Forms toolbar:* Displays buttons used to interact with the requisition form. This is derived from the Performance Management forms toolbar. Some of the options can be enabled or disabled in Admin > Manage Form Templates. Some options that can be enabled may not apply to requisition forms
- *Route Map:* The approval path for the requisition, with the current approval step highlighted in green
- *Route Map Buttons:* Buttons that allow the user to interact with the route map and route the form
- *Form Section Navigation:* These grey buttons are derived from the Performance Management form and do not serve a great deal of purpose on a requisition. Presently these cannot be disabled
- *Internal Posting Preview and External Posting Preview:* Links to preview the job details as a candidate would see them
- *Requisition Details:* The fields defined on the Requisition XML with permissions for the current user to view or edit
- *Form Management buttons:* The route map buttons and buttons to save the form or close without saving.



Recruiting User View- Pre-Approved Requisition Record

The recruiting user view of the approved or closed requisition record contains the following sections:

- *Requisition title:* Displays the internal title of the requisition. The form template name cannot be shown on approved requisitions except in the audit trail
- *Mini Forms toolbar:* Displays the Print Preview and Audit buttons. Full form template button options are not available in approved requisitions
- *Requisition Navigation Options:* Displays links to navigate between the job requisition detail, candidate list, job postings and a requisition-related candidate search
- *Internal Posting Preview and External Posting Preview:* Links to preview the job details as a candidate would see them
- *Language toggle:* If a requisition is posted in multiple languages, a drop down appears allowing the user to set up the requisition in multiple languages
- *Requisition Details:* The fields defined on the Requisition XML with permissions for the current user to view or edit
- *Form Management buttons:* The buttons to save the form or close/re-open the requisition



Recruiting User View- Closed or Approved Requisition

11.2 Quick Facts

- Changes made to the Requisition XML will retroactively apply to existing requisition records.
- You can configure a requisitions to allow users to send them back to the previous step if they cannot be approved. Navigate to *Admin Tools* > *Manage Form Templates* > *Enable form routing to previous step* to enable this feature.

11.3 Prerequisites

- *Provisioning* > *Company Settings* > *Enable*
  - Performance Appraisal Smart Form
  - Competency Library Management Suite
  - Workflow
  - Plus UI
  - Version 10 UI
  - Question Object Management
  - Recruiting
  - Recruiting V12 UI framework
  - Version 11 UI framework
  - Enable Advanced Find User Component

    - Recruiting Application
- Provisioning
    - *Edit Job Requisition Application Template* > *configured and loaded*
    - *Applicant Status Set* > *applicant status set exists in the instance*
- *Admin Tools*
    - Recruiting Languages selected
    - *Set up Job Boards* > *Country and State/Province Values Set up*
    - Picklists to be used in the requisition are defined

11.4 Configuration

Context

Procedure

1. *Provisioning* > *Company Settings* :
    1. Enhanced Job Search UI
    2. Enable inline viewing of resumes
    3. Enable External Career Site Home Page
    4. Enable Team Recruiting Functionality
2. *Provisioning* > *Import/Update/Export Job Requisition Template* > *Upload configured XML*
3. Admin Tools
    1. *Form Templates* > *Select a route map and settings*
    2. *Permission to Create Forms (Non-RBP) or Manage Permission Roles* > *Role* > *Permission* > *General User Permission* > *Permission to Create Forms (RBP)*

11.5 Configuring XML

Requisitions rely on the Requisition XML template configured and uploaded in *Provisioning* > *Managing Recruiting* > *Import/Update/Export Job Requisition Template* . Requisition templates cannot be deleted after creation but they can be disabled.

You must include the following declaration at the top of every Requisition XML document.

```
<!DOCTYPE job-req-template PUBLIC "-//SuccessFactors, Inc.//DTD Job Requisition
Template//EN" "job-req-template.dtd">
```

11.5.1 Defining template name

Include these elements right beneath the DOCTYPE element. You can change the CDATA content if desired. The CDATA content displays prominently in the instance and admins and recruiting users who use the default locale of the instance will interact with it.

- *job-req-template:* The declaration of the template type and attributes
- *template-name:* The unique ID of the XML template and name that appears for the requisition in the user interface
- *template-desc* : A template-desc element is used to provide descriptive text
- *template-lastmodified*: The last modification date of the candidate template.

```
<job-req-template type="jobReq" spell-check="true" min-posting-days="0" min-
internal-lead-days="0">
  <template-name>
    <![CDATA[New - Net Addition to Headcount]]>
  </template-name>
  <template-desc><![CDATA[]]></template-desc>
  <template-lastmodified>3/5/06 12:00 AM</template-lastmodified>
```

11.5.2 job-req-template Element

```
<job-req-template type="jobReq" spell-check="true" min-posting-days="0" min-internal-
lead-days="0">
```

Type must always be set to jobReq.

type attribute

```
<job-req-template type="jobReq" spell-check="true" min-posting-days="0" min-internal-
lead-days="0">
```

Spell check on a form level does not function in the Recruiting product.

min-posting-days Attribute

```
<job-req-template type="jobReq" spell-check="true" min-posting-days="0" min-internal-
lead-days="0">
```

You can set this attribute to 0 or a positive number. If set, the application will not accept postings of length less than x days and will not allow a user to manually remove the posting until x days have passed.

If the client uses this attribute, it is best practice include an instructional field on the requisition details explaining what the posting settings are so recruiting users know what restrictions have been set up.

Job Postings: Supervisor Sales Analysis 5

Job Requisition Detail - Candidates (2) - Job Postings (0) - Candidate Search

This job must be posted for a minimum of 3 days.

Job postings

Posting Type	Posting Status	Posting Start Date	Posting End Date
Intranet Posting	Not Posted	06/15/2013	06/16/2013

Minimum Posting Days Warning Message

min-internal-lead-days Attribute

```
<job-req-template type="jobReq" spell-check="true" min-posting-days="0" min-internal-
lead-days="0">
```

This attribute may be set to 0 or a positive number. If set, the requisition must be posted for x days internally before external posting is allowed.

If the client uses this attribute, it is best practice include an instructional field on the requisition details explaining what the posting settings are so recruiting users know what restrictions have been set up.

Job Postings: Supervisor Sales Analysis 5

Job Requisition Detail - Candidates (2) - Job Postings (0) - Candidate Search

This job must be posted internally for at least 7 days before being posted to the external site.

Job postings

Posting Type	Posting Status	Posting Start Date	Posting End Date
Intranet Posting	Not Posted	MM/DD/YYYY	MM/DD/YYYY
External Career Site	Not Posted	06/15/2013	MM/DD/YYYY

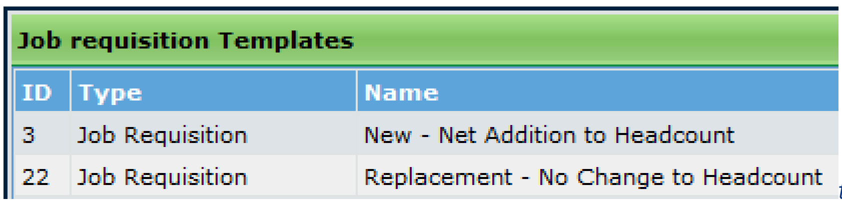
Minimum Internal Posting Lead Days Warning Message

11.5.2.1 template-name Element

```
<template-name>
  <![CDATA[New - Net Addition to Headcount]]>
</template-name>
```

The template name is the unique ID for the requisition template, and is set in the default language of the instance. If the template name changes, uploading the template in Provisioning creates a new requisition form. There is no way to change a template name once the requisition form has been created; you must disable the old req form and a new req form must be set up, permissioned, tied to route map, etc.

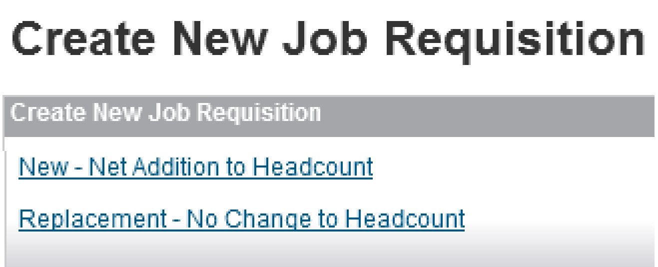
Template names can be localized if the instance has multiple language packs enabled. See the Translation section of this guide for more information about localization.



Job requisition Templates

ID	Type	Name
3	Job Requisition	New - Net Addition to Headcount
22	Job Requisition	Replacement - No Change to Headcount

template-name Value Shown in Requisition Templates in Provisioning



template-name Value Shown in the User Interface to a Recruiting User

CDATA

```
<![CDATA[New - Net Addition to Headcount]]>
```

The template-name CDATA can contain any English or non-English characters in any UTF-8 character set. Spaces are allowed. Avoid special characters like Windows apostrophes (curly like ' instead of a straight ') since they may cause errors.

template-desc Attribute

```
<template-desc><![CDATA[]]></template-desc>
```


The CDATA value of template-desc is not very useful.It only shows up in some browsers and only on the *Admin Tools* > *Form Templates page*.

template-lastmodified Attribute

The CDATA value of template-desc is primarily used by consultants working with the XML to keep track of their pattern of changes. It must be manually updated to ensure accuracy.

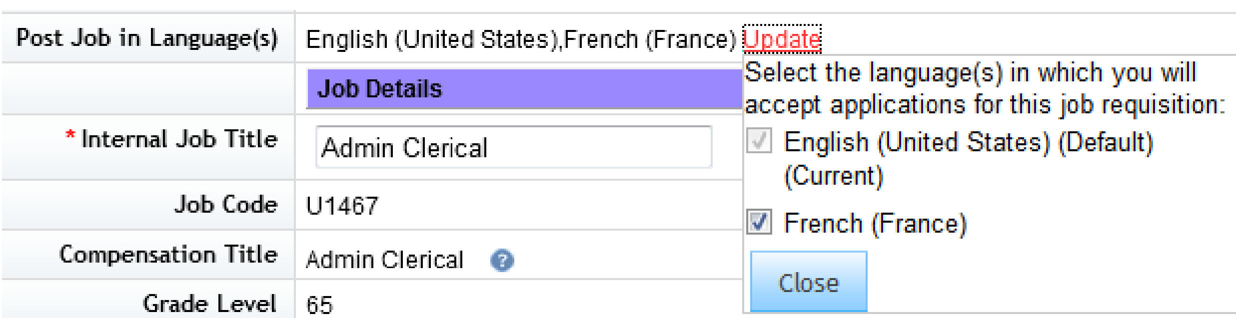
```
<template-lastmodified>3/5/06 12:00 AM</template-lastmodified>
```

11.5.2.2 supported-languages Element

Requisitions can be configured to post in multiple languages. The Requisition XML must contain a declaration of allowable language packs. Only language packs enabled both in *Provisioning* > *Company Settings* and in *Admin Tools* > *Recruiting Languages* should be set up as supported languages in the Requisition XML.

```
<supported-languages>
    <lang><![CDATA[en_US]]></lang>
    <lang><![CDATA[fr_FR]]></lang>
</supported-languages>
```

The supported languages populate the jobPostLanguage field on the requisition details page.



Supported Languages Shown in the Requisition Posting languages field

For more information on multi-language posting see the Working with Job Requisitions [page 297] section of this guide.

lang Element

Each lang element declared identifies a language pack supported in the requisition posting languages.

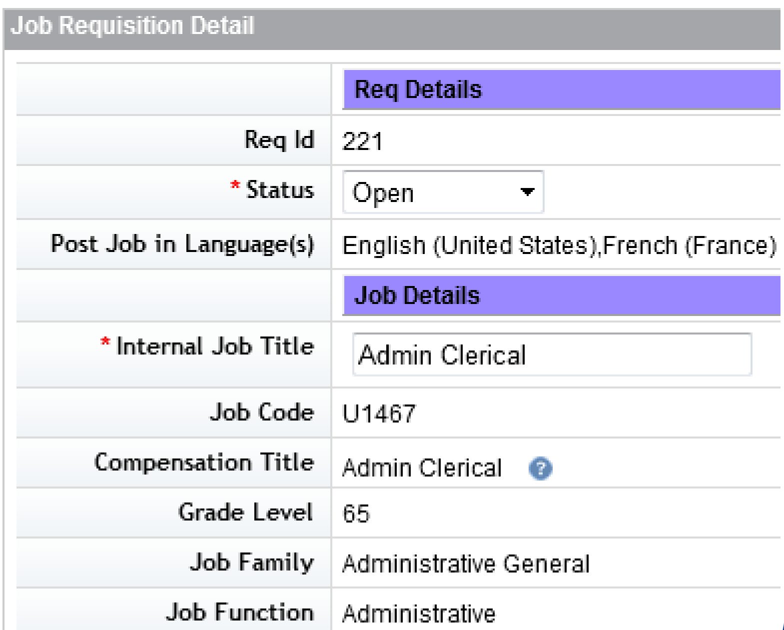
```
<lang><![CDATA[en_US]]></lang>
```

At least one lang element must be declared. Multiple lang elements may be declared. The CDATA value in the lang element must exactly match a language pack that was enabled for the instance.

11.5.3 field-definition Elements

Clients may specify what fields they want to include in a requisition. The field-definition elements in the Requisition XML define the field list and the behavior of each field.

```
  <field-definition id="title" type="text" required="true" custom="false">
    <field-label mime-type="text-plain"><![CDATA[Internal Business Title]]></field-
label>
  </field-definition>
```



Requisition Fields

11.5.3.1 id Attribute

```
  <field-definition id="title" type="text" required="true" custom="false">
```

> **Tip**
>
> You cannot define a default value for any fields except defaultLanguage and currency on the Job Requisition.

Table 18: Special Requisition Standard Fields

Standard Field ID	Field Type	Special Functionality
id	text	• System-issued unique numeric identifier for the requisition record • Clients cannot import ids, specify an alternate pattern to the id, or specify the starting number for new ids • Ids are roughly sequential, but other objects besides requisitions may contribute to the sequence, so it is possible to have a sequence of requisitions numbered 38, 39, 42. This is normal and expected. • Can be made searchable on candidate-facing career sites • Appears multiple places in the user interface, such as Job Requisitions tab, job search results, filter options and many more • Must be configured and should be permissioned as read to all users • Do not apply write permissions to this field
status	picklist	• Appears in multiple places in the user interface, such as Job Requisitions tab, reports, and many more • Contains any picklist values the client desires to use • May be defined in such a way as to interact with the requisition Closed state – see the Working with Job Requisitions [page 297] section of this guide for more information • It is best practice to not label this field “Requisition Status” – use “Recruiting Status” or similar to help clients distinguish between this and the requisition “state”.

Standard Field ID	Field Type	Special Functionality
country	derived	• *Always* configure in all requisitions • *Always* set as required and grant write permissions to an operator in the route map to ensure the field receives a value prior to approval • Values are managed in *Admin Tools* > *Set up Job Board Options*. • Value in this field interacts with the overrides t in the Application XML to control the fields conditionally exposed to applicants • As with most non-filter fields, this cannot be made searchable by candidates. This may result in needing to define both this country field and a second searchable country field on the Requisition XML • Field is limited to 256 characters
title	text	• Appears in the user interface as the clickable link to open the requisition record • Searchable on candidate-facing career sites • If records are created via Browse Families & Roles, the value autopopulates from the Families and Roles library • Appears as an editable field on the short requisition create page, regardless of the user's read/write permissions • Appears on the internal job posting • Field is limited to 100 charcters
extTitle	text	• If records are created via Browse Families & Roles, the value autopopulates from the Families and Roles library • Appears on the external job posting • Will show a "Same as Internal" button in the user interface for all users with edit privileges. The button pulls the value from the internal title field into the extTitle field. This cannot be disabled. • Used in all job posting distribution integrations • Field is limited to 100 characters

Standard Field ID	Field Type	Special Functionality
listingLayout	richText	• Stores the internal job description • If records are created via Browse Families & Roles, the value autopopulates from the Families and Roles library • Appears on the internal job posting • Appears with rich text editor capabilities. Rich text editor capabilities cannot be configured to add to or remove capabilities. • Appears in the interviewer notification and some other emails • Not reportable • When Job Profile Builder integration is enabled, this field is audited (b1402). • When the Job Profile Builder integration is enabled, permissions from the listingLayout field override those of the extListingLayout field. (b1402) • Grants users with the appropriate permissions access to the Job Profile sub-tab. (b1402) • May be involved with other integrations (b1402). • Field is limited to 10,000 characters

Standard Field ID	Field Type	Special Functionality
extListingLayout	richText	• Used to store the external job description • If records are created via Browse Families & Roles, the value autopopulates from the Families and Roles library • Appears on the internal job posting • Appears with rich text editor capabilities. Rich text editor capabilities cannot be configured to add to or remove capabilities. • Will show a "Same as Internal" button in the user interface for all users who have edit privileges. The button pulls the value from the internal job description field into the extListingLayout field. This cannot be disabled. • Used in all job posting distribution integrations • Appears in job alert and other emails • Not reportable • Field is limited to 10,000 characters
jobRole	jobRole	• Gives users with the appropriate permissions the ability to update the requisition and select a different role using "Browse Families and Roles" in the Job Profile Builder integration.
jobCode	text	• If records are created via *Browse Families & Roles and Provisioning* > *Company Settings* > *Enable Job Code is checked*, then the value autopopulates from the Families and Roles library • Serves as the unique ID that joins Families and Roles data to the Job Classification Foundation Object data when the Job Code Entity functionality is used. For more information, see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section of this guide.

Standard Field ID	Field Type	Special Functionality
defaultLanguage	text	• Determines the default posting language of the requisition • In several functionalities, is part of the set of language-selection rules used to determine data display to candidates and recruiting users if the user's preferred language cannot be determined • Value of the field can either be set in the Requisition XML or the XML-specified default value can be overridden in *Admin Tools* > *Recruiting Settings* > *Use originator's preferred language as the default language of a new job requisition*
jobPostLanguage	text	• Enables the recruiting user to post requisitions in multiple languages • Values are populated from the supported-languages element in the Requisition XML. For more information see the supported-languages Element [page 257] section of this guide. • Selecting more than one value in this field produces a language toggle in the upper right hand corner of the requisition user interface that allows the user to toggle between languages and store translated values for other fields • Selecting values in this field causes the requisition to be searchable in those languages on the career sites

Standard Field ID	Field Type	Special Functionality
numberOpenings	number	• Allows the user to specify the number of openings on a requisition • When an Applicant is moved into a hired-category status (Hired, Onboard, Pre-Start, or Employee), the system automatically subtracts 1 from this field • Cannot provide any true position management functionality that involves handling position numbers with unique IDs • The client can choose to have requisitions automatically close when numberOpenings=0. Otherwise, the requisition must be manually closed when the final hire is made. For more information on configuring the automatic closing, see Manage Recruiting Settings [page 462].
candidateHired	date	• Should be configured without any user permissions to view or edit the field • If configured, produces a status bar next to the numberOpenings field showing the total number of openings and total number remaining
interviewGuide	attachment, multiattachment or multiattachmentselection	• If configured and populated with data, appears on the interview notification email and in the Interview Central Print and Go Pack

Standard Field ID	Field Type	Special Functionality
filter1-15	picklist	• Can be made searchable on candidate-facing career sites • If searchable, appears in other requisition search dialogue boxes, such as Forward Candidate to Requisition search • Should be configured as required, and use a picklist value of N/A or similar if clients want to be optional. Leaving this field unrequired can cause grey Application Error pop ups in unexpected places • Labels and picklist associations must be configured in *Provisioning* > *Internal and External Applicant Status Settings* • Should have a picklist defined in the XML even though the controlling picklist is set up in Provisioning. This will produce a warning message upon XML upload but will not block upload. XML picklist definition is necessary for some token rendering, report rendering and API interaction • Supports cascading (parent-child) picklists up to six levels deep

Standard Field ID	Field Type	Special Functionality
mfield1-15	picklist	• Can store multiple values in a single field • Requires a primary value to be specified. Primary value is used in integrations since most other systems cannot receive multiple values in a single field. • Can be made searchable on candidate-facing career sites • Labels and picklist associations must be configured in *Provisioning* > *Internal and External Applicant Status Settings* • Should have a picklist defined in the XML even though the controlling picklist is set up in Provisioning. This will produce a warning message upon XML upload but will not block upload. XML picklist definition is necessary for some token rendering, report rendering and API interaction • Supports cascading (parent-child) picklists up to five levels deep • If replacing a single-select field with a multi-select field, remove the single-select fields from configuration (taking note/documenting the field IDs for use in the script), add the multi-select fields from configuration, clone ticket DCOPS-44987 and adjust the script to request the contents of the single-select field be moved to the multi-select field. **Tip** Multi-select picklists (mfields) are not supported in the `<job-event-compact-view-fields>` field.

Standard Field ID	Field Type	Special Functionality
intStartDate	date	• Internal posting will work even if this field is not configured in the Requisition XML • Should be included in XML configuration if the client is importing legacy data from another system and wishes to include an internal posting start date • Normal field permissioning does not affect this field
extStartDate	date	• External posting will work even if this field is not configured in the Requisition XML • Should be included in XML configuration if the client is importing legacy data from another system and wishes to include an external posting start date • Normal field permissioning does not affect this field
intEndDate	date	• Internal posting will work even if this field is not configured in the Requisition XML • Should be included in XML configuration if the client is importing legacy data from another system and wishes to include an internal posting end date • Normal field permissioning does not affect this field
extEndDate	date	• External posting will work even if this field is not configured in the Requisition XML • Should be included in XML configuration if the client is importing legacy data from another system and wishes to include an external posting end date • Normal field permissioning does not affect this field
costOfHire	currency	• No automated cost of hire tracking supported • Used in the legacy Source Quality report

Standard Field ID	Field Type	Special Functionality
currency	enum	• Values must be specified in the XML; values cannot be controlled by client admins • Values must be valid ISO three-character currency codes. See the internet for a current list of acceptable codes. • The value selected in the currency field controls the symbol that appears on all fields defined as type="currency" elsewhere on the requisition • Must be configured in order to use Employee Referral.
erpAmount	currency	• Amount of Employee Referral reward • Value must be specified in the XML • Required for Employee Referral • If the currency field is only declared, erpAmount is required.

Standard Field ID	Field Type	Special Functionality
department division location	derived	• Values for these fields are automatically assembled based on the values present in the corresponding field on active and inactive users in the BizX user database • Can be made searchable on candidate-facing career sites • As with all fields other than mfields, multiple values cannot be selected • Do not need to be configured in the Requisition XML but it is strongly recommended • Whether or not these fields are configured in the Requisition XML, they appear in many places in the user interface such as requisition Display Options and Filter Options, Ad Hoc Reports, Offer Letter and Recruiting Email token lists and others. If not configured, they will appear blank to users • There is no way to add or remove a value from these fields other than adjusting the data stored on BizX user profiles. Some clients create dummy user accounts so that they can specify new values, and make special arrangements to clear out the values for inactive BizX users to avoid inactive values appearing • The standard recruiting reports use these fields but may be re-mapped to use other fields if necessary • As a result of the dependencies and limitations on these fields, some clients configure these fields and a duplicate set of fields to store the same set of business data with more robust field functionality like mfields or the jobCode field types • May show up as `type="enum"` in older XML files; this will work correctly but derived is now the proper field type. Relabeling is managed on a suite-wide level in the succession-data-model and/or *Admin Tools* > *Text Replacement*. Changes affect other modules besides Recruiting

Standard Field ID	Field Type	Special Functionality
questions	questions	• Places the pre-screen question section on the requisition that defines the pre-screen questions presented to a candidate during the apply process • Can only be permissioned as a whole. For example, it is not possible to hide the weight column or only allow users with edit access to select from the question library and block them from creating their own questions. • Not reportable • Cannot be re-labeled
competencies	competencies	• Places the competencies section on the requisition that defines the competencies that are presented to interviewers on the Interview Assessment form. For more information see the Interview Central [page 225] section of this guide. • Can only be permissioned as a whole; for example, it is not possible to hide the weight column • Not reportable • The expected rating and weight columns presently do not have any function even though they cannot be disabled
assessment	derived	• Enables third-party Assessment Integration. • Required for third-party assessment. • For additional information see the Assessment Integration [page 220] section
originatorName	operator	• Automatically captures the value of the user who created the requisition • Should not be configured to be editable by other users

Standard Field ID	Field Type	Special Functionality
hiringManagerName recruiterName sourcerName coordinatorName secondRecruiterName vpOfStaffingName	derived	• User lookup fields that provide a view into active BizX user directory • Provides users field level permissions on Requisition XML and Application XML – for more information, see the Decide on Recruiting Operators [page 50] section of this guide • Used in route maps • Only supports one user selection per field
<operator>Email	derived	• Each operator field has a correlating derived email field • Auto-populates with the content of the Employee Profile email standard-element for the user selected in the operator field • Used to populate the related tokens on the Offer Letter and Recruiting Email templates • Only Email, Phone and Fax data can be autopopulated from the operator's Employee Profile; no other Employee Profile data can be populated on the requisition
<operator>Phone	derived	• Each operator field has a correlating derived phone field • Auto-populates with the content of the Employee Profile businessPhone standard-element for the user selected in the operator field • Used to populate the related tokens on the Offer Letter and Recruiting Email templates • Only Email, Phone and Fax data can be autopopulated from the operator's Employee Profile; no other Employee Profile data can be populated on the requisition.

Standard Field ID	Field Type	Special Functionality
<operator>Fax	derived	• Each operator field has a correlating derived fax field • Auto-populates with the content of the Employee Profile fax standard-element for the user selected in the operator field • Used to populate the related tokens on the Offer Letter and Recruiting Email templates • Only Email, Phone and Fax data can be autopopulated from the operator's Employee Profile; no other Employee Profile data can be populated on the requisition.
hiringManagerTeam recruiterTeam sourcerTeam coordinatorTeam secondRecruiterTeam vpOfStaffingTeam vTeam		• User lookup fields that provide a view into active BizX user directory • Provides users field level permissions on Requisition XML and Application XML • Cannot be used in route maps • Only supports multiple user selections per field • Supports admin use of Recruiting Groups to assign users to the field • Labels are managed in the Requisition XML • For more information, see the Decide on Recruiting Operators [page 50] and Team Recruiting [page 331] sections of this guide
intranetPosting corporatePosting agencyPosting	bool	• Always configure in the Requisition XML • Can set posting status on legacy data migrated from other systems
intranetPrivatePosting externalPrivatePosting	bool	• Always configure in the Requisition XML • Can set posting status on legacy data migrated from other systems • Requires additional setup – for more information see the Internal and External Private Postings [page 347] section of this guide

Standard Field ID	Field Type	Special Functionality
formDueDate	date	• Used to send requisition approval reminder notifications using the Document Due Notification template in *Admin Tools* > *E-Mail Notification Templates Settings* • Populated by the settings in *Admin Tools* > *Form Templates* • Cannot be disabled; field will still show on the short requisition create page even if this field is not configured on the Requisition XML • If configured on the XML, the date in the field can be shown on the requisition record
classificationType	enum	• Used in some third party integrations such as eQuest • Values must be specified in the XML; values cannot be controlled by client admins. • Allowable values are PERMANENT, CONTRACT, CONTRACTPERMANENT and INTERN; these values can be removed or re-labeled but no additional values can be defined
classificationTime	enum	• Used in some third party integrations such as eQuest • Values must be specified in the XML; values cannot be controlled by client admins • Allowable values are FULLTIME and PARTTIME; these values can be removed or re-labeled but no additional values can be defined
eeoJobCat	Picklist	• Used in standard recruiting reports
industry	enum	• Used in some third party integrations such as eQuest • Values are managed under *Admin Tools* > *Set up Job Board Options*. Values can only be enabled or disabled; no new values can be added. The value list is provided by eQuest

Standard Field ID	Field Type	Special Functionality
function	text	• Used in some third party integrations such as eQuest • User interface is a type-ahead prompt. The value list is provided by eQuest and cannot be changed • Best practice is to configure some instructional text to tell the user to expect the type-ahead interface since this is non-standard from the other requisition fields
city	text or picklist	• Used in some third party integrations such as eQuest • Used in standard recruiting reports • No standard city list available
stateProvince	derived	• Used in some third party integrations such as eQuest • Used in standard recruiting reports • Standard state list appears automatically when countries are configured in *Admin Tools* > *Set up Job Board Options*. If only selected state values are desired, set up individual states in addition to setting up countries
postalcode	text or picklist	• Used in some third party integrations such as eQuest • Used in standard recruiting reports • Used in radial search
salRateType	enum	• Values must be specified in the XML; values cannot be controlled by client admins
customDate1-5	jobCode	• Values can be autopopulated using Job Code Entity functionality. For more information see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section of this guide. • Renders in the user interface as a date field • As with other non-filter/mfield fields, this field cannot be made searchable

Standard Field ID	Field Type	Special Functionality
customLong1-5	jobCode	• Values can be autopopulated using Job Code Entity functionality. For more information see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section of this guide. • Renders in the user interface as a numeric field — can only accept whole integers, no decimals. • As with other non-filter/mfield fields, this field cannot be made searchable
customString1-15	jobCode	• Values can be autopopulated using Job Code Entity functionality. For more information see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section of this guide. • Renders in the user interface as a text or picklist field depending on the configuration of the corporate-data-model • As with other non-filter/mfield fields, this field cannot be made searchable
packageId	text or picklist	• Used in some third party integrations such as Verifications Inc.
costCenterId	text or picklist	• Used in some third party integrations such as eQuest and Verifications Inc.
bgiAccountId	text or picklist	• Used in some third party integrations such as Verifications Inc.
onboardingPackageId	text or picklist	• Used in some third party integrations such as Verifications Inc.
intJobDescHeader intJobDescFooter extJobDescHeader extJobDescFooter	richText	• Value can be selected from the Header and Footer Templates library • Appears on the internal and external job postings, respectively • Appears with rich text editor capabilities. Rich text editor capabilities cannot be configured to add to or remove capabilities. • Appears in the interviewer notification and some other emails • Not reportable

Standard Field ID	Field Type	Special Functionality
positionNumber	text	• When a requisition is created from the Succession org chart, Succession Management will populate this field with the appropriate position number

Related Information

Job Requisiiton Standard Field Guide

Job Requisition for Standard Field Guide for Partners

11.5.3.2 type Attribute

```
<field-definition id="title" type="text" required="true" custom="false">
```

Recommendation

Do not change the field type of a field; this can cause application errors on existing records storing data that do not match the new field type.

The type attribute defines the data that the system will accept in the field. It consists of the following options:

- *text:* a single line of alphanumeric text with a 100-character limit (character limit and display are non-configurable).) Each text field can store one value per locale, allowing the user to toggle between languages to enter data in various locales
- *textarea:* multiple lines of alphanumeric text with a 256-character limit, displayed as a 100-character-wide box (character limit and display are non-configurable.) Each textarea field can store one value per locale, allowing the user to toggle between languages to enter data in various locales
- *date:* a date manually entered by user or selected from calendar pull-down. Displays mmddyyy or ddmmyyyy according to user's chosen language pack
- *percent:* a percent value with one decimal
- *bool:* true or false (shown as a check box); should not be made required because if required, always needs to be checked
- *enum:* an enumerated type (shown as a pull-down list) where values are defined in the XML
- *number:* a number value with two decimal places, formatted by locale
- *currency:* a currency value, where currency symbol is determined by the field id "currency"
- *picklist:* field options come from a picklist defined in admin (shown as a pull down list)
- *derived:* a pull-down or "find value" field (depending on length of list) where values are automatically determined from another area of the system
- *instruction:* a non-editable field that stretches left-to-right across the screen, used to display messages to users. Cannot be made reportable or writable or an error will result.

- *attachment:* a field that can have a single document uploaded and attached to it.
- *multiattachment:* a field that can have multiple documents uploaded and attached to it.
- *multiattachmentselection:* a field that supports the upload of multiple documents attachments. Acts as a mini library where all documents uploaded are stored for later re-use without requiring they be uploaded again. This means there is an additional check box next to all uploaded files and that checkbox must be selected in order to actually attach the document to the record.
- *richText:* alphanumeric lines with about a 32,000 character limit, which includes hidden characters used to define html formatting (character limit and display are non-configurable.) Each richText field can store one value per locale, allowing the user to toggle between languages to enter data in various locales
- *hyperlink:* stores a URL and text to display in place of the URL
- *jobCode:* field that can have data autopopulated from the Job Classification Foundation Object when a requisition is created via Browse Families and Roles. For more information see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section of this guide.
- *questions:* special field type that can only be defined once per requisition template and only on the "questions" field id Places the pre-screen questions section onto the requisition. For more information see the Requisition Pre-Screen Questions [page 322] section of this guide.
- *competencies:* special field type that can only be defined once per requisition template and only on the "competencies" field id. Place the competencies section onto the requisition. For more information see the Interview Central [page 225] section of this guide.

operator: special field type that can only be defined on a particular pre-defined list of field ids. For more information see the Decide on Recruiting Operators [page 50] section.

operatorTeam: special field type that can only be defined on a particular pre-defined list of field ids. For more information see the Team Recruiting [page 331] section of this guide.

11.5.3.3 required Attribute

```
<field-definition id="title" type="text" required="true" custom="false">
```

This attribute defines if a field is required for completion of a requisition record. The field requirement is only enforced if the user editing the requisition can write to the field during their edit. If the field is hidden or read only to the user during editing, the field being blank will not prevent the user from saving the requisition.

Allowable values for the required field are "true" or "false". Fields cannot be conditionally required on the requisition record.A field cannot be hidden, displayed, or made required based on the answer to an earlier field. You cannot ask a question like, "Is this a replacement requisition?" and then display or require a "Person Being Replaced" field if the recruiting user selects yes. The suggested workarounds are:

- Make the "Person Being Replaced" field unrequired and rename it something like "If yes, specify the Person Being Replaced"
- Make the "Person Being Replaced" field required and rename it something like "If yes, specify the person being replaced (enter N/A if not applicable)"

11.5.3.4 custom Attribute

```
<field-definition id="title" type="text" required="true" custom="false">
```

There are some field IDs that are reserved as standard fields. You do not need to include them in the XML configuration but if used they must have the appropriate corresponding field type and be marked as custom="false". All other field IDs should be marked custom="true".

11.5.3.5 group-name Attribute

```
<field-definition id="recruiterName" type="operator" required="true"
custom="false" group-name="Recruiters">
```

On operator and operatorTeam field types, the client may not want to allow recruiting users to select from any active BizX user. By specifying a group-name attribute, you limiting the available users in this field to only users defined in this Recruiting Group.

There are exceptions to this when an admin is setting up operatorTeam defaults. For more information on that exception, see the Team Recruiting [page 331] section of this guide.

For more information about setting up Recruiting Groups, see the Recruiting Groups [page 63] section of this guide.

The group-name attribute is an optional attribute and is only supported on fields that are type="operator" or type="operatorTeam".

11.5.3.6 field-label Element

```
<field-label mime-type="text-plain"><![CDATA[Business Title]]></field-label>
```

The field-label element usually controls the appearance of the field name in the user interface. However, not all field labels in the user interface are controlled by this label element. On certain fields, the succession data model controls the field label, or on other fields there are Provisioning settings that control the label used in the system.

The label element is not conditional — it is not possible for one field to display one label to hiring managers and a different label to recruiters.

The field-definition element must contain at least one field-label element.

mime-type Attribute

```
<field-label mime-type="text-plain"><![CDATA[Business Title]]></field-label>
```


Mime-type determines whether or not the system will render html tags defined in the CDATA content. The two supported mime types are:

- *text-plain* Plain text, unformatted.
- *text-html* HTML-formatted text.

CDATA Content

The CDATA content is configurable to contain the client's preferred text.

```
<field-label mime-type="text-plain"><![CDATA[Business Title]]></field-label>
```

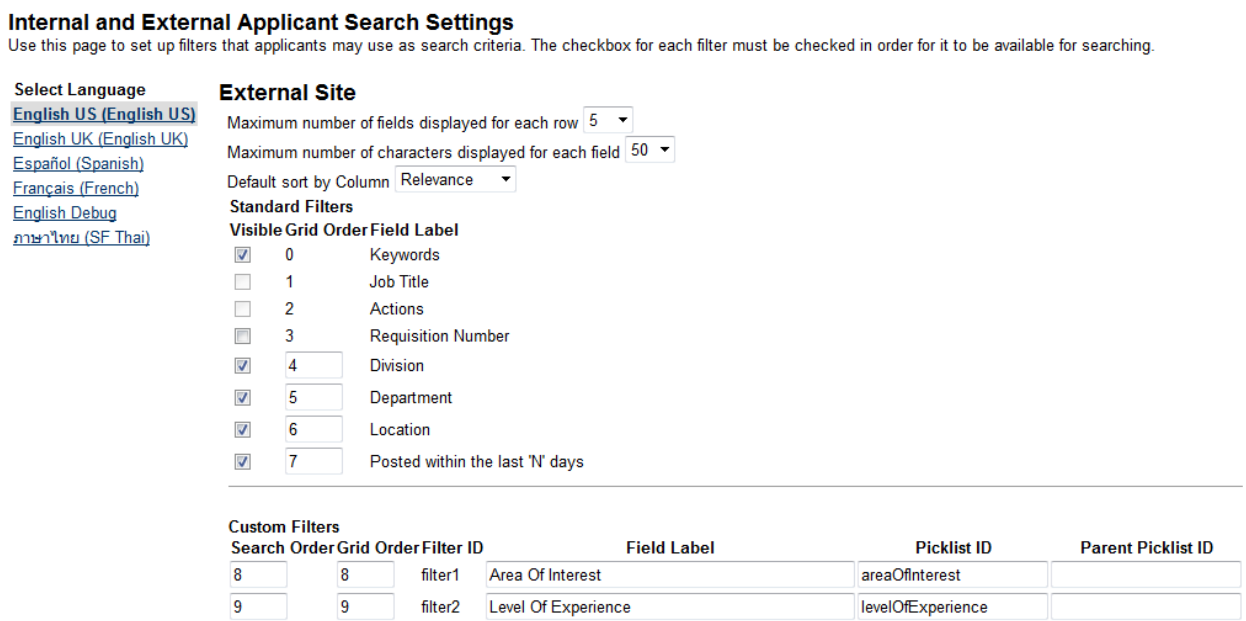
> **Tip**
>
> Use the following HTML in the CDATA value to define a table with a background color to separate sections of the requisition. Replace the background color hexcode with the client's preferred brand color, and replace the field label as appropriate to the field.
>
> ```
> <table frame="border" width="100%"> <tr><td style="background-color:#6699FF"
> valign="bottom">FIELD LABEL</td></tr> </table>
> ```

11.5.3.7 Internal and External Applicant Search Settings

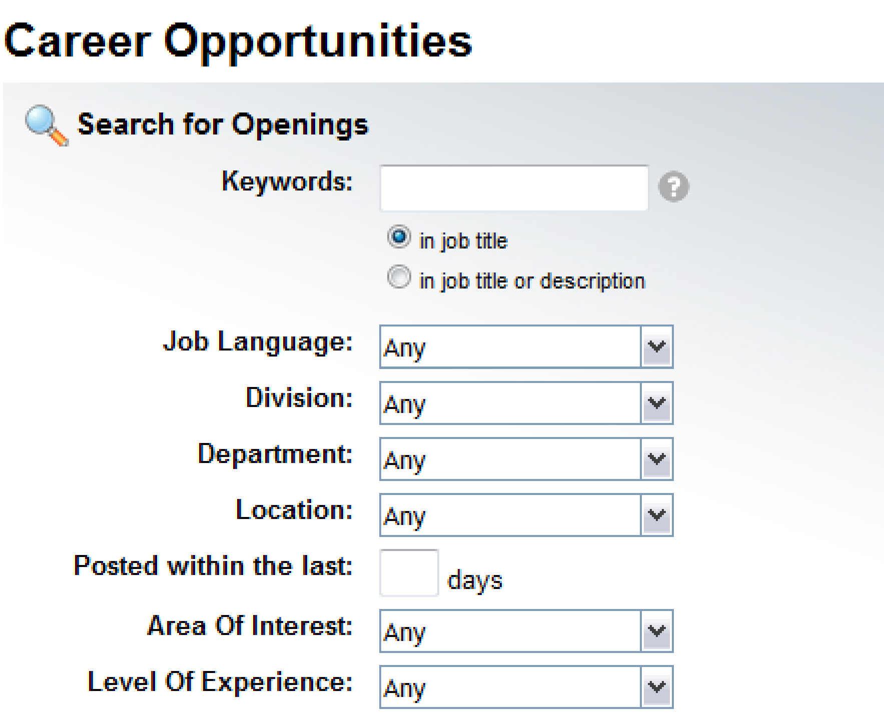
If filter or mfield ids are used in the Requisition XML, the Internal and External Applicant Search Settings must be configured before the Requisition XML can be uploaded into the instance. Among other things, these settings determine the labels and picklists used on filter fields and mfields.

If the instance contains multiple Requisition XML templates, the templates should use the same filter and mfield definitions, including the same field labels and picklists, to avoid conflicts between templates. If a filter or mfield is not used on a Requisition XML template it can be de-permissioned from all recruiting operators. All filters and mfields should be configured to be required, to avoid grey Application Error pop ups in the instance.

The search settings in *Provisioning* > *Internal and External Applicant Search Settings* control the fields applicants view and use as search criteria when searching for requisitions.



Internal and External Applicant Search Settings



Career Site Search Options

Table 19:

Setting	Behavior
Maximum number of fields displayed for each row	Specifies how many fields are shown, left to right, in the search results before the information wraps to the next line
Maximum number of characters displayed for each field	Specifies how many characters are shown before the data trails off into an ellipsis…

Setting	Behavior
Default sort by Column	Specifies the field search results are sorted by when they are first returned. Candidates can select any other filter field to sort by if they wish
Visible (on standard fields)	Specifies whether a standard field will show as a search option to candidates
Grid Order	Specifies if a searchable field will also appear in the search results table and, if so, in what order (from left to right). Setting this field to zero causes it to be omitted from the search results table
Field Label	Specifies the field label that will be seen in Requisition Details and the Career Site search options
Search Order	Specifies whether a field will appear in the Career Site search options and, if so, in what order (from top to bottom). Setting this field to zero causes it to be omitted from the search options
Picklist ID	Specifies to which picklist the field is associated. The picklist association in the Requisition XML is mostly ignored; the picklist association must be made in this spot in order for the Requisition XML to load correctly in Provisioning. The picklist association in the XML should exist in any case, to ensure proper reporting data.
Parent Picklist ID	Specifies to which parent picklist the field is associated, if the field is a cascading (child) field. The picklist association in the Requisition XML is mostly ignored; the picklist association must be made in this spot in order for the Requisition XML to load correctly in Provisioning. The picklist association in the XML should exist in any case, to ensure proper reporting data.
Person to Display in Search Results internal site	Specifies which, if any, operator should be listed as the contact person on the job posting for internal candidates conducting a job search. This option is not available for external candidates.

Be cautious when removing or changing the picklists associated to a filter or mfield. Candidate saved searches and job alerts that rely on that field configuration may cease to function if the configuration is changed.

11.5.4 field-permission Elements

```
<field-permission type="write">
```

Field permissions determine which fields a recruiting user sees in a specific requisition state.

Field permissions are read and applied top to bottom in the order they appear in the XML template, meaning the later permissions override the former in case of conflict. For example, you can define all the read permissions for all operators first and the write permissions after all read permissions are set up. That way if there are any conflicts between permissions, the greater permissions rule.

The best practice is to set up a separate permission block for each operator, defining the appropriate permissions, even if two operators have the same permission set. The reason this is best practice is that it makes it easy for Customer Success to later make small changes to the permission structure at the client's request. Permission structures that group field permissions together for different operators are significantly more difficult to adjust at a later date without Professional Services.

> **Tip**
>
> Three permission blocks for the "J" recruiting operator will be automatically added to all Requisition XML templates upon upload into Provisioning. The J recruiting operator is used to ensure the report schemas have the appropriate permissions to the fields.

XML Sample

Note that this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
   <field-permission type="write">
     <description><![CDATA[Hiring Manager and Upline Edit Permissions]]></
description>
     <role-name><![CDATA[G]]></role-name>
     <role-name><![CDATA[GM+]]></role-name>
     <status><![CDATA[pre-approved]]></status>
        <field refid="jobPostLanguage"/>
        <field refid="title"/>
        <field refid="replacementFor"/>
   </field-permission>
```

type Attribute

```
   <field-permission type="read">
```

The type attribute of the field permission element determines what kind of permissions are applied in the permissions block. The type attribute must be set to one of the following types:

- *read:* the field can be read by internal and external users in the specified roles, only applicable to open requisitions
- *write:* the user can read and write the fields, after the requisition is open

There is no "none" or "hide" type — removing a field from view is accomplished by omitting it from any permission blocks.

description Element

```
<description><![CDATA[Hiring Manager and Upline Edit Permissions]]></description>
```

The description element is most useful as a brief description of what the field permission block is intended to do. This is an optional element. Only one description element can be contained within the field-permission element.

role-name Element

```
<role-name><![CDATA[G]]></role-name>
```

- The role-name element defines which operators are affected by the permission block. Multiple role elements are supported within each permission block. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

status Element

```
<status><![CDATA[pre-approved]]></status>
```

The only conditional control available over field permissioning is via the requisition state, where field permissions can be adjusted based on whether the requisition is pending approval, has already been closed, etc. At present there is no way to change field permissioning based on route map step or other variables.

Allowable status CDATA values are:

- pre-approved
- approved
- closed

field Element and refid Attribute

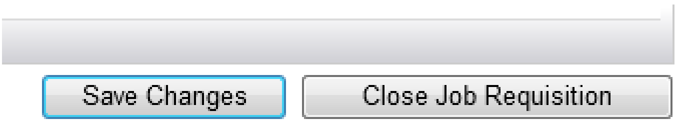
```
<field refid="title"/>
```

Specify all field IDs that should be affected by the permission block.

11.5.5 button-permission Element

```
<button-permission>
```

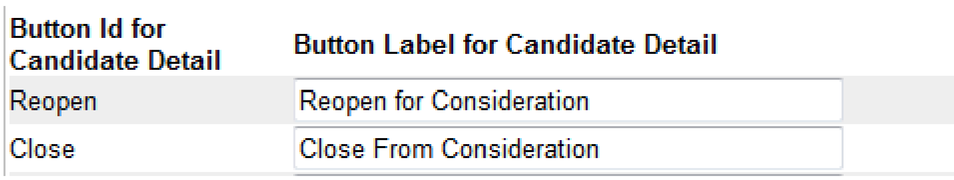
The Close and Reopen requisition buttons are permissionable. The button-permission element defines who can access and use these buttons in the user interface.



Buttons on an Open Requisition

Buttons on a Closed Requisition

The labels on buttons are configurable in *Provisioning* > *Job Requisition System Field Labels*.



Requisition Buttons Field Labels

The Close button natively only appears in the requisition state of "approved" and the Reopen button only appears in the requisition state of "closed", so there is no status element supported in button-permissions.

description Element

```
<description><![CDATA[Allow recruiters to close reqs]]></description>
```

The description element is most useful as a brief description of what the button permission block is intended to do. This is an optional element. Only one description element can be contained within the button-permission element.

role-name Element

```
<role-name><![CDATA[G]]></role-name>
```

- The role-name element defines which operators are affected by the button permission block. Each permission block supports multiple role elements. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

field Element and refid Attribute

```
<button-id><![CDATA[reopenReq]]></button-id>
```

XML Sample

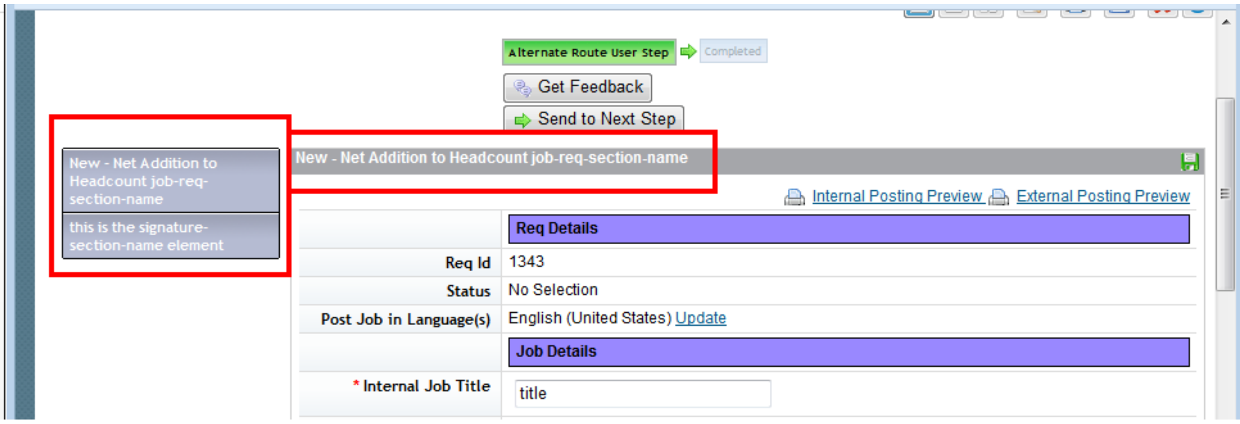
Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

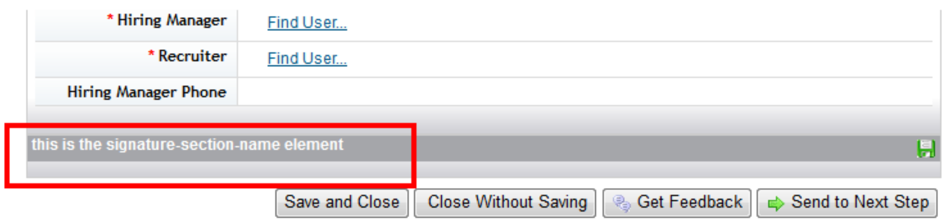
https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<button-permission>
  <description><![CDATA[]]></description>
  <role-name><![CDATA[R]]></role-name>
  <role-name><![CDATA[T]]></role-name>
  <role-name><![CDATA[W]]></role-name>
  <button-id><![CDATA[closeReq]]></button-id>
  <button-id><![CDATA[reopenReq]]></button-id>
</button-permission>
```

11.5.6 job-req-section-name and signature-section-name Elements

There are two types of section names you may configure: the job-req-section-name element that defines the string for the job req section header, and the signature-section-name element that defines the string for the signature section.





Section Names in Requisition

Please note that you cannot add or modify a section name after creating a template. To modify an existing section name or create a new one, you must upload the Requisition XML and change the template name in the template-name and template-name-lang elements.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<job-req-section-name><![CDATA[New - Net Addition to Headcount]]>
</job-req-section-name>
<signature-section-name><![CDATA[this is the signature-section-name element>
</signature-section-name>
```

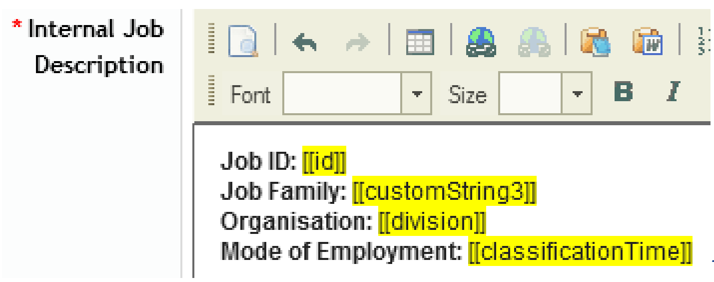
11.5.7 listing-fields Element

Clients may want to reference requisition fields as tokens (variables) in their job descriptions, headers and footers. Most fields in the requisition can be set up as a tokenby adding the field id to the listing-fields element.

<*listing-fields*>

Only one listing-fields section is supported in the Requisition XML.

Insert Job Requisition Field Token Selector



Tokens in a Job Description

field Element and refid Attribute

```
<field refid="title"/>
```

Specify all field IDs that should be affected by the listing fields block. The listing-field block supports multiple field elements.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<listing-fields>
  <field refid="title"/>
  <field refid="jobCode"/>
  <field refid="customString1"/>
  <field refid="customString2"/>
  <field refid="customString3"/>
  <field refid="customString4"/>
  <field refid="customString5"/>
```

```
    <field refid="customString6"/>
    <field refid="classificationTime"/>
</listing-fields>
```

11.5.8 mobile-fields Element

<mobile-fields>

In order for an approver to review and approve a requisition via the BizX Mobile application, you must define the fields available in the mobile view in the Requisition XML. Additional setup is required — for more information, see the Route Requisition to Next Step [page 459] section of this document.

The mobile-fields element defines the fields that show on the mobile screen during requisition approval.

mobile-fields Element

<mobile-fields>

The Requisition XML supports only one mobile-fields section.

field Element and refid Attribute

<field refid="title"/>

Specify all field IDs that should be affected by the mobile fields block. Mobile-fields support multiple field elements. If more than 50 fields are configured in this section, the user can experience errors with the mobile app, but the functional limit is much lower than 50 since a large number of fields creates a lot of scrolling and becomes unwieldy.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<mobile-fields>
    <field refid="id"/>
    <field refid="hiringManagerName"/>
    <field refid="title"/>
    <field refid="customString2"/>
    <field refid="location"/>
```



```
    <field refid="costCenterId"/>
    <field refid="addReplace"/>
    <field refid="replacementFor"/>
    <field refid="budgetSal"/>
    <field refid="targetedSal"/>
    <field refid="targetBonusPercent"/>
</mobile-fields>
```

11.5.9 offer-letter-fields Element

<*offer-letter-fields*>

In instances where *Provisioning* > *Company Settings* > *Enable Offer Approval* is checked, this section should be removed from the Requisition XML entirely. If this section remains and contains certain disallowed fields, an error message will display when a recruiting user attempts to create an offer letter:

```
Error. The following fields require a valid input: <bulleted field list>
```

In instances where *Provisioning* > *Company Settings* > *Enable Offer Approval* is unchecked, this section defines the fields that appear on the left side of the offer letter generation screen for input anduse as tokens in the offer letter.

field Element and refid Attribute

<*field refid="title"*/>

Specify all field ids that should be affected by the offer-letter-fields block.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<offer-letter-fields>
  <field refid="title"/>
</offer-letter-fields>
```

11.5.10 assessment-scale Element

<*assessment-scale* reverse-scale="false">

Recruiters can rate applicants on competencies as part of the Interview Central process. Additional setup is required for provide interview assessment functionality. For more information see the Interview Central [page 225] section of this guide.

The assessment scale element defines the rating scale that will be used to assess all applicants interviewed on this requisition via Interview Central.

reverse-scale Attribute

Some clients have their instances set up such that the rating scales are reversed; 1 is the highest possible rating instead of the lowest. For such a client, the reverse-scale attribute ensures that Interview Central respects that same logic.

```
<assessment-scale reverse-scale="false">
```

scale-id Element

```
<scale-id><![CDATA[Interview Scale]]></scale-id>
```

Associates a rating scale to the requisition to determine what rating numbers and labels are used in Interview Central. The rating scale must already be configured in the instance. The exact name of the rating scale, including correct capitalization, spacing and punctuation must be used. Avoid special characters.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

11.5.11 Set application status configuration

```
<application-status-config>
```

The application-status-config element defines the applicant status set for requisitions created from this XML template. The applicant status set is used to manage the steps through which applicants are routed during the hiring process, and manages the interaction between statuses and feature permissions (and, in multi-stage application environments, it also manages the interaction between statuses and application field-permissions).

11.5.11.1 XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<application-status-config>
  <application-status-set name="Candidate Workflow"/>
  <field-permission type="write">
    <description><![CDATA[Write Permissions]]></description>
    <role-name><![CDATA[R]]></role-name>
    <role-name><![CDATA[G]]></role-name>
    <status><![CDATA[Default]]></status>
    <status><![CDATA[Interview]]></status>
    <status><![CDATA[Hired]]></status>
    <field application-field-id="recruiterPhoneScreenDate"/>
    <field application-field-id="screeningNotes"/>
  </field-permission>
  <feature-permission type="interviewAssessment">
    <description><![CDATA[Users can launch interview assessment]]></description>
    <role-name><![CDATA[R]]></role-name>
    <role-name><![CDATA[G]]></role-name>
    <status><![CDATA[Interview]]></status>
  </feature-permission>
</application-status-config>
```

11.5.11.2 application-status-set Element and name Attribute

```
<application-status-set name="Candidate Workflow"/>
```

Specify the applicant status set name to use on requisitions created with this Requisition XML template.

11.5.11.3 field-permission Element

```
  <field-permission type="write">
    <description><![CDATA[Write Permissions]]></description>
    <role-name><![CDATA[R]]></role-name>
    <role-name><![CDATA[G]]></role-name>
    <status><![CDATA[Default]]></status>
    <status><![CDATA[Interview]]></status>
    <status><![CDATA[Hired]]></status>
    <field application-field-id="recruiterPhoneScreenDate"/>
    <field application-field-id="screeningNotes"/>
  </field-permission>
```

Field permission elements should only be declared within the application-status-set element if the instance is set up with *Provisioning* > *Company Settings* > *Recruiting V2 Application* > *Enable Multi Stage Application checked*. If this setting is unchecked, the permissions will be read out of the Application XML instead. If this setting is checked, all field-permissions in the Application XML should be commented out or removed except for the write permissions to the statusId field. If contradicting field permissions are specified in both the Application XML and Requisition XML the permissions may not be rendered correctly for recruiting users.

An unlimited number of field-permission elements can be included in the Requisition XML.

For more information about multi-stage application, see the Multi-Stage Application [page 95] section of this guide.

type Attribute

```
<field-permission type="read">
```

The type attribute of the field permission element determines what kind of permissions are applied in the permissions block. The type attribute must be set to one of the following types:

- *Read:* the field can be read by internal and external users in the specified roles, only applicable to open requisitions
- *Write:* the user may both read and write the fields, this is after the requisition is open

There is no "`none`" or "`hide`" type. To remove a field from view, omit it from any permission blocks

description Element

```
<description><![CDATA[Write Permissions]]></description>
```

role-name Element

```
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[G]]></role-name>
```

- The role-name element defines which operators are affected by the permission block. Each permission block supports multiple role elements. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

status Element

```
<status><![CDATA[Default]]></status>
<status><![CDATA[Interview]]></status>
<status><![CDATA[Hired]]></status>
```


In a multi-stage application environment, field permissions can be adjusted based on whether the applicant is in Interview, Offer, etc. There is no way to change field permissioning or hide/display fields based on application or requisition data.

Each permission block supports multiple status elements.

> **Tip**
>
> All statuses defined in the Applicant Status Workflow must be declared in the XML.

The status CDATA must be set to the Name of Status value set up in *Admin Tools* > *Edit Applicant Status*. Attempting to use the Internal Label or Candidate label from that same screen will not work.

field Element and application-field-id Attribute

```
<field application-field-id="recruiterPhoneScreenDate"/>
<field application-field-id="screeningNotes"/>
```

Specify all field IDs that should be affected by the permission block. The asterisk is also supported to indicate “all” fields.

required Element

```
<field application-field-id="baseSalary" required="true"/>
```

Certain fields may need to be made unrequired and available in most statuses, but then become required at a certain point in the status workflow. The required attribute can be added to the field application-field-id element to specify that the ordinarily non-required field should be required in that status.

11.5.11.4 feature-permission Elements

```
<feature-permission type="interviewAssessment">
  <description><![CDATA[Users can launch interview assessment]]></description>
  <role-name><![CDATA[R]]></role-name>
  <role-name><![CDATA[G]]></role-name>
  <status><![CDATA[Interview]]></status>
</feature-permission>
```

Feature permissions define operator access to certain special functionalities. An unlimited number of feature-permission elements can be included in the Requisition XML.

type Attribute

```
<feature-permission type="interviewAssessment">
```

- *candQuestions:* In multi-stage application environments, this must be permissioned to the C operator in the Default status to allow the applicant access to the pre-screening questions during the initial application process. This should not be used in single-stage application environments, permissioned to any other operators or set up in any other applicant status. For more information see the Requisition Pre-Screen Questions [page 322] and Completing Application Pre-Screen Questions [page 312] sections of this guide.
- *lateStageApp:* In late stage application environments, this causes an Invite to Apply button to appear on the application page, and an Invite to Late-Stage Application option to appear in the Actions menu for applicants who have been forwarded and then added to the requisition, but have not yet completed an application. For more information see the Late Stage Application section of this guide.
- *interviewAssessment:* Provides access to the Interviewers portlet on the application page, including the ability to set up interviewers and view all ratings after interview assessments are completed. For more information see the Interview Central [page 225] section of this guide.
- *offerApproval:* Provides access to the Offer Approval action in the Offer menu on the application page. For more information see the Offer Approval [page 382] section of this guide.
- *offerLetter:* Provides access to the Offer Letter action in the Offer menu on the application page. For more information see the Offer Letters [page 401] section of this guide.
- *onboarding:* Provides access to the Onboarding option on the application page. For more information see the External Third Party Integrations [page 626] section of this guide.
- *assessmentIntegration:* Provides access to the assessment integration portlet on the application page. For more information see the Assessment Integration [page 220] section of this guide.

description Element

```
<description><![CDATA[Interview Permissions]]></description>
```

The description element is most useful as a brief description of what the field permission block is intended to do. This is an optional element. Only one description element can be contained within the field-permission element.

role-name Element

```
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[G]]></role-name>
```

- The role-name element defines which operators are affected by the permission block. Each permission block supports multiple role elements. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

status Element

```
<status><![CDATA[Default]]></status>
<status><![CDATA[Interview]]></status>
<status><![CDATA[Hired]]></status>
```

The only conditional control available over feature-permissioning is via the applicant status, where field permissions can be adjusted based on whether the applicant is in Interview, Offer, etc. There is no way to change field permissioning based on other application or requisition data.

Each permission block supports multiple status elements.

The status CDATA must be set to the Name of Status value set up in *Admin Tools* > *Edit Applicant Status*. Attempting to use the Internal Label or Candidate label from that same screen will not work.

11.5.12 application-template-name Element and name Attribute

```
<application-template-name name="Candidate Detail Info Template"/>
```

The application template name element defines which Application XML template will be presented to candidates and recruiting users when managing applications on requisitions created from this Requisition XML template. After the Requisition XML is created, this should not be changed or it may cause errors on existing and/or new records.

11.5.13 candidate-email-permission Element and type Attribute

```
<candidate-email-permission type="candidateEmail">
```

By default all operators can access the Email button on the application record. If the client wishes to restrict certain operators from accessing the email button, this element can be added to the Requisition XML and only permissioned users with access to the Email button. This can only be declared once in the Requisition XML template and cannot be permissioned by status.

11.5.13.1 description Element

```
<description><![CDATA[Interview Permissions]]></description>
```

The description element is most useful as a brief description of what the field permission block is intended to do. This is an optional element. Only one description element can be contained within the field-permission element.

11.5.13.2 role-name Element

```
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[G]]></role-name>
```

- The role-name element defines which operators are affected by the permission block. Each permission block supports multiple role elements. The role-name CDATA content must contain only valid roles and relational roles such as O, R, RM, GH, etc. For more information about valid roles, see the Decide on Recruiting Operators [page 50] section of this guide.

11.5.13.3 XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Requisition blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<candidate-email-permission type="candidateEmail">
  <description><![CDATA[Recruiters can email candidate.]]></description>
  <role-name><![CDATA[R]]></role-name>
</candidate-email-permission>
```

11.6 Defining reportable custom fields

Navigate to *Provisioning* > *Configure Reportable Custom Fields* and configure your fields. For more information, see the Reportable Custom Fields [page 66] section of this guide.

11.7 Configuring custom tokens

Navigate to *Provisioning* > *Configure Custom Tokens* and configure your fields. For more information, see the Custom Tokens [page 65] section of this guide.

11.8 Enabling the requisition audit trail

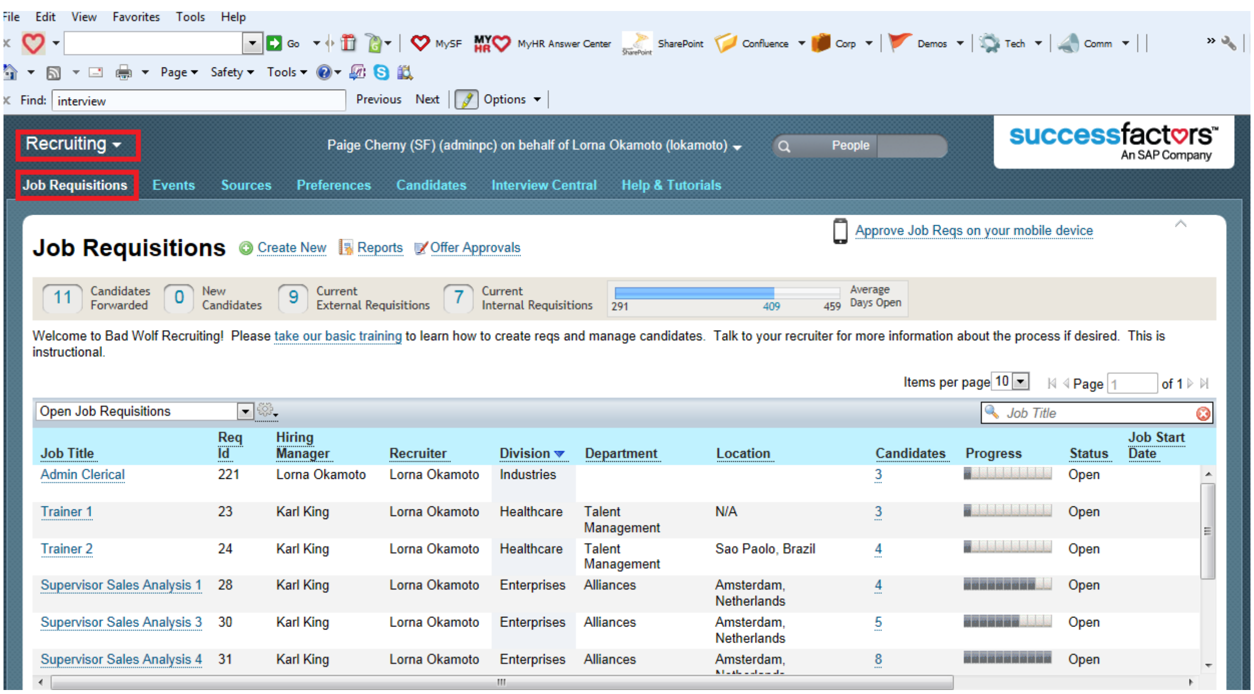
Admin Tools > *Recruiting Settings* > *Enable change tracking and display for Job Requisition data and Job Postings*

11.9 Working with Job Requisitions

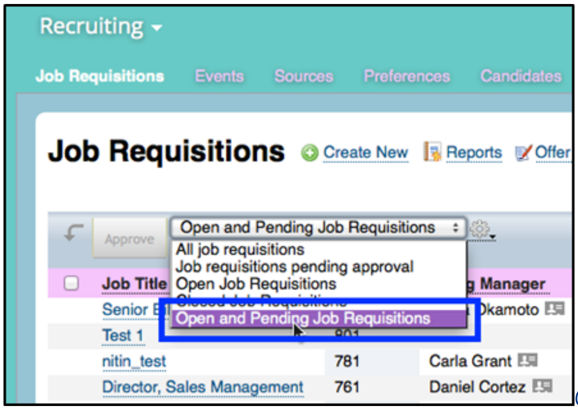
11.9.1 Requisition List Page

When a recruiting user navigates to Recruiting, the Job Requisitions tab is the default landing page. This may vary if the recruiting user does not have permissions for this tab, but is otherwise not configurable.

The requisition list page displays all the requisitions to which the recruiting user has access, and navigational elements to interact with the requisitions.



Requisition List Page



Open and Pending Job Requisitions Option

The new “Open and Pending Job Requisitions” option on the Requisition State dropdown allows the user to view the full list of open requisitions and those requisitions pending approval.

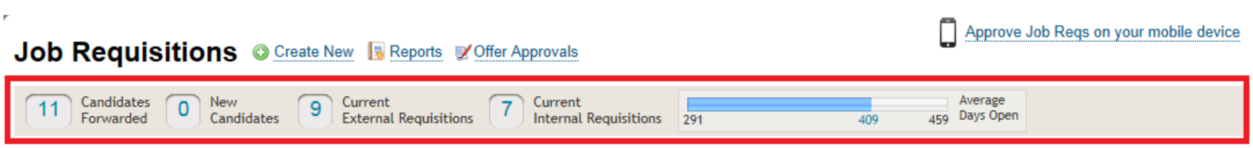
There are two versions of the requisition list page. The older version should no longer be used — ensure that clients are using the newest version by following the configuration instructions below.

Pre-Requisites

- *Provisioning* › *Company Settings* › *Recruiting Application*

11.9.2 Recruiting YouCalc Widget

The top of the requisition list page displays a graphical representation of requisition data.



Recruiting YouCalc widget

Pre-Requisites

- *Provisioning* › *Company Settings* › *Recruiting Application*
- *Provisioning* › *Company Settings* › *Enable YouCalc for Analytics*
- Requisition XML is configured, loaded and tested

Configuration

1. *Provisioning* > *Company Settings* > *Enable YouCalc Model for Job Requisition*
2. Grant a user permissions to manage YouCalc Models.
   a. *Non-RBP:* *Admin Tools* > *Administrative Privileges* > *YouCalc Models*
   b. *RBP:* *Admin Tools* > *Manage Permission Roles* > *Role* > *Permissions* > *Manage Reports and Dashboards*
3. *Admin Tools* > *Manage YouCalc Dashboards* > *Upload New Dashboard*
4. Populate the following information:

Table 20:

Field	*Content*
Dashboard Name	Recruiting Metrics Bar
Description	Optional – enter anything
Dashboard Type	Recruiting
Choose File	Download the latest version of the file from the YouCalc Library and upload it here

Working with the Recruiting YouCalc Widget

The YouCalc widget is interactive, acting as a method to filter the requisition list to view only requisitions that meet certain criteria.

Table 21:

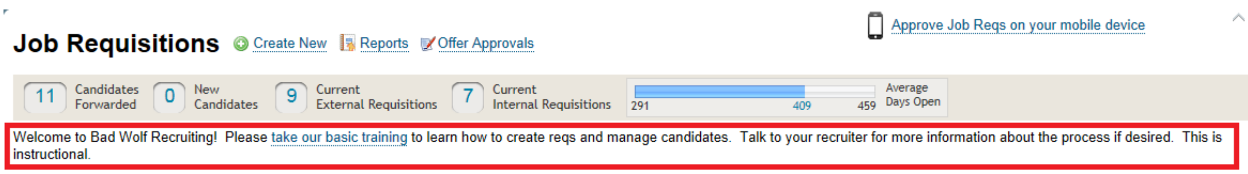
Metric	*Functionality*
Candidates Forwarded	Displays the number of candidates in the Forwarded or Invited to Apply statuses. Clicking filters the requisition list to only requisitions containing applicable candidates
New Candidates	Displays the number of applicants the viewing recruiting user has never clicked on. Clicking this filters the requisition list to only requisitions containing applicable candidates
Current External Requisitions	Displays the number of requisitions presently posted to the external career site. Clicking filters the requisition list to only applicable requisitions.
Current Internal Requisitions	Displays the number of requisitions presently posted to the internal career site. Clicking filters the requisition list to only applicable requisitions.
Average Days Open	Averages the age of all Approved requisitions and shows the average on a scale of 0 – oldest. Users do not interact with this metric as a navigational element.

Use the *Clear all filters* link to return to a non-filtered view of the requisition list.

The contents of the YouCalc widget are not configurable; the same metrics display for all clients. The widget is not permissionable. If enabled, it appears for all users with access to the requisitions tab.

11.9.3 Instructional text

Clients may wish to provide instructional text on the requisition list page to help orient users or provide links to training and other helpful tips.



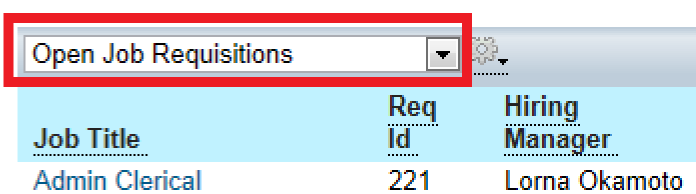
Requisition List Page Instructional Text

Configuration

Admin Tools > *Manage Recruiting Settings* > *Instructions above job requisitions list*

11.9.4 Requisition state filter

Recruiting users can filter their requisition list based on the current state of the requisitions.



Requisition State Filter

The options in the requisition state drop down are not configurable.

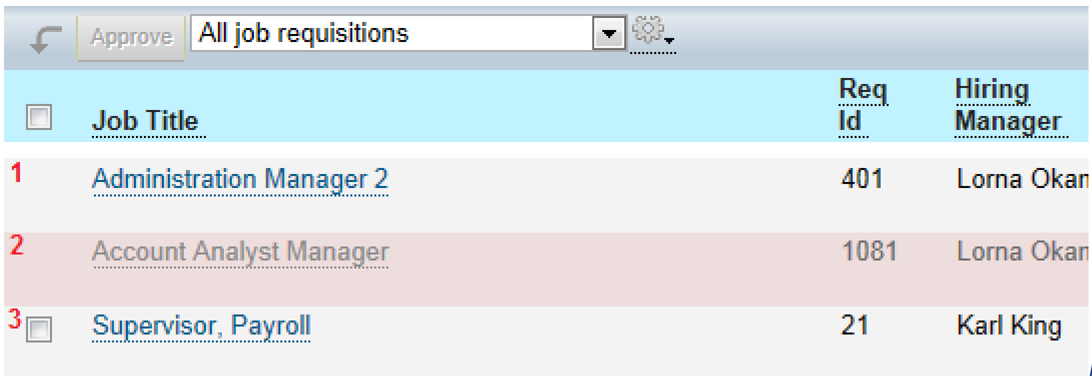
Table 22:

Option	*Displays*
All job requisitions	All requisitions the recruiting user has access to for any reason
Job requisitions pending approval	Pre-approved requisitions the recruiting user can access
Open Job Requisitions	Approved requisitions the recruiting user can access
Closed Job Requisitions	Closed requisitions the recruiting user can access.

Open and Pending Requisitions	Both open and pending requisitions the recruiting user can access.

It is not possible to multi-select requisition states in the filter drop down.

There are clear user interface differences between requisitions in different states.

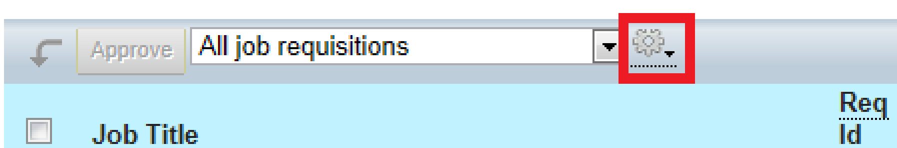


Requisition State List Filter

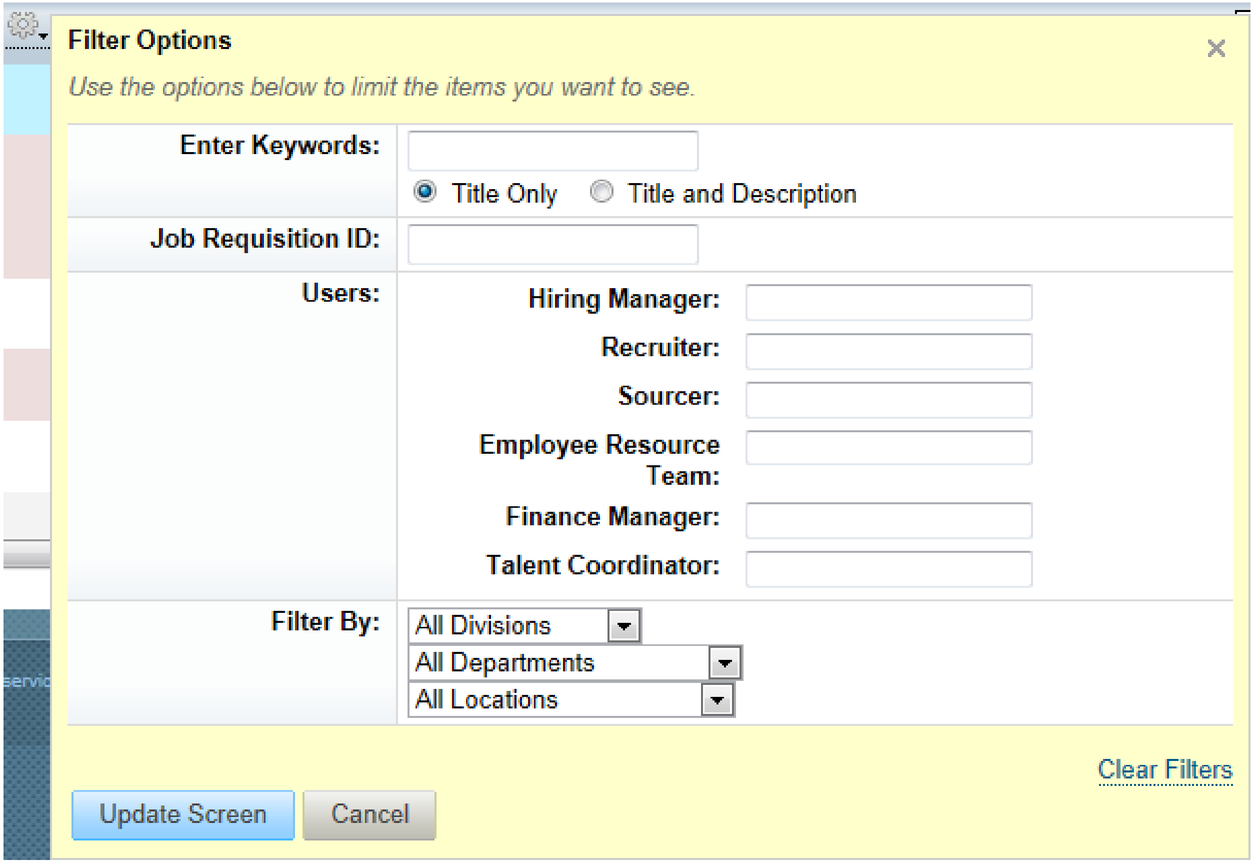
1. Approved requisitions do not have a checkbox next to them.
2. Closed requisitions are highlighted in pink.
3. Pre-approved requisitions have a checkbox displayed at the left.

11.9.5 Requisition Filter Options and Display Options

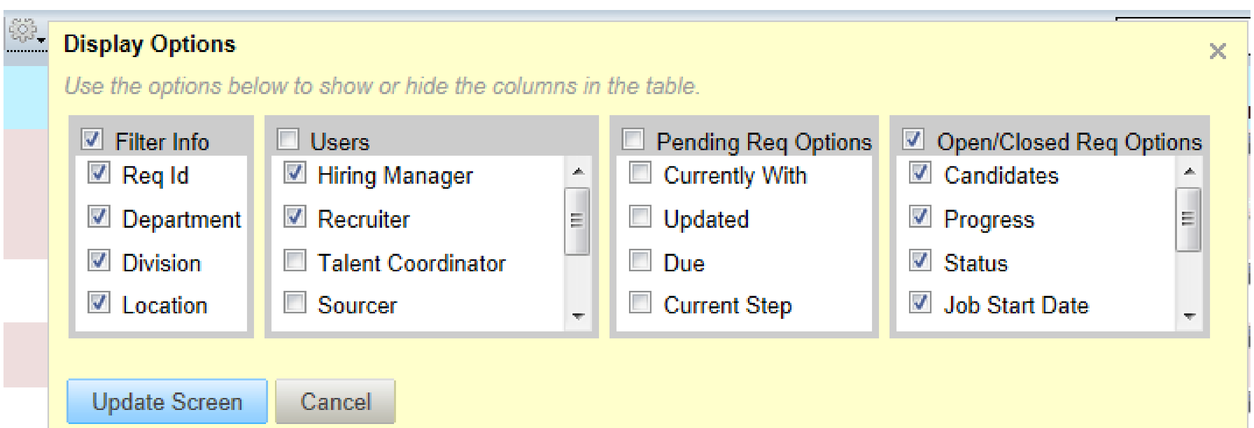
The requisition list can be adjusted by recruiting users to change which requisitions appear in the list and what columns of data appear in the table.



Requisition List Gear



Requisition Filter Options



Requisition Display Options

The fields available in both Filter Options and Display Options are non-configurable, except for Department, Division and Location, which can be disabled in Manage Recruiting Settings . There is no way to add or remove fields from these screens. If the recruiting user selects a display option not configured as a field in the Requisition XML, the resulting column in the requisitions table appears blank.

Age Column

The Age column displays the age of the requisition in number of days, calculated by subtracting the Date Approved from the current date on open requisitions, or Date Closed on closed requisitions. It displays with a red, yellow or green background color. The logic for the colors is not presently configurable.

Days open:

- < 30 : Green
- 31 to 59 : Yellow
- 60+ : Red

11.9.6 Creating and Accessing a Requisition

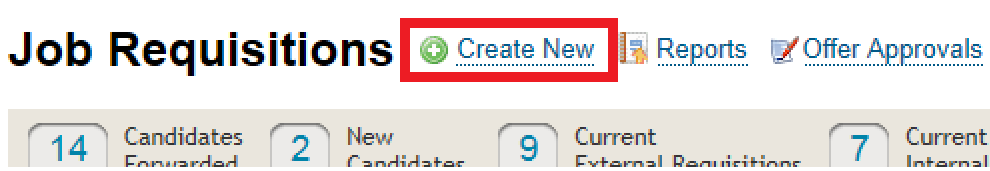
Recruiting users with appropriate permissions can create new requisitions.

Configuration

- Grant user permissions to create form
  1. *Non-RBP:* *Admin Tools* > *Permissions to Create Forms* > *requisition templates*
  2. *RBP:* *Admin Tools* > *Manage Permission Roles* > *Role* > *Permission* > *General User Permission* > *Permission to Create Forms* > *requisition templates*

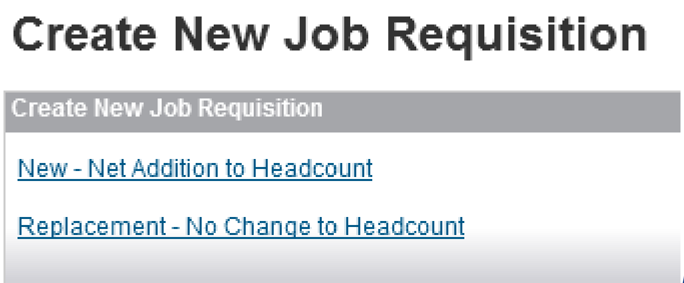
11.9.7 Initiating a New Requisition

Click *Create New* on the requisition list page.



Create New Requisition

If the recruiting user has permissions to more than one requisition template, a template selection page appears. If the recruiting user has permissions to only one requisition template, that template is automatically selected and the page bypassed.



Requisition Template Selection Page

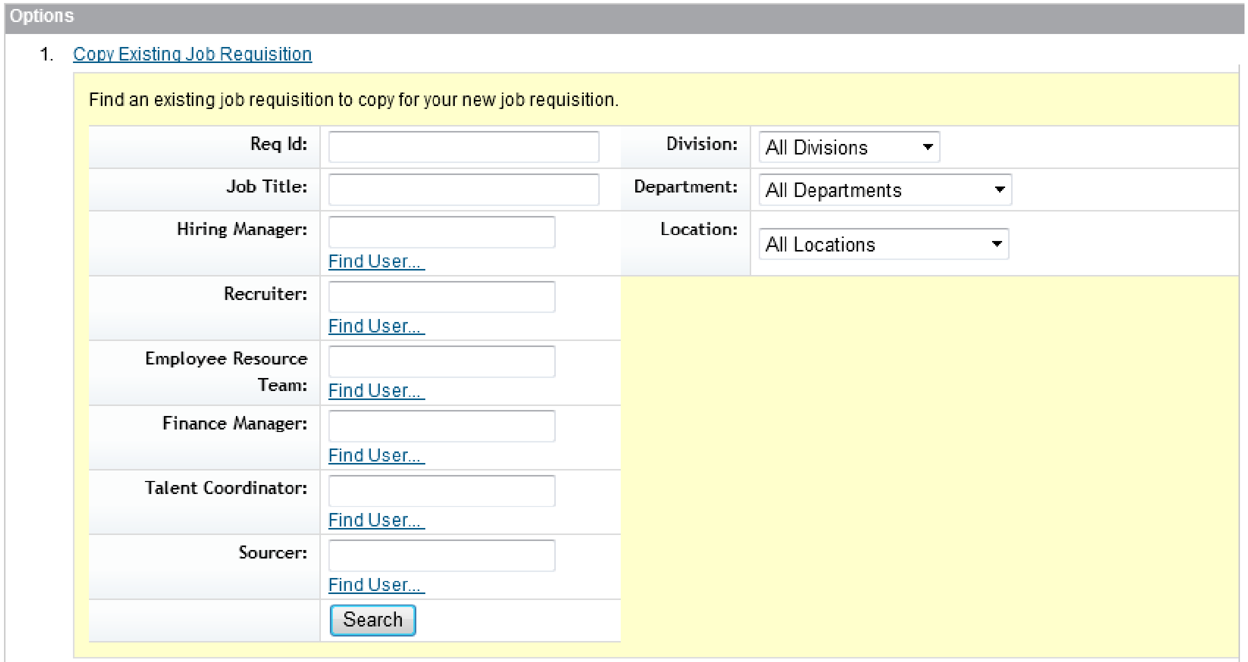
The recruiting user is then prompted to pick a requisition creation method.

Requisition Create Method Selection Page

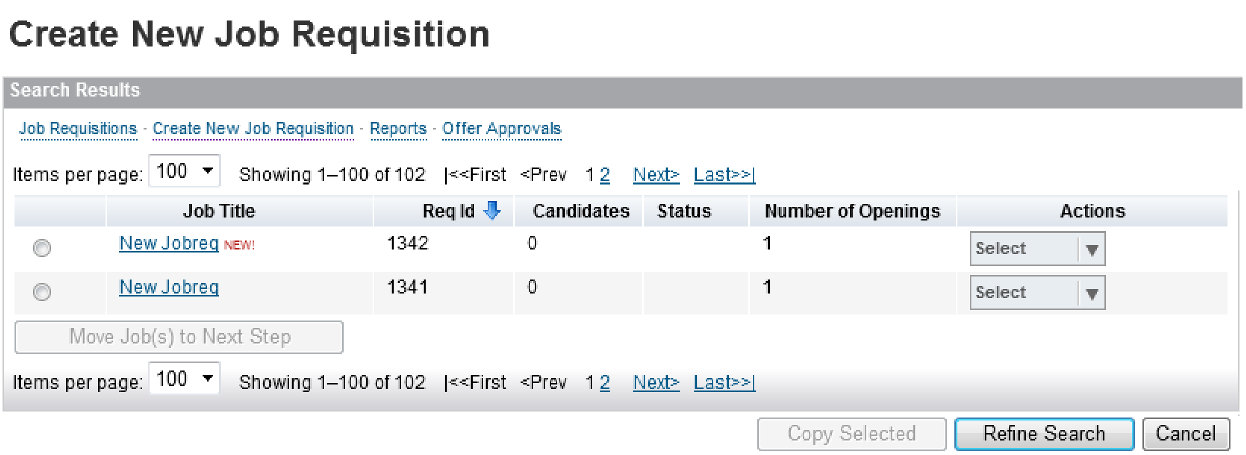
There are three requisition creation methods. At present all three of these options always appear to all users; they cannot be disabled or permissioned.

11.9.8 Copy Existing Job Requisition

The recruiting user will be prompted with a requisition filter page to search for requisitions they may want to copy. The fields on this page are non-configurable. There is no way to add or remove fields from this screen.



Copy Requisition Search Page



Copy Requisition Search Results Page

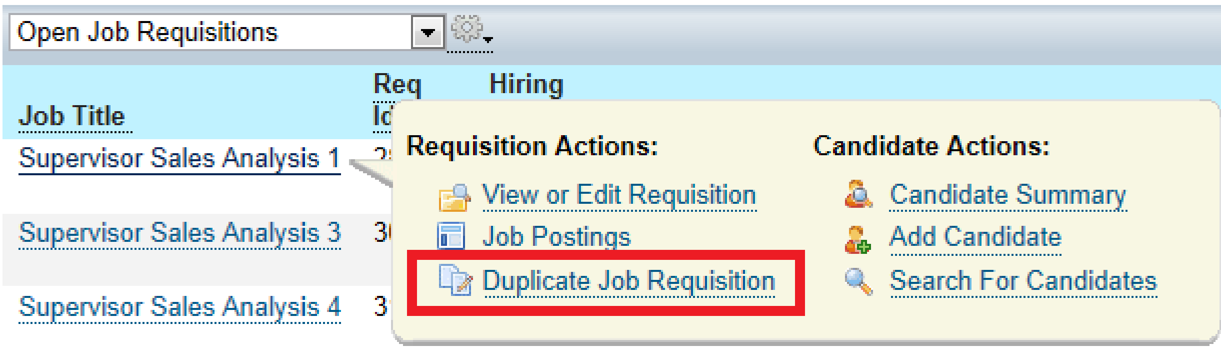
The recruiting user can select a radio button and click Copy Selected or click the menu under the Actions column and select Copy.

11.9.9 Mass Copy Existing Job Requisition

Alternatively, recruiting users can copy a requisition directly from the requisition list page by hovering over the desired requisition and selecting *Duplicate Job Requisition* from the hover-over.

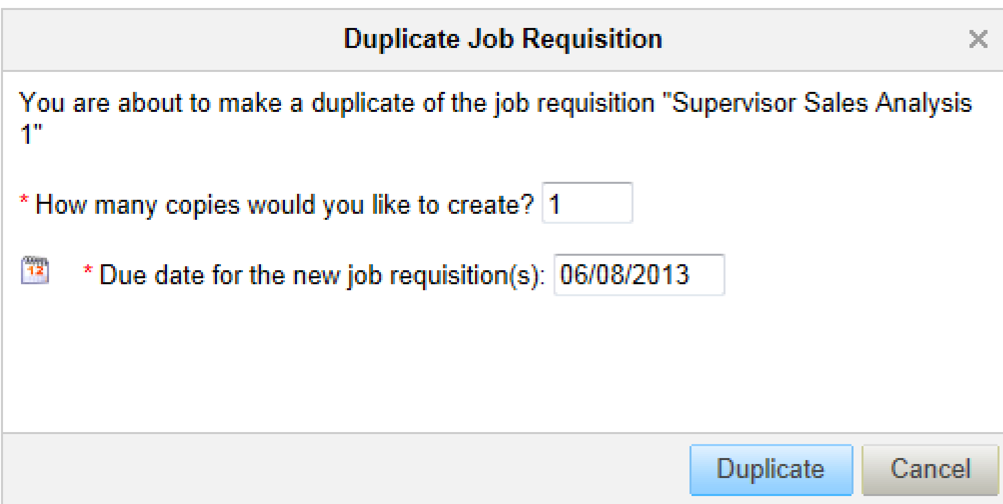
Configuration

- Provisioning > Company Settings > Enable Mass Copy Job Requisitions
- Set maximum copies allowed



Duplication Job Requisition from the Requisition Hover Over

The recruiting user is prompted to specify the number of copies of the requisition and the applicable due date.



Duplicate Job Requisition Prompt Screen

The recruiting user receives a confirmation message upon successful copy.

Duplicate Job Requisition Confirmation Message

Copied Requisition Behavior

When a requisition is copied, data from all the fields copies.

There is no way to configure or select which fields will copy. The copied data includes the requisition operator field data. This means the operator users on the source requisition can access the copied requisition. Particularly note there is no way to remove a user's access even after changing the names of the users in the operator fields — take this into account before copying a requisition.

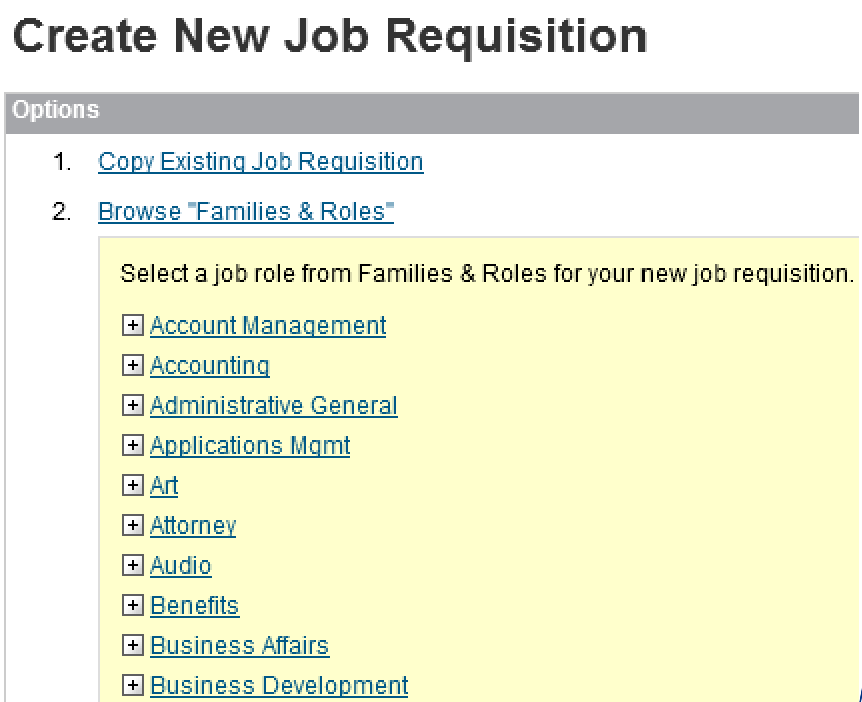
The applicant list on the requisition will not copy.

The audit trail on the requisition will not copy.

It is possible to copy a requisition even if it was created using a different template. This can result in a copied requisition having some blank fields, if those fields did not exist on the source requisition.

Browse "Families & Roles"

The recruiting user creating a new requisition may choose to create via Families and Roles. This allows the user to browse through the Families and Roles library configured by the administrator in Admin Tools, select a role and have data from that role auto-populate to the requisition.



Browse Families & Roles Requisition Create Page

All families and roles from the library will appear. There isno way to permission families or roles that the user can see (that is, there is no way to only allow a hiring manager to see roles in their organization, or to prevent them from seeing executive or HR families and roles.)

The recruiting user expands the desired families and can select from and/or expand the desired roles.

2. Browse "Families & Roles"

Selecting a Role from Browse Families & Roles

When the role is selected the system will populate the data from the Role Name, Job Description and Competencies areas of the Families and Roles library onto the title, extTitle, listingLayout, extListingLayout and competencies field IDs on the requisition.

11.9.10 Using Job Code in Browse Families and Roles

The client may want the recruiting users to select the job code instead of the role. This can be configured.

Configuration

1. *Provisioning* > *Company Settings* > *Enable Job Code*
2. *Admin Tools* > *Families and Roles* > *Configure job codes on the roles*

Selecting a Job Code from Browse Families & Roles

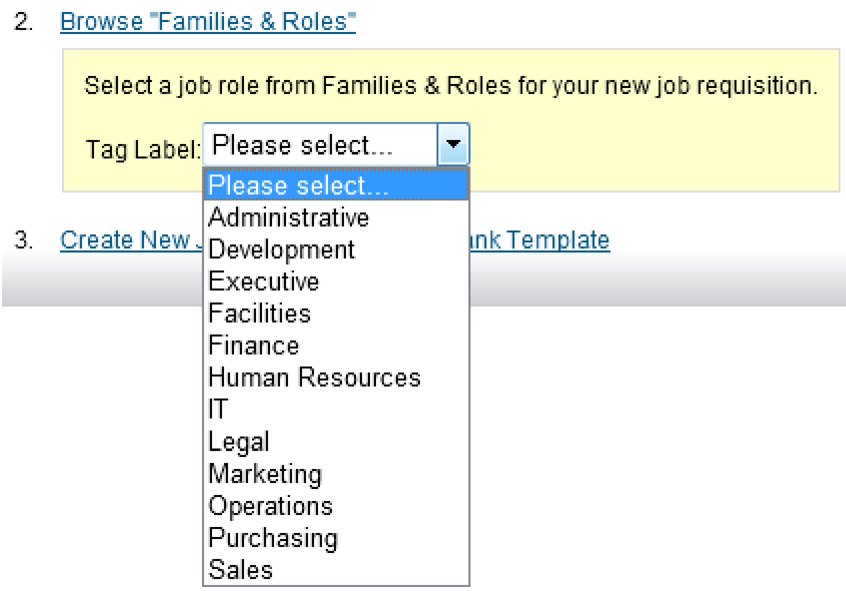
When the job code is selected, the system will populate the data from the Job Code in Families and Roles into the jobCode field ID on the requisition. This is in addition to the normal data auto-population that occurs from Browse Families and Roles on the role level.

It is possible to view and auto-populate the requisition with additional data about the job code. For more information, see the Auto-Populating Data on a New Requisition (Job Code Entity) [page 313] section.

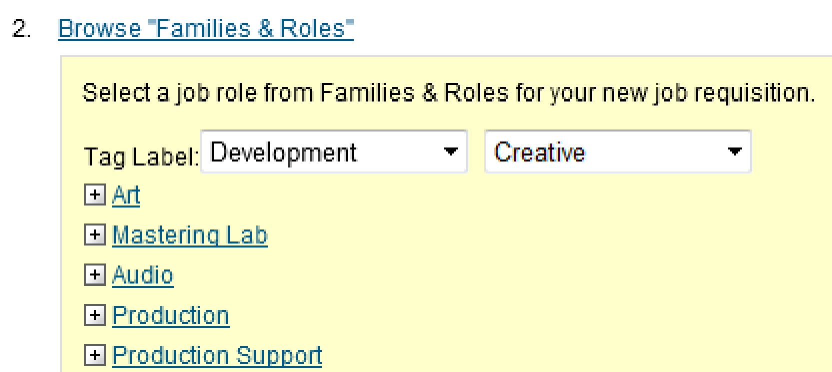
11.9.11 Using Job Role Tags in Browse Families and Roles

Clients may find that viewing the entire list of families and roles is too much for their users. In this case, you can use the Job Role Tags functionality to filter the Families and Roles list.

Job Role Tags allows the admin to “tag” each role with a picklist value, and then present that picklist to the recruiting user. The recruiting user picks a value and only sees Families that contain Roles tagged with the matching value. It is possible to set up one layer of tagging or two layers of tagging with a parent-child relationship between the two picklists.



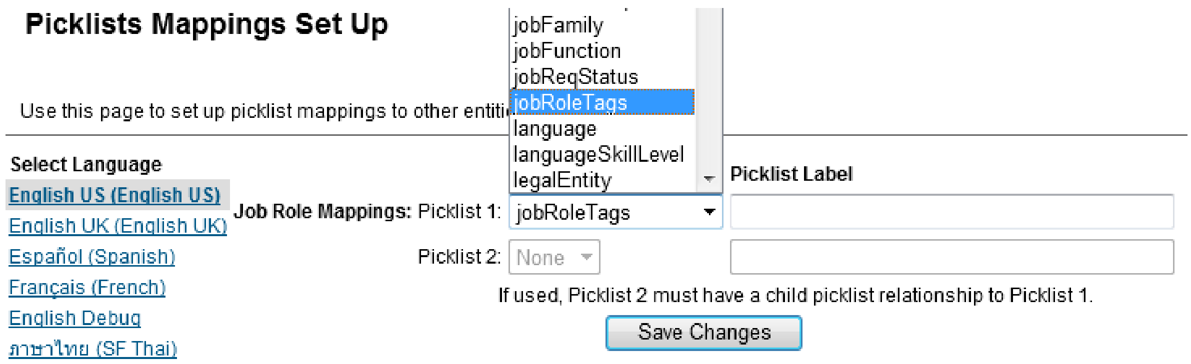
Selecting a Tag on the Browse Families and Roles Page to See Only Tagged Roles



Viewing Filtered Families Based on Parent-Child Tag Selections

Configuration

1. *Provisioning* > *Company Settings* > *Enable job role tags*
2. *Admin Tools* > *Picklists* > *create the picklist(s) for the job role tags*
3. *Admin Tools* > *Picklists Mappings Set Up*
   a. Select the tags picklist in the Picklist 1 field using the drop down and provide a Picklist Label to display on the Browse Families and Roles page.
   b. If needed, select the child tags picklist in the Picklist 2 field using the drop down and provide a Picklist Label to display on the Browse Families and Roles page.



Picklists Mappings Set Up Page

4. Create a job role tags mapping file to associate the families and roles to tags.

	A	B	C	D	E	F
1	JOBFAMILY	JOBROLE	PARENT_PICKLIST_ID	PARENT_PICKLIST_LABEL	PICKLIST_ID	LABEL
2	Marketing General	Marketing Intern			jobRoleTags	Marketing
3	Distribution	Material Handler I			jobRoleTags	Operations
4	Distribution	Distribution Intern			jobRoleTags	Operations
5	Sales General	Sales Intern			jobRoleTags	Sales
6	Company Store	Company Store Associate I			jobRoleTags	Facilities
7	Facilities General	Facilities Coordinator I			jobRoleTags	Facilities

Job Role Tags Mapping File

The mapping file consists of the following:

Table 23:

Column	*Expected Content*
JOBFAMILY	Valid job family already configured in the Families and Roles library. Family name value must match exactly.
JOBROLE	Valid job role already configured in the Families and Roles library. Role name value must match exactly and must be associated with a valid role to which it is also associated in the Families and Roles library.
PARENT_PICKLIST_ID	Valid picklist ID. Populate if both parent and child picklists are used in tagging.
PARENT_PICKLIST_LABEL	Valid picklist value in the default language of the instance. Populate if both parent and child picklists are used in tagging.
PICKLIST_ID	Valid picklist ID. If parent-child picklists are not used in tagging, use this as the primary picklist. If parent-child picklists are used in tagging, this picklist ID must be a valid child of the specified parent picklist id.

LABEL	Valid picklist value in the default language of the instance. If parent-child picklists are not being used in tagging, use this as the primary picklist. If parent-child picklists are being used in tagging, this pick-list value must be a valid child of the specified parent pick-list value.

5. *Admin Tools* > *Import Job Role Tags* > *Select the tags mapping file and upload*

You can leave some roles untagged — this will effectively hide the role (and family, if all the roles in that family are untagged) from the recruiting user creating a requisition via Browse Families and Roles.

There is no way to delete a role tag mapping after it has been uploaded, but it can be replaced. If you need to remove a role tag mapping, it is recommended to create a "Retired" picklist value, upload a role tagging map to the picklist value, and then change the picklist value status to OBSOLETED. This will hide the picklist value from the tags picklist on the Browse Families and Roles page and prevent the role (and family, if all the roles in that family are tagged to an OBSOLETED value) from the recruiting user creating a requisition via Browse Families and Roles.

11.9.12 Create New Job Requisition from Blank Template

When a recruiting user chooses to create the new requisition from a blank template, no data will autopopulate onto the requisition from Families and Roles or from a source copied requisition.

11.9.13 Complete the Short Requisition Create Page

Before the requisition is created, the recruiting user is presented with a short requisition create page to collect some essential details.

These details are collected upfront because they must be fed directly into the requisition because the record cannot exist without them. The title is used as a navigational element, the due date is calculated into scheduled reminders, and some operators are involved in the route map.

Short Requisition Create Page

This page is automatically assembled — it is not possible to add or remove fields from the page, or to re-order the content. Only operators who are part of the route map will display on this page. All fields on this page will display as editable, regardless of the field permissions in the Requisition XML. Field permissions only take effect once the requisition record is created and saved to the database.

After the recruiting user clicks Next, the Requisition Details page appears. This is when a requisition number is issued. At this point, the requisition is in the pre-approved state. Depending on the method used to create the requisition, some data may pre-populate onto the requisition.

The recruiting user will be required to complete all required fields before taking the next steps to route the requisition along the recruiting route map for approval.

11.9.14 Auto-Populating Data on a New Requisition (Job Code Entity)

The main method to auto-populate data on a requisition (other than the few fields that auto-populate from Families and Roles) is through a feature commonly called Job Code Entity. Configuration of the Job Code Entity feature enables some additional job attributes to pre-populate on the requisition when the recruiter selects a given job code.

The Families and Roles library stores the role information and associates it to a job code. A separate Job Classification foundation objects library stores the job codes and associated data. The Families and Roles library is a Platform feature and the Job Classification foundation object is an Employee Central feature, but they can be set up and used for non-EC clients.

Only selected fields can be pre-populated from the Job Classification foundation object library, so the Job Code Entity feature is useable but limited.

11.9.14.1 Pre-Requisites

- *Provisioning* > *Company Settings* > *Enable Job Code*
- *Admin Tools* > *Families and Roles set up*
- *Admin Tools* > *Picklists set up*

11.9.14.2 Configuration

1. Set Up Families and Roles
   The families and roles configuration should be one of the first things you complete. For more information, see the Families and Roles [page 57] section in this guide.
   The foundation objects library relies on the corporate data model XML to be configured before it functions.
2. *Provisioning* > *Company Settings* > *Employee Central Foundation Objects*
3. Configure the XML (see below)
   - *Provisioning* > *Import/Export Corporate Data model XML*

11.9.14.2.1 Configure XML

Corporate Data Model XML Declaration

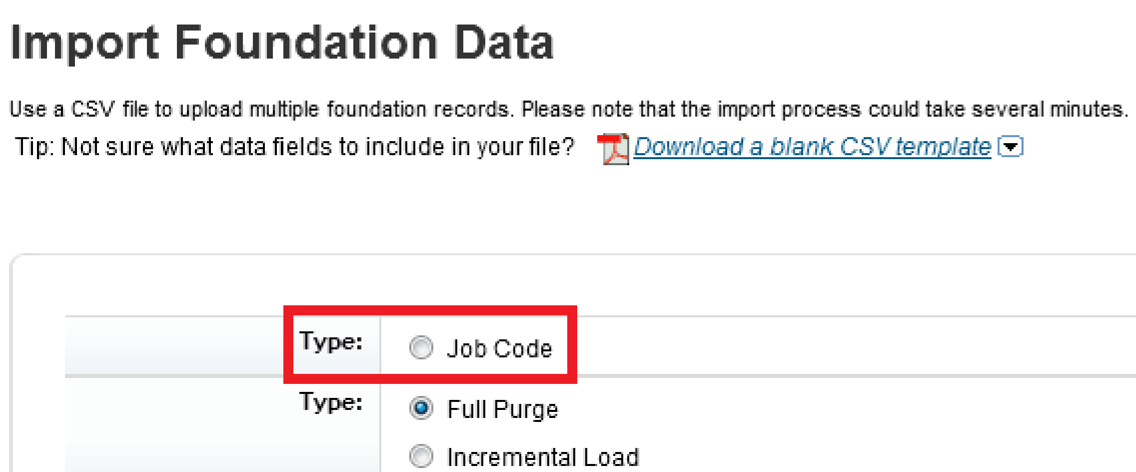
You must first configure the Corporate Data Model XML. The following declaration must exist at the top of every Corporate Data Model XML document.

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE corporate-data-model PUBLIC  "-//SuccessFactors, Inc.//DTD Corporate Data
Model//EN"  "http://svn/viewvc/svn/V4/trunk/src/com/sf/dtd/corporate-datamodel.dtd">
<corporate-data-model>
  <description>Success Factors HRIS Data Model</description>
```

hris-element Element and id Attribute

```
<hris-element id="jobCode">
```

The Job Classification foundation object is the only foundation object used in Recruiting but other HRIS objects are supported for EC in addition to Job Classification. The HRIS element with id="jobCode" must exist and contain the recruiting-related fields, as shown. The presence of the jobCode hris-element produces the Job Code option on the Import Foundation Data page.



Import Foundation Data Job Code HRIS Element

hris-field Element and id Attribute

The hris-element can contain multiple hris-field elements. The field elements define the fields in the foundation object import file.

```
<hris-field id="custom-string1" visibility="both">
  <label>Compensation Title</label>
</hris-field>
<hris-field id="custom-string2" visibility="both">
  <label>Grade Level</label>
  <picklist id="gradeLevel"/>
</hris-field>
```

	A	B	C	D
1	custom-string1	end-date	custom-string2	custom-string3
2	Compensation Title	end-date	Grade Level	Job Family

Import Job Code Foundation Data HRIS Field Elements

You may configure the following hris-field id values. These field names must be used exactly as listed below. Other hris-field id values may be supported for use in Employee Central but there is a mapping process that links the hris-field ids from the Job Classification foundation object to the jobCode fields in the Requisition form, and only these hris-field ids are supported in this mapping process. Additional fields cannot be used for Recruiting.

Tip

The Job Code Entity file can also be set up via a scheduled recurring process in Provisioning. Clients should either extract the data from the current system of record or they can manually create the file if some of the data is to come from the system of record and some comes from other systems. If the JCE process is via a scheduled job from your HRIS, it is possible to do a Full Purge which replaces all existing records, or an Incremental load which inserts new records where a match is not found, updates records where it does find a match and leaves existing records alone if they are not mentioned in the import file.

The visibility attribute does not affect Recruiting; unless it has been adjusted for EC reasons, it should be set to "both".

Table 24:

hris-field id	*Acts as field type*
description	Text (100 character limit)
custom-string1-15	Text or Picklist (100 character limit)
custom-long1-5	Integer (no decimals)
custom-date1-5	Date

label Element

```
<label>Grade Level</label>
```

The label element controls the appearance of the field name in the user interface for both importing the foundation data and for the field as it appears in the requisition page, regardless of the field-definition label in the Requisition XML.

The hris-field element must contain at least one field-label element.

picklist Element and id Attribute

```
<picklist id="gradeLevel"/>
```

The custom-string hris-field ids can be configured to validate against a picklist upon foundation data import, and render as picklists on the requisition page. The picklist must be defined in the hris-field in the corporate-data-model XML.

XML Sample

Note this is just an example for reference, not a recommended set of configuration. For a current Corporate Data Model blueprint XML see the Professional Services Sharepoint:

https://connect.successfactors.com/professionalservices/Welcomekit/Pages/Welcome.aspx

```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE corporate-data-model PUBLIC  "-//SuccessFactors, Inc.//DTD Corporate Data
Model//EN"  "http://svn/viewvc/svn/V4/trunk/src/com/sf/dtd/corporate-datamodel.dtd">
<corporate-data-model>
  <description>Success Factors HRIS Data Model</description>
  <hris-element id="jobCode">
    <hris-field id="name" visibility="both" required="true">
      <label>Name</label>
    </hris-field>
    <hris-field max-length="100" id="description" visibility="both">
      <label>Job Description</label>
    </hris-field>
  </hris-element>
</corporate-data-model>
```

1. Configure jobCode fields in Requisition template

For each Recruiting-related hris-field configured in the corporate-data-model, configure a corresponding field-definition in the Requisition XML.

Note the field IDs change between the Corporate Data Model XML and the Requisition XML. Where the corporate data model states custom-string1 the requisition states customString1. (If you reference these fields in the Offer Details XML, the field IDs change yet again. To reference this field in the Offer Details XML you would configure jce_customString1.)

Be sure to configure the standard jobCode field-definition id in the Requisition XML.

```
   <field-definition id="jobCode" type="text" required="true" custom="false">
     <field-label mime-type="text-plain"><![CDATA[Job Code]]></field-label>
   </field-definition>
   <field-definition id="customString1" type="jobCode" required="true"
 custom="false">
     <field-label mime-type="text-plain"><![CDATA[Compensation Title]]></field-label>
   </field-definition>
   <field-definition id="customString2" type="jobCode" required="true"
 custom="false">
     <field-label mime-type="text-plain"><![CDATA[Grade Level]]></field-label>
   </field-definition>
```

Table 25:

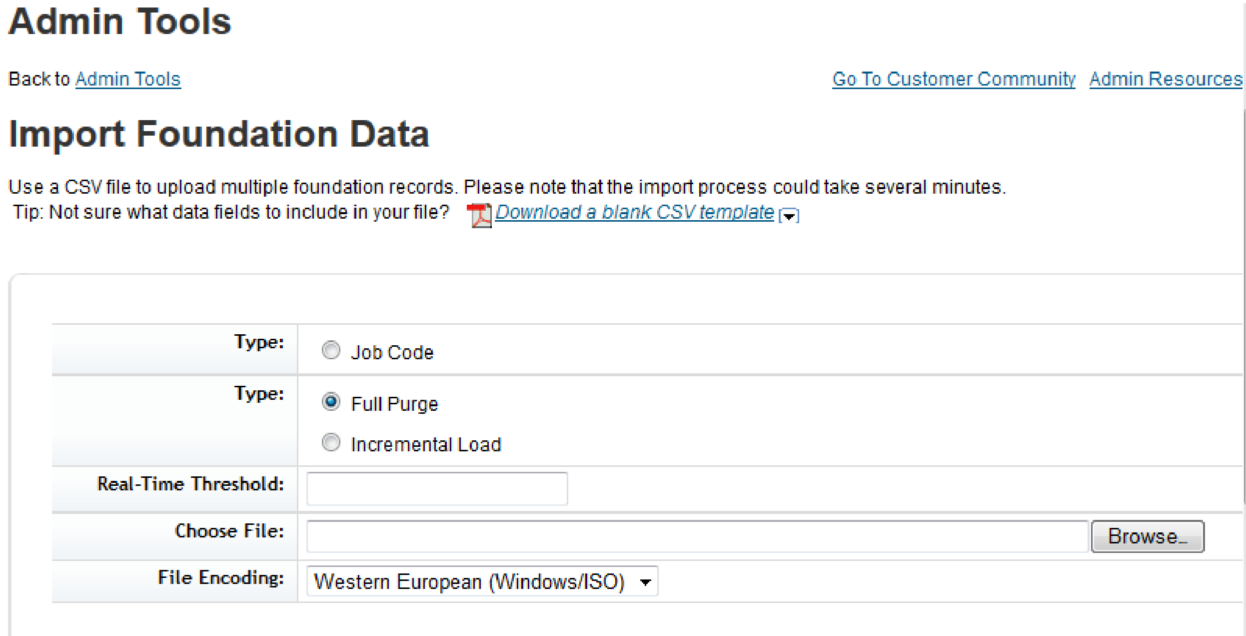
field-definition id	*Acts as field type*
description	Text (100 character limit)
customString1-15	Text or Picklist (100 character limit)
customLong1-5	Integer (no decimals)
customDate1-5	Date

This data is auto-populated from the foundation data library at the point of requisition creation. There is no dynamic link that causes this data to be automatically updated on the requisition if the data in the foundation data library is changed at a later date.

It is possible to permission the jobCode fields as editable to users if desired. Ensure that the client gives careful consideration to whether these fields should be made editable or not.

1. Import job code foundation data

You manage the data that will populate into these requisition fields by uploading it via the job code CSV template in *Admin Tools* > *Import Foundation Data*.



Foundation Data Job Code Import

To upload foundation data:

- Download the Excel template by selecting Type: Job Code and clicking the "Download a blank CSV template"
- Populate the Excel file with data
- Select an import type. Full Purge replaces all existing records, and Incremental Load inserts new records where a match is not found, updates records where it does find a match and leaves existing records alone if they are not mentioned in the import file
- Choose file by browsing your computer
- Click Validate Import File Data to check the file for any possible data errors without importing it, if desired.
- Click Import to import the data

3. Set up job code field preview in Browse Families and Roles

Clients may wish to provide the user more job code related information while they are selecting from families and roles during the requisition creation process. Up to five fields can be displayed on the Browse Families and Roles page under the Job Code.

Foundation Data Displayed in Browse Families and Roles

Provisioning > Job Code Custom Field Configuration Settings > 4. Enter the corporate data model hris-field ids >

11.9.15 Manually Populating Data on a New Requisition

Generally entering data on the requisition is an intuitive exercise where the recruiting user types in or selects the appropriate values for the fields the client has chosen to configure on the requisition page. There are some fields with special functions, outlined here.

11.9.15.1 Job Descriptions

Click update to enter or change data in a job description field. Job descriptions support HTML formatting and the fields include a rich text editor to make job description formatting easy and intuitive.

When pasting job description content from a Microsoft Word document, the content contains formatting and tags not supported by web browsers. There are several approaches to ensure the job description content only contains formatting that will appear properly to candidates viewing the posting.

Paste as plain text

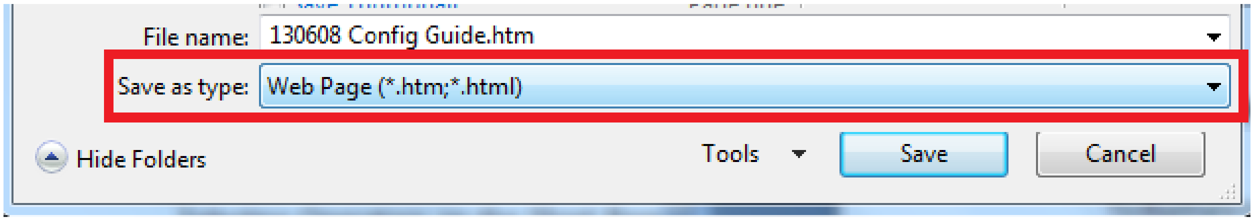
This button behaves as though the recruiting user pasted the copied content in Notepad or another plain text editor, then copied that content and pasted it into the job description field. This strips 100% of existing formatting from the content and the recruiting user can start fresh and apply new formatting.

This button should be used if the recruiting user has copied content from another web page. The copy action can pick up HTML content the recruiting user does not realize is there, and those third party HTML tags may wind up appearing in the job description.

Paste as Plain Text Button

Paste from Word

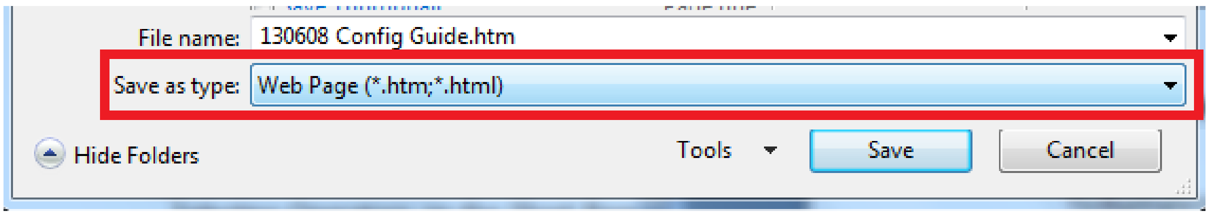
This button strips out unsupported MS Word formatting and preserves as much formatting as can reliably be supported in various web browsers.



Paste from Word Button

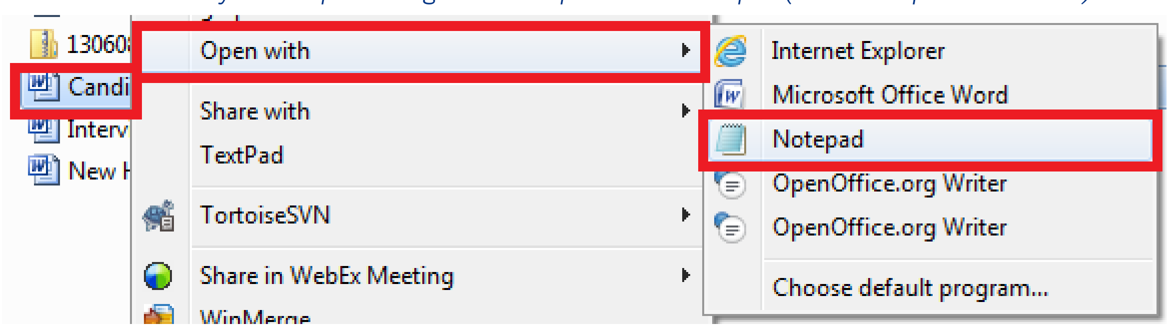
To illustrate to clients how much unsupported formatting Microsoft inserts into a Word document, follow these steps:

1. Open the MS Word document
2. *Save As* › *Save as type: Web Page (*.htm;*.html)*



Save as HTML

3. Save the document on your computer and close the document
4. *Locate the file on your computer* › *right click* › *Open With* › *Notepad (or another plain text editor)*



Open With Notepad

5. View all the fancy MS-specific tags and formatting markup that browsers will not reliably render. Explain to the client that SuccessFactors strips this content down to the reliably supported formatting and that is why they will see less formatting in the copied content than they see in the source MS Word.

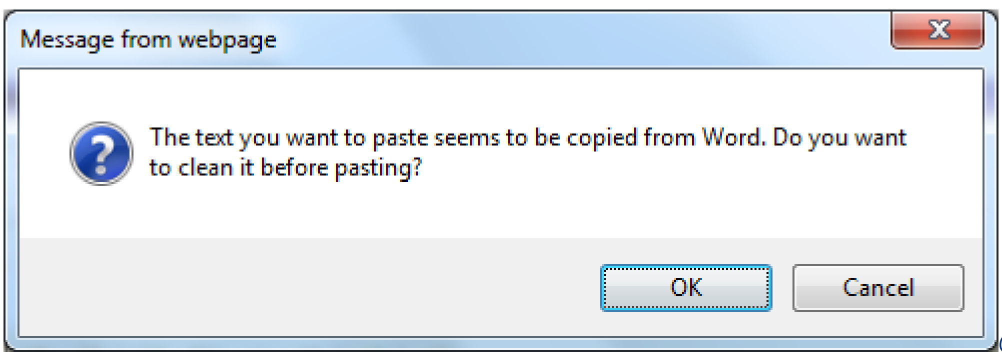
```
</style>
<![endif]--><!--[if gte mso 9]><xml>
 <o:shapedefaults v:ext="edit" spidmax="3074"/>
</xml><![endif]--><!--[if gte mso 9]><xml>
 <o:shapelayout v:ext="edit">
  <o:idmap v:ext="edit" data="1"/>
 </o:shapelayout></xml><![endif]-->
</head>

<body lang=EN-US style='tab-interval:35.4pt'>

<div class=WordSection1>

<p class=MsoNormal><span lang=EN-GB style='mso-ansi-language:EN-GB'>Employee
Profile: <span class=SpellE>Werkervaring</span> = Background element Work Experience
</span><span lang=EN-GB style='font-family:Wingdings;mso-ascii-font-family:
Calibri;mso-ascii-theme-font:minor-latin;mso-hansi-font-family:Calibri;
mso-hansi-theme-font:minor-latin;mso-ansi-language:EN-GB;mso-char-type:symbol;
mso-symbol-font-family:Wingdings'><span style='mso-char-type:symbol;mso-symbol-font-family:
Wingdings'>à</span></span><span lang=EN-GB style='mso-ansi-language:EN-GB'> <span
class=GramE>You</span> see 1 input<o:p></o:p></span></p>
```

MS Word Document Saved as HTML and Opened in a Plain Text Editor

Clean Pasted Content Warning Prompt

If a recruiting user copies and pastes content directly from MS Word without using the Paste from Word button, the product will recognize there is a risk of including browser-unsupported formatting, and will prompt the user to clean the content:

`The text you want to paste seems to be copied from Word. Do you want to clean it before pasting?`



Clean Pasted Content Warning Prompt

If the recruiting user clicks OK, the system will copy using the Paste from Word functionality. If the recruiting user clicks "Cancel," the system pastes exactly what was copied from MS Word, including unsupported formatting. This is not recommended because it can cause a lot of odd behavior when the user attempts to edit content or make additional formatting changes in the job description field, and may cause the job description to appear strangely to candidates viewing the job posting.

11.9.15.2 Internal and External Posting Preview

By clicking Internal Posting Preview or External Posting Preview Recruiting users can preview the header, footer and job description content as the candidate will see it.

11.9.15.3 Requisition Pre-Screen Questions

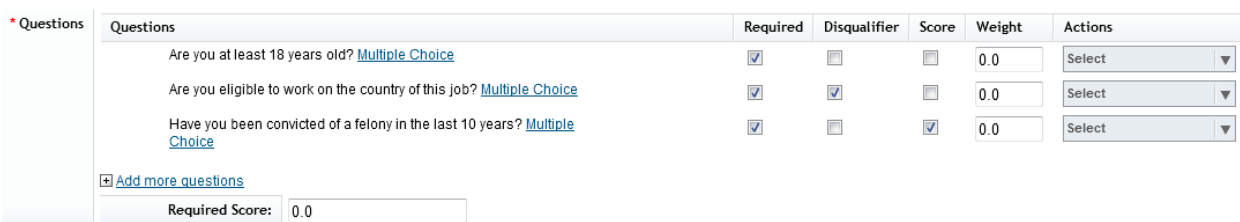
Recruiting users can define pre-screen questions presented to applicants at the point of application. These pre-screen questions can be used to gather information, score the applicants and automatically disqualify applicants who meet certain criteria. For more information about how pre-screening questions are used on the application, see the Completing Application Pre-Screen Questions [page 208] section of this guide.

Pre-screening questions cannot be auto-populated on a requisition; they must be set up individually on each requisition. If a requisition is copied, the pre-screening questions will be part of the data copied onto the resulting record. Note neither pre-screening questions nor pre-screening question responses are reportable.

It is a best practice to configure the questions field id on the requisition as read only once the requisition reaches approval. If this field is left with write permissions it would be possible for question wording or answer options to be changed after applicants have already applied, causing a mismatch between the question and answer. This also opens the client up for possible accusation of unfair hiring practices. For instance, if they require a question, get several applicants that respond to that question, and then the question is made unrequired, the client could be accused of treating subsequent applicants with more leniency than the initial applicants.

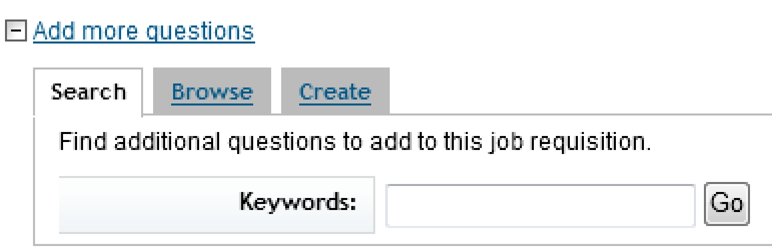
If this best practice is not followed and a recruiting user changes the scoring/disqualifier settings on the pre-screen questions after some applicants have already applied, they will be prompted upon save to allow the existing applicants to be re-evaluated and possibly un-disqualified based on the new scoring criteria. This helps to protect clients from accusations of unfair hiring practices.

In order to receive the prompt, the recruiting user saving the changes must have appropriate permissions to status the applicants. (If the recruiting user who changes the scoring criteria does not have permissions to status the applicants, the next recruiting user who has permissions to status the applicants and performs a requisition save will receive the prompt instead.)



Pre-Screen Questions on a Requisition

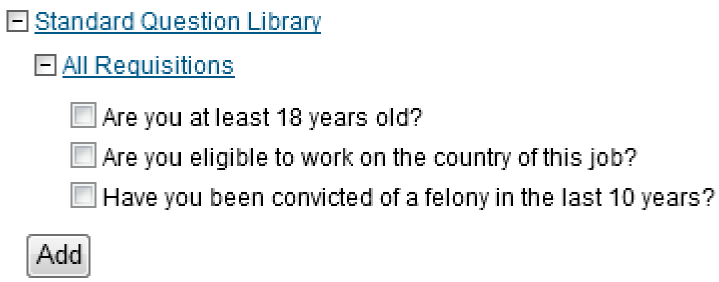
- Add more questions



Add Pre-Screen Questions to a Requisition

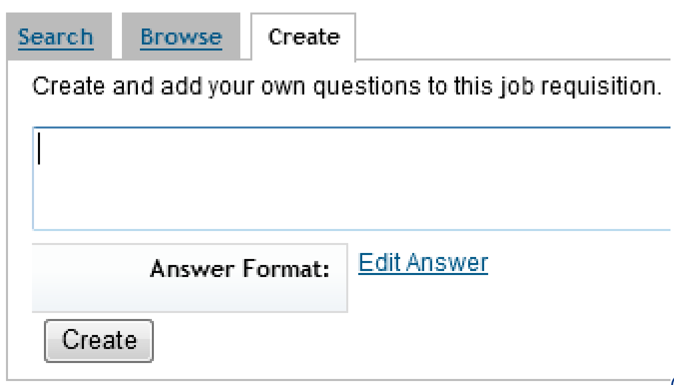
- Search or Browse the Questions library. Any user with write permissions to the questions field ID can access all three tabs. There is no way to restrict a user to only using questions from the library and bar them from creating their own questions.
- For more information on how to set up the Questions library, see the Question Libraries [page 564] section of this guide.

- Recruiting users can access all questions libraries set up in the instance. You cannot restrict access to only certain libraries for certain users. Users can save questions to their own personal libraries accessible only to them. For more information on how to save questions to a personal library, see the Question Libraries [page 564] section of this guide.
- Check the boxes next to questions and click Add



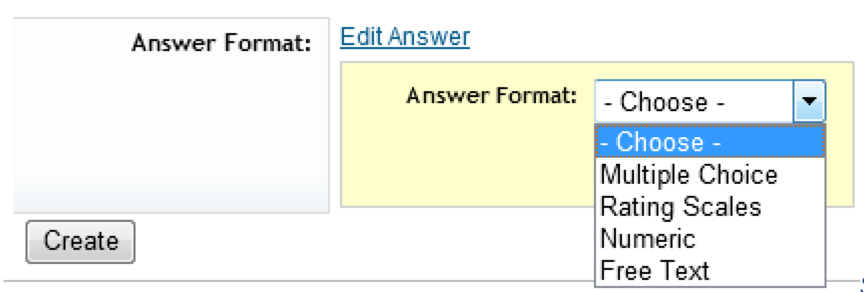
Browse Pre-Screen Questions on a Requisition

- Questions appear in the library in alphabetical order. They will appear on the requisition (and in the application when viewed by a candidate) in the order in which the checkboxes were clicked while adding questions to the requisition.
- Create new questions



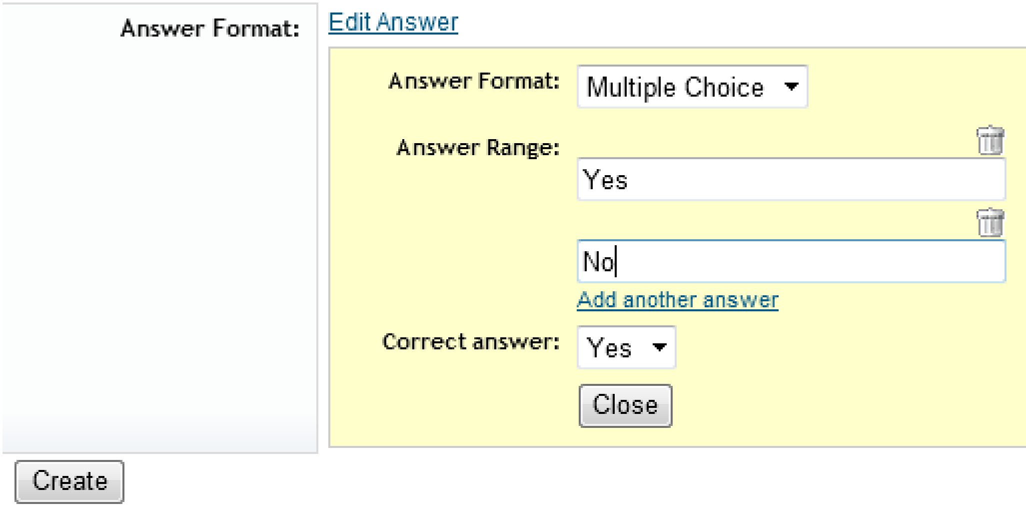
Create a New Pre-Screen Question on a Requisition

- Add the question name in the text box
- Click Edit Answer to specify the question details
- Select an Answer Format



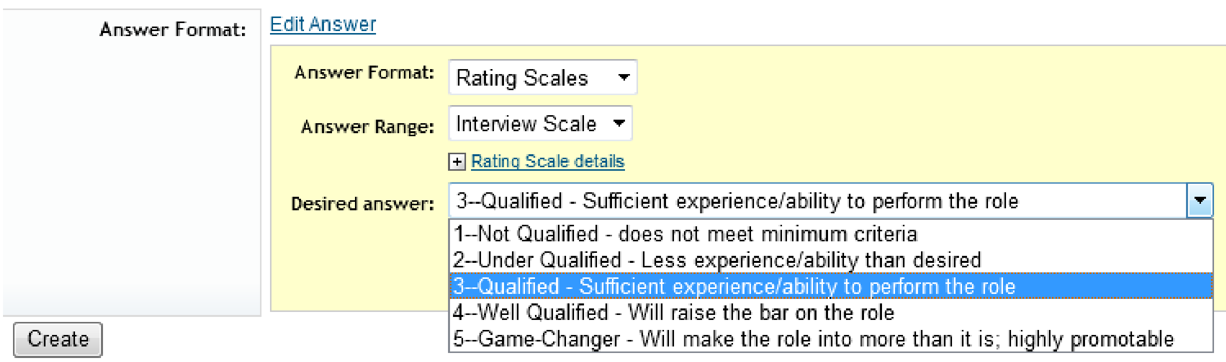
Select an Answer Format on a Pre-Screen Question on a Requisition

- *Multiple Choice:* Define multiple answers from which the user can pick. The answers will appear as radio buttons; applicants can select one answer. The recruiting user can define a single Correct answer. There is no way to select multiple correct answers.



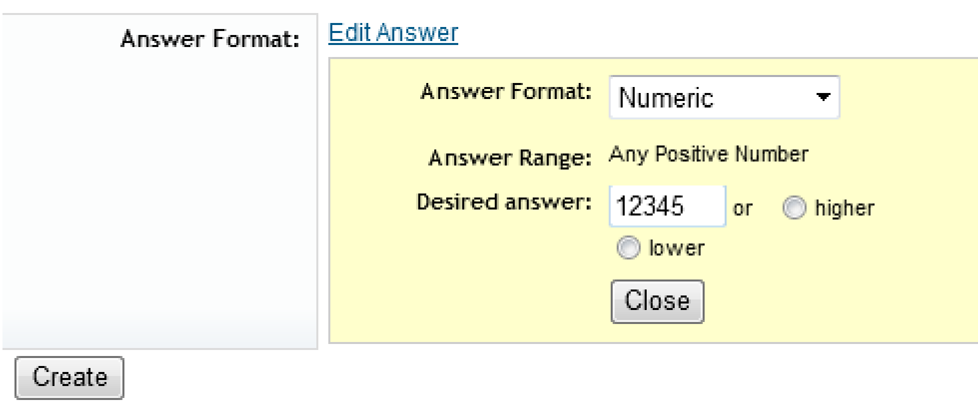
Multiple Choice Answer Format on a Requisition Pre-Screening Question

- *Rating Scales:* Select from a rating scale defined in *Admin Tools* > *Rating Scales*. Correct answers can be specified as anything higher or lower than the selected value. This doesn't provide true multi-select functionality but does allow multiple correct answers to be specified.



Rating Scale Answer Format on a Requisition Pre-Screening Question

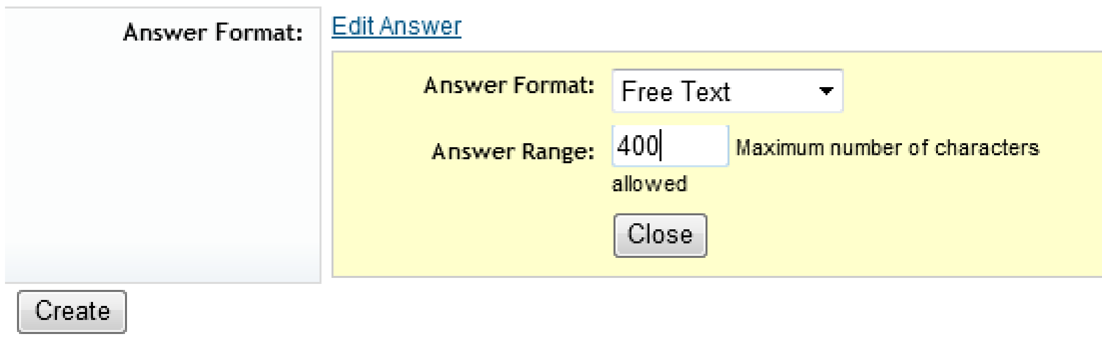
- *Numeric:* Specify any number five digits or less, decimals included. Correct answers can be specified as anything higher or lower than the specified value. No formatting constraints can be applied to this answer range (for example, there is no way to restrict the applicant to only entering a four digit year.)



Numeric Answer Format on a Requisition Pre-Screening Question

- *Free Text:* Allow the applicant to write any answer they wish. No correct answer can be specified.

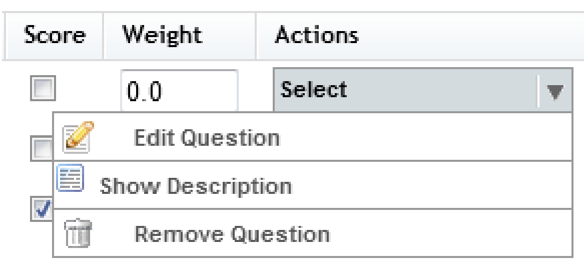
> ➜ Tip
>
> The free text response is a plain text field. It cannot be changed to support HTML, which would honor line-breaks and other formatting.



Free Text Answer Format on a Requisition Pre-Screening Question

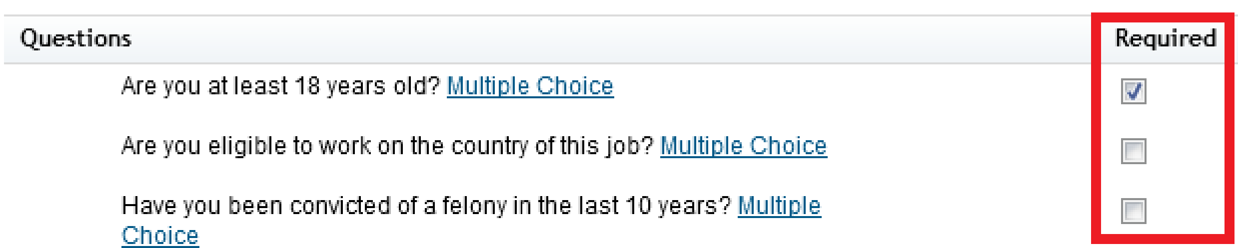
These are presently the only answer formats available.

- Click *Create*.
- If needed, edit and adjust the questions selected on the requisition.



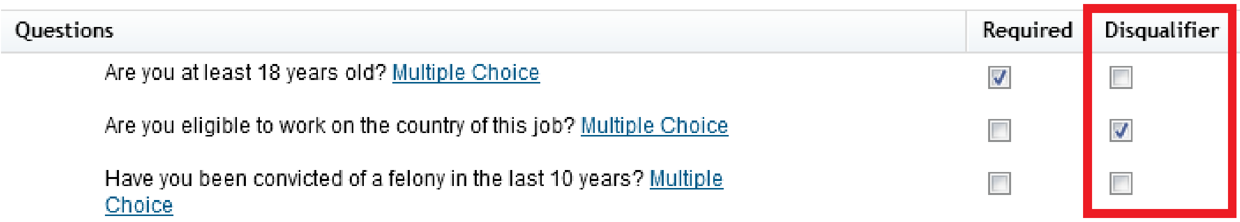
Manage a Requisition Pre-Screening Question

- Select which questions will be required when candidates apply to the requisition.



Require a Requisition Pre-Screening Question

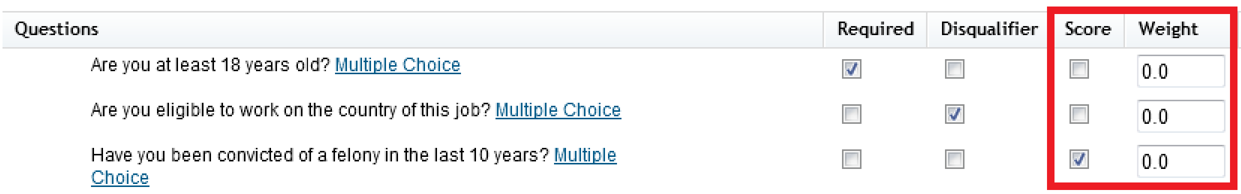
- Select which questions will be disqualifiers. If a question is selected as a disqualifier, applicants who do not provide a correct answer are automatically disqualified. Free text questions cannot be selected as disqualifier questions since there is no way for the system to identify a correct answer.



Questions	Required	Disqualifier
Are you at least 18 years old? Multiple Choice	☑	☐
Are you eligible to work on the country of this job? Multiple Choice	☐	☑
Have you been convicted of a felony in the last 10 years? Multiple Choice	☐	☐

Make a Requisition Pre-Screening Question a Disqualifier

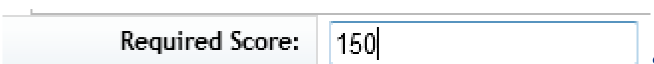
- Select if whether a question will count towards the applicant's total score and, if so, for how much. The "Weight" column can more accurately be described as "points" – the total weight does not need to add up to 100 but instead will simply be added to the candidate's total.



Questions	Required	Disqualifier	Score	Weight
Are you at least 18 years old? Multiple Choice	☑	☐	☐	0.0
Are you eligible to work on the country of this job? Multiple Choice	☐	☑	☐	0.0
Have you been convicted of a felony in the last 10 years? Multiple Choice	☐	☐	☑	0.0

Apply Points to a Requisition Pre-Screening Question

- Determine the Required Score needed for an applicant to pass the overall questions. If the applicant's total score falls below the Required Score threshold, the applicant will be automatically disqualified.



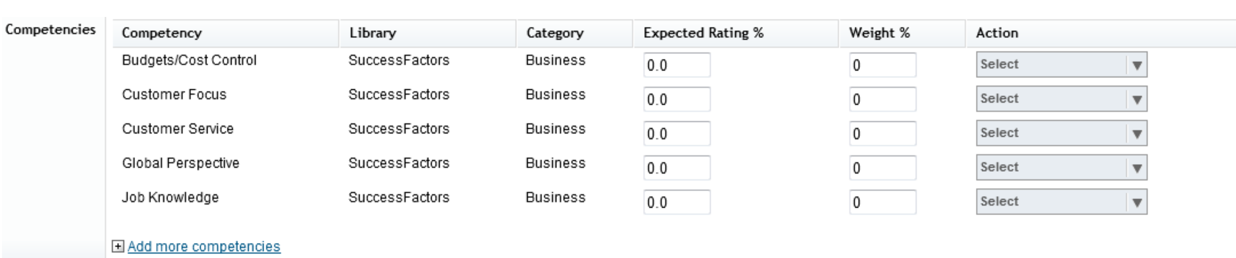
Set a Required Score to Pass the Pre-Screening Questions

11.9.15.4 Competencies

Recruiting users can define competencies presented to interviewers. These interview competencies can be used to gather information and rate the applicants to help arrive at a hiring decision. For more information about how competencies are used, see the Interview Central [page 225] section of this guide.

Competencies can be auto-populated on a requisition from Families and Roles. They can then be added to or removed individually on each requisition. If a requisition is copied, the competency will be part of the data copied onto the resulting record. Note neither competencies nor Interview Central results are reportable.

The Expected Rating and Weight % columns do not presently have any affect in Interview Central; these columns can be left blank. No change will occur based on data entered in these columns.



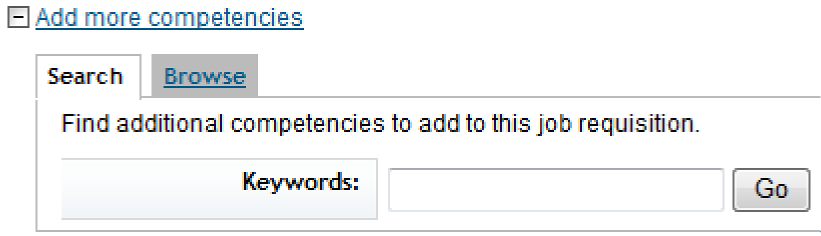
Competencies

Competency	Library	Category	Expected Rating %	Weight %	Action
Budgets/Cost Control	SuccessFactors	Business	0.0	0	Select
Customer Focus	SuccessFactors	Business	0.0	0	Select
Customer Service	SuccessFactors	Business	0.0	0	Select
Global Perspective	SuccessFactors	Business	0.0	0	Select
Job Knowledge	SuccessFactors	Business	0.0	0	Select

⊞ Add more competencies

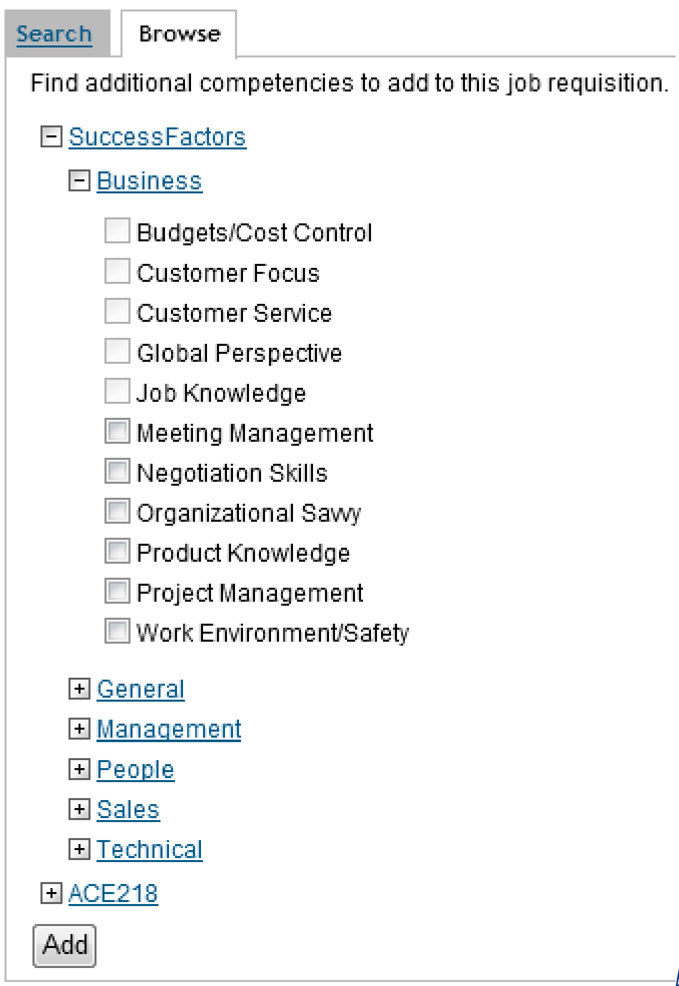
Competencies on a Requisition

1. Add more competencies.



Selecting Competencies on a Requisition

2. Search or Browse the Competencies library. Any user with write permissions to the competencies field ID can access both. There is no way to allow a recruiting user to create their own competencies; they must select from a library.
   For more information on how to set up the Competencies library, see the Competency Libraries [page 568] section of this guide.
   Recruiting users can access all competency libraries set up in the instance. It is not presently possible to restrict access to only certain libraries for certain users.
3. Check the boxes next to competencies and click *Add*.



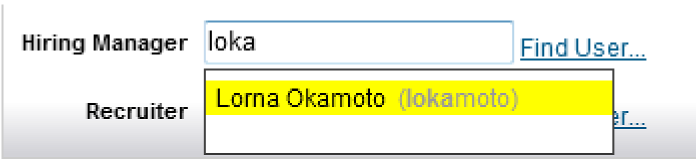
Browsing Competencies on a Requisition

Competencies appear in the library and on the requisition in alphabetical order.

11.9.16 Operators

Selecting Operators on the Short Requisition Create Page

On the short requisition create page, it is possible to use a type-ahead lookup to select an operator. It is not possible to configure this type-ahead lookup on the Requisition Details page.



Type-Ahead User Lookup

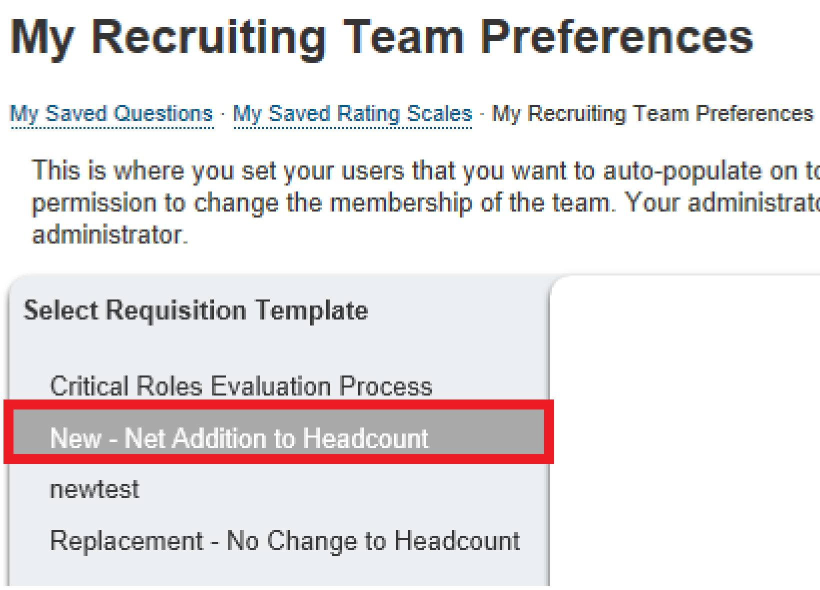
Auto-Populating Operators from Admin Tools Settings

For more information see the Add Default Primary User [page 560] section under Manage Recruiting Team Settings in this guide.

Auto-Populating Operators from Personal Preferences

It is possible for a recruiting user to set up Personal Preferences to auto-populate users into the operator fields.

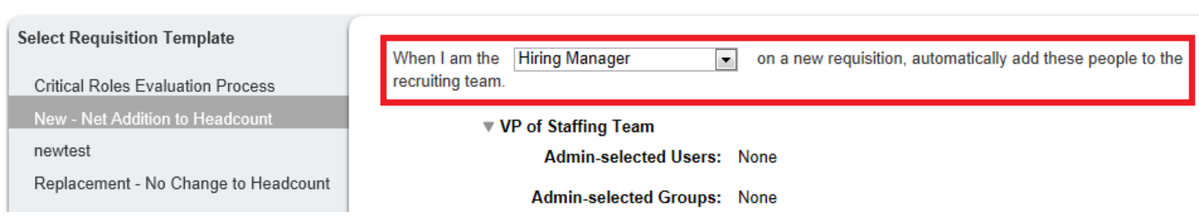
- *Recruiting* > *Preferences* > *My Recruiting Team Preferences*
- Select a Requisition Template.



Selecting a Requisition to Adjust Personal Preferences

1. Select “Hiring Manager” (or whatever label has been given to the hiringManagerName field in the instance) from the “When I am the…” drop down.

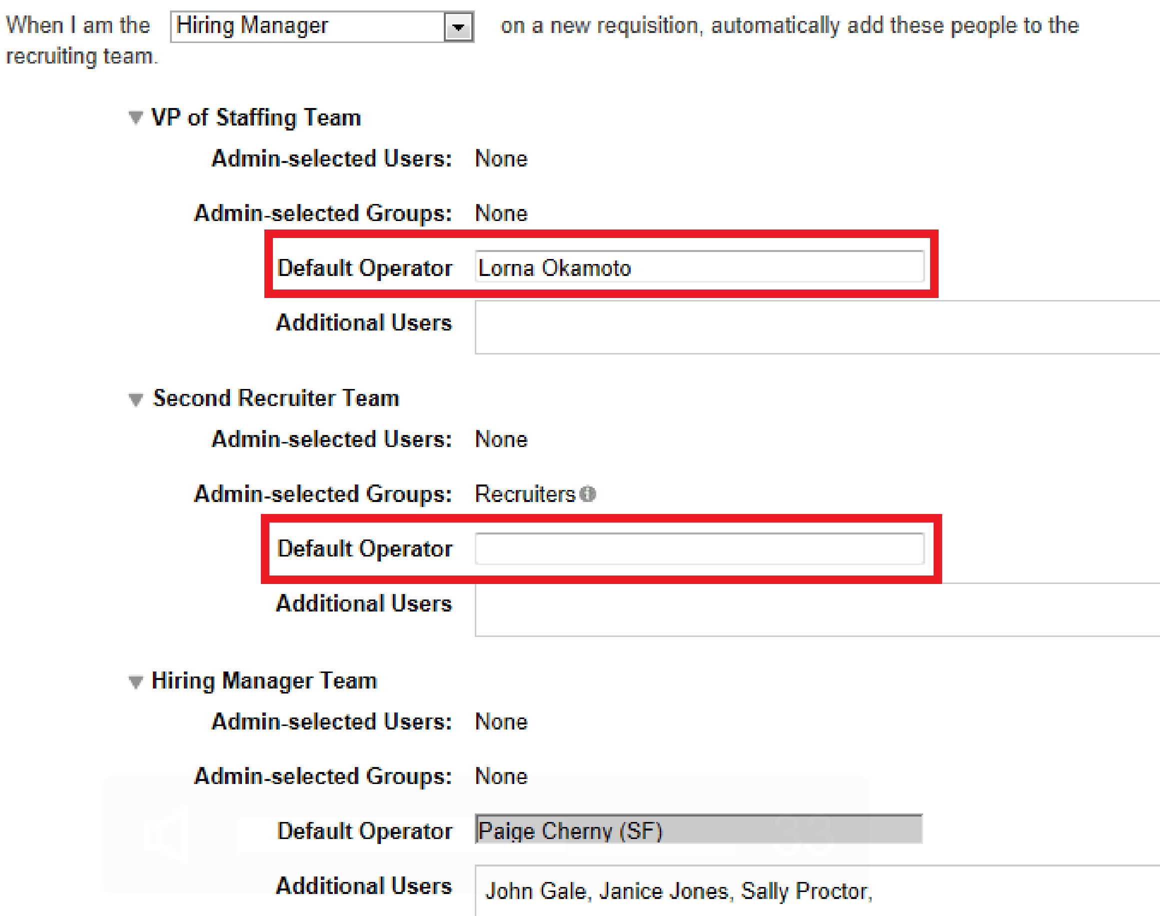
   > **Note**
   >
   > Note you can only specify default operators for requisitions on which you are the hiring manager. This prevents conflicts from occurring, where multiple users on the requisition might specify different default operators.

   Select Hiring Manager

2. Specify the desired user as a Default Operator for each field, if any.

   > **Tip**
   >
   > Your name appears as the Default Operator value for the hiring manager field, since you are setting this up for conditions where you are the hiring manager.



Specify Users as Default Operators

Tip

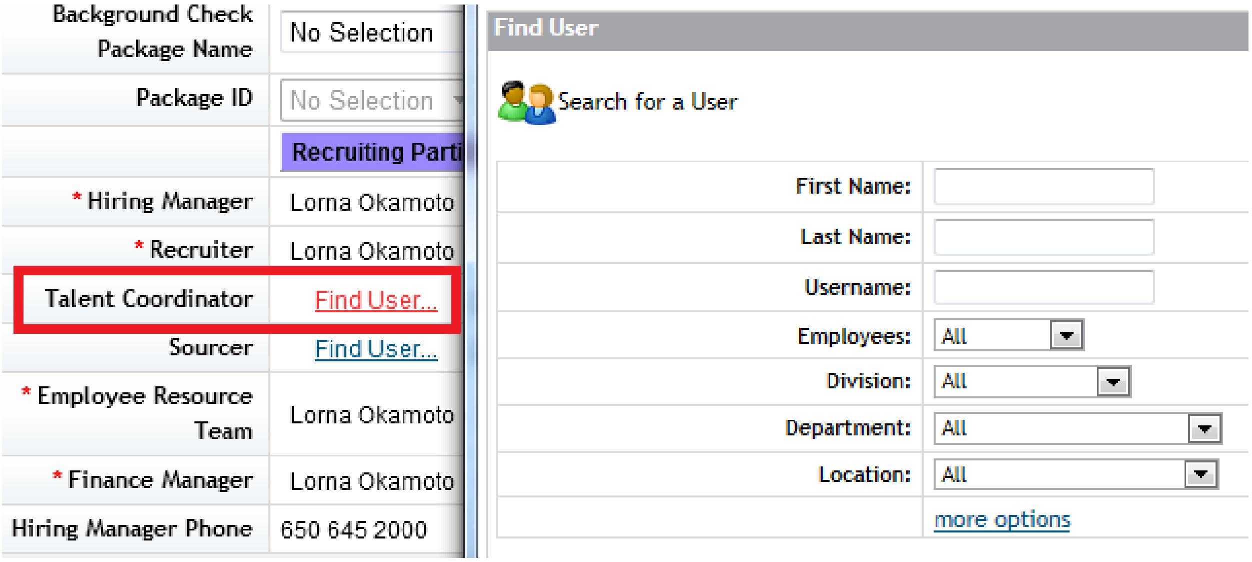
Personal preference lookups occur automatically only at the point where the requisition details page is saved. This means personal preferences will not auto-populate onto a new requisition, and additions/removals from personal preferences resulting from changes to the primary operators will not take effect until the recruiting user saves the requisition details page.

If there is a conflict between the operators already manually-selected on a requisition and the personal preferences for that operator field, the operators already selected on the requisition will be retained and the personal preferences will not be honored.

If there is a conflict between the default operator user set up in Personal Preferences and the default operator user set up in *Admin Tools* > *Manage Recruiting Team Settings*, the value in Personal Preferences takes precedence.

Managing Operators on the Requisition Detail Page

On both the short requisition create page and the Requisition Details page there is a Find User link that opens a user search pop-up. The recruiting user can enter search criteria and select the user they wish to place in the operator field.



Find User Lookup

Both in the type-ahead and in the Find User lookups, results will be constrained if the field has a recruiting-group attribute specified on it in the XML. For more information, see the group-name Attribute [page 278] section of this guide in Requisition XML configuration.

Unrequired operator fields also have a Clear link available so that the selected user can be removed, if desired. Required operator fields will not have this link — to remove a user from the field you have to select a replacement user.

Clear User from an Unrequired Operator Field

11.9.17 Team Recruiting

11.9.17.1 Feature Summary

Fields defining teams of users are supported on the requisition in addition to the recruiting operators that contain a single user. A team can be made up of users are selected individually or set up as a Recruiting Group. For more information on Team Recruiting see Manage Recruiting Team Settings [page 557].

11.9.17.2 Quick Facts

- It is not possible to route for approval to a team role
- You can include both an individual role and the same team role on a single requisition template. For instance, it is possible to enable a Recruiter and a Recruiter Team role on a single requisition. This has a number of advantages. For example:
    - Flexibility to assign to a single role (as opposed to team)
    - Sorting by single name
    - Allowing a single role to be included in a route map
- Team Recruiting is not available via SFAPI – the only way to get Team Recruiting preferences is if the user clicks *Restore Admin Defaults* once the req has been created. If the requisition is created via API; personal settings will not populate.

11.9.17.3 Configuration

1. To enable the Recruiting Team Functionality, navigate to *Provisioning* > *Company Setting* > *Recruiting* > *Enable Recruiting Team Functionality*
2. Configure the Job Requisition XML.
    - Template level default team recruiting settings can be set by first adding the corresponding job req templates with team recruiting fields and then configuring for these fields. Note that only team recruiting fields present in the template can be configured. If a job req template does not have any team recruiting fields then no configuration is possible. The following are the job req template fields for team recruiting:
        - hiringManagerTeam
        - coordinatorTeam
        - recruiterTeam
        - sourcerTeam
        - secondRecruiterTeam
        - vpOfStaffingTeam
        - vTeam
3. To enable team recruiting fields, fields need to be configured in the XML. Not all fields are required. The admin can select one team field per existing operator, but the recommended configuration is for all fields. Each field should be assigned the appropriate permissions to define who has read or write access to that field. These fields can be labeled however the client wants. Permissions granted to users in these fields are the same as the primary operators.

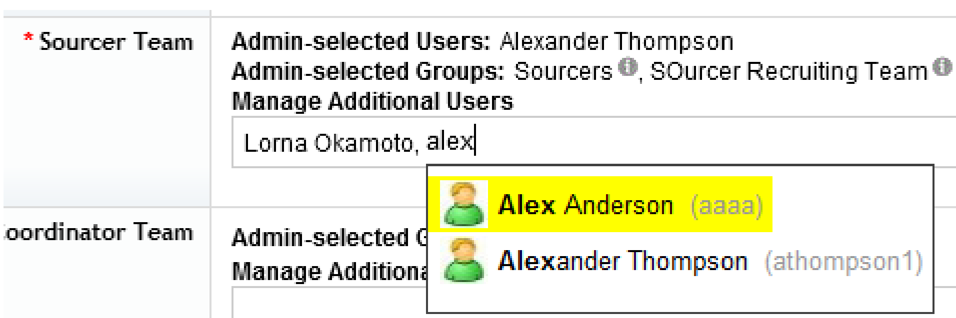
Example

```
<field-definition id="hiringManagerTeam" type="operatorTeam" required="true"
custom="false">
      <field-label><![CDATA[Hiring Manager Operator Team]]></field-label>
          <field-description><![CDATA[]]></field-description>
  </field-definition>
  <field-definition id="recruiterTeam" type="operatorTeam" required="false"
custom="false">
      <field-label><![CDATA[Recruiter Operator Team]]></field-label>
```

```
            <field-description><![CDATA[]]></field-description>
    </field-definition>
    <field-definition id="sourcerTeam" type="operatorTeam" required="true"
custom="false">
        <field-label><![CDATA[Sourcer Operator Team]]></field-label>
            <field-description><![CDATA[]]></field-description>
    </field-definition>
    <field-definition id="coordinatorTeam" type="operatorTeam" required="false"
custom="false" group-name="ACE Head Quarters">
        <field-label><![CDATA[Coordinator Operator Team]]></field-label>
            <field-description><![CDATA[]]></field-description>
    </field-definition>
    <field-definition id="vpOfStaffingTeam" type="operatorTeam" required="false"
custom="false">
        <field-label><![CDATA[VP of Staffing Operator Team]]></field-label>
            <field-description><![CDATA[]]></field-description>
    </field-definition>
    <field-definition id="secondRecruiterTeam" type="operatorTeam" required="false"
custom="false">
        <field-label><![CDATA[Second Recruiter Operator Team]]></field-label>
            <field-description><![CDATA[]]></field-description>
    </field-definition>
    <field-definition id="vTeam" type="operatorTeam" required="false"
custom="false">
        <field-label><![CDATA[Approver Team]]></field-label>
            <field-description><![CDATA[]]></field-description>
    </field-definition>
```

11.9.17.4 Managing Operator Teams on the Requisition Detail Page

Recruiting team fields may contain multiple users, separated by commas. To enter users in a recruiting team field, type the user's first or last name, or username and select from the type-ahead lookup prompt. The comma will be automatically added. To select an additional user, begin typing another name after selecting your first user.



Type-Ahead Multi-Select User Lookup

Results will be constrained if the field has a recruiting-group attribute specified in the XML.

For more information, see the group-name Attribute [page 278] section of this guide in Requisition XML configuration.

To remove a user from an operatorTeam field, hover your mouse over the user and a strikethrough line will appear. Click the strikethrough user and that user will be removed.

Clear User from an operatorTeam Field

11.9.17.5 Auto-Populating operatorTeams from Admin Tools Settings

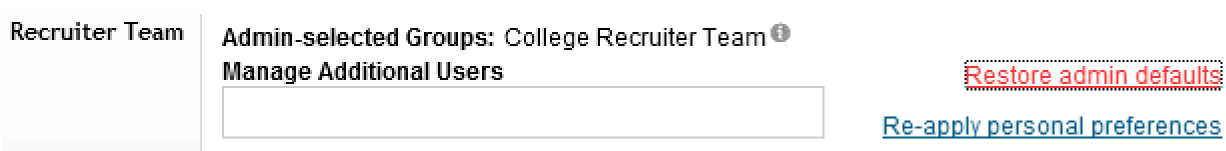
For more information see the Manage Recruiting Team Settings [page 557] section of this guide.

11.9.17.6 Managing Admin-Defaulted Users and Groups on a Requisition

Recruiting users with write access to the operatorTeam field can remove the users and groups the admin settings defaulted onto the requisition.

Clear Admin-Defaulted User or Group from an operatorTeam Field

If the recruiting user removes admin settings and then changes their mind, they can choose to Restore Admin Defaults, which pulls the current set of admin settings back onto their requisition. This will also work to look up and apply admin settings on requisitions that pre-date the admin settings.



Look Up Admin Settings and Apply them to a Requisition

Alternatively, the admin can choose to prevent a recruiting user from altering the admin-defaulted settings, even if that recruiting user has write access to the operatorTeam field.

- *Admin Tools* > *Manage Recruiting Team Settings*
    - Select a requisition template
    - Prevent end-users from changing an admin's default settings

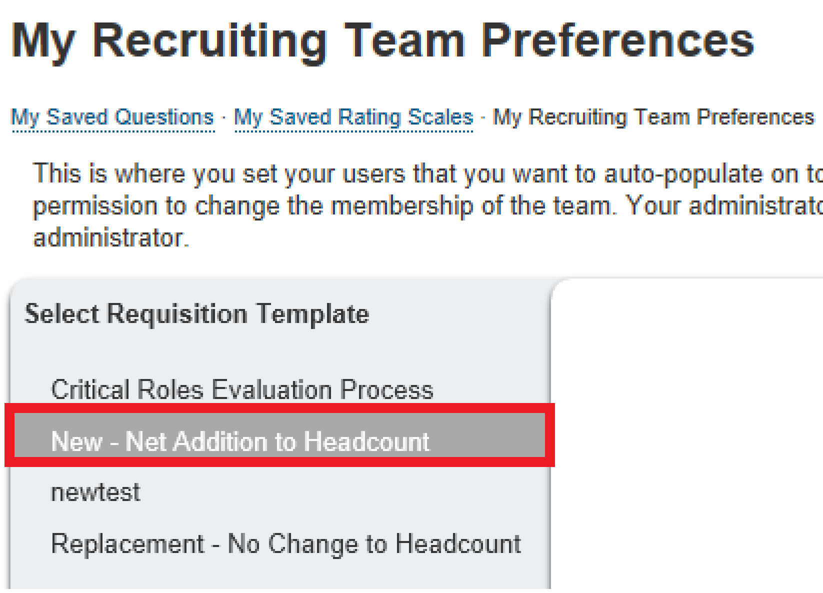
Protect the Admin Default Settings from Changes by Recruiting Users

> Note
>
> Any admin settings or personal preferences changes that would require a new user or group name to appear on a requisition are not retroactively applied to existing requisitions. Any changes that alter the content of a group name already appearing on a requisition are retroactively applied to existing requisitions.

11.9.17.7 Auto-Populating operatorTeams from Personal Preferences

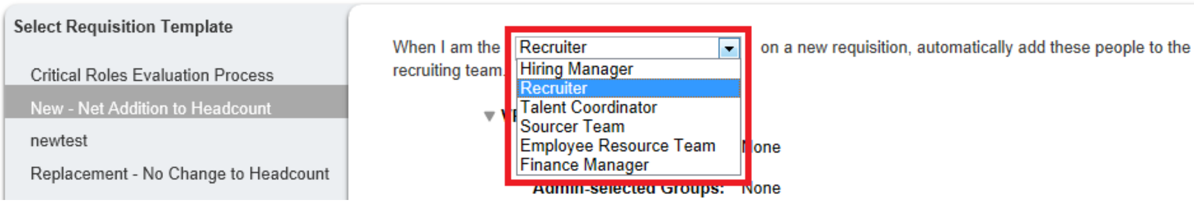
It is possible for a recruiting user to set up Personal Preferences that will auto-populate personal groups of users into the operatorTeam fields.

- *Recruiting* > *Preferences* > *My Recruiting Team Preferences*
- Select a Requisition Template.



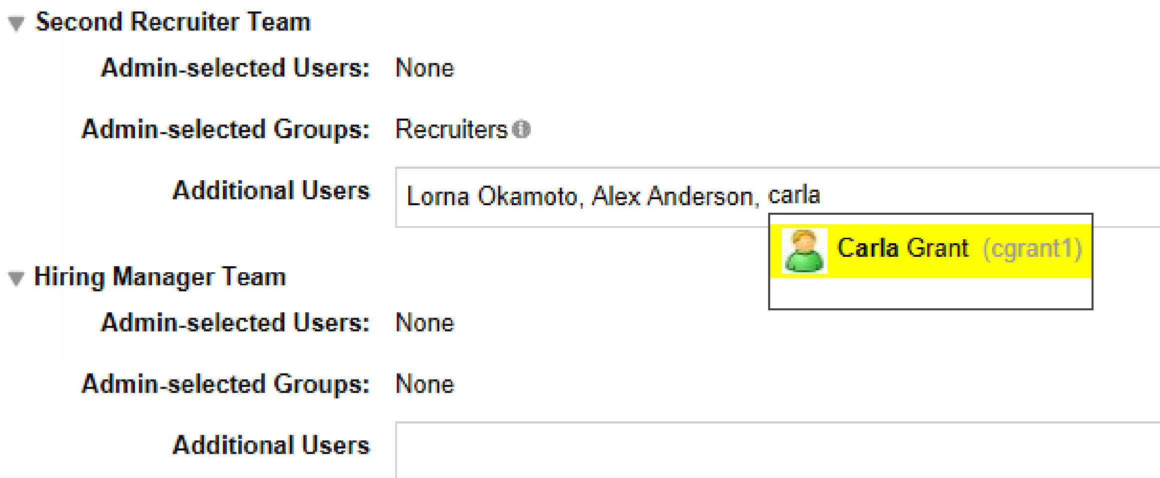
Selecting a Requisition on which to Adjust Personal Preferences

1. Select a value from the “When I am the...” drop down
   It is possible to set up different sets of personal preferences that will apply depending on the role(s) you are playing on a given requisition. For instance, when you are the recruiter on a requisition you may want a particular team of sourcers to appear, but when you are the hiring manager on a requisition and someone else is the approver then you may not want that team to appear.



Select Hiring Manager

2. Specify the desired users, if any, in each team field.



Specify Recruiting Team Users

Note that personal preference lookups occur automatically only upon the point that the requisition details page is saved. This means personal preferences will not auto-populate onto a new requisition, and additions/removals from personal preferences resulting from changes to the primary operators will not take effect, until the recruiting user saves the requisition details page.

The personal preferences saved by a user create a personal Recruiting Group behind the scenes. This Recruiting Group will be used on requisitions. This ensures that if a user later changes their personal preferences the group is dynamically updated and those changes will be automatically reflected on a requisition that references that group.

Clear a Personal Preferences Group from an operatorTeam Field

If the recruiting user removes personal preferences and then changes their mind, they can choose to Re-apply personal preferences, which pulls the current set of all users' personal preferences back onto their requisition. This will also look up and apply personal preferences on requisitions that pre-dated the personal preferences setup.

Tip

If a recruiting user's personal preferences are already applied to a requisition as a personal group, and the user alters the personal preferences, those alterations will apply to the requisition that contains their group.

However, if a user creates new personal preferences, that new personal preferences group will not be retroactively applied to existing requisitions.

Tip

Any admin settings or personal preferences changes that require a new user or group name to appear on a requisition are not retroactively applied to existing requisitions. Any changes that alter the content of a group name already appearing on a requisition are retroactively applied to existing requisitions.

11.9.18 Requisition detail button toolbar

Pre-approved requisitions display a toolbar related to the Performance Management form toolbar.

Requisition Form Toolbar

Some of the icons on the toolbar can be enabled or disabled in Admin > Form Templates. Not all buttons that can be enabled will function on the Requisition form. For example, while spell check works when clicked from the job description field itself, clicking the icon on the form toolbar to trigger spell check does not check the appropriate recruiting-related fields.

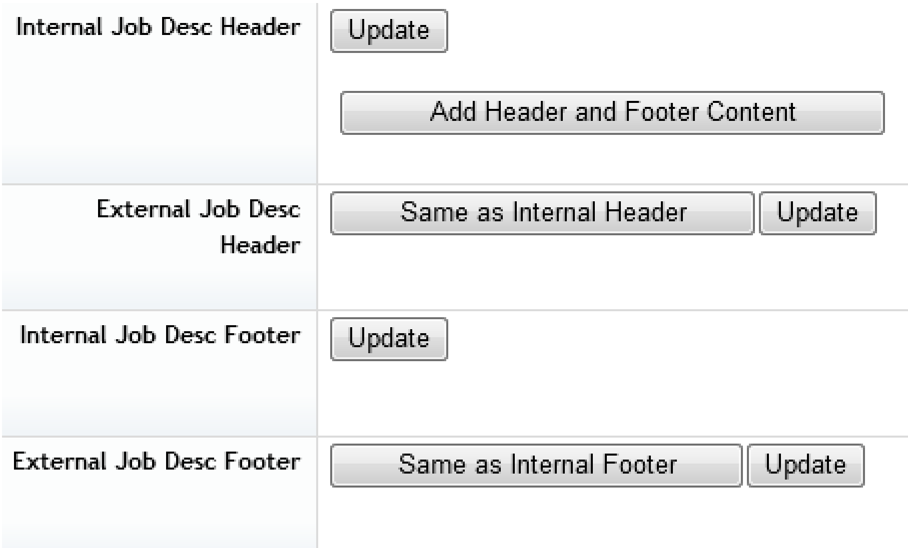
If Provisioning Company Settings are incorrectly configured, this toolbar may appear multiple times in the user interface. If this occurs, review your baseline company settings, particularly making sure that all the UI version settings are correctly enabled.

11.9.19 Headers and Footers

Header and footer fields store rich text content appended to the top and bottom of a job description when the job is posted.

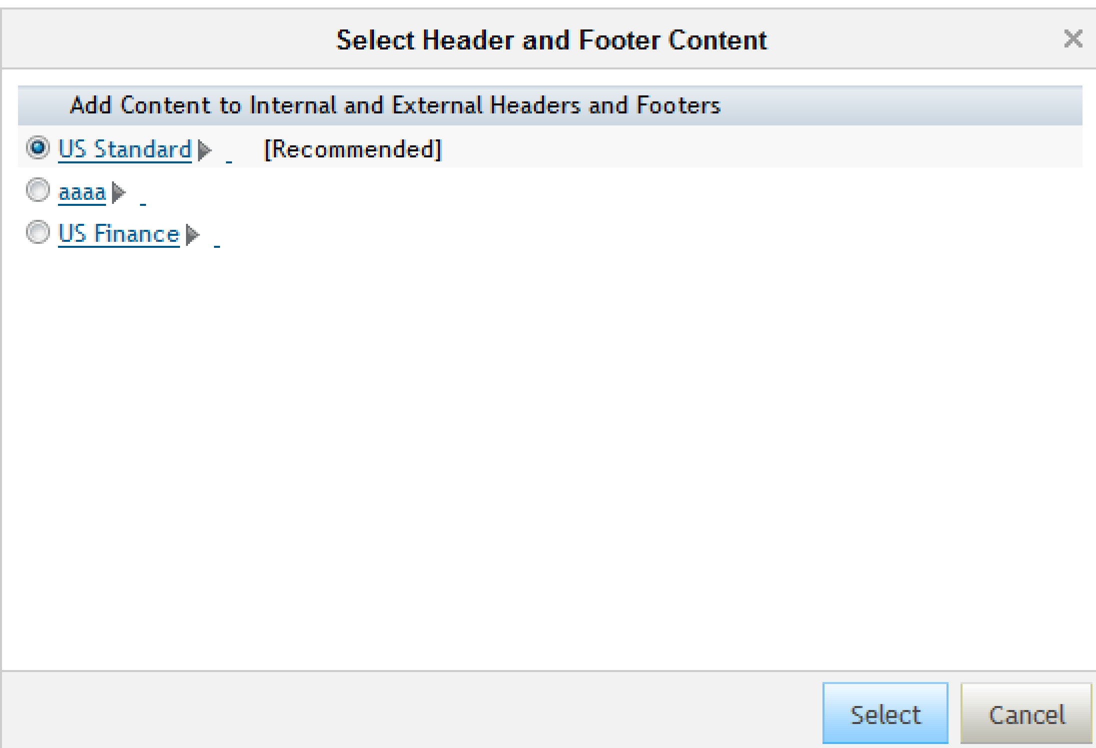
Configuration

- *Provisioning* > *Company Settings* > *Enable Job Description Header and Footer*
- Configure the Requisition XML with intJobDescHeader, extJobDescHeader, intJobDescFooter and extJobDescFooter field IDs. For more information on configuring these fields see the id Attribute [page 176] section of this guide.



Header and Footer Fields on a Requisition

A recruiting user can click Update and write their own header and footer, or can click Add Header and Footer Content and select from a list of pre-defined header and footer templates. For more information on setting up templates see the Manage Job Posting Header [page 547] and Footer section of this guide.

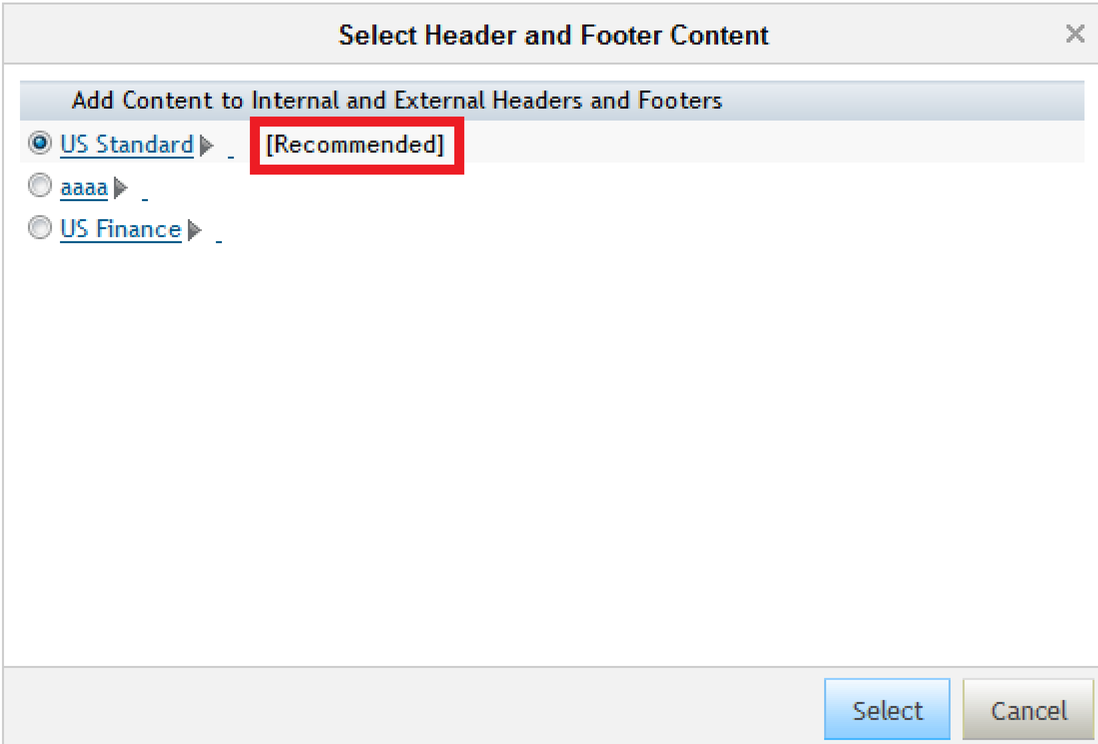


Select Header and Footer Content from the Header and Footer Template Library

After selecting a header and footer template, the recruiting user can click update and make further changes to the header and footer text, if desired.

Header and footer templates cannot automatically populate onto a requisition; they must be selected by a recruiting user. The recruiting user must have write permissions in order to select a template. There is no way to give the user permission to select a template while restricting them from updating the text afterwards.

The header and footer templates contain filter field values. These filter field values are compared to the values stored in the filter fields on the requisition. The best possible match will appear at the top of the list flagged as [Recommended].



Recommended Header and Footer Template

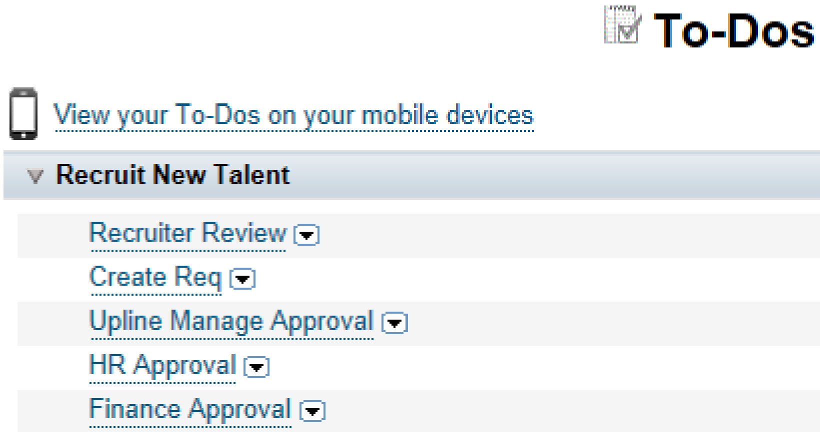
A [Recommended] value always appears; if several templates equally match the requisition filter field values, the first item in the matching list will appear as [Recommended]. You cannot disable this feature.

The external header and footer display “Same as Internal Header” and “Same as Internal Footer” buttons so a recruiting user can easily copy content from the internal values to the external fields if desired.

11.9.20 Routing a Requisition for Approval

When the recruiting user is done filling out the requisition data they can send the requisition to the next step in the approval.

The next user in the approval route map receives a Document Routing Notification email to inform them they have an action to take to approve the requisition. The requisition approval also appears on the user's To-Do list, under the route map step name.



Requisition Approval To-Do List

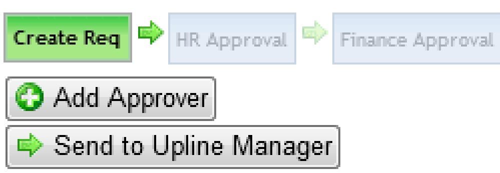
Only the "Currently With' user can send the requisition back one step in the route map. This applies for all route map step types and users. If a "Currently With" user sends back a requisition, the action will be captured in the audit trail, including any comments

Other than this configuration, there is no way to reject or send a requisition back to a previous route map step. You may configure an iterative or collaborative step to allow recruiting users to pass a requisition form back and forth to other users within a step.

Recruiting users cannot see the requisition record on the requisition list page until it reaches them in the approval route map. If the recruiting user is not part of the route map, that user cannot see the requisition record until it is approved. This behavior can be changed in *Admin Tools* > *Recruiting Settings*. Allow users to view pre-approved requisitions without regard to route map status.

The user can approve in one of three ways:

1. Open the requisition and click the approval/send button. Note the button name varies depending on the route map configuration.



Requisition Record Approval

2. Open the requisition list page, check the boxes next to the requisitions and approve several requisitions at once.
3. Using SuccessFactors HCM mobile – see below.

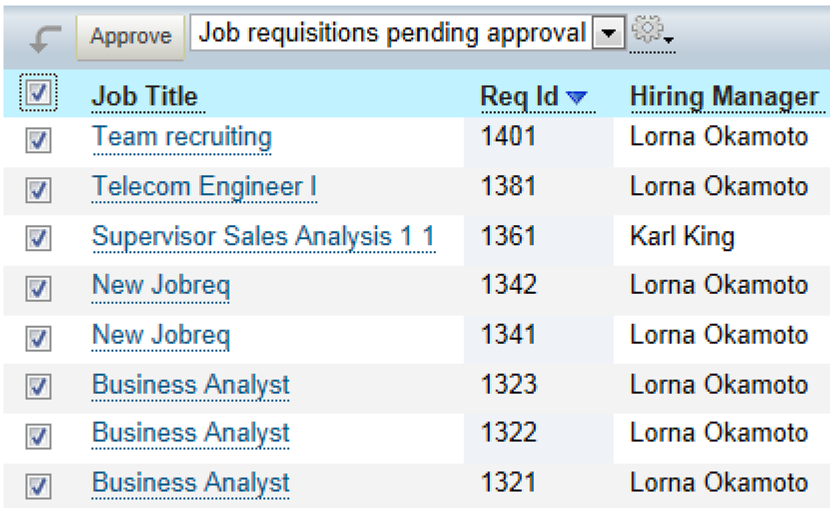
Pre-Requisites

- *Provisioning* > *Company Settings* > *Enable Jam Integration*
- *Provisioning* > *Company Settings* > *Enable Mobile Access*
- Configure Requisition XML with mobile fields. For more information see the mobile-fields Element [page 288] section of this guide.
- Grant permissions to mobile in Admin Tools

- *RBP: Admin Tools > Manage Permission Roles > Role > Permission > General User Permission > Mobile To-Do List Access*
- *Non-RBP: Admin Tools > Permission to Access Mobile > Mobile To-Do List Access*

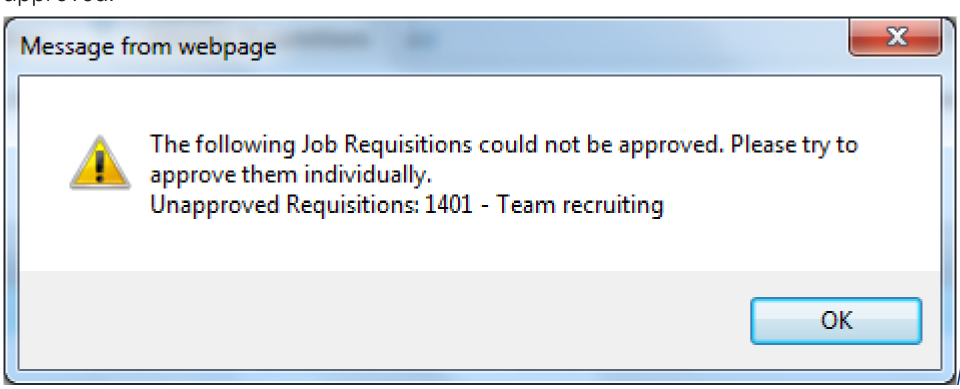
Configuration

1. *Provisioning > Company Settings > Mass Approve Requisitions*



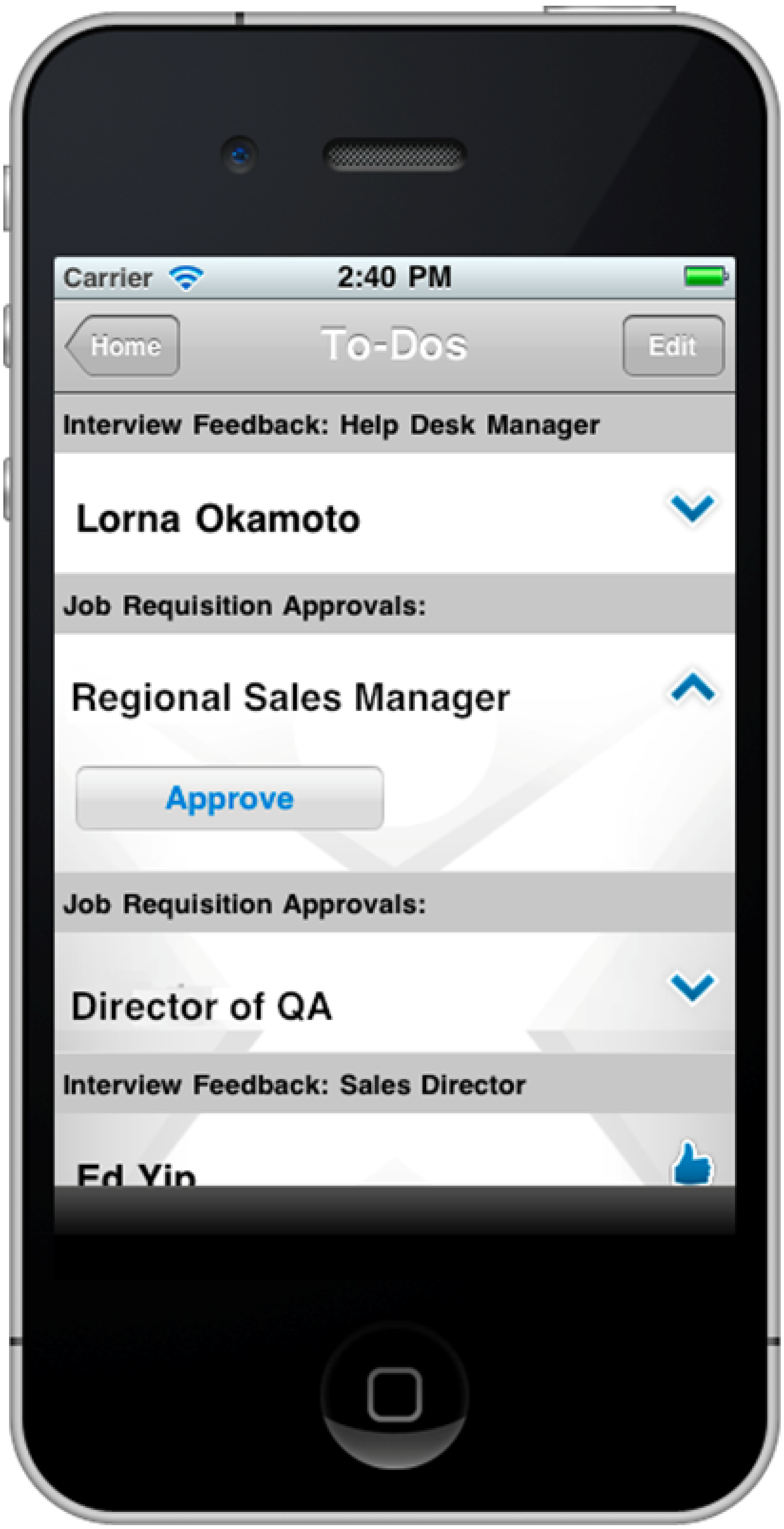
Mass Approve Requisitions from the Requisition List Page

Checkboxes appear next to all pre-approved requisitions, even if the viewing user is not the "currently with" approver or even if the requisition requires additional data input before it can be approved. There is no way to hide the checkboxes on ineligible pre-approved requisitions. If the recruiting user attempts to approve an ineligible requisition via mass approve, a pop up error will stop them and warn them the requisition cannot be approved.



Mass Approve Requisitions Error Message

2. Open the To-Do list in the SuccessFactors HCM Mobile application and approve the requisition



Approve Requisition via Mobile

> **Tip**
>
> A requisition that has incomplete required fields cannot be approved via mobile; the recruiting user must first log on to the tool online and complete the required fields. Also note that comments are not presently supported when approving via the mobile application.

The user to which the requisition is sent is the "Currently With" user. Only the Currently With user can approve a requisition. If the Currently With user is not available another user can proxy in, if they have proxy access, and approve on their behalf.

Users who have access to the requisition as part of an operatorTeam cannot approve. For instance, while the Recruiter may be an approver, the members of the recruiterTeam cannot approve on their behalf unless they proxy in as the recruiter.

11.9.21 Manage Requisition State and Status

It is not presently possible to close or put on hold a pre-approved requisition. Configure a picklist item in the status field to indicate that a pre-approved requisition is no longer active. A status of "99999" indicates a status of closed, while a status of "88888" indicates a requisition on hold. All users who have access to that pre-approved requisition will continue to have access to the record; there is no way at present to remove a Pre-approved requisition from a recruiting user's view. An originator may delete the Pre-approved requisition if deletion capabilities are enabled.

Table 26: Dates used to Caluculate Time to Hire, Time to Fill, and Age of Requisition

Date	Definition
Date Create	Date the job requisition was created
Approved date	Date the job requisition was approved
Closed Date	Date the job requisiiton was closed
External Posting Start Date	The job requisition's posting date
External Posting End Date	The job requisition's posting date
Internal Posting Date	The job requisition's posting date
Internal Posting End Date	The job requisition's posting date
Latest Hold Removal date	The job was places in an "on hold" status; This looks for the date the job req was moved to a non "on hold" status
Job Start Date	Editable field on the job requisition
Due Date	Editable field on the job requisition
Actual Start Date	Editable field on the job requisition
Application Date	Date the job application was submitted
Candidate Review Date	Date the application was first opened by a recruiting operator
Date of Availability	Editable field on the job application
Start Date	Editable field on the job application

Date	Definition
Hired on Date	Generated when a candidate is moved into a step with a Hired status.If the are moved into a Hired status more than once, it is the most recent move.

Customers can enable three Recruiting settings to automatically calculate Recruiting metrics in *Admin Tools* > *Recruiting Settings* : Time to Hire, Time to Fill and Age of Requisition. Time to Hire and Time to Fill are automatically calculated based on the Start Data and End Date selected in *Recruiting Settings.* Checking the *exclude time spent in hold statuses* checkbox exclude hold status time from the calculation. Job Start Date and Actual Start Date are standard fields on the requisition, and in order to use them a client must have them configured in the XML and must populate them with data from the calendar widget.

Age of Requisition populates a non-default value for the *Age of Requisition* field in reportable requisition fields. Age of Requisition is based on the Start Date seleted in *Recruiting Settings.* Once the requisition is closed, Age of Requisition becomes Time to Fill. Age of Requisition is calculated in whole days only. If an admin user does not configure Age of Requisition, the default age calculation of current date minus approved date (closed dated minus approved date if requisition is closed) persists.

If a requisition is placed in an 88888 status prior to approval, each day spent on hold counts as -1 for the age of the requisition. Customers should use a different pre-approval hold status to support this workflow, or the calculated age of the requisition could be a large negative number, which would not produce the desired behavior.

Pre-approved requisitions can be closed and then re-opened while still in the pre-approved state. This will honor the existing button permissions.

For more information see button-permission Element [page 283].

When the requisition re-opens in the pre-approved state, it will be in the same Route Map step it was in prior to being closed.

Tip

You cannot permission the requisition open and requisition closed buttons based on requisition state. For example, you cannot permission a hiring manager to have the ability to close a requisitions when it's pre-approved, but not when the requisitions is in the approved state.

When a requisition completes all steps in the route map it automatically switches from the Pre-approved state to the Approved state.

This triggers the Document Completed Notification (from *Admin Tools* > *E-mail Notification Templates Settings*). Please note that the carbon copy feature on the route map that Performance Management uses to CC users on the Document Completed Notification does not apply to Recruiting.

Once a requisition is in the Approved state there is no way to again send it back into Pre-approved for further route map approvals. The only supported requisition state change is to close the requisition.

There is no way to automatically close requisitions upon the final hire. Requisitions must be manually closed once the position is filled.

Requisitions can be closed by clicking the "Close" button. The recruiting user must have the appropriate permissions to view the button. This button can have a custom label specified.

Close Requisition Button

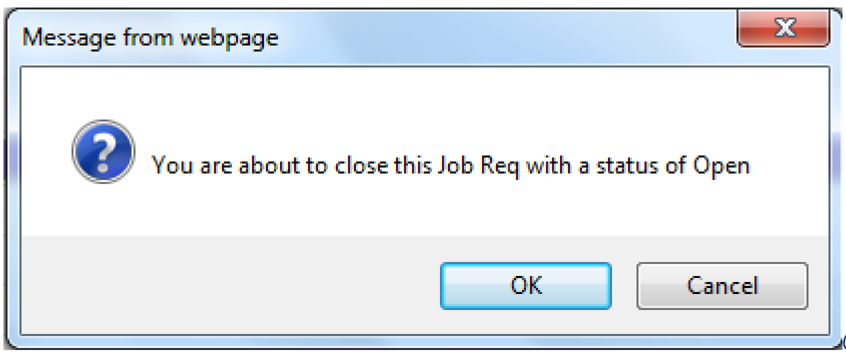
A recruiting user can close a requisition regardless of the status field value. This could result in a “Closed” requisition containing a status value of “Open” or other similar incorrect value.

To guard against this, it is possible to configure the requisition status field to be validated against the requisition Approved/Closed state. This optional configuration helps ensure the requisition state and status match.

Configuration of Closed Status (99999)

1. *Admin* > *Picklists* > *Export the picklists*
2. Locate the picklist defined on the Requisition XML status field.
3. For picklist items you wish to associate with the Closed state, set the value column to 99999.
4. Import the picklist changes

With this configuration in place, the user will receive a pop up warning when they click the Close button.

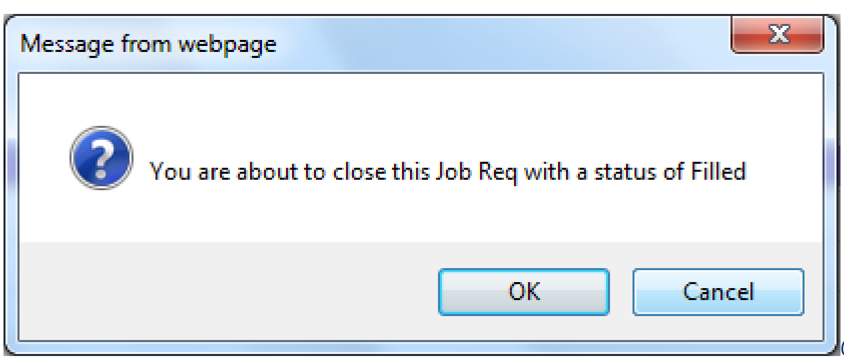


Close Requisition Status Warning

If the status is not a 99999 status, the attempt to close the requisition will not succeed and the recruiting user will see this error message at the top of the requisition detail page.

Close Requisition Status Instructions

The user can change the status to an appropriate 99999 status and either click the “Close” or “Save buttons”. If a 99999 status is selected the Save button will act as the “Close” button.

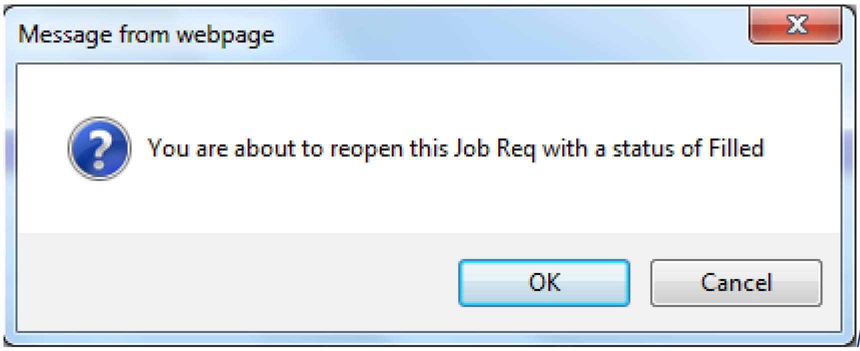


Close Requisition Status Warning

Once the requisition is closed, recruiting users with appropriate button permissions can see the Reopen button and change the requisition state back to Approved.

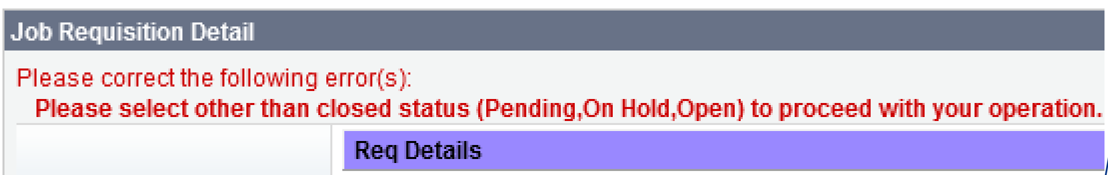
Reopen Requisition Button

With the 99999 configuration in place, the user receives a pop up warning when they click the Reopen button.



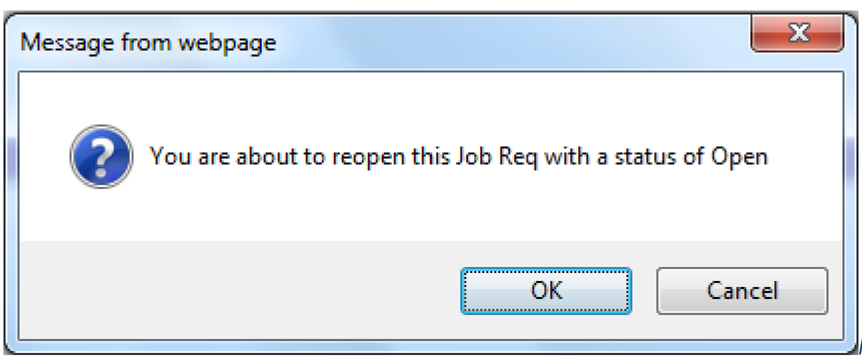
Reopen Requisition Status Warning

If the status is a 99999 status, the attempt to re-open the requisition will fail and the recruiting user will see this error message at the top of the requisition detail page.



Reopen Requisition Status Instructions

The user can change the status to an appropriate non-99999 status and click the Reopen button.



Reopen Requisition Status Warning

Configuration of Hold Status (88888)

1. *Admin* > *Picklists* > *Export the picklists*
2. Locate the picklist defined on the Requisition XML status field.
3. For picklist items you wish to associate with the Hold state, set the value column to 88888.
4. Import the picklist changes.

11.9.22 Post Requisitions

Requisitions can be posted through the Recruiting Management tool to several locations:

- Internal career site
- External career sites
- Private Postings
- Job boards
- Agencies

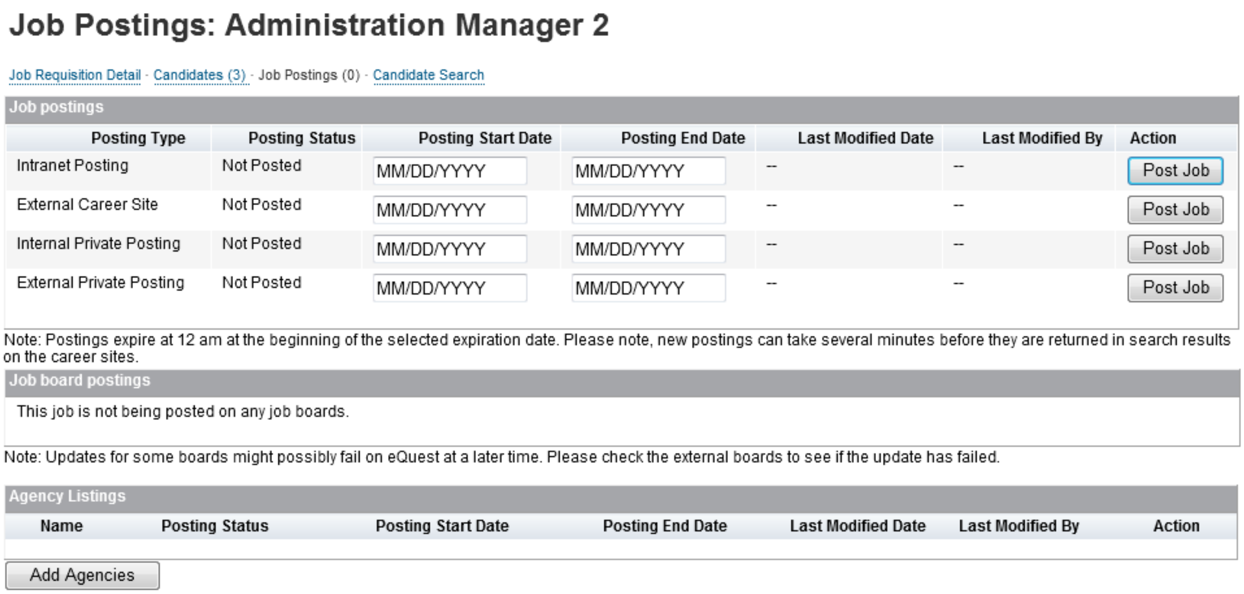
Recruiting Management does not support passing job tracking codes to third-party job boards, including Monster and eQuest.

> **Recommendation**
>
> Any updates to the requisition also update the posting. Adding additional questions to a job requisition promps the user with a message that they are modifying an existing posting. Making a field added to an existing requisition required can cause conflicts when using multi-stage applications. Do not add additional required questions to existing requisitions.

Navigate to the job postings page from the requisition hover over or the links at the top of the requisition.

Job Postings Navigation on the Requisition Hover Over

Job Postings Navigation on the Requisition Navigation Links



Job Postings Page

Posting Type

The Internal and External postings types will appear in all instances.

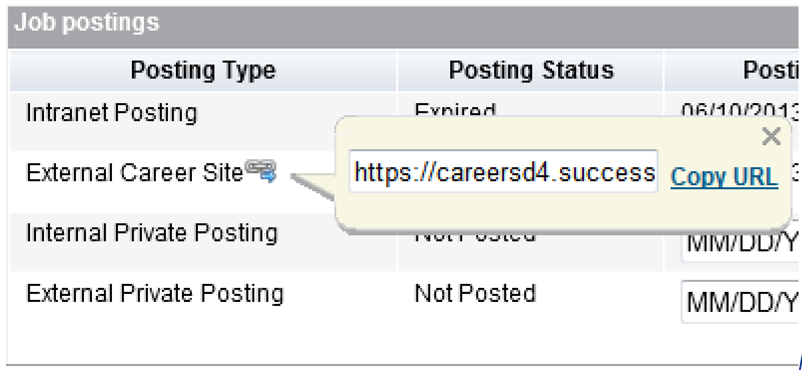
The internal and external private posting types may be present depending on the instance configuration. For more information, see the Internal and External Private Postings [page 354] sections of this guide.

Posting Type

The labels for the internal, external, and agency posting types are configurable in *Provisioning* > *Job Requisition System Field Labels*. Configure the field labels for private postings in the Requisition XML.

When a job is currently posted, there is a hyperlink icon. When clicked, this icon displays the direct link to the posting that the recruiting user can copy and distribute in e-mail or by other means.

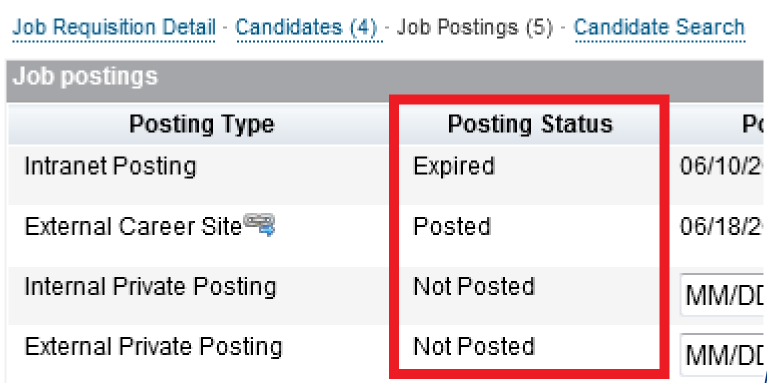
There may also be a Copy URL link that automatically copies the direct link to the clipboard. This is not supported in all browsers — for example, Firefox default browser security settings do not allow a Web application to access the clipboard, and so in that browser the Copy URL link is not available.



Posting Hyperlink URL

Posting Status

The posting status displays the present state of the job posting. The values are maintained automatically, and may display Expired, Posted or Not Posted.

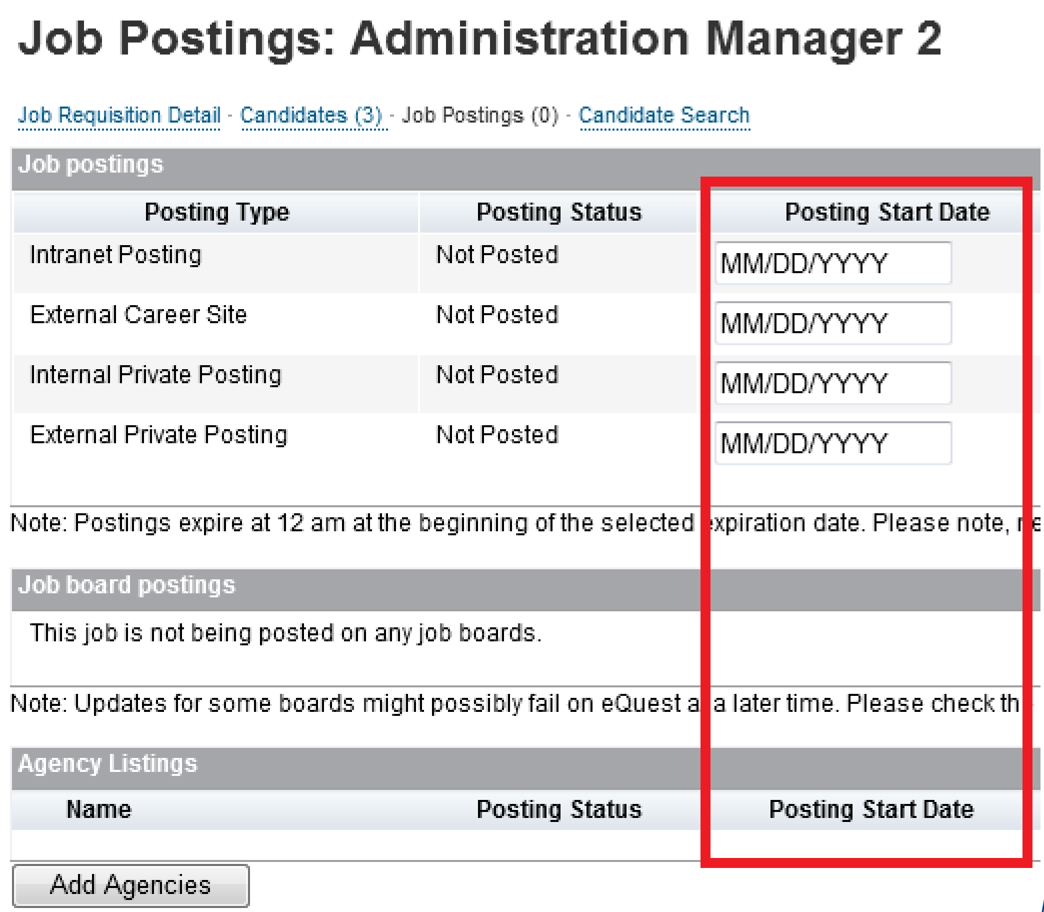


Posting Status

There is no e-mail notification available to alert a recruiting user to an upcoming posting expiration, nor any way to set up auto-renewal for postings.

Posting Start Date

On any posting type the recruiting user can select a start date when the posting will appear.



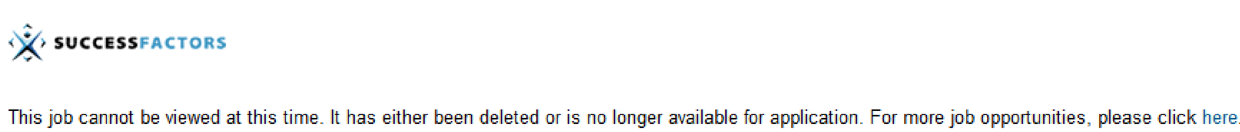
Posting Start Dates

Only requisitions in the approved state can be posted. It is not possible to set up posting information on a preapproved requisition even for future-dated posting. It is not possible to have a requisition immediately post automatically upon approval.

Posted requisitions must be indexed before they become searchable or available on the career site. The indexer runs three times an hour, so it can take anywhere from 1 to 20 minutes for the posting to appear. This is not configurable.

> **Tip**
>
> Posting times are handled in the time zone of the server in which the client instance is set up. This is not configurable.

If a candidate attempts to access the job posting before the posting being indexed (which could occur if the recruiting user sent them a direct link, for example), a warning message appears, stating: `This job cannot be viewed at this time. It has either been deleted or is no longer available for application. For more job opportunities, please click here.`

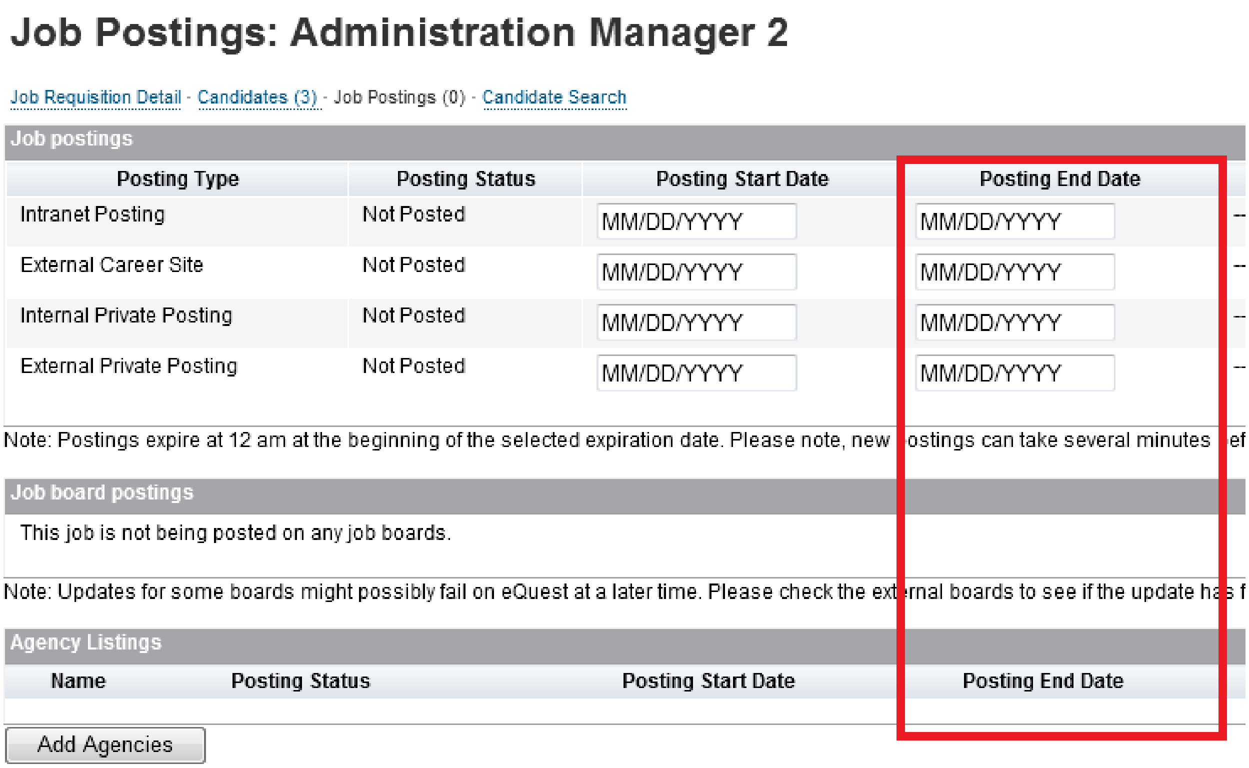


Posting Unavailable Warning Message

Recruiting users should post the job at least an hour before distributing it to candidates or third party job boards. Posting the requisition to a third party job board immediately after posting the job externally could mean that during the highest-traffic period of exposure for that fresh posting, the link will not work.

Posting End Date

On any posting type, the recruiting user can select an end date when the posting will cease to appear.



Posting End Dates

The posting dates do not display a time stamp but time is factored in. Postings begin at 12 am on the posting start date, and end at 12 am, at the beginning of the selected expiration date. There is no way to configure a time to be visible or editable..

If the posting dates fail to save, verify that you have disabled the Twitter integration or fully configured it properly.

Posting Start Date/Posting End Date

Posting start and end times are displayed based on the user's time zone, as designated in *Admin Tools* > *Manage Users*. You cannot hide these columns from the job postings page.

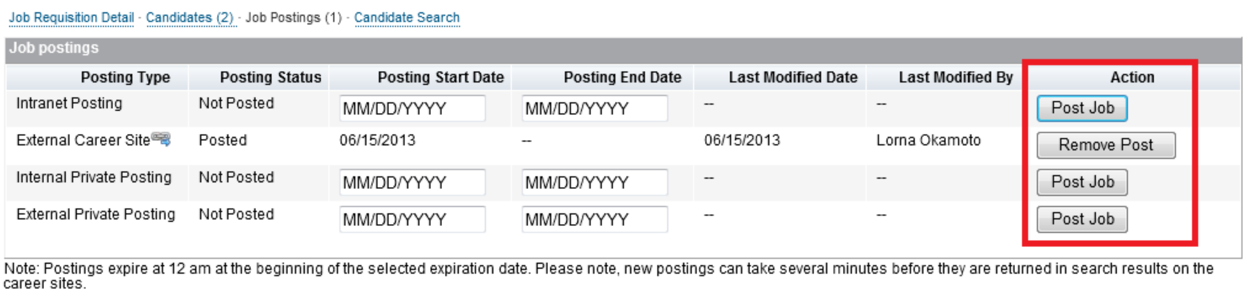
Last Modified Date and Last Modified By

The Last Modified information displays the details of the last change to the posting information. The values are maintained automatically.

You can track and report all posting activity in the JobReq Posting Audit History folder in Ad Hoc Reports. The posting history is not available in the job postings page user interface.

Action

Once you have specified posting dates, click Post Job in the Action column. Once the posting dates have been saved, the button will change to Remove Post. The *Remove Post* button will be present even if the posting start date has not yet occurred or the posting end date has already passed.



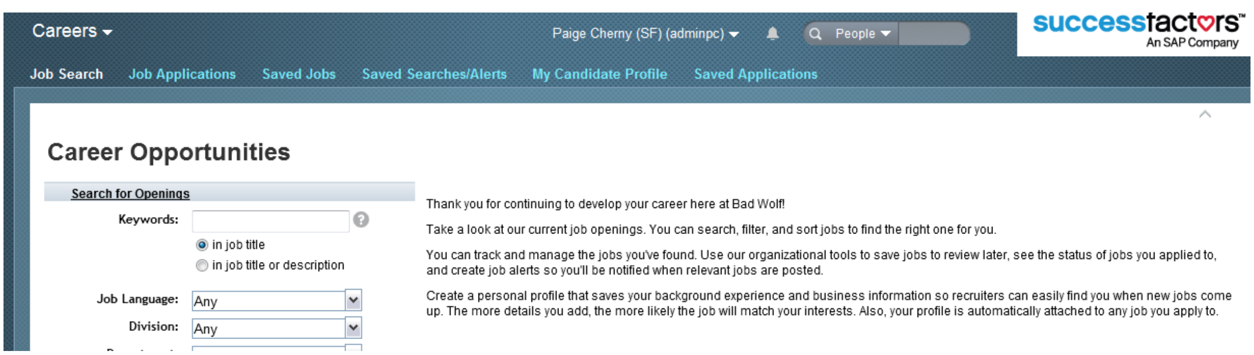
Posting Action

There is not an option to extend, repost, or renew the posting. To change posting dates, the recruiting user must click Remove Posting, adjust the dates, and click Post Job again.

11.9.22.1 Internal Posting

A recruiting user can post the requisition to the internal career site. There is a single internal career site, accessible to candidates via the Careers tab.

The internal career site posting option is available in all instances. No special XML configuration, or Admin Tools or Provisioning setup is needed other than proper baseline and Requisition XML configuration.



Internal Career Site

Jobs posted to the internal career site are only accessible to active BizX users. If a client has a large population of employees but has chosen not to give BizX user accounts to some employees, they will not be able to access the internal career site.

For clients using SSO, where employees can only access the BizX site from within the client's network, it is not possible for employees to go home and access internally posted jobs from their home computer unless they have VPN. The definition of internally posted jobs is only users who can access BizX can access the internal postings.

Recruiting Marketing functionality such as site branding is not supported on internally posted jobs.

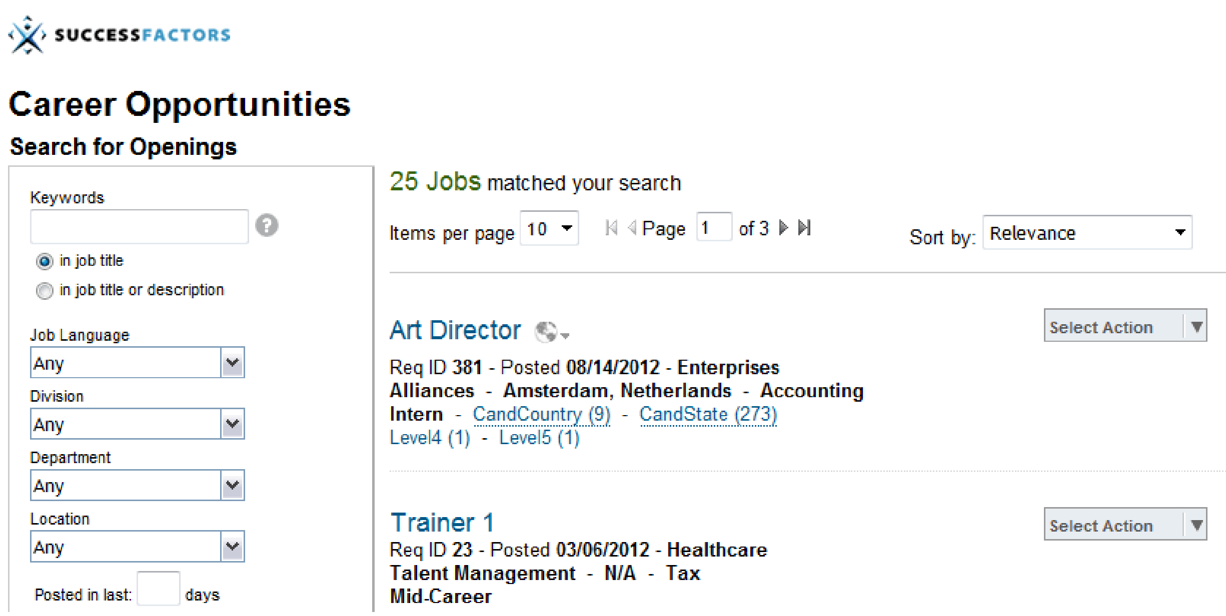
11.9.22.2 External Posting

A recruiting user can post the requisition to the external career sites.

The external career site posting option is available in all instances. No special XML configuration, or Admin Tools or Provisioning setup is needed other than proper baseline and Requisition XML configuration.

There can be multiple external career sites. When the requisition is posted externally, it posts to the Default site and to all microsites where the microsite filter criteria matches the requisition data. There is no way to pick and choose the microsites to which the requisition posts, or to post a job to a microsite while excluding it from the Default site or other microsites with filter criteria that match the requisition data.

For more information about microsite functionality, see the Manage Recruiting Sites [page 497] section of this guide.



External Career Site

If the client has chosen to enable and set up the Twitter integration, all new external postings will be tweeted. For more for information see the External Third Party Integrations [page 626] section of this guide.

11.9.22.3 Job boards

The job boards section is used to manage jobs posted to third party job boards via the eQuest integration. For more information, see the External Third Party Integrations [page 626] section of this guide. It is not possible to hide the Job Boards section.

11.9.22.4 Internal and External Private Postings

The private posting functionality allows recruiting users to distribute a job to selected candidates in situations when the posting should not be available in job search results. This functionality allows the requisition to have a candidate-accessible job posting page, but be omitted from search results.

Configuration

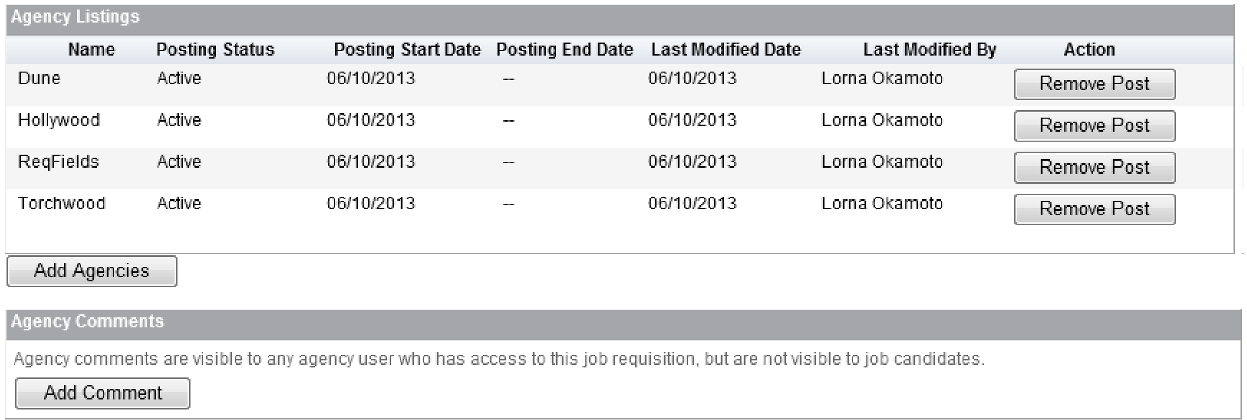
1. Configure the following fields in the Requisition XML

```
  <field-definition id="intranetPrivatePosting" type="bool" required="false"
custom="false">
    <field-label mime-type="text-plain"><![CDATA[Private Internal Posting]]></
field-label>
  </field-definition>
  <field-definition id="externalPrivatePosting" type="bool" required="false"
custom="false">
    <field-label mime-type="text-plain"><![CDATA[Private External Posting]]></
field-label>
  </field-definition>
```

2. *Admin Tools* > *Manage Recruiting Settings* > *Enable private postings of jobs*

11.9.22.5 Agency Postings

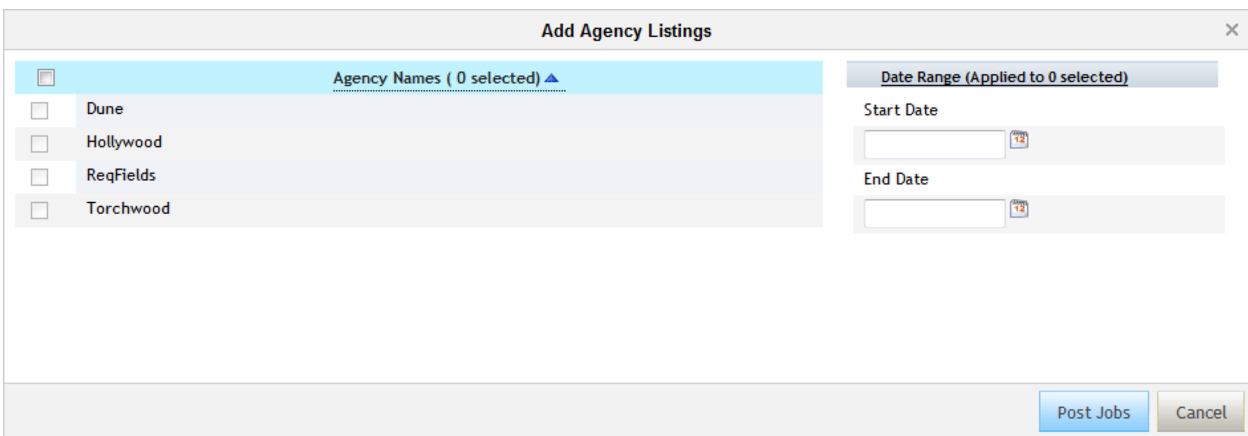
If the client is using the agency portal, the recruiting user can post to all or to selected agencies. For detailed information about configuring, posting to and using the Agency functionality, see the Agency [page 569] section of this guide.



Agency Listings Table

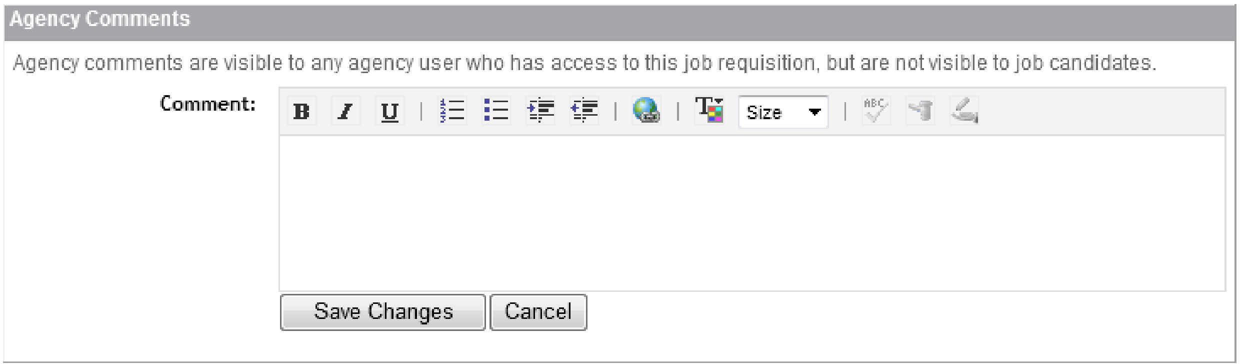
If *Provisioning* › *Company Settings* › *Enable Posting to specific agencies* is unchecked, the main Job Postings table lists an Agency option. Recruiting users can post jobs to "Agency" the same way they would to the internal career site. In this case, the job is either posted to all agencies or none.

If *Provisioning* › *Company Settings* › *Enable Posting to specific agencies* is checked, the Agency option is absent from the main Job Postings table and a new Agency Listings table appears. The recruiting user can click Add Agencies and select which agencies they wish to post to, and may set start and end dates for the agency postings.



Add an Agency Listing

The recruiting user can specify comments to be seen by agencies when they view the posting.



Agency Comments

11.9.23 Search Requisitions

Recruiting users can search for requisitions when forwarding a candidate or copying a requisition. See the Forward Candidates to a Requisition [page 85] and Copy Existing Job Requisition [page 304] sections of this guide.

Candidates can search for posted requisitions on the career portals. For more information, see the Search for Openings [page 572] section of this guide.

11.9.24 Delete Requisitions

Users with the appropriate permissions can delete Pre-Approved and Approved Job Requisitions. These deleted requisitions can also be restored once deleted.

11.9.24.1 Pre-requisites

- *Provisioning* > *Company Settings* > *uncheck Hide Delete Icon Inside Form*
- *Admin Tools* > *Form Template Administration* > *Form Templates* > *uncheck Disable delete button*
- Grant users the appropriate permissions for Job Requisition Delete
  - *Non-RBP*: *Recruiting Permissions* > *Deleted Job Requisitions*
  - RBP: *Manage Permission Roles* > *Recruiting Permissions* > *Delete Job Requisitions*
- Grant users the appropriate permissions for Job Requisition Restore
  - Non-RBP: *Manage Recruiting Administration* > *Restore Deleted Job Requisitions*
  - RBP: *Manage Permission Roles* > *Manage Recruiting* > *Restore Deleted Job Requisitions*

> **Note**
>
> If no permissions are granted for Job Requisition Delete, the Originator can still delete pre-approved requisitions, as before. However, any requisitions deleted after 1402 can be restored.

11.9.24.2 Working with Requisition Deletion

Navigate to the Job Requisition detail page and in the button toolbar, click the delete button to delete the requisition. If the job being deleted has applications attached to it, users will be presented with a warning when they attempt to delete the requisition.

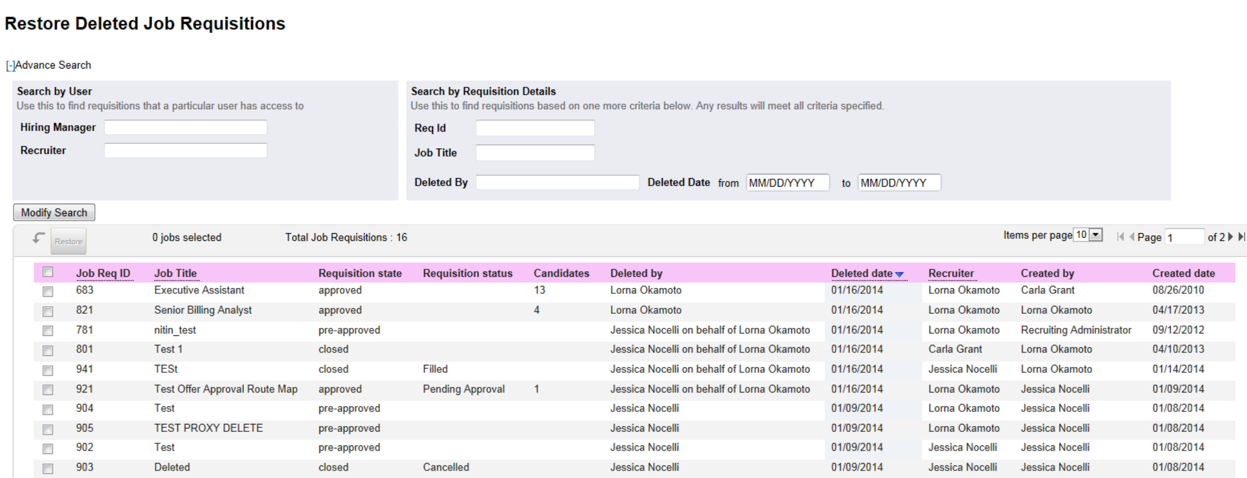
Emails will not go to forwarded candidates, only actual applicants will be emailed.

Customers can choose to configure a generic email and send to all candidates, including those who have been dispositioned from the job requisition, or they may choose not to email candidates automatically and use the multi-select status set feature to select the candidates they would like to notify.

If there are no candidates associated with the requisition the user will still be given a brief warning to confirm they want to delete the job requisition.

Job Requisition Restore

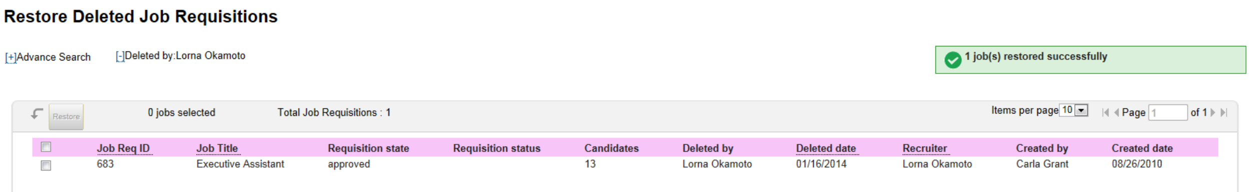
Using the advanced job requisition search, users can search for deleted requisitions by requisition ID, job title, the user who deleted it or the deletion date. The user can select the appropriate requisition and click “Restore” in the upper left of the search results. Once the job is restored the user will see a success message.



Job Req ID	Job Title	Requisition state	Requisition status	Candidates	Deleted by	Deleted date	Recruiter	Created by	Created date
683	Executive Assistant	approved		13	Lorna Okamoto	01/16/2014	Lorna Okamoto	Carla Grant	08/26/2010
821	Senior Billing Analyst	approved		4	Lorna Okamoto	01/16/2014	Lorna Okamoto	Lorna Okamoto	04/17/2013
781	nitin_test	pre-approved			Jessica Nocelli on behalf of Lorna Okamoto	01/16/2014	Lorna Okamoto	Recruiting Administrator	09/12/2012
801	Test 1	closed			Jessica Nocelli on behalf of Lorna Okamoto	01/16/2014	Carla Grant	Lorna Okamoto	04/10/2013
941	TESt	closed	Filled		Jessica Nocelli on behalf of Lorna Okamoto	01/16/2014	Jessica Nocelli	Lorna Okamoto	01/14/2014
921	Test Offer Approval Route Map	approved	Pending Approval	1	Jessica Nocelli on behalf of Lorna Okamoto	01/16/2014	Lorna Okamoto	Jessica Nocelli	01/09/2014
904	Test	pre-approved			Jessica Nocelli	01/09/2014	Lorna Okamoto	Jessica Nocelli	01/08/2014
905	TEST PROXY DELETE	pre-approved			Jessica Nocelli	01/09/2014	Lorna Okamoto	Jessica Nocelli	01/08/2014
902	Test	pre-approved			Jessica Nocelli	01/09/2014	Jessica Nocelli	Jessica Nocelli	01/08/2014
903	Deleted	closed	Cancelled		Jessica Nocelli	01/09/2014	Jessica Nocelli	Jessica Nocelli	01/08/2014

Search deleted job requisitions

Restoring deleted job requisitions will reinstate all active To Dos including form routing approvals, offer approvals and overdue interview assessments. The email from *Admin Tools* > *System Email Notifications or Recruiting Email Notifications* that has already been sent for these tasks will be triggered again to alert the user.



Job Requisition Restore success message

If the interview is in the past, the Outstanding Interview Assessment email will be triggered at a particular time depending on where the server is located. This gives the user the chance to go and update the interview date to the present and send the current notification if they would like to.

There is no restore email alert for Candidates. If it is necessary to alert candidates you have restored a requisition, a manual email may be sent.

11.9.25 Job Profile Builder Integration

11.9.25.1 Feature Summary

The Recruiting – Job Profile Builder Integration populates job requisitions with pre-defined Job Profile content set up by an administrator. This pre-population helps ensure consistency and professionalism in job requisitions.

11.9.25.2 Prerequisites

- Enable and set up the Job Profile Builder. https://jam4.sapjam.com/groups/539388/documents/797936/slide_viewer

11.9.25.3 Quick Facts

- The following functionality is not supported
  - SFAPI access to individual job profile sections (education, skills, competencies, etc.) on a requisition
  - Importing content into each Job Profile section separately on a requisition during requisition data migration
  - Creating a requisition via the SFAPI with a completed Role field and blank job description with the expectation the system will look up the job profile associated with the role and populate the Job Profile data onto the imported requisition.
  - Separate permissions for job profile template editing (layout/formatting) and job profile content

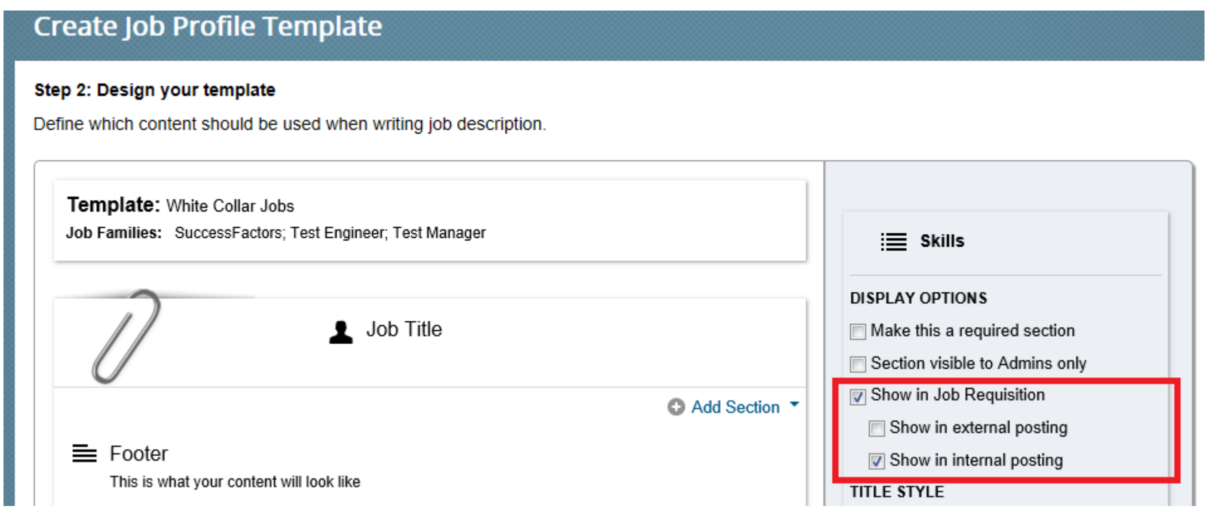
- ○ Ability to define how many levels of library information the recruiting users and candidates will see in the library sections of the job profile. Only one level (the name of the library item) of information is supported on the candidate facing posting.
  - ○ Search functionality in Browse Families and Roles
- When using the Job Profile Builder integration, the competencies field is not supported on the requisition. Include it on the job profile template to ensure it displays.
- Job Role Tags can be used in combination with the Job Profile Builder
- Job Code Entity functionality can be used with the Job Profile Builder integration. The user browses Families and Roles and selects the desired job code. The Job Code Entity fields and job profile content populate onto the Requisition

Related Information

Using Job Role Tags in Browse Families and Roles [page 309]

11.9.25.4 Configuration

1. To enable the Recruiting – Job Profile Builder integration navigate to *Admin Tools* > *Manage Recruiting Settings* > *Use Job Profiles in Requisitions*
2. To set up which sections of Job Profiles are used in requisitions, navigate to *Admin Tools* > *Manage Job Profile Templates* > *select or create a template* > *click Next* > *click the gear in the desired section*. For more information, see https://jam4.sapjam.com/groups/539388/documents/797936/slide_viewer
   - ○ Select Show in Job Requisition. Select your preference to "Show in internal posting," "Show in external posting," both, or neither.



Show in Job Requisition Settings

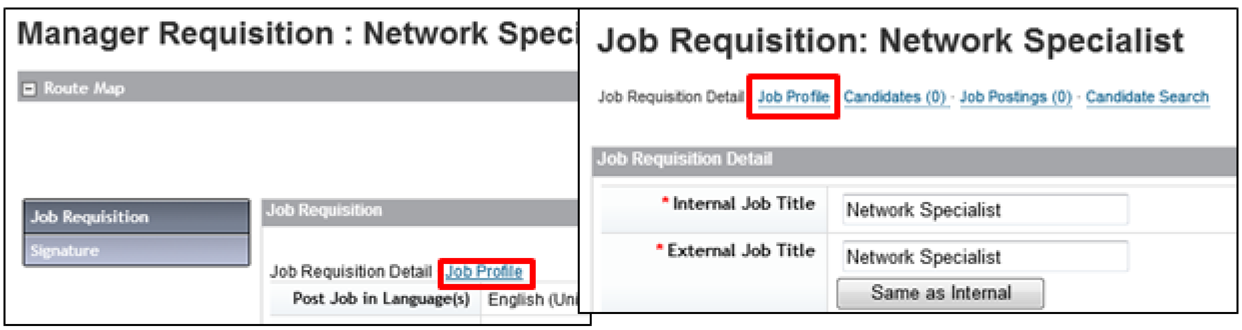
3. (Optional Additional Configuration) Define the fieldid "jobRole" on the Requisition XML and permission it appropriately. If defined in the XML, the new field is supported in the SFAPI, legacy data migration import, Ad Hoc Reports, Offer Approval, Offer Letter and job requisition tokens.

4. (Optional Additional Configuration) Update the listingLayout field permissions on the Requisition XML to change user access to the Job Profile tab (omitted, read or write). When the Job Profile Builder integration is enabled, the extListingLayout and competencies field permissions become irrelevant; all job profile access is controlled by the listingLayout field permissions.

11.9.25.5 Working with the Job Profile Builder Integration

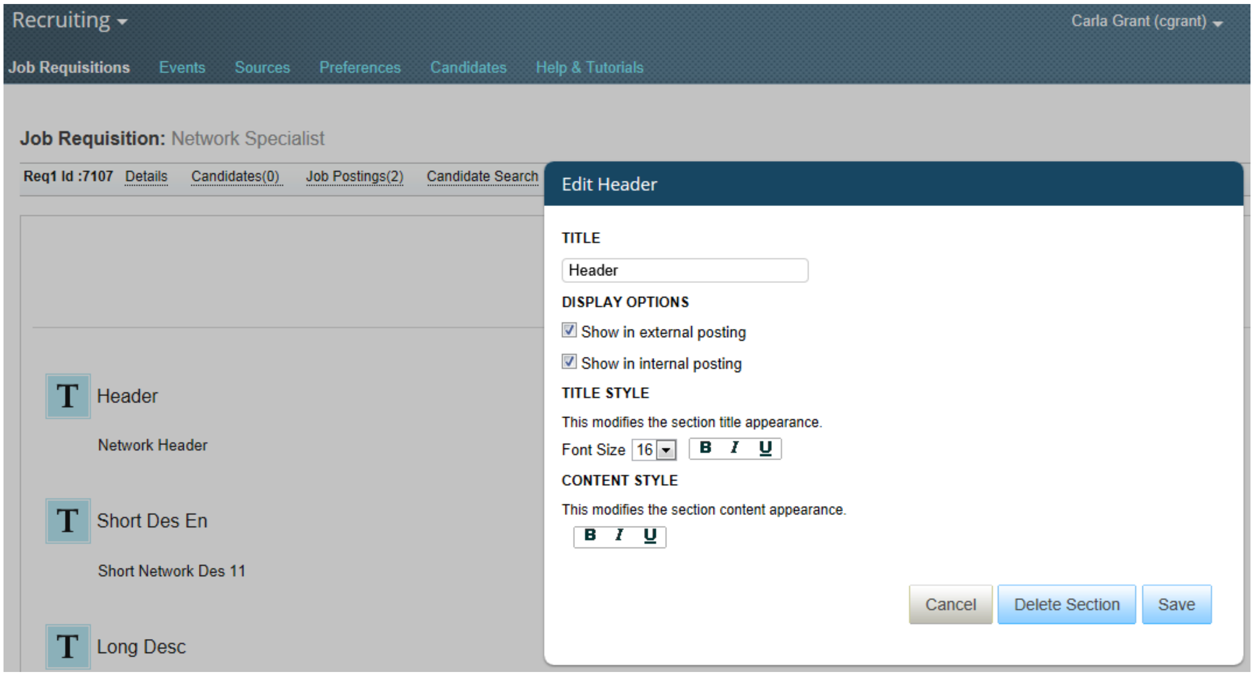
When creating a requisition using “Browse Families and Roles,” when the recruiting user selects the appropriate family from the dropdown, the full job profile information is displayed, broken out into sections and allowing the recruiting user to browse the different roles before selecting the appropriate one.

The job description will no longer appear under “Requisition Details” but under a new “Job Profile” sub-tab. This tab is available for both Approve and Pre-Approved Requisitions. This sub-tab also includes the internal description, external description and competencies.



Job Profile sub- tab (Pre-Approved and Approved Requisitions)

Users with write permissions to the listingLayout field can edit the sections of the job profile. You can edit the title and formatting of the overall section by clicking on the section heading. For library sections, you can also edit the library by clicking the section header. For text sections, edit the content by clicking directly on the section's text. Each individual section can be limited to the internal posting, the external posting, or both. It is possible to display sections to recruiting users and not candidates.

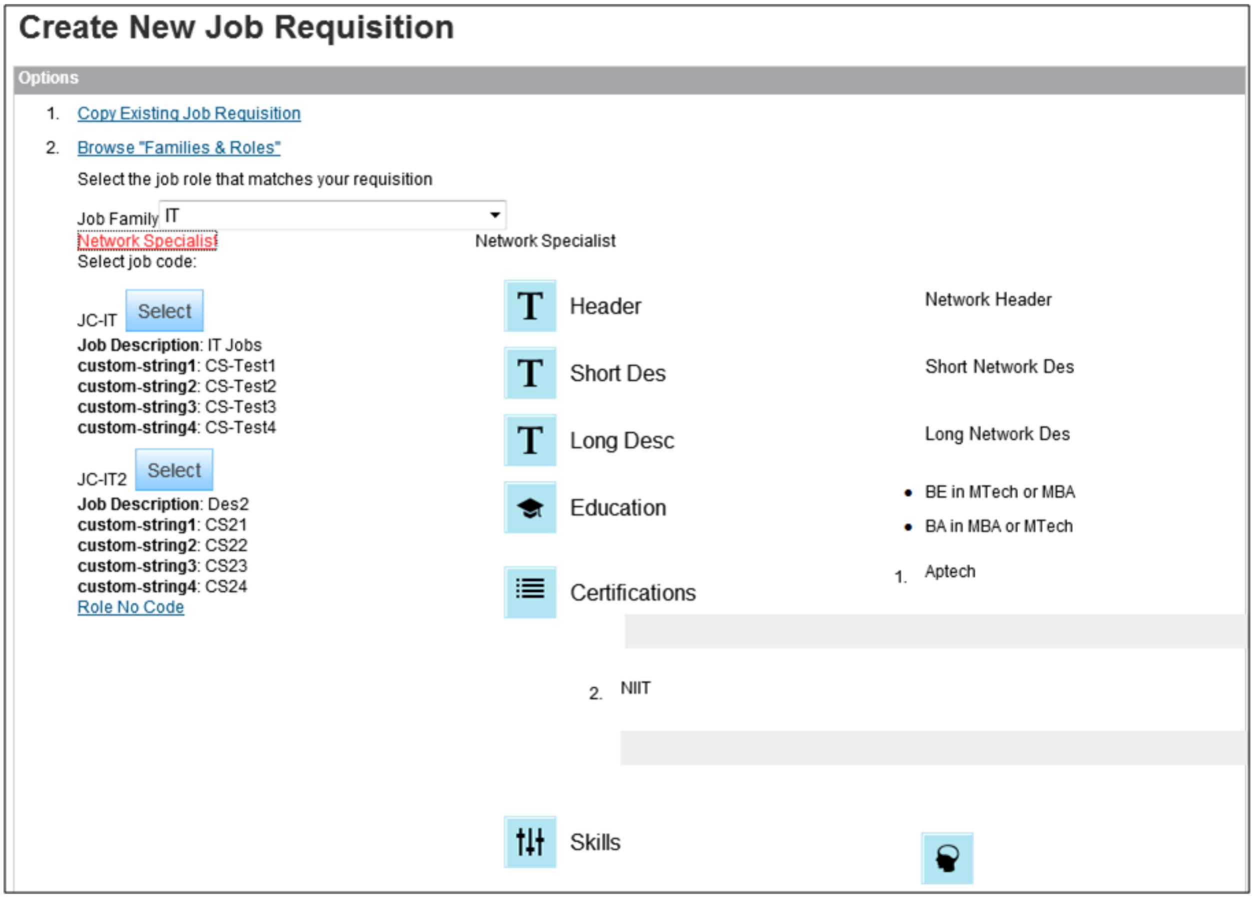


Edit Job Profile sections

Note

Changes made to library sections of the job profile on the requisition do not affect the job profile library in Admin.

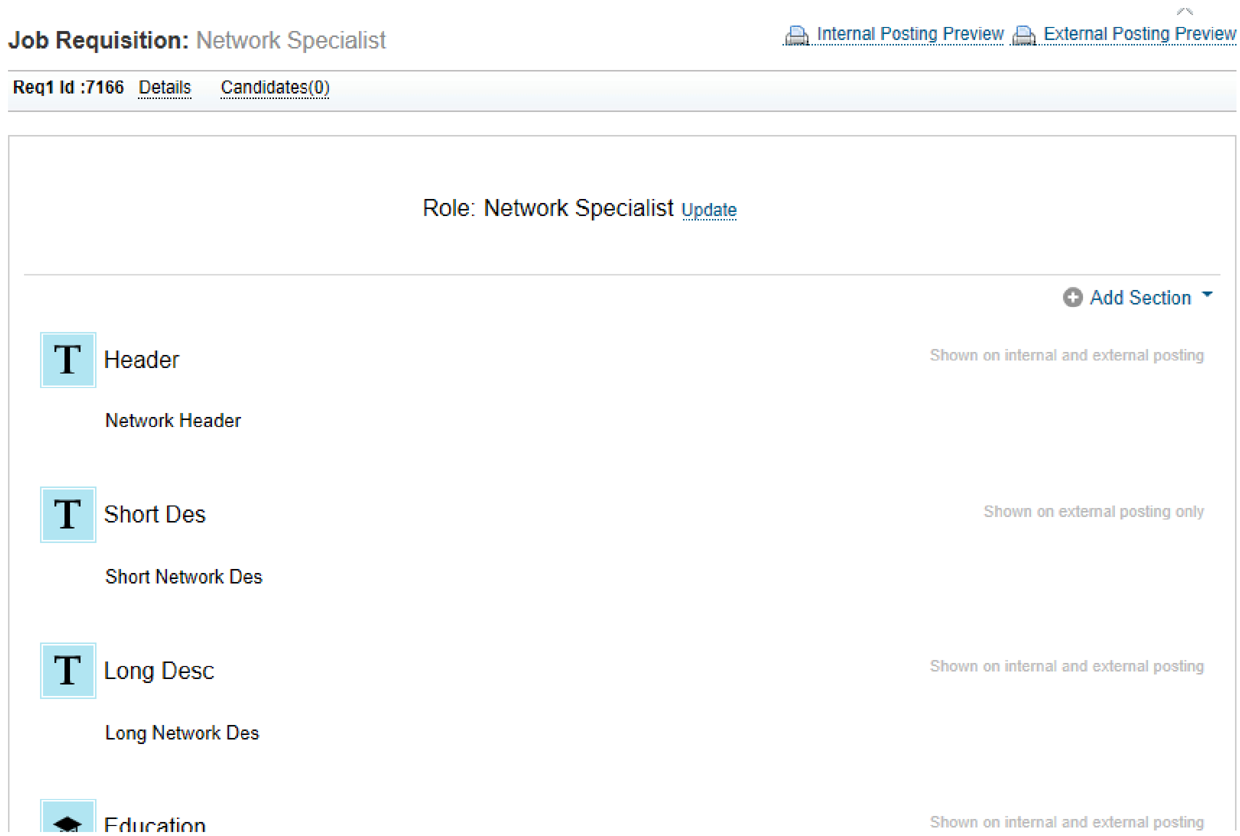
The recruiting user can also edit the library-based sections individually, such as Competencies or skills. When editing these sections, the corresponding library is displayed and the user can add additional items from the library. The user can also add additional sections, but the ability to edit or add sections is not configurable by user permission. It is not possible to allow only recruiters to add sections, but not hiring managers, for example.



Create Job Requisition using Browse Families and Roles

Editing previously defined Roles on the Job Requisition

If the jobRole field is configured and permissioned in the Requisition XML, users can click “update” to the right of the job role displayed at the top of the requisition, which will redirect them back to “Browse Families and Roles,” where they can select a new Family & Role. Selected a new Family and Role will overwrite any existing job profile customization on the requisition. The user will see a warning , asking them to confirm their selection of the Family/Role for the requisition.



Update an existing role on the Job Requisition

To manage Job Profile Templates, navigate to *Admin Tools* > *Job Profile* > *Manage Job Profile Templates*. Here you can add new templates or editing existing templates. You can also configure individual templates to show/hide sections on job requisitions.

Handling Pre-Existing Requisitions

For existing requisitions with a job description defined, the job description will move to the Job Profile tab and remain as is, once the Job Profile Builder Integration is enabled. Existing competencies will also move to the Job Profile tab.

In order to select roles for existing requisitions, the layoutListing and jobRole fields must be enabled and permissioned. When these fields are turned on, the user can select a job role for requisitions without a role, or select a new role for jobs with existing roles. These role selections will overwrite the existing job descriptions and competencies.

Data Migration and the Job Profile Builder Integration

- Importing requisitions through legacy data migration with a completed Role field and blank Job Description field causes the system to look up the job profile associated with that role and populate the Job Profile data onto the imported requisition

- To import the jobRole during data migration, use the format “Family|Role” in the field (without quotation marks, without spaces next to the pipe)
- Importing requisitions with a single block of job description text in listingLayout is supported, even if the Job Profile Builder integration is enabled. The job description will appear in a single field on the Job Profile tab on the imported requisition
- Requisitions created via the Succession Org Chart will populate the appropriate job role and associated job profile for the To-Be-Hired position used to initiate the requisition

11.10 SAP Job Requisition Trigger Integration

11.10.1 Feature Summary

The Requisitions Triggers integration allows for vacant position details to be passed to SuccessFactors Recruiting Management when a position is ready for hire. A vacant position describes a position that is ready for hire. This may in some cases be a position which is currently occupied, but it is known that the occupant will be taking leave.

When a position is set to vacant the infotype 1007 is created for the position. For SAP customers using the integration, a new infotype 1107 will be established automatically when the vacancy is created, and closed when the vacancy is closed. The infotype 1107 will trigger the creation of a Job Requisition in SuccessFactors RCM. Customers who are not using vacancies at all in SAP can trigger an IT1107 manually in SAP to create a requisition in RCM. See SAP documentation for more information.

A scheduled report running regularly triggers the requisition creation process in SuccessFactors. The position is queried in SAP and standard fields configured in the integration are sent to the SuccessFactors job requisition. The attributes sent are stored in the IT1107.

When the next report runs, all positions with an infotype 1107 are selected. For those without a NEW flag, the next extract is compared to the previous one that is stored on IT1107. If there are any changes the requisition is selected for an update. Some fields are not updated for Recruiting reasons. See Working with SAP Requisition Triggers [page 372] for details on updating fields. The job requisition is sent to the hiring manager (the manager of the position in SAP). First, the hiring manager completes the position details and the other approvers, *saves* the requisition and sends the job to the next user in the approval chain.

The job requisition template ID must be available in SAP HCM for the integration to work. In the case of multiple templates, the standard integration will distinguish between a manager position and an employee position in SAP and choose the right template ID configured in SAP HCM. If there are other templates involved, the client can implement their own business logic to define the right template for the position using BAdI (Business Add Ins)

> **Tip**
>
> A client can customize this integration to send jobs to a recruiter or another individual, but this requires customizing the integration package on the SAP side.

➜ Tip

The user will need to save the job requisition to view the route map and send to the next step.

If the customer is also using the SAP New Hire integration, the information from the New Hire integration will be cross-referenced against the open job requisitions. If this operation fails, the integration updates the applicant status to “TransferredToSAPError”, leaves the Exported On field empty and provides a more detailed error message in the sapError field on the application. The user can correct any issues with the data and re-status the candidate to “SendToSAP” to try again.

11.10.2 Quick Facts

- The pre-built integration pack contains the minimum required fields and a set of commonly used fields. Clients can choose to remove any fields not part of the minimum requirements. Clients can also set up their integration to include additional fields not part of the default integration.
- Because the integration pack uses SAP PI as middleware, the client must have resources knowledgeable in all three technologies (SAP HCM, SAP PI and SF RCM with an SF PS engagement to change the configuration of RCM) to make changes to the pre-built integration.

11.10.3 Prerequisites

- *Provisioning* > *Company Settings* > *SFAPI*
- *Provisioning* > *Company Settings* > *Recruiting Application* > *Enable SFAPI Webservices*
- A dummy integration user must be set up with:
  1. API login privileges
     a. *RBP*: *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *General User Permissions* > *API User Login*
     b. *Non-RBP*: *Admin Tools* > *Manage API Login Permission*
  2. Recruiting Permissions to access the Recruiting objects via API
     a. *RBP*: *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *Recruiting Permissions* > *grant permissions for all SFAPI functionalities (18 total)*
     b. *Non- RBP*: *Admin Tools* > *Recruiting Permissions* > *grant permissions for all SFAPI functionalities (18 total)*
  3. Set API Login Exceptions
     - *Admin Tools* > *Password & Login Policy Settings* > *Set API Login Exceptions* > *Add* > *Set the following settings*
       1. Username - The dummy integration user
       2. Maximum password age (days) – Set to -1 days

3. IP address restrictions – Designated IP address(es) or address range for use with the integration.

> **Tip**
>
> The dummy integration user configured in Provisioning cannot be included in any Recruiting Group. If the dummy user is included in a recruiting group, the customer will not be able to close or reopen a job requisition.

11.10.4 Configure the Route Map

Out of the box, the integration supports sending the requisition to the manager of the position being filled (G role), or the technical user creating the job requisition (the API User) (the O role).

The SuccessFactors user ID of the user should be sent to the originator field during the initial transfer only.

If you have the recruiter defined in Org Management in SAP you can specify this user as the originator, using mappings.

> **Tip**
>
> The route map cannot start with the R role, or any other recruiting role without customizing the integration package to include the relevant operator fields.

For more information on configuring Route Maps, see the Route Map [page 454] section.

11.10.5 Configure and Permission the Requisition XML

First define the fields that will be mapped from SAP. The following fields are required.

Table 27:

Field Definition	*Required on Job Req XML*	*Required in data feed to SF*
guid	No	Yes
originator	No	Yes
title	Yes	Yes
sapPositionID	Yes	Yes
dateCreated	No	Yes
jobCloseDate	No	Yes
jobReqStatus	No	Yes
status	Yes	Yes
country	Yes	Yes

The remaining SAP data fields that are supported in the out of the box integration are listed below. It is recommended to import as much information as possible about the position to maintain SAP as the source of truth.

Additional custom fields should be added to the SuccessFactors requisition template if more information is needed to import from SAP.

In general, pick-lists in SuccessFactors need to be avoided for the custom fields filled by SAP. If pick-lists are not properly maintained with values that match SAP, the integration will fail. The intention is to reduce the implementation effort and creating /updating picklists in BizX is extremely “expensive”.

The requisition fields which are filled by SAP system should be read only fields in the UI. In case of a change in the SAP system, the requisition is updated and all fields are overwritten in BizX, so operators have no need to change fields that will eventually be overwritten. The single source for all fields sent for the requisition trigger is the SAP HCM system. No data is transferred back to SAP. If you do not configure your job requisition in the recommended state the process will fail.

> **Tip**
>
> SAP integration fields are not standard fields in SuccessFactors Recruiting. These are custom fields and must be defined as reportable custom fields. For more information see Reportable Custom Fields [page 66].

11.10.5.1 Field Behaviors

Division, Department and Locations (BizX Standard Fields)

The fields department, division and location are important fields for BizX because they are used for reporting and permissions. The fields are mapped as follows:

- *SFSF Department* > *Org unit / or Cost Center*
- *SFSF Division* > *Company code of the org unit the employee is assigned to*
- *Location* > *personnel area of the org unit the employee is assigned to*

The fields are sent as a combination of Name and ID, for example <Name (ID)>

Division, Department and Location can only be sent via API if the value is an attribute of the User Data File, or else the import will fail. For this reason, the decision was made to deliver an example mapping, but in the standard delivery the mapping will not be delivered as ‘active’. Customers need to explicitly activate the mapping for the three fields on the SAP side, as well as define them in the job requisition XML.

- *country:* SAP ERP determines the ID of the personnel area from the *Personnel Area* field (PERSA) of the infotype *Account Assignment Features* (1008). For this ID, in the table T500P, the SAP ERP system determines the entry that is stored in the LAND1 field.

  > **Note**
  >
  > Country is required for SuccessFactors RCM. The integration will fail if the customer does not define country in the HR master data, or in another way.

- *sapState:* SAP ERP determines the ID of the personnel area from the *Personnel Area* field (PERSA) of the infotype *Account Assignment Features* (1008). For this ID, in the table *Personnel Areas* (T500P), the SAP ERP system determines the key for the region that is stored in the *Region (State, Province, County*) (REGIO) field. This is translated to the name of the region that is stored in the BEZEI field in table T005U.

> **Note**
>
> If the client is using eQuest, the standard State field will be required. Customers might choose to bring sapState across to inform the HM or Recruiters' selection for eQuest State.

- *city:* SAP ERP first determines the ID of the personnel area from the *Personnel Area* field (PERSA) of the infotype *Account Assignment Features* (1008). For this ID, in the table T500P, the SAP ERP system determines the entry that is stored in the ORT01 field.
- *postalcode:* SAP ERP determines the ID of the personnel area from the *Personnel Area* field (PERSA) of the infotype *Account Assignment Features* (1008). For this ID, in the table T500P, the SAP ERP system determines the entry that is stored in the PSTLZ field.

Default Posting Language

You must include the correct language in the following XML parameters with the requisition is created via the API. You cannot update the posting language and default language after the requisition is created; it is necessary to do it when the requisition is first created. If the posting language is not specified, it defaults to en_US, regardless of the default language of the site. This can cause errors when creating job requisitions via API.

- jobPostLanguage
- defaultLanguage

Example XML:

```
<urn:jobPostLanguage>en_GB</urn:jobPostLanguage>
<urn:defaultLanguage>en_GB</urn:defaultLanguage>
```

Salary Fields

For each of the following fields, regardless of the type of compensation configured, if the field is empty the SAP ERP system transfers the value 0 to SFSF:

- salaryMin
- salaryMax
- salaryMid

Compensation Fields

For compensation fields, the infotype *Planned Compensation*(1005) is defined for either the position or the job. If the infotype fields cannot be determined for the position, the SAP ERP system uses those for the job.

Compensation types and populating sapPayType:

The infotype is divided into three planned compensation types. You can use only one of these planned compensation types per position or job.

The SAP ERP system transfers the information on which planned compensation type is valid for the position or job to the SuccessFactors BizX field *sapPayType* on the Job Req. This is for reporting purposes in BizX, so the Reporting team can use this field to filter reports. The filter options SAP will send SF in this field are;

- Salary
- Pay Scale
- Direct

> **Tip**
>
> There is more information on where the data for each field is exported from in SAP on the SAP Portal here .

XML Example

> **Note**
>
> This XML should only be used for the field definition IDs. Do not copy and paste into your instance.

Customers using Org Management (OM) and positions may have personnel structure data maintained in OM and thus only need the position to identify the area to which the candidate needs to be assigned to.

```
<field-definition id="id" type="text" required="false" custom="false">
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Requisition
Number]]></field-label>
  <field-label mime-type="text-plain" lang="en_US"><![CDATA[Requisition Number]]></
field-label>
  <field-description><![CDATA[SF Job Req ID]]></field-description>
  </field-definition>
<field-definition id="sapPositionID" type="text" required="false" custom="true">
  <field-label><![CDATA[Position Object ID]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Position Object ID]]></field-label>
  <field-description><![CDATA[Position Object ID (8-digit)]]></field-description>
  </field-definition>
  <field-definition id="sapPositionName" type="text" required="false" custom="true">
  <field-label><![CDATA[SAP Position Name]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[SAP Position Name]]></field-label>
  <field-description><![CDATA[Position Object Title]]></field-description>
  </field-definition>
  <field-definition id="title" type="text" required="false" custom="false">
  <field-label><![CDATA[Job Title]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Job Titel]]></field-label>
  <field-description><![CDATA[Position Title]]></field-description>
  </field-definition>
  <field-definition id="extTitle" type="text" required="true" custom="false">
  <field-label><![CDATA[External Job Title]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Externer Job Titel]]></field-label>
  <field-description><![CDATA[External Position Title]]></field-description>
  </field-definition>
  <field-definition id="sapJobDesc" type="richText" required="false" custom="true">
  <field-label><![CDATA[SAP Job Description]]></field-label>
```

```
  <field-label lang="de_DE_SF"><![CDATA[SAP Jobbeschreibung]]></field-label>
  <field-description><![CDATA[Position Object Description]]></field-description>
  </field-definition>
  <field-definition id="listingLayout" type="richText" required="false"
custom="false">
  <field-label><![CDATA[Job Description]]></field-label>
  <field-description><![CDATA[]]></field-description>
  </field-definition>
  <field-definition id="extListingLayout" type="richText" required="true"
custom="false">
  <field-label><![CDATA[External Job Outcome (Job description)]]></field-label>
  <field-description><![CDATA[]]></field-description>
  </field-definition>
  <field-definition id="division" type="enum" required="false" custom="false">
  <field-label><![CDATA[Company (Code)]]></field-label>
  </field-definition>
  <field-definition id="department" type="enum" required="false" custom="false">
  <field-label><![CDATA[Org Unit (Code)]]></field-label>
  </field-definition>
  <field-definition id="location" type="enum" required="false" custom="false">
  <field-label><![CDATA[Personnel Area (Code)]]></field-label>
  </field-definition>
  <field-definition id="costCenterId" type="text" required="false" custom="false">
  <field-label><![CDATA[SAP Cost Center]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Kostenstelle]]></field-label>
  </field-definition>
  <field-definition id="instrComp" type="instruction" required="false"
custom="true">
  <field-label lang="de_DE_SF"><![CDATA[<table style="color: white;" frame="border"
width="100%"><tr><td style="background-color:#708090" valign="bottom"><b>Rate
Plan</b></td></tr></table>]]></field-label>
  <field-label lang="en_US"><![CDATA[<table style="color: white;" frame="border"
width="100%"><tr><td style="background-color:#708090" valign="bottom"><b>Rate
Plan</b></td></tr></table>]]></field-label>
  <field-description><![CDATA[]]></field-description>
  </field-definition>
  <field-definition id="sapPayType" type="picklist" required="false" custom="true">
  <field-label><![CDATA[SAP Compensation Plan]]></field-label>
    <picklist-id>sapPayType</picklist-id>
  </field-definition>
  <field-definition id="jobGrade" type="text" required="false" custom="false">
  <field-label><![CDATA[Pay Grade]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade]]></field-label>
  <field-description><![CDATA[SAP Pay Grade]]></field-description>
  </field-definition>
  <field-definition id="jobLevel" type="text" required="false" custom="false">
  <field-label><![CDATA[Pay Grade Level]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade Level]]></field-label>
  <field-description><![CDATA[SAP Pay Grade Level]]></field-description>
  </field-definition>
  <field-definition id="jobType" type="text" required="false" custom="false">
  <field-label><![CDATA[Pay Grade Type]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade Type]]></field-label>
  <field-description><![CDATA[SAP Pay Grade Type]]></field-description>
  </field-definition>
  <field-definition id="sapPayGradeArea" type="text" required="false" custom="true">
  <field-label><![CDATA[Pay Grade Area]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade Area]]></field-label>
  <field-description><![CDATA[SAP Pay Grade Area]]></field-description>
  </field-definition>
  <field-definition id="sapPayScaleGroup" type="text" required="false"
custom="true">
  <field-label><![CDATA[Pay Scale Group]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Scale Group]]></field-label>
  <field-description><![CDATA[SAP Pay Scale Group]]></field-description>
  </field-definition>
  <field-definition id="sapPayScaleLevel" type="text" required="false"
custom="true">
```



```
  <field-label><![CDATA[Pay Scale Level]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Scale Level]]></field-label>
  <field-description><![CDATA[SAP Pay Scale Level]]></field-description>
  </field-definition>
  <field-definition id="sapPayScaleType" type="text" required="false" custom="true">
  <field-label><![CDATA[Pay Scale Type]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Scale Type]]></field-label>
  <field-description><![CDATA[SAP Pay Scale Type]]></field-description>
  </field-definition>
  <field-definition id="sapPayScaleArea" type="text" required="false" custom="true">
  <field-label><![CDATA[Pay Scale Area]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Scale Area]]></field-label>
  <field-description><![CDATA[SAP Pay Scale Area]]></field-description>
  </field-definition>
  <field-definition id="sapCap" type="text" required="false" custom="true">
  <field-label><![CDATA[ESG for CAP]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[ESG for CAP]]></field-label>
  <field-description><![CDATA[ESG for CAP]]></field-description>
  </field-definition>
  <field-definition id="instrSal" type="instruction" required="false" custom="true">
  <field-label lang="de_DE_SF"><![CDATA[<table style="color: white;" frame="border"
width="100%"><tr><td style="background-color:#708090" valign="bottom"><b>Salary
Information</b></td></tr></table>]]></field-label>
  <field-label lang="en_US"><![CDATA[<table style="color: white;" frame="border"
width="100%"><tr><td style="background-color:#708090" valign="bottom"><b>Salary
Information</b></td></tr></table>]]></field-label>
  <field-description><![CDATA[]]></field-description>
  </field-definition>
<field-definition id="currency" type="enum" required="false" custom="false">
  <field-label mime-type="text-plain"><![CDATA[Currency]]></field-label>
    <enum-value value="EUR">
   <enum-label><![CDATA[EUR]]></enum-label>
    </enum-value>
    <enum-value value="GBP">
   <enum-label><![CDATA[GBP]]></enum-label>
    </enum-value>
    <enum-value value="USD">
   <enum-label><![CDATA[USD]]></enum-label>
    </enum-value>
    <default-value>USD</default-value>
</field-definition>
  <field-definition id="salaryMin" type="currency" required="false" custom="false">
  <field-label><![CDATA[Amount from]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade from]]></field-label>
  <field-description><![CDATA[SAP Pay Grade from]]></field-description>
  </field-definition>
  <field-definition id="salaryMid" type="currency" required="false" custom="false">
  <field-label><![CDATA[Reference Salary]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Reference Salary]]></field-label>
  <field-description><![CDATA[SAP Reference Salary]]></field-description>
  </field-definition>
  <field-definition id="salaryMax" type="currency" required="false" custom="false">
  <field-label><![CDATA[Amount to]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Pay Grade to]]></field-label>
  <field-description><![CDATA[SAP Pay Grade to]]></field-description>
  </field-definition>
  <field-definition id="sapCompTimeUnit" type="text" required="false" custom="true">
  <field-label><![CDATA[Time Unit]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Time Unit]]></field-label>
  <field-description><![CDATA[Time Unit]]></field-description>
  </field-definition>
```

Some customers do not use Org Management, but they need other entities at the requisition –like Personnel Area/ Subarea, Employee Group / Subgroup, Cost Center, Country- which is required when a found candidate has to be hired in SAP HCM. The following fields are also supported in the Requisition Trigger for these customers;

```
  <field-definition id="sapOrgUnitName" type="text" required="false" custom="true">
  <field-label><![CDATA[SAP Org Unit Name]]></field-label>
  </field-definition>
  <field-definition id="sapOrgUnitID" type="text" required="false" custom="true">
  <field-label><![CDATA[SAP Org Unit ID]]></field-label>
  </field-definition>
  <field-definition id="sapPersonnelAreaTxt" type="text" required="false" 
custom="true">
  <field-label><![CDATA[SAP Personnel Area (std)]]></field-label>
  </field-definition>
  <field-definition id="sapPersonnelAreaIDTxt" type="text" required="false" 
custom="true">
    <field-label><![CDATA[SAP Personnel Area ID (std)]]></field-label>
  </field-definition>
  <field-definition id="sapPersonnelSubAreaTxt" type="text" required="false" 
custom="true">
    <field-label><![CDATA[SAP Personnel Subarea (std)]]></field-label>
  </field-definition>
  <field-definition id="sapPersonnelSubAreaIDTxt" type="text" required="false" 
custom="true">
    <field-label><![CDATA[SAP Personnel Subarea ID (std)]]></field-label>
  </field-definition>
  <field-definition id="sapEEGroupTxt" type="text" required="false" custom="true">
    <field-label><![CDATA[SAP EE Group (std)]]></field-label>
  </field-definition>
  <field-definition id="sapEEGroupIDTxt" type="text" required="false" custom="true">
    <field-label><![CDATA[SAP EE Group ID (std)]]></field-label>
  </field-definition>
  <field-definition id="sapEESubGroupTxt" type="text" required="false" 
custom="true">
    <field-label><![CDATA[SAP EE Subgroup (std)]]></field-label>
  </field-definition>
  <field-definition id="sapEESubGroupIDTxt" type="text" required="false" 
custom="true">
    <field-label><![CDATA[SAP EE Subgroup ID (std)]]></field-label>
  </field-definition>
```

11.10.6 Working with SAP Requisition Triggers

11.10.6.1 Creating and Updating the Job Requisition

When a vacancy is created at the position level in SAP org management, the requisition is not automatically created, but is queried. The requisitions template ID retained in the query is attached to the position and all attributes of the positions are extracted and extend to the requisition template using the field mapping.

The INFOTYPE 1107 (vacancy) is created and the requisition is created via WebService API in BizX in the pre-approved Route Map state. When position attributes change in SAP HCM the INFOTYPE 1107 (vacancy) is marked for an update. A report runs and all positions with an INFOTYPE 1107 are selected and the corresponding requisition is updated.

> **Note**
>
> Not all fields updated will be changed in SuccessFactors with every update. See field update exceptions below.
>
> 1. title and extTitle will not be updated after the creation so the recruiter can advertise the jobs in with an externally facing title
>   - sapPositionName will contain the HRIS job title and will be created and updated
> 2. listingLayout and extListingLayout will not be created or updated
>   - sapJobDesc can be created and updated. Recruiters can use this information, if it's available, to update the advertised job description
> 3. originator is transferred during the initial transfer for job requisition data, but not updated. The SF USERID of the manager of the position can be defined as the originator, which means the customer can begin the approval process with the manager of the role. If this cannot be specified via OM, the API user may be defined as the originator, but all requisitions will be sent to a dummy user first in this case. For more information on configuring the originator see here .
>   - If a dummy user is required the customer can choose to have recruiting users login and assign the job requisition to the next person(s) in the workflow.
> 4. jobReqStatus is not defined explicitly on the job requisition XML, but is applied in SuccessFactors' Recruiting Management (Pre-Approved=0, Approved=1, Closed=2). This status cannot be customized. State is a required field when closing or reopening the job requisition. E.g `<urn:jobReqStatus>1</urn:jobReqStatus>`
> 5. status will only be considered when closing and reopening the job requisition. The statuses defined in the SAP Integration Scenario must be configured in the job requisition status picklist (SAPClosed, SAPReopened, SAPDeleted). For more information on updating job requisition status refer to below
> 6. dateCreated is only sent for the initial transfer. Contains the system date on which the requisition is created
> 7. dateClosed is only send when the job requisition is closed. Contains the system date on which the requisition is closed
> 8. All other standard fields mentioned in the XML above will be updated and created

> **Tip**
>
> It is not possible to make an update in SAP which changes the Job Requisition Template. If you need to use a different requisition template, you need to close the vacancy in SAP first, and create a new one.

When a vacancy is created at the position level in SAP org management, the requisition is not automatically created, but is queried. The requisitions template ID retained in the query is attached to the position and all attributes of the positions are extracted and extend to the requisition template using the field mapping.

11.10.6.2 Opening and Closing Job Requisitions

If the Infotype 1107 Status changes (the SAP Target Status is different from the Current Status) the SuccessFactors' jobRequisitionStatus will also be changed. It is always necessary for the API query to define the status to change a requisition to. Reopening a job requisition does not automatically open the job requisition in the state it was closed in.

Closing Job Requisitions

- In SAP if the Infotype 1107 State changes from Open to Closed the API should send <urn:jobReqStatus>2</urn:jobReqStatus>
- The job requisition will be changed to a state of closed in SuccessFactors
- A message will be passed back to SAP " Internal status changed from `<old status>` to `<new status>`"
  - (e.g Internal status changed from 0 to 2)
- SAP will store the state of the requisition before it was closed
- Job Requisition Status (configurable field on the job requisition xml) will be updated to a value of SAPClosed

Reopening Job Requisitions

- Should the Infotype 1107 State change back to Open, SAP will update jobReqStatus with the value that was stored when the requisition was closed
- Job Requisition Status will be updated to a value of SAPReopened
- The position will be reopened again in the pre-approved or approved state, as determined by the stored former state. In the case of a pre-approved requisition, this will in the route map step the requisition was closed in.

> **Note**
>
> Closing and reopening requisitions the integration **absolutelyrequires** the latest update available on the SAP Portal. Do not attempt to reopen job requisitions if the update has not been installed.
>
> If there is an attempt to reopen a job requisition which has not previously been approved, SuccessFactors will send an error "Can't update the internal status to 1. Please change it to 0 to reopen the req." The integration cannot respond to this error. The update will fail. If clients report this error they should be prompted to install the update from the SAP portal to continue using the SAP Requisition Triggers.

12 Employee Referral

Rx Employee Referral allows employees of a company to refer contacts to jobs at their company.

Employee Referral tracks the source and referring employee for each new candidate. Employees are able to view the status of all their referrals currently in the hiring process.

Employees can use Linkedin or Facebook contacts within the referral process. These social connections can be matched to the open jobs or generally for a company. The ER application allows an employee to share a job with their contact via a number of social networks or email or the employee may refer the contact and the system will generate a notification via email to the referred person.

To implement Employee Referral, some conditions must be met:

- Site must have Candidate SSO enabled and ERM enabled in Command Center
- Site must be implemented with Valhalla
- First and last name must be required on the Business Card

12.1 Feature Summary

Employee Referral allows employees of a company to refer contacts to jobs at their company.

Employee Referral allows for tracking the source and referring employee for each new candidate. Employees are able to view the status of all their referrals currently in the hiring process. Employees can share jobs via social networks and by using email referrals. Candidates can also be submitted to the system socially or manually and will be tracked back the referrer.

12.2 Quick Facts

- There is no way to delay the sending of email
- Any Referrer Email set for the “Invite to Apply” status will not send.
- Employee Referral does not work in a status if it's been configured with a category of `Onboard.` Do not use the Onboard status in conjunction with Employee Referral.

12.3 Prerequisites

- *Provisioning* > *Company Settings* > *Version 12 UI framework (Revolution)*

12.4 Configuration

1. Enable the feature in Provisioning. Navigate to *Provisioning* > *Company Settings Enable Employee Referral Program (Not for use with Recruiting Marketing)*
2. Add the Employee Referral Payout amount to the job requisition. Employee Referral Payout is a currency field. If currency is not configured on the job requisition, you must add it. If it is only declared, only the erpAmount is required. XML information for both is required. Permission this field in addition to declaring it in the XML. Include this XML declaration for erpAmount

```
<field-definition id="erpAmount" type="currency" required="false" custom="false">
<field-label><![CDATA[ERP Amount]]></field-label>
<field-description><![CDATA[Employee Referral Bonus Amount]]></field-description>
</field-definition>
```

3. Grant Admin users permission to setup the Employee Referral Program
   a. *Non RBP:* *Admin Tools* > *Managing Recruiting* > *Recruiting Administration* > *Employee Referral Program Setup*
   b. *RBP:* *Admin Tools* > *Manage Security* > *Manage Permission Roles* > *Permissions* > *Recruiting Administrator Permissions* > *Manage Recruiting* > *Employee Referral Program Setup*
4. Set referral ownership rules in Admin Tools- See Setup Employee Referral [page 551] Program.
5. Enable Employee Referral email for referrals. Navigate to *Admin Tools* > *System Properties* > *E-mail Notification Template Settings*. Add the *Enable Employee Referral Program Candidate* to the General pool notification. You can also associate the *Enable Employee Referral Program Candidate* to a job requisition.

   Tip

   Admins can update the verbiage of the email, but the URL tokens must remain in place.

6. Configure Referrer (employee) settings for the Applicant Status Trail. Referrer (employee) settings can be applied to all applicant statuses.

   Table 28: Employee Referral Applicant Statuses

Setting Name	Descriptions
Visible to Referrer (employee)	whether the stat is visible to the Referrer
Referrer (employee) Label	The label the Referrer (employee) will see when their Referral is in the corresponding status.
Referrer (employee) Next Step Text	The text the Referrer (employee) will see when their Referral is in the corresponding status
Referrer (employee) Email	Select an email template which will be automatically sent to the Referrer (employee) when their Referral is moved to the corresponding status

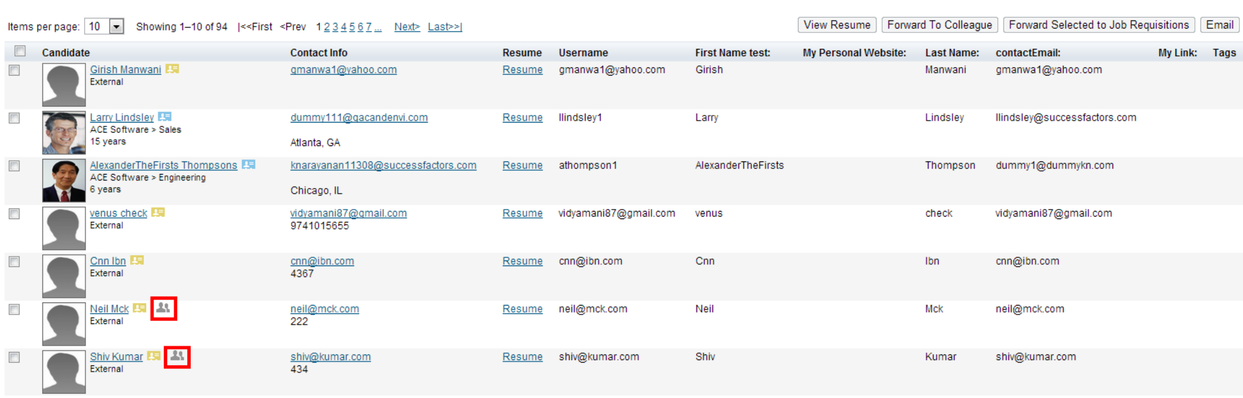
7. Navigate to *Admin Tools* > *Manage Recruiting* > *Edit Applicant Status Configuration*. Find the applicant status set for Job requisitions. For all statuses, the customer can update the Employee Referral Program Settings.
   a. Visible to Referrer

b. Referrer Label
c. Refer Next Step Text
d. Referrer Email

12.5 Working with Employee Referral

12.5.1 Candidate Search Page

Employee Referral icons indicate candidates in active Employee Referral in both Power and Conceptual Candidate Search.

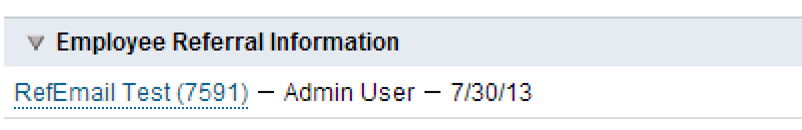


Candidate Search Employee Referral Icons

"Active" Employee Referral candidates are in a forwarded, invite-to-apply or in-progress status on a job requisition. If ownership by duration is selected, "active" indicates a currently owned referral. On Candidate Power Search only, a recruiting user can filter by active or all referrals. For this filter, the definition of active is the same as the display in Candidate Search results. Selecting "View All" displays all candidates who at one point were an employee referral.

12.5.2 Candidate Profile

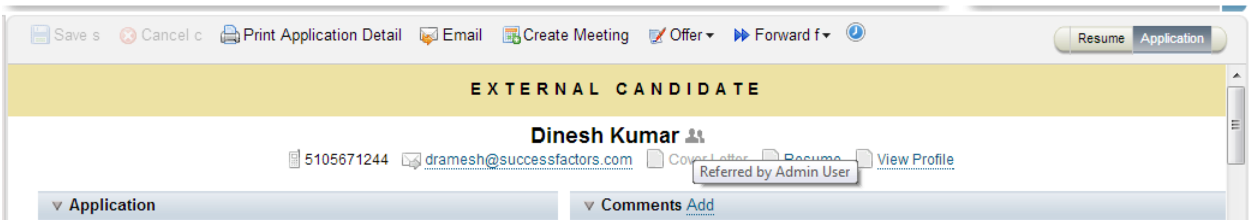
On the Candidate Profile, the Employee Referral Portlet shows the following information in this order: job requisition title, job requisition ID, name of the referrer and the date of the referral.



Candidate Summary Employee Referral Portlet

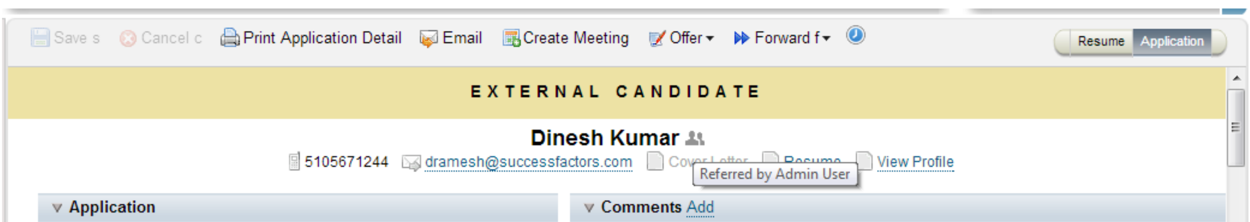
12.5.3 Candidate Summary Page

Employee Referral Candidates on the summary list page have an employee referral icon displayed next to them. The Candidate Summary also displays two source columns, Source and Candidate Source. For all employee referrals, the Source column will contain “Forwarded.” The Candidate Source will be “Employee Referral” during pre-apply. After the candidate applies, the Source column will display where the candidate applied for the job, i.e. Corporate: Site Name. See Employee Referral Source Columns for more information.



Employee Referral Candidate Summary Page

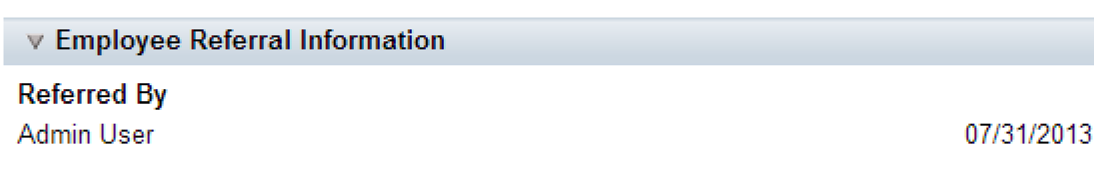
If the recruiting user clicks into an application, they can hover over the employee referral icon next to the referral name at the top of the page to display the name of the referrer.



Employee Referral Information in the Application

12.5.4 Application

In the Application, the Employee Referral Information Portlet show the referrer and the date of referral for only the specified job.

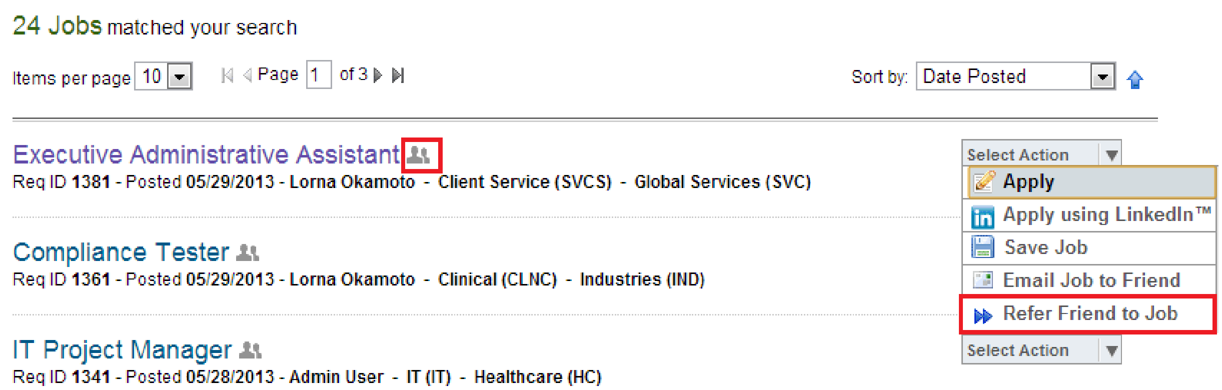


Application

Employee Referral Information Portlet

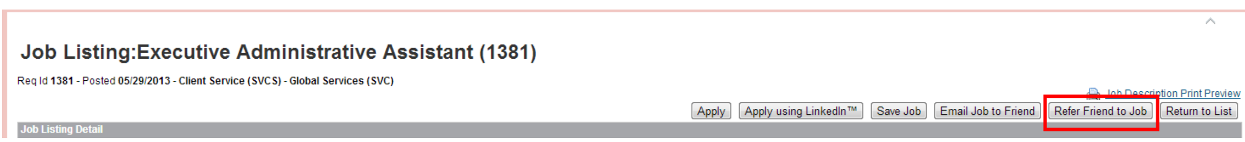
All of the above behavior applies to both RCM stand-alone and RCM/RMK integrated Employee Referral.

12.5.5 Job Search Page (RCM Stand-alone only)



Employee Referral on the Job Search Page

Jobs posted internally and externally have an employee referral icon next to the job title. A referral can make a referral to a job using the select-action dropdown menu next to the job title, or by clicking into the job and clicking the “Refer friends to job” on the job description page.



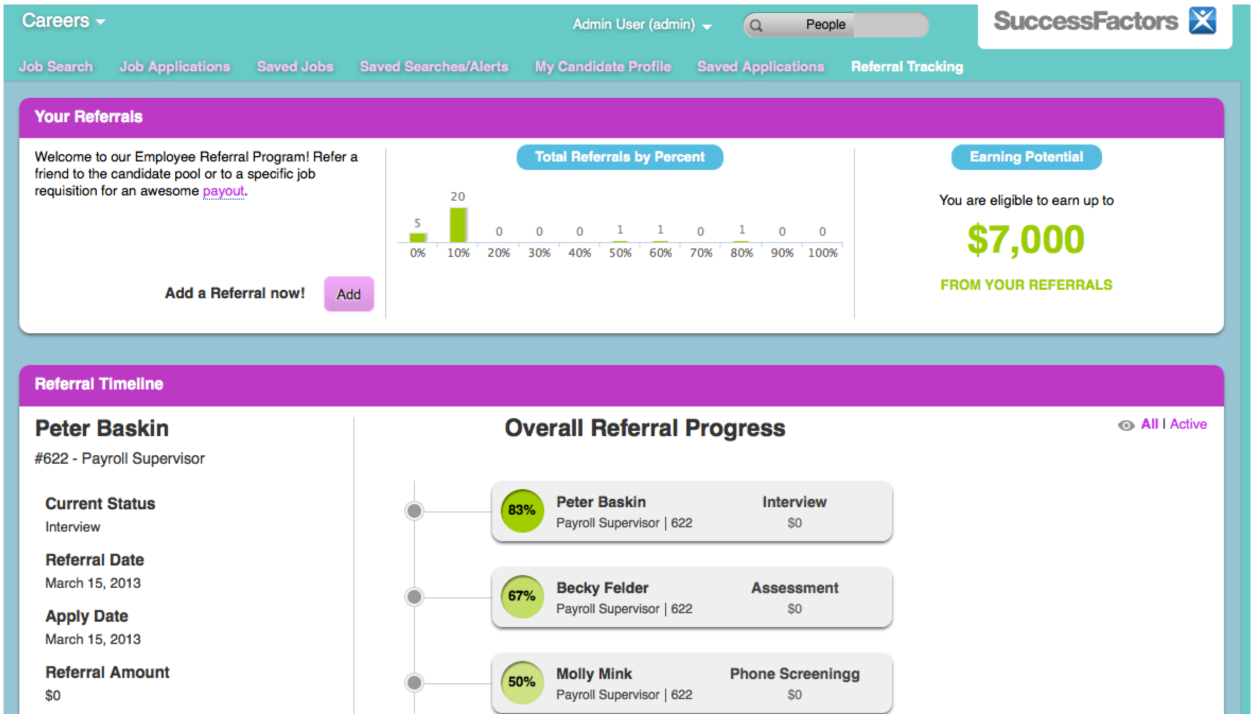
A referrer who initiates a referral this way is prompted to enter the first name, last name, email, phone number and country of the referral. First and last name, email and country are required fields. Attaching a resume can be made required in the Employee Referral settings in Admin Tools. The phone number field's required status is based on whether or not the phone number field is marked as required in the candidate profile.

When adding a referral through this scenario:

- If the email address does not exist in the system, an external candidate account is created and the candidate is added to the forwarded status of the job requisition. The referral will receive an email informing them they have been referred to the job requisition by ER. The email will contain a username & URL where the referral can set their password. Once their password is set, they will be automatically logged in and land on the job description page where they can apply to the job.
- If the email address already exists in the system, ownership rules are checked to determine the selected ownership setting.
    - If ownership by requisition is selected, the system will check whether the referral already exists on the selected job. If the referral already exists for the job requisition, the referral will not be added.
    - If ownership by duration is selected, the system will check whether the referral is currently owned.
    - If the referral is currently owned by the referring employee, the system will check if the candidate already exists on the job requisition. If the candidate exists, the referring employee will not be able to refer the candidate to that job. If the candidate does not exist the referral will be added to the forwarded status for the job requisition.
    - If the referral is currently owned by another employee, the system will not allow the referral to be submitted to the selected job requisition.

12.5.6 Tracking

A user can track their referrals in BizX by navigating to *Careers* > *Referral Tracking*.



1. Your Referrals: This area contains a configurable message added in the Employee Referrral settings in Admin Tools. Any URL added will automatically open a new window.
2. Total referrals by percent: Bar graph showing how far referrals have progressed in the application process. The percentages are calculated based on the number of applicant statuses visible to employees (configured in the Applicant Status Setup Page). Job requisitions can have different status sets, so these percentages track them all uniformly regardless of the number of statuses for each requisition.
   - Applicants are classified into percentages based on the leading number, e.g. all percentage completions beginning with "1" will appear in the 10% section of the bar graph. The percentages displayed on the bar graph are not configurable and cannot be hidden from users.
3. Earning Potential: Shows the Employee Referral amount sum of all referrals a user has made. If an employee makes referrals to jobs with different currencies, the sum for each currency is displayed separately. . For example, if you refer jobs in both dollars and euros, you will see two separate entries for each currency. Up to five separate currencies will display. This is not configurable.
4. Referral Timeline: The left-hand side shows a summary of the selected referral, or if no referral is selected, a summary of the referral with the highest percentage completion. This summary shows the referral's first and last name, corresponding requisition ID and title where applicable, the referral's current status for the requisition, the date of referral for that requisition, the apply date for that requisition, the referral amount for the requisition and the next step text configured for the referral's current status. Other jobs the referral has applied to are also shown, along with the requisition ID and job title.
5. The right-hand portion of the Referral Timeline shows the overall referral progress. A user can view all referrals or active referrals. "All" referrals includes disqualified and already hired candidates, as well as those currently in pipeline. Active includes referrals who have not yet applied, generic referrals and those in-progress on a requisition. Disqualified and hired referrals are excluded from the active set.

- The tiles in the overall referral progress show the referral's first and last name, the requisition and requisition ID, the current status and the referral amount where applicable. The percentage of the referral's progress in the applicant status pipeline is also shown.

6. Add a referral now (*RCM stand-alone only*): This adds the referral to the general candidate pool, and captures the referral's first name, last name, phone number, email, and country. All these fields are required. The resume field can be set as required in Employee Referral settings via Admin tools.

When adding a referral through this scenario:

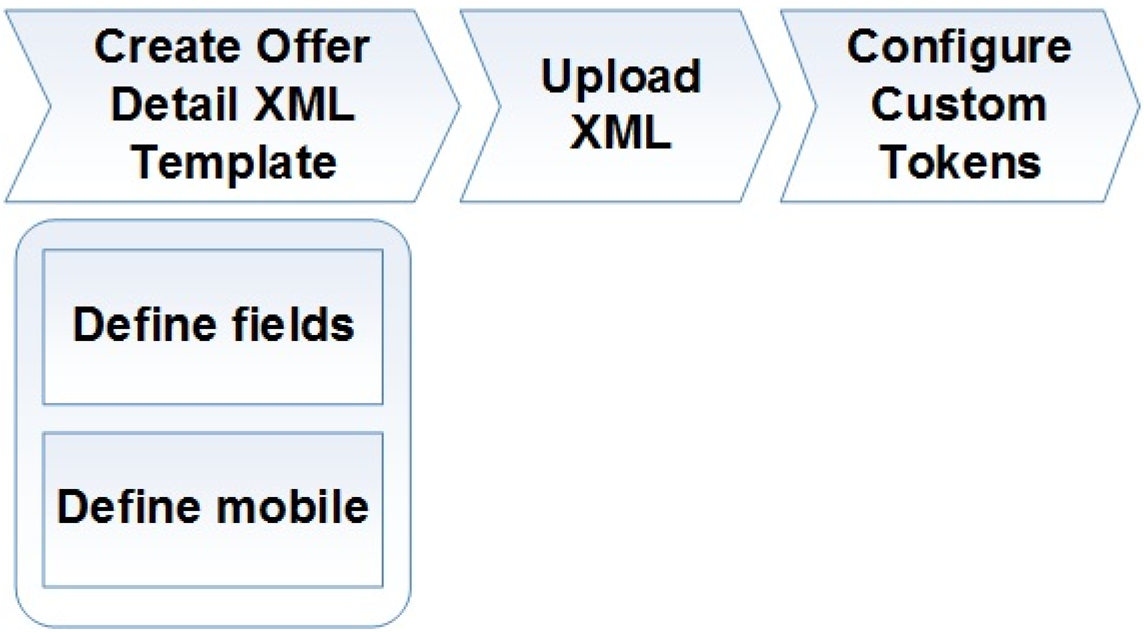
- If the email address already exists in the system, adding a general referral is not allowed. This is a way to add a candidate to the system; if they already exist you will be prompted to refer them to a job.
- If the candidate doesn't exist, an external account is created with their email address. The referral becomes searchable in Candidate Search and will receive an email informing them they've been added via Employee Referral. The email contains the referral's username and a URL where the referral can set their password. Once the password is set, the referral lands on the job page of the external career site to search and apply for jobs.

13 Offer Approval

Once a recruiter, hiring manager, or other authorized user decides to hire a candidate to fill a job requisition, the offer process consists of assembling details of the offer that will be extended to the candidate, routing these details for approval, generating an offer letter using tokens from the requisition, application and offer details form and extending an offer letter to a candidate.

To enable the offer process you must configure the offer details component. The majority of the configuration is done in the Offer Detail XML template, with an additional step in Provisioning to set up tokens.

Tokens: To generate offer letters more easily, you must configure tokens to support the fields you want to include. Translated are populated according to the selected letter locale.



Configuration Process for Offers

> **Recommendation**
>
> If a customer wants some fields to be read-only on the Offer Approval, they should use Offer Approval standard fields . If field values are changed on the source template, the new values will override the value on the offer approval, and any already approved versions. If a customers want all version history tracked in the offer approval, they should only use standard fields that are not read only and reportable custom fields. Standard fields in the SAP integration and standard reports will also need to be updated.

13.1 Feature Summary

The offer details record is a collection of the salary, start date and other elements the company wants to use while negotiating employment with the candidate. Offer details are entered by a recruiter or other authorized user, an ad hoc list of approvers is defined and the offer is sent for approval. Approvers can approve or reject with comments.

13.2 Quick Facts

- Users can approve or reject offers via mobile, but comments are not supported on mobile
- All approvers have access to completed Offer Approvals and pending Offer Approvals in the To Do list and the Candidate Offer Approvals tab. Approvers can also view the data from previous versions of an offer approval, and compare it to the new version and see changes.
- You can configure more than one Offer Details template to use in the approval process.
- Approved or rejected offer detail records, if changed, will automatically version themselves to the next version. (Example: Editing the details on version one will create a version two.) Previous versions of the Offer Details are available in the Offer Approval screens (click *View Previous Versions*) Changes between the two versions will be highlighted in yellow.
- Offer detail records cannot be associated to a route map. There is a configurable workflow which can be applied to the Offer Approval XML template.
- Offer detail records cannot do calculations on fields.
- Offers are mainly composed of referenced data from the application and requisition, but can include some standalone fields.
- Offer data is reportable but not available in the API. Offer data is not searchable.
- Offers cannot be recalled after being sent for approval; the approver must actn\.
- It is not possible to select external, non-SuccessFactors HCM users as approvers for an offer.
- Comments upon routing for approval cannot be disabled or required.
- Do not use the old offer-fields section of the requisition XML when offer approval is turned on, or errors may occur on the offer letter page.
- Do not change he position of any reportable custom fields once defined in the Offer Detail XML; if it is changed the field will report incorrect values in the Recruiting and V2 Secured reporting schemas.
- Users can add custom help text on Offer Approval fields.
- Offer approval fields never update the job application or the job requisition. Offer fields that correspond to fields from the job requisition or job application only allow data to flow one way, from the requisition or application to the offer approval.
- To enable editing of job code entity fields on the Offer Approval, navigate to *Admin Tools* > *Manage Recruiting Settings* > *Offer Approval* > *Enable Job Code Entity fields to be editable*
- You cannot disable Offer Approval. If the customer does not want to use offer approval, check *Enable Offer Approval* in Provisioning, and add the Offer Aproval feature permission to an inactive step in the pipeline, or for a recruiting operator who does not have access to view candidates in a given step. Otherwise the Offer Approval button shows in the in step where the Offer Letter is configured, for all operator roles with Offer Letter create permissions.

Related Information

Permission Offer Approval Feature to Operators [page 391]

13.3 Prerequisites

- Configured and functioning requisition, application, candidate profile templates
- Blueprint XML

13.4 Configuration

13.4.1 Enable Offer Approval in Provisioning

- *Provisioning* > *Company Settings* > *Enable Offer Approval*

13.4.2 Create Offer Detail XML template

The Offer Details screen depends on the Offer Detail XML template, which is accessible through *Provisioning* > *Managing Recruiting* > *Import/Update/Export Offer Detail Template*.

Fields in the XML template can come from the Requisition XML, the Application XML or can be stand-alone configured fields. These stand-alone fields have some limitations regarding reportability and therefore are less advisable to configure.

Standard fields in the Offer Detail XML, whether from the requisition, application or stand-alone offer fields, will automatically be permissioned as read or write. The permissioning on these fields cannot be changed via configuration. (Exception is jobCode type fields; the read/write is set en masse for those in Recruiting Settings.) If custom fields are configured as custom reportable, they will be writable. Otherwise, these fields are read-only.

Use Offer standard field, custom reportable fields from the job application or job requisition, or standalone offer approval custom fields in order to ensure changes to the offer detail are captured from one version to the next. If these field types are not used, you cannot track changes in the offer details. Partner access to Offer standard fields.

Some additional notes about the Offer Letter XML:

- All Job Requisition standard fields are supported (b1402)
- The XML supports attachments
- Does not support HTML mime types- plaintext only
- Does not support instructional fields

Configuring fields on the application, rather than the requisition, is recommended, as it allows for a greater variety of data. For example, you can collect different salary information from different candidates by defining that field on the application. This better supports one-to-many, requisition-to-opening hiring situations.

1. In Provisioning, navigate to Import/Update/Export Offer Detail Template.
2. If you intend to use custom fields, set them to “reportable” in *Provisioning* > *Custom Reportable Fields*, or they will not be editable in the XML template. For more information, see the Reportable Custom Fields [page 66] section.
3. To create pre-defined Offer Approval workflow, add an `<offer-approvers>` section to the end of the Offer Detail XML. For more information about pre-defined Offer workflows, see Configuring a Pre-Defined Offer Approval Workflow (b1402) [page 395].
    a. editable=true/false determines if users can add or delete steps from the predefined workflow
    b. Define the step id
        a. editable=true/false determines if users can change the default user populated
        b. edtInvalidUser=true/false means that if the user selects an invalid Offer Detail template for a given requisition (meaning the user does not exist on the requisition) or the default user is inactive, the field will become editable. This setting is applicable for individual steps, rather than the whole workflow.

The XML template begins with the declaration of the offer-detail-template element, in the following format:

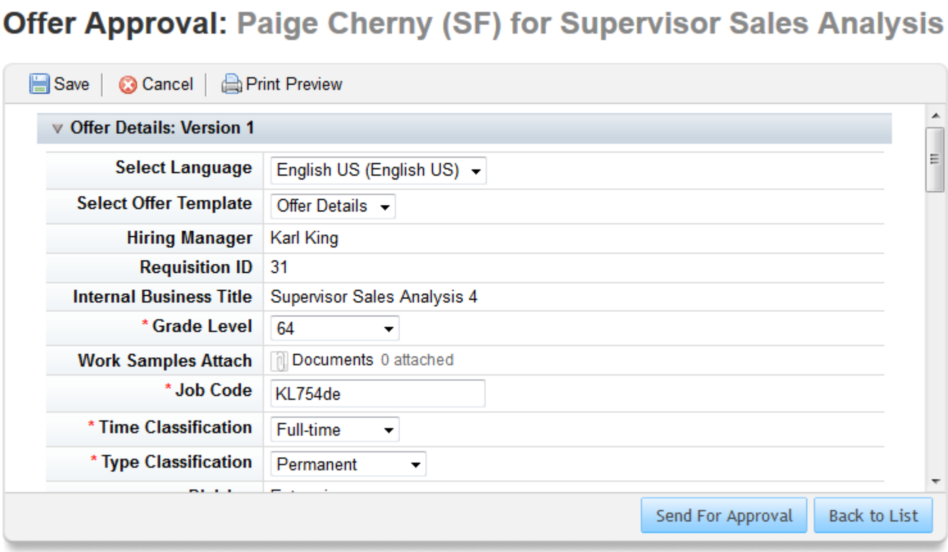
```
<?xml version="1.0" encoding="UTF-8"?>
<!DOCTYPE offer-detail-template PUBLIC "-//SuccessFactors, Inc.//DTD Offer Detail
Template//EN" "offer-detail-template.dtd">
<offer-detail-template>
  <template-name>
    <![CDATA[Offer Details]]>
  </template-name>
  <template-desc>
    <![CDATA[Offer Details]]>
  </template-desc>
  <template-lastmodified>10/9/28 9:58 AM</template-lastmodified>
```

The declaration contains the following elements:

- *template-name:* The name of the offer-detail-template.
- *template-desc:* A template-desc element provides text describing the offer details. Use this element instead of comments as appropriate.
- *template-lastmodified:* The last modification date of the offer detail list.

13.4.2.1 Defining fields

Field definitions for the offer process functions in a similar way as with other XML templates. Fields definitions in the Offer Detail XML template specify the fields visible to all users when making an offer. Unlike other Recruiting components, it is not possible to permission certain fields for specific operators.



Offer Page Based on Offer Detail XML

The field-definition element serves as the container for defining the data and attributes of fields. For example:

```
<field-definition id="title" type="text" required="true" custom="false" template-type="job-req" anonymize="false">
```

13.4.2.1.1 id

```
<field-definition id="title" type="text" required="true" custom="false" template-type="job-req" anonymize="false">
```

The unique name of the field. If referencing fields from the requisition or application, this field id must match the field ID in the Requisition or Application XML template.

The following field IDs are established as stand-alone offer detail fields in the system, shown in Table 15.

Table 29: Table 15 Standalone Offer Fields

ID	*Type*
customString1-15	text
customLong1-10	number
customDate1-10	date
customPicklist1-10	picklist

Note these field IDs are the same IDs used on the requisition for Job Code Entity fields. In order to prevent conflicts, the JCE fields must be prefaced with “jce_” when referenced on the Offer Details XML. Example: jce_customString1.

If the offer standalone fields are configured in multiple Offer Detail XML templates in the same instance, the fields must be configured identically in each template.

Only certain field IDs may be referenced from the Requisition and Application XML. The following fields are unsupported for referencing on offer details.

Table 30: Table 16 Unsupported fields

ID	*Source*
filter1-15	Requisition
mfield1-15	Requisition
cellPhone	Requisition
numberOpenings	Requisition
extTitle	Requisition

Be sure all Requisition and Application fields defined in the Offer Details XML are set up and synced as custom reportable fields in Provisioning. If not, these fields may not be editable, populated correctly or available as tokens correctly.

13.4.2.1.2 type

```
<field-definition id="title" type="text" required="true" custom="false" template-
type="job-req" anonymize="false">
```

Recommendation

Do not change the field type of a field; this can cause application errors on existing records storing data that do not match the new field type.

In addition to the stand-alone offer detail fields, the following field types are supported when referenced from the Requisition or Application XML.

- *text:* a single line of text
- *textarea:* multiple lines of text
- *date:* a date
- *percent:* a percent value
- *bool:* true or false (shown as a checkbox)
- *enum:* an enumerated type (shown as a pull-down list)
- *picklist:* field options come from a picklist (shown as a pull-down list)
- *number:* a number value with two decimal places, formatted by locale
- *operator*
- *derived*
- *richText*
- *attachment*
- *multiattachment:* Indicates a field that can have multiple documents uploaded and attached to it.

13.4.2.1.3 required

```
<field-definition id="title" type="text" required="true" custom="false" template-
type="job-req" anonymize="false">
```

The "required" attribute specifies whether or not a field is required. If not required, the field can be left empty.

13.4.2.1.4 custom

```
<field-definition id="title" type="text" required="true" custom="false" template-
type="job-req" anonymize="false">
```

True or false value that declares whether a field is custom or standard.

13.4.2.1.5 template-type

```
<field-definition id="title" type="text" required="true" custom="false" template-
type="job-req" anonymize="false">
```

Attribute required for any field pulled from the Requisition or Application XML. This attribute must be set to either job-req or job-application. If the field is an Offer Details stand-alone field, omit this attribute.

13.4.2.1.6 anonymize

```
<field-definition id="title" type="text" required="true" custom="false" template-
type="job-req" anonymize="false">
```

Specify true or false in order to anonymize or not during DRM 2.0 data purge.

13.4.2.1.7 field-label Element

The field-label element usually controls the appearance of the field name in the user interface. However, not all field labels in the user interface are controlled by this label. On certain fields the succession data model controls the field label, or on other fields there are Provisioning settings that control the label used in the system.

The label element is not conditional; it is not possible for one field to display one label to internal candidates and a different label to external candidates. It is not possible for one field to display one label to candidates and a different label to internal recruiting users.

The field-definition element must contain at least one field-label element.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

Recommendation

If referencing fields from the requisition or application, this label must match the label in the Requisition or Application XML template.

mime-type Attribute

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

Mime-type determines whether or not the system will render any html tags that are defined in the CDATA content. The two supported mime types are:

- *text-plain* Plain text, unformatted.
- *text-html* HTML-formatted text.

CDATA Content

The CDATA content is configurable to contain the client's preferred text.

```
<field-label mime-type="text-plain"><![CDATA[First Name]]></field-label>
```

13.4.2.1.8 XML Sample

```
  <field-definition id="title" type="textarea" required="true" custom="false"
template-type="job-req" anonymize="false">
    <field-label mime-type="text-plain">
      <![CDATA[Internal Business Title]]>
    </field-label>
  </field-definition>
  <field-definition id="jce_customString2" type="jobCode" required="true"
custom="false" template-type="job-req" anonymize="false">
    <field-label mime-type="text-plain">
      <![CDATA[Grade Level]]>
    </field-label>
  </field-definition>
  <field-definition id="workSamples" type="multiattachment" required="true"
custom="true" template-type="job-application" anonymize="false">
    <field-label mime-type="text-plain">
      <![CDATA[Work Samples Attach]]>
    </field-label>
  </field-definition>
  <field-definition id="firstName" type="text" required="false" custom="false"
template-type="job-application" anonymize="false">
```

```
    <field-label mime-type="text-plain" lang="en_US">
      <![CDATA[First Name]]>
    </field-label>
  </field-definition>
  <field-definition id="lastName" type="text" required="false" custom="false"
template-type="job-application" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US">
      <![CDATA[Last Name]]>
    </field-label>
  </field-definition>
  <field-definition id="candStartDate" type="date" required="false" custom="true"
template-type="job-application" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US">
      <![CDATA[Projected Start Date]]>
    </field-label>
  </field-definition>
  <field-definition id="candSalary" type="currency" required="false" custom="true"
template-type="job-application" anonymize="false">
    <field-label mime-type="text-plain" lang="en_US">
      <![CDATA[Annual/Hourly Base Salary]]>
    </field-label>
  </field-definition>
<field-definition id="currency" type="enum" required="false" custom="false">
  <field-label mime-type="text-plain"><![CDATA[Currency]]></field-label>
    <enum-value value="EUR">
   <enum-label><![CDATA[EUR]]></enum-label>
    </enum-value>
    <enum-value value="GBP">
   <enum-label><![CDATA[GBP]]></enum-label>
    </enum-value>
    <enum-value value="USD">
   <enum-label><![CDATA[USD]]></enum-label>
    </enum-value>
    <default-value>USD</default-value>
</field-definition>
```

13.4.2.2 Defining mobile Offer Details

If BizX mobile is enabled for the client, Offer Details can be approved via the mobile application if mobile fields are configured in the Offer Detail XML. The element is named mobile-fields. You must specify existing field IDs.

For example:

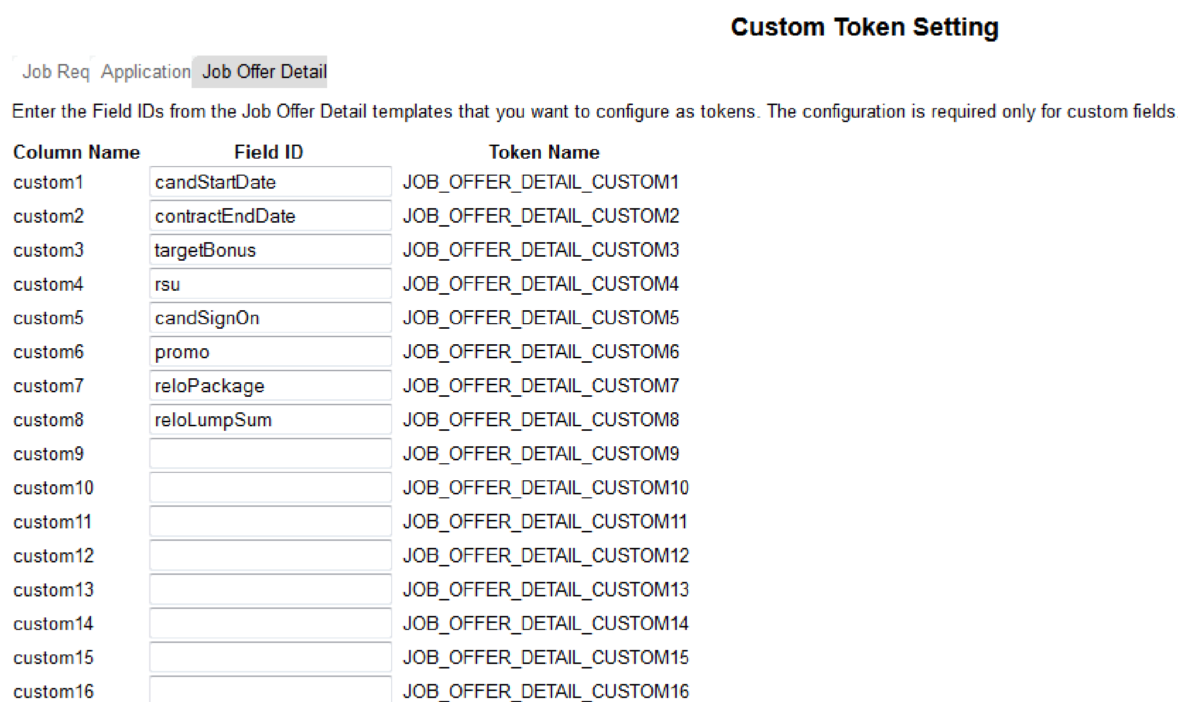
```
<mobile-fields>
    <field refid="title"/>
    <field refid="firstName"/>
    <field refid="lastName"/>
    <field refid="candStartDate"/>
    <field refid="candSalary"/>
</mobile-fields>
```

13.4.3 Uploading XML

- *Provisioning* › *Import/Update/Export Offer Detail Template*. Import the template.

13.4.4 Configuring custom tokens

Provisioning > *Configure Custom Tokens* . Similar to the Application and Requisition, configure the tokens to be used in offer letter templates.



Custom Token Setting

Job Req | Application | Job Offer Detail

Enter the Field IDs from the Job Offer Detail templates that you want to configure as tokens. The configuration is required only for custom fields.

Column Name	Field ID	Token Name
custom1	candStartDate	JOB_OFFER_DETAIL_CUSTOM1
custom2	contractEndDate	JOB_OFFER_DETAIL_CUSTOM2
custom3	targetBonus	JOB_OFFER_DETAIL_CUSTOM3
custom4	rsu	JOB_OFFER_DETAIL_CUSTOM4
custom5	candSignOn	JOB_OFFER_DETAIL_CUSTOM5
custom6	promo	JOB_OFFER_DETAIL_CUSTOM6
custom7	reloPackage	JOB_OFFER_DETAIL_CUSTOM7
custom8	reloLumpSum	JOB_OFFER_DETAIL_CUSTOM8
custom9		JOB_OFFER_DETAIL_CUSTOM9
custom10		JOB_OFFER_DETAIL_CUSTOM10
custom11		JOB_OFFER_DETAIL_CUSTOM11
custom12		JOB_OFFER_DETAIL_CUSTOM12
custom13		JOB_OFFER_DETAIL_CUSTOM13
custom14		JOB_OFFER_DETAIL_CUSTOM14
custom15		JOB_OFFER_DETAIL_CUSTOM15
custom16		JOB_OFFER_DETAIL_CUSTOM16

Configuring Custom Fields as Tokens

1. Navigate to *Provisioning* > *Configure custom tokens*
2. Enter in the fields you want to use as tokens
3. Save

13.4.5 Permission Offer Approval Feature to Operators

Add an offerApproval feature permission in the Requisition XML in all the stages where users should have access to the Offer Detail record and feature.

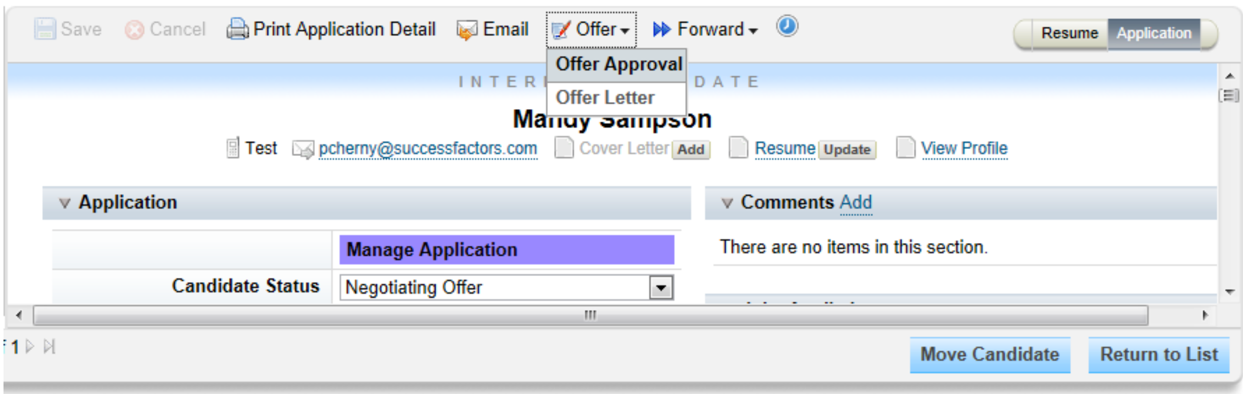
```
     <feature-permission type="offerApproval">
       <description><![CDATA[R can launch offer letters during statuses with an
Offer category.]]></description>
       <role-name><![CDATA[T]]></role-name>
       <role-name><![CDATA[R]]></role-name>
       <status><![CDATA[Offer Negotiation]]></status>
     </feature-permission>
```

Recommendation

As a best practice, configure the offer letter or approval feature in all steps where users need access to the offer information. For example if you allow users to create an offer approval at the Offer Approval stage, it's likely the user should have access to the offer approval detail in the steps following Offer Approval, such as Offer Extended, Background Check, and Hired. If the feature is not enabled for the additional steps, users will not have access to that detail in the UI.

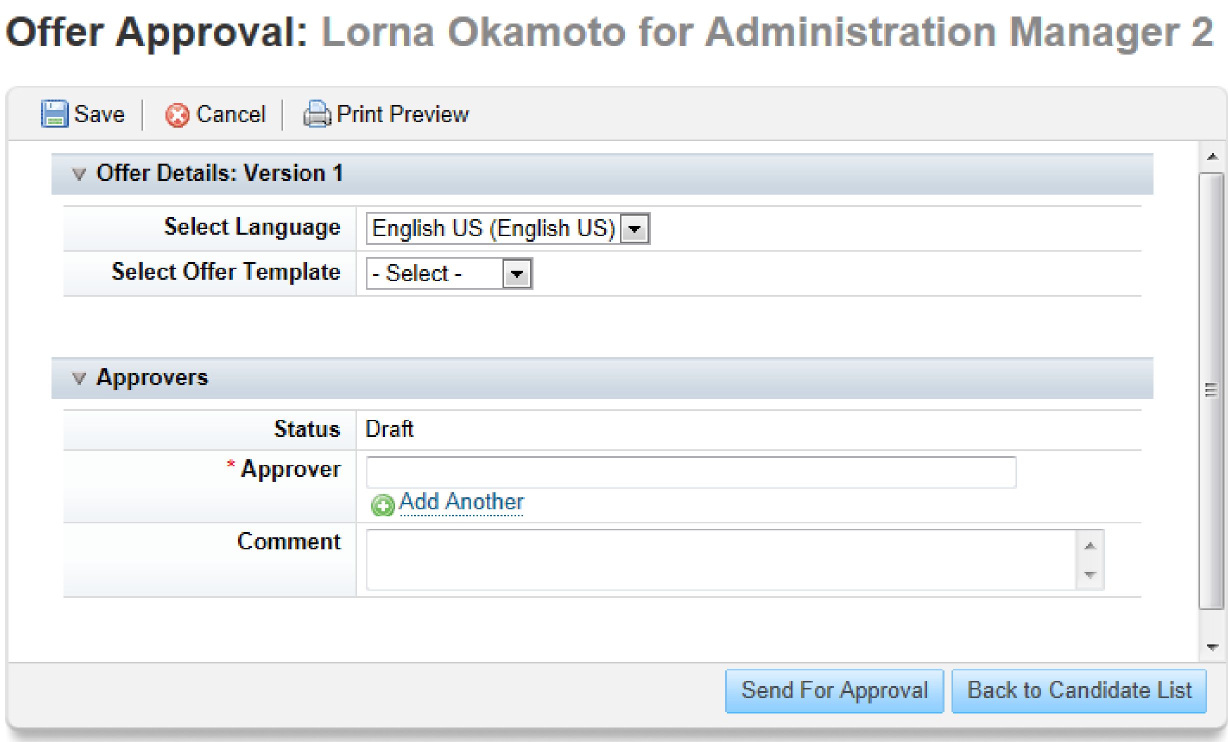
13.5 Working with Offer Detail Approval

After configuring the Offer Detail XML template, setting up tokens and enabling the offerApproval feature permission, the Offer drop down will appear in the Application record toolbar and Offer Approval will appear as an option. Users can configure either an ad hoc Offer Approval process, or customers can choose to configure a pre-defined workflow for Offers. Only one workflow option can be associated per template, but clients can have multiple Offer Detail templates configured.



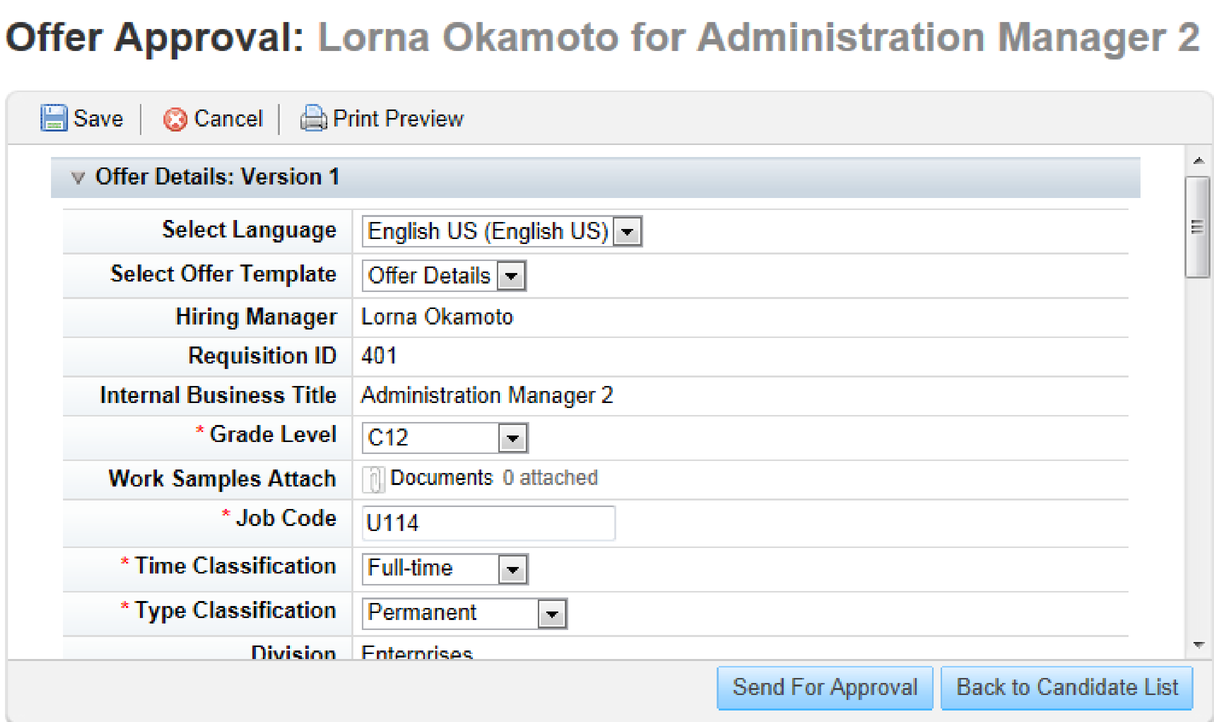
Offer Approval Options

When selected, the user will be directed to the Offer Details page and will be prompted to select an Offer Template.



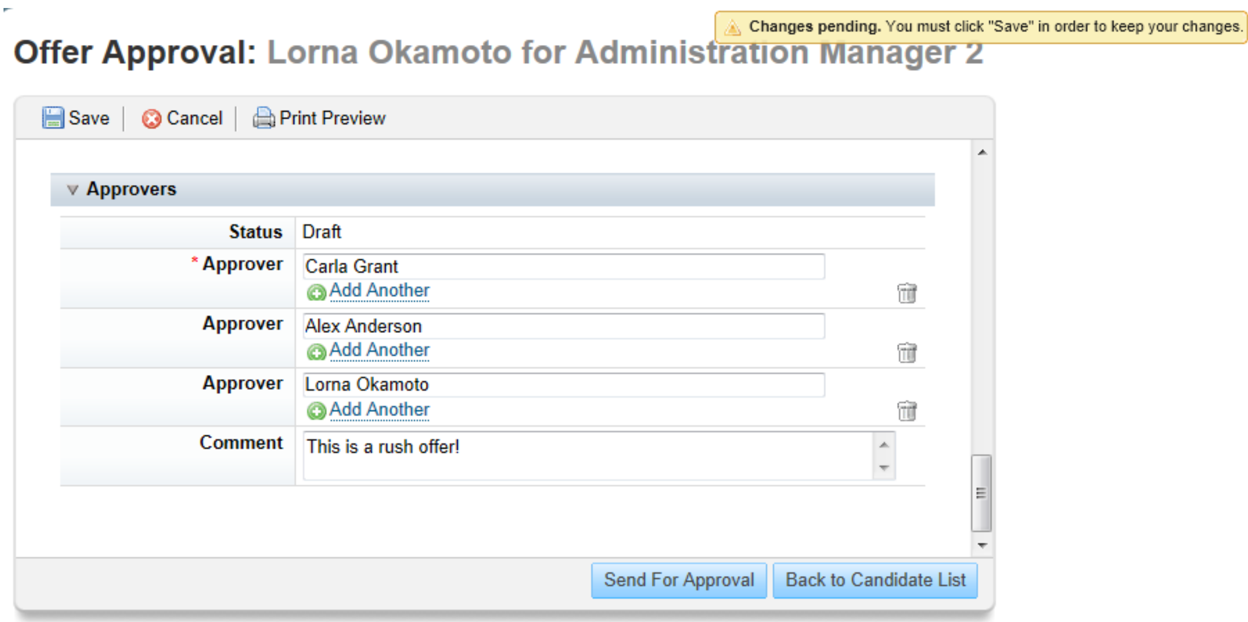
Offer Template

Data auto-populates into fields referenced from the Requisition and Application XML. The user must enter data into all required fields.



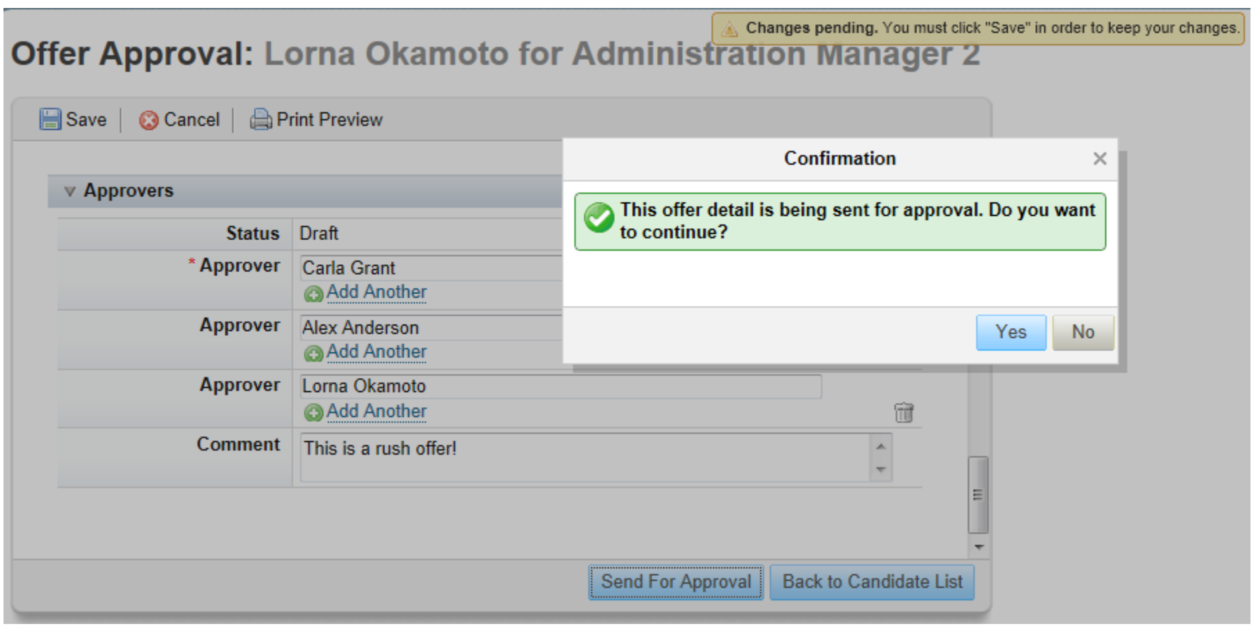
Offer Details Fields

After completing all required fields the user can enter a list of ad hoc approvers, selecting from BizX users.



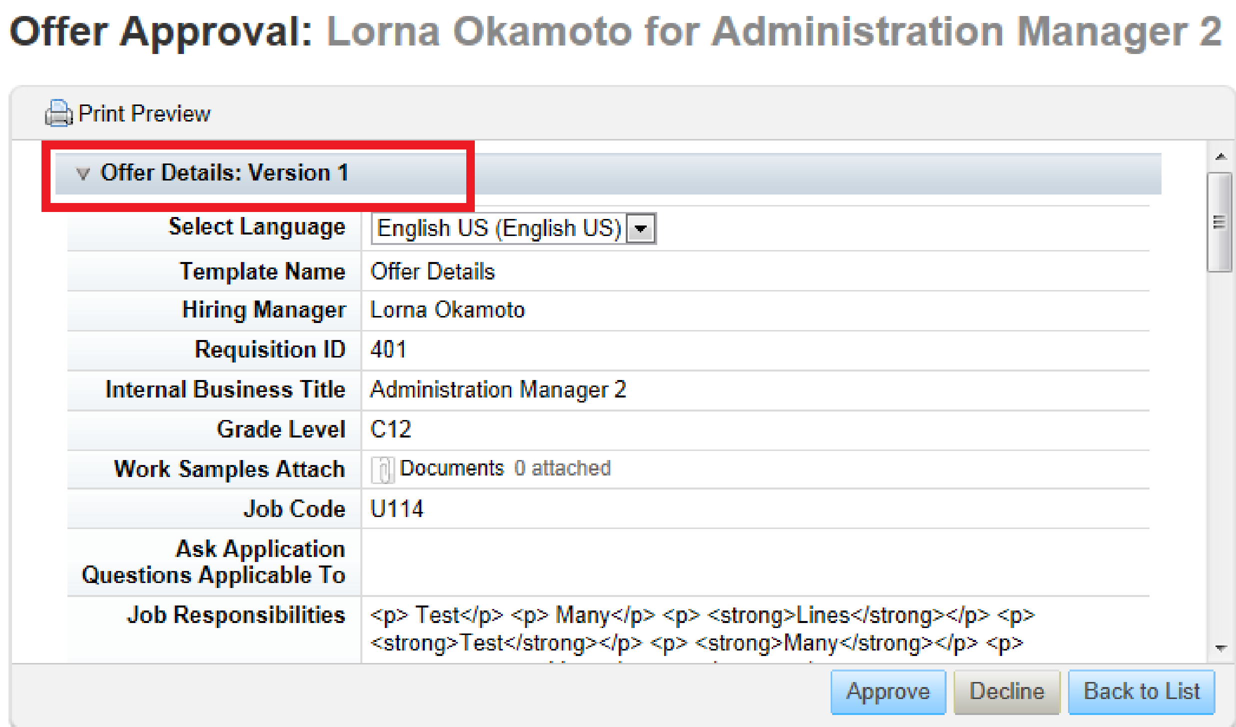
Ad hoc Approvers

The user must click the “Send For Approval” button. A confirmation message will appear, providing a double check that the user really wants to send the offer details for approval.



Offer Confirmation Message

Upon confirmation, the offer details will automatically become read-only and a version will be created. The approver will receive a notification email and be required to approve or decline.



Offer Details Version

13.5.1 Configuring a Pre-Defined Offer Approval Workflow

If the XML for the pre-defined Offer Approval is configured, the offer approvers will be automatically populated with a role, a recruiting group or a hard-coded approver.

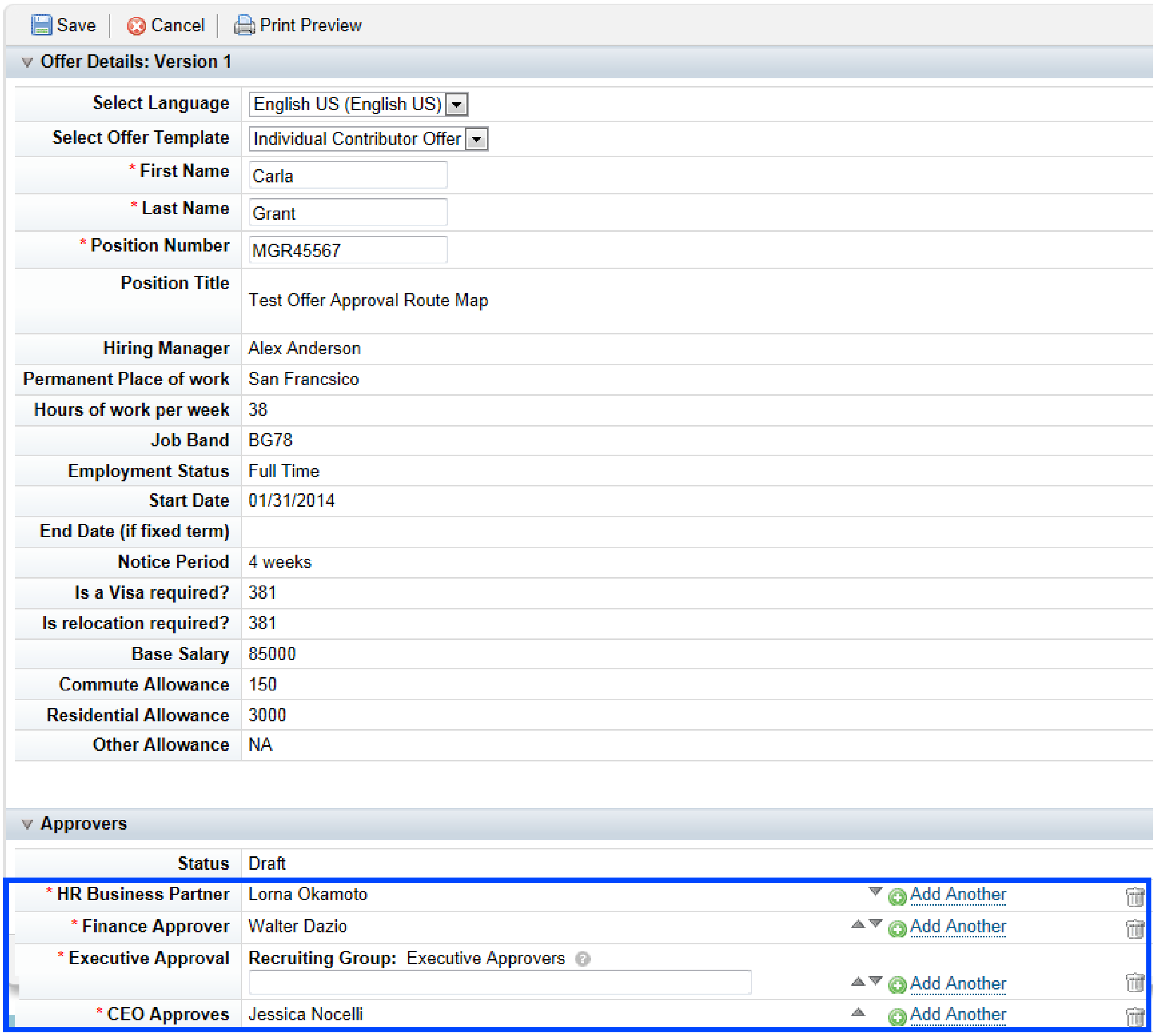
Example

```
<offer-approvers editable="true" reorder="true">
    <offerApprovalStep id="hrApproves" editable="false" editInvalidUser="true">
     <field-label><![CDATA[HR Business Partner]]></field-label>
     <field-label lang="fr_FR"><![CDATA[HR Business Partner FR]]></field-label>
        <default-user type="role"><![CDATA[R]]></default-user>
    </offerApprovalStep>
    <offerApprovalStep id="financeApproves" editable="false"
editInvalidUser="true">
     <field-label><![CDATA[Finance Approver]]></field-label>
     <field-label lang="fr_FR"><![CDATA[Finance Approver]]></field-label>
        <default-user type="role"><![CDATA[S]]></default-user>
    </offerApprovalStep>
    <offerApprovalStep id="executiveApproval" editable="true"
editInvalidUser="true">
     <field-label><![CDATA[Executive Approval]]></field-label>
     <field-label lang="fr_FR"><![CDATA[Executive Approval FR]]></field-label>
        <default-user type="recruitinggroup"><![CDATA[Executive Approvers]]></
default-user>
    </offerApprovalStep>
    <offerApprovalStep id="ceo" editable="false" editInvalidUser="true">
     <field-label><![CDATA[CEO Approves]]></field-label>
     <field-label lang="en_GB"><![CDATA[CEO Approves]]></field-label>
```

```
      <field-label lang="fr_FR"><![CDATA[CEO Approves FR]]></field-label>
         <default-user type="user"><![CDATA[adminjn]]></default-user>
     </offerApprovalStep>
   </offer-approvers>
```

Enabling this pre-defined offer approval workflow prevents the offer approval from being improperly routed. Users can also re-order approvers by clicking the up and down arrow icons next to the “Add Another” option.

Offer Approval: Carla Grant for Test Offer Approval Route Map


Save | Cancel | Print Preview

Offer Details: Version 1

Select Language	English US (English US)
Select Offer Template	Individual Contributor Offer
* First Name	Carla
* Last Name	Grant
* Position Number	MGR45567
Position Title	Test Offer Approval Route Map
Hiring Manager	Alex Anderson
Permanent Place of work	San Francsico
Hours of work per week	38
Job Band	BG78
Employment Status	Full Time
Start Date	01/31/2014
End Date (if fixed term)	
Notice Period	4 weeks
Is a Visa required?	381
Is relocation required?	381
Base Salary	85000
Commute Allowance	150
Residential Allowance	3000
Other Allowance	NA

Approvers

Status	Draft	
* HR Business Partner	Lorna Okamoto	Add Another
* Finance Approver	Walter Dazio	Add Another
* Executive Approval	Recruiting Group: Executive Approvers	Add Another
* CEO Approves	Jessica Nocelli	Add Another

Pre-Configured Offer Approval Workflow

The approval can also be done via mobile if the approver has the BizX application installed.

Mobile Offer Approval

After the offer is approved by all approvers or is rejected by one approver, the offer details are once again available for editing. Any changes made and sent will result in a new version.

Offer Details are reportable in Ad Hoc Reporting. Because there may be many versions of the Offer Details routed for approval, this content appears in two places in Ad Hoc Reports:

1. Offer Details
2. Last Offer Details

Offer Details will return one row of data for every version of the offer, causing the applicant to appear in the report multiple times because there will be a one-to-many relationship between the applicant and the offer details versions. This should only be used if the client deliberately wants to look at the full offer history of the candidate, like in a scenario where they are trending the history of offer negotiations.

Last Offer Details will return only the data from the most recent (highest version) Offer Details record. This will ensure there is a one to one relationship between the applicant and the offer details on the report. This is the advisable folder to use in most reports involving offer details.

13.6 Recruiting Home Page Tiles

Clients with Recruiting v12 enabled can configure a set of custom tiles available to end users on their homepage. The tiles specific to Recruiting are My Team, the To-Do List and the Careers tile.

13.6.1 Feature Summary

13.6.1.1 My Team Tile

The My Team tile gives a manager a view of their direct reports, matrix report and to-be-hired employees. The user can drill into each user record to see their local time, records, add a badge or a new note, or view overdue items.

The My Team tile is available in medium and large sizes. The medium mode displays the number of active team member and the total number of unresolved issues for that team. The large size shows all direct reports, matrix reports and roles “to be hired.”

For teams with fewer than 50 direct reports, the large tile displays a picture and the number of “issues” associated to that person. An issue can be anything that requires user attention, like a new application or an overdue form.

For teams with greater than 50 reports, team members display in a list view. The content is the same as for teams with fewer than 50 members.

13.6.1.2 To-Do List Tile

The To-Do tile summarizes all tasks assigned to a logged in user. The To-Do tile is available in large and extra-large sizes.

The large view displays all items that are active, upcoming and complete. Recruiting, HRIS Action, RCM Interview Assessment, Offer Details, Recruiting Events and HRIS Change Request tasks are available on the tile. For a full list of available categories, see the Platform documentation. The large view is filterable by “Active,” “Active & Upcoming” or “Completed.” Active shows only active tasks the user can take action on. Active & Upcoming displays active tasks and those in progress, but requiring no immediate action. Completed shows tasks that are finished. Tasks are always sorted by date (descending).

The extra-large tile view displays all items in progress and uncompleted. This includes all items labeled “Due Now” and “Due Anytime.” Completed items do not display.

13.6.1.3 Careers Tile

The Careers Tile lets the user view job information within their organization. It is available in two sizes small and large. The small view displays the number of open jobs in the system and a link to search jobs.

The large view displays a link to the users candidate profile, the number of open jobs and links to open jobs, the number of job alerts and links to the user’s job alerts, a link to create a job alert, a link to saved jobs (with the number of save jobs displayed) and a link to jobs applied (with the number of jobs applied displayed). The information displayed is not configurable.

13.6.2 Prerequisites

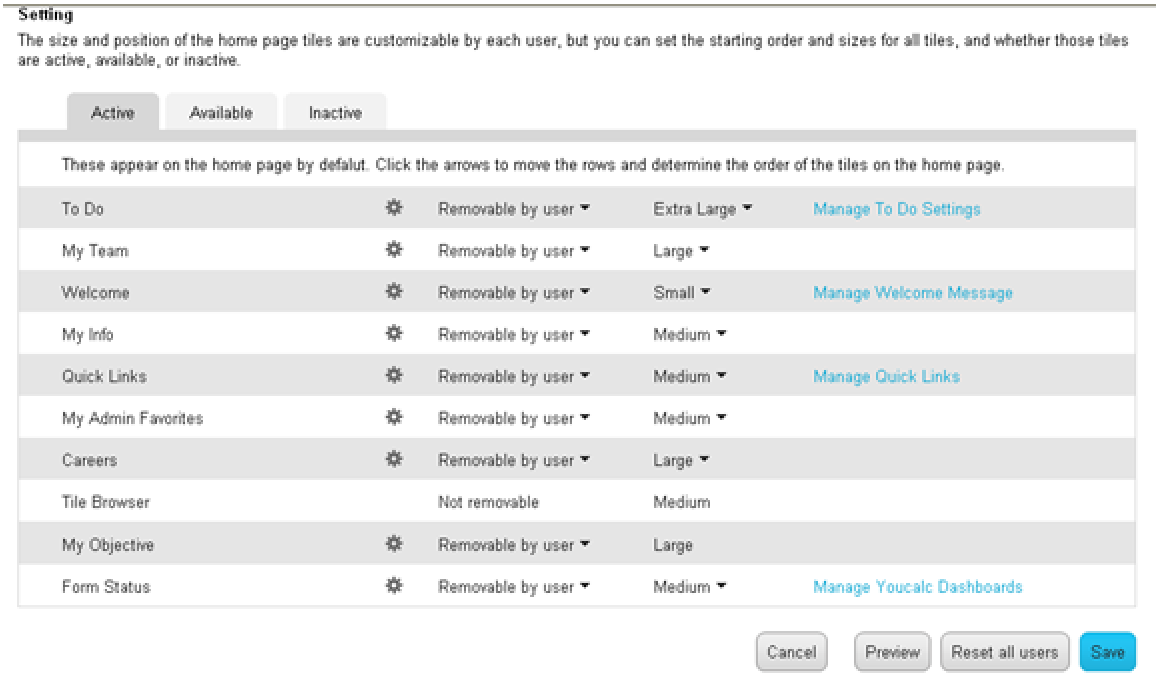
- Customer must have Recruiting v12 enabled
- v12 Homepage must be turned on (*Admin Tools* > *Company Settings* > *Manage v12 Homepage* > *Turn on Home Page*)

13.6.3 Configuration

Context

Procedure

1. Navigate to *Admin Tools* > *Company Settings* > *Manage v12 Homepage* .
2. This displays a grid of tiles and tile options. To enable a tile click the gear icon to the right and select “Move to Available.” You can also move tiles to the “Not Used” menu to make them unavailable to users.



Configuring Home Page Tiles

3. Using this grid, you can configure the default size and if the end user can remove the tile, as well as reorder the tiles.
4. Some tiles, including the To-Do list have additional configuration options. You can access these by clicking the link next to the tile in question. For the To-Do list tile, you can set the number of days to display tasks after they're done, and the number of days before a task is due to start displaying pending tasks. There is also an option to drop tasks from the to-do list after 60 days, regardless if they are completed. An admin can also create supplemental to-do lists using this menu. These lists will be based on categories and tasks in addition to the categories automatically included on the To-Do tile. For example, the admin could create a list to manage collecting 360 performance feedback.

14 Offer Letters

14.1 Setting up Offer Letter templates

See the Manage Offer Letter Templates [page 535] section of the guide.

14.2 Feature Summary

The Offer Letter feature allows a recruiting user to select a pre-built template, update the contents and generate a letter containing offer details and language for use in negotiating and finalizing offer terms with a candidate.

14.3 Quick Facts

- The Offer Letter Portlet can be permissioned via XML on the Candidate Job Application. If you grant users permissions to write an Offer Letter, they are automatically granted read permissions. You can also grant read-only permissions without write Offer Letter creation permissions. Removing the read permission hides the Offer Letter portlet. Add the following feature permission block to the <application-status-config> section of the Job Requisition Template. You can declare multiple <role-name> tags, but only one <status> tag. Declare the status name as any status from the application status set, or `"*"`, which indicates all statuses in the status set. Multiple blocks can be added to configure the visibility permission of portlet for various roles in different statuses.

```
<feature-permission type="offerLetterPortlet">
        <description><![CDATA[DESCRIPTION HERE]]></description>
        <role-name><![CDATA[ROLE]]</role-name>
        <role-name><![CDATA[ROLE]]</role-name>
        <status><![CDATA[STATUS NAME]]></status>
    </feature-permission>
```

- If the <application-status-config> or <offerLetterPortlet> blocks are not included in the template, the portlet is visible to anyone with access to the applicant profile page for the job requisitions using the template.
- The Offer Letter Portlet cannot be configured or permissioned to hide it from view for selected operators
- Do not use the offer-letter-fields element in the Requisition XML when offer approval is turned on or there may be errors on the offer letter page
- Do not change the position of any reportable custom fields or offer letter tokens saved in an offer letter template can render the incorrect value

14.4 Configuration

14.4.1 Permissioning the Offer Letter feature to operators

Add an offerLetter feature permission in the Requisition XML in all the stages where users should have access to the Offer Letter feature.

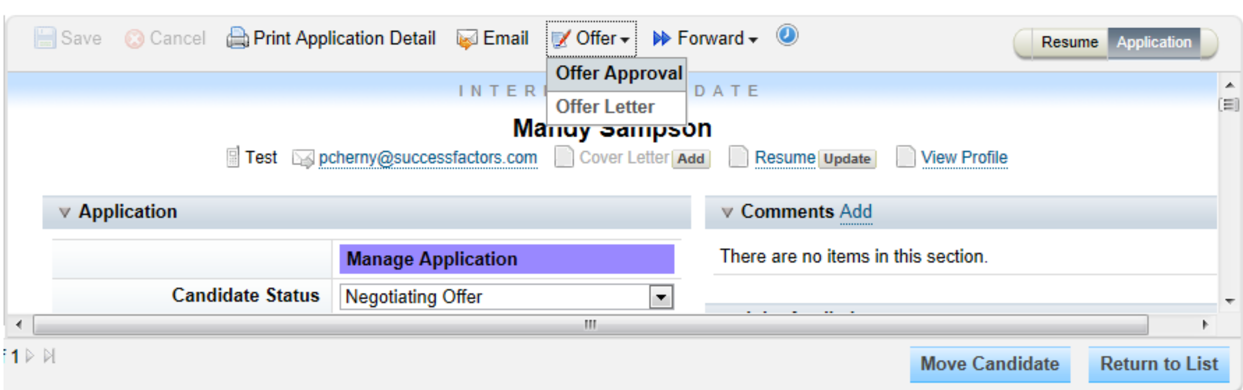
```
    <feature-permission type="offerLetter">
      <description><![CDATA[R can launch offer letters during statuses with an
Offer category.]]></description>
      <role-name><![CDATA[T]]></role-name>
      <role-name><![CDATA[R]]></role-name>
      <status><![CDATA[Offer Negotiation]]></status>
    </feature-permission>
```

Recommendation

As a best practice, configure the offer letter or approval feature in all steps where users need access to the offer information. For example if you allow users to create an offer approval at the Offer Approval stage, it's likely the user should have access to the offer approval detail in the steps following Offer Approval, such as Offer Extended, Background Check, and Hired. If the feature is not enabled for the additional steps, users will not have access to that detail in the UI.

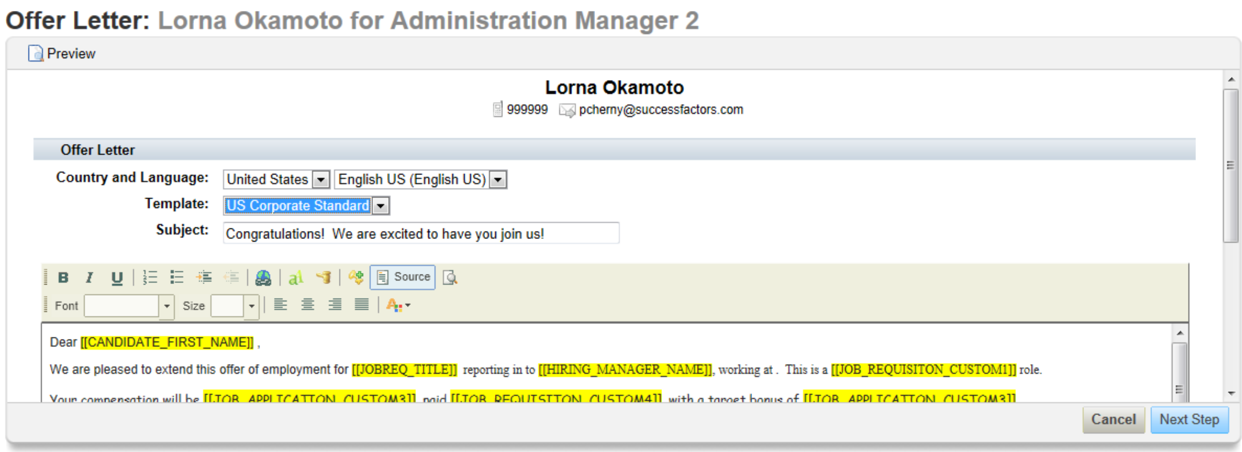
14.4.2 Creating Offer Letters

After configuring the offerLetter feature permission, the Offer drop down appears in the Application record toolbar and Offer Letter will appear as an option.



Offer Letter Drop Down

When selected, you will be directed to the Offer Letter page. The first offer letter template in the list will default.

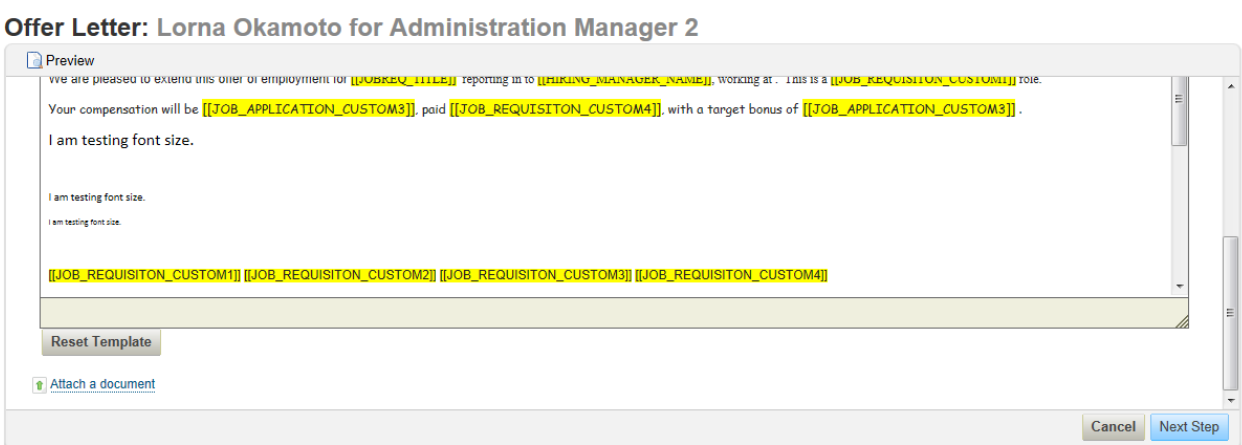


Offer Letter

You can change the offer language and refine the contents of the letter to their satisfaction. If desired, attachments can be added to the offer letter using the “Attach a document” link at the bottom of the page.

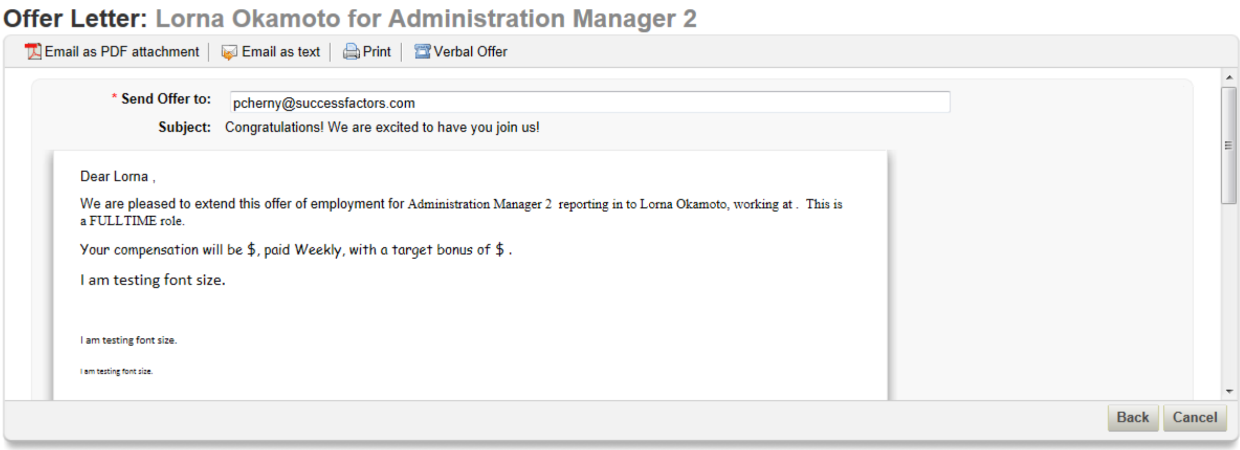
14.4.3 Previewing Offer Letters

After setting up the offer letter to your satisfaction, click the *Next Step* button.



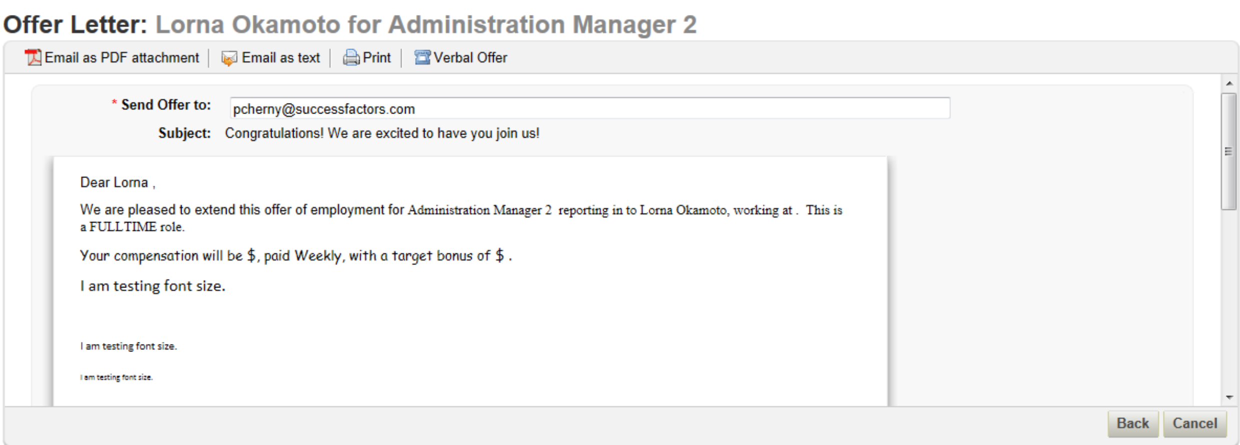
Offer Letter Configuration

A preview page loads, with the tokens populated. If the value for the field associated to the token is blank, the token will remain as a reminder to the user that it should be manually replaced or the data should be filled into the field before generating a letter.



Offer Letter Preview

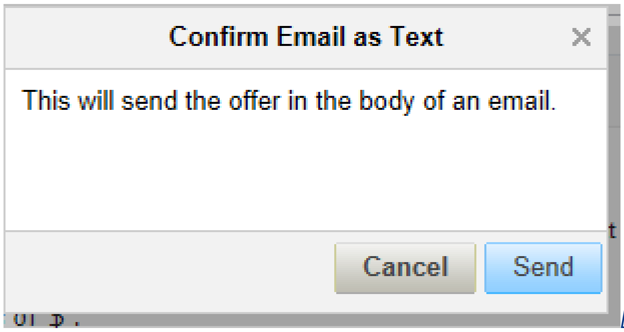
14.4.4 Distributing Offer Letters



Distributing Offer Letters

There are four methods of distributing offer letters to a candidate and/or recording offer letter activity to the Application record.

- *Email as PDF attachment*
  - When this option is selected, the user is brought to an email screen to send the candidate an email. The offer letter as a PDF document and any attachments on the offer letter are attached to this email.
- *Email as text*
  - When this option is selected, the user receives a warning/confirmation screen. If the user chooses to proceed, an email is sent to the candidate containing the offer letter text, including any attachments to the offer letter.



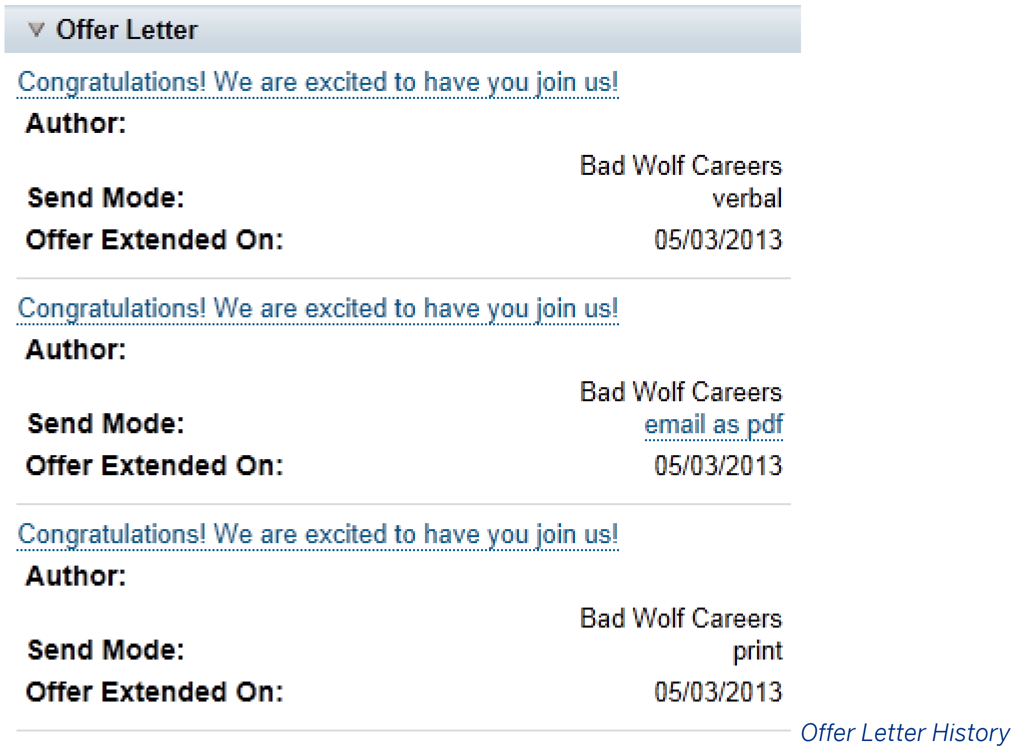
Email as Text Confirmation

- *Print*
  - When this option is selected, the system will prompt the user to download or save a PDF copy of the offer letter.
    Email as Text Confirmation
- *Verbal Offer*
  - When this option is selected, the system will only record the offer letter but will not send it to the candidate.

When any option is selected, it becomes greyed out and cannot be re-selected unless the offer letter is re-generated. This is to prevent accidentally distributing the offer letter multiple times.

Offer Letter with Grayed Out Options

When any option is selected, the system records the user, date and timestamp, and offer letter contents including attachments and (if PDF) email, in the Offer Letter Portlet on the applicant's record for compliance purposes.



14.4.4.1 Online Offer

A secure online portal where offer letters can be sent and candidates can login and accept or decline, or ask a question.

14.4.4.1.1 How to Configure Online Offer

Enable Online Offer in SuccessFactors HCM Admin Tools.

Procedure

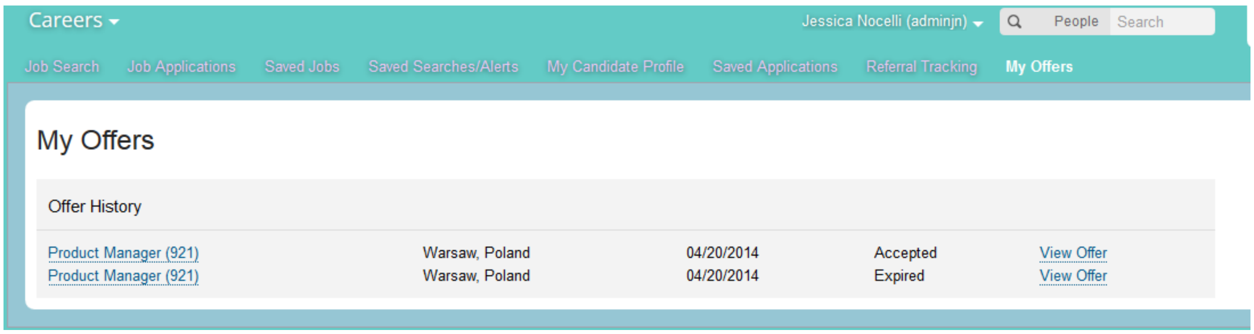
1. Navigate to *Admin Tools* > *Manage Recruiting* > *Manage Recruiting Settings* > *Offer Letter* and enable the online offer by selecting *Allow candidates to accept offers online.*
2. Select *Allow candidates to email job requisition operator*, if you would like candidates to be able to contact the recruiter or another operator with questions. This is not required for Online Offer. Select an operator for candidates to e-mail. If the selected operator is invalid on the requisition the offer was generated from, the Recruiter’s e-mail will be used by default. If the Recruiter’s e-mail address is also invalid, the e-mail address for system generated emails will be used.

14.4.4.1.2 Viewing Online Offers

After enabling online offers, recruiting users can send offers to candidates to accept, reject, or negotiate.

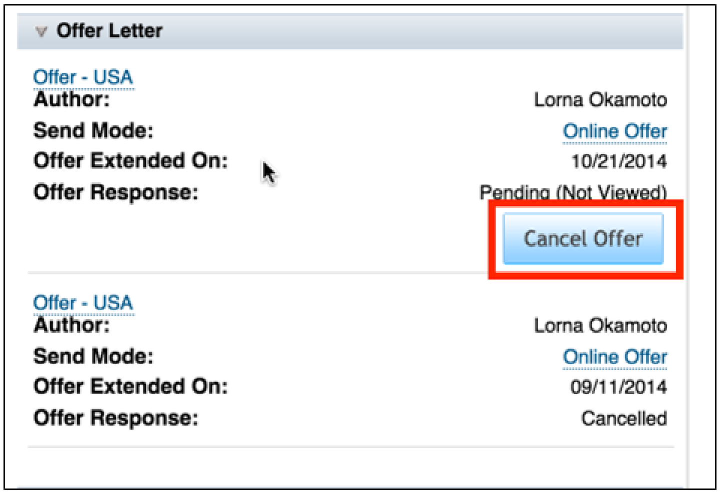
Once the Online Offer is enabled, recruiting users can select it like any other Offer Letter option. Once the Online Offer is generated, the candidate receives an e-mail notifying them that they have received an offer and containing a link to view and accept the offer.

Once the candidate logs in to the career site, they see a tab called *My Offers* where they can view online offer letters. This tab only appears if the Online Offer is enabled, and if the candidate has pending online offers. From this tab, the candidate can accept the offer, decline with a comment, or email the recruiter for further information (if the option to contact an operator is enabled). Choosing any of these three options opens a rich text editor where the candidate can enter comments before performing the action. A candidate comment is required to decline the offer.



The *My Offers* tab supports multiple versions of an Offer Letter for the same job requisition, but the candidate can only accept the most recent version. Candidates can view older Offer Letters, offers for other requisitions or any expired offers on the My Offers tab. Once enabled, a recruiting user can add the [[CANDIDATE_OFFER_URL]] token to the offer letter to create a direct link to the online offer.

Once the recruiting user sends the online offer, they can see when the letter was sent, if it was accepted or is pending acceptance, and if the candidate has viewed the letter or not. All of this information displays in the Offer Letter portlet. You can also see comments the candidate has left on the Offer Letter in the portlet. You cannot print comments from the Application screen, but they are reportable via Ad Hoc Reporting. Online Offers are reportable via Ad Hoc Reporting, the same as any other offer letter. Once an online offer has been extened, you can click *Cancel Offer* in the Offer Letter portlet. Only the user who created the offer can cancel it. Configure the *Online Offer Cancelled by Sender* and *Online Offer Cancelled by Sender Candidate Notification* e-mail triggers to send notifications about the offer cancellation.



14.4.4.2 Online Offer with eSignature

To enable Online Offer with eSignature, a customer must have a DocuSign account.

- For new DocuSign clients, contact mailto::sales_successfactors@docusign.com. Indicate that you are a SuccessFactors Recruiting customer, who would like to sign up for a new account. Provide a system administrator e-mail and password to DocuSign. This admin user can update DocuSign account preferences and is the primary account for the integration. Enter the account ID provided by DocuSign, along with the system administrator e-mail and password in SuccessFactors HCM *Admin Tools* > *Manage Recruiting Settings* > *Offer Letter* > *Enable electronic signature for offer letters*.
- For existing DocuSign clients, enter your DocuSign account ID, system administrator e-mail, and password in SuccessFactorsHCM *Admin Tools* > *Manage Recruiting Settings* > *Offer Letter* > *Enable electronic signature for offer letters*

Recommendation

The candidate's email address and name must match exactly in the DocuSign system and SuccessFactors HCM. This includes middle name or initial - if a candidate has middle name or initial in one system, they name just match exactly in the other system.

14.4.4.2.1 How to Configure Online Offer with eSignature

Prerequisites

- You must enable and configure Online Offer.

- The customer must have a DocuSign account and contract.
- **For demo instances only"** To configure this integration in your ACE instance use the following credentials:
  - New Account in DEMO.DOCUSIGN.NET:
  - SuccessFactorsDocuSignBranding@outlook.com
  - PW: DocuSign1
  - Short Account ID: 728735

  DocuSign only allows one email address to be tied to one DocuSign user account (per environment (DEMO & Production)). This means when testing you will need to have unique email addresses tied to your Recruiting Users that are creating online offers with eSignature.

Context

DocuSign offers all new DocuSign clients a trial period of sending 100 offer letters with unlimited users. DocuSign also provides a Demo instance for clients to test functionality.

Procedure

1. Navigate to *Admin Tools* > *Managing Recruiting Settings*.
2. Check *Enable electronic signature for offer letters*.
3. Select the eSignature environment (demo or production) and enter
   - eSignature Company Account ID (from DocuSign account)
   - eSignature admin e-mail address (from DocuSign account)
   - eSignature admin password (from DocuSign account)
4. Navigate to *Permissions* > *Recruiting Permissions*. Grant users the *eSignature Sender Permission*.

   The recruiting user sees a warning if they attempt to create an online offer letter for a candidate who already has an offer letter for another job at the same company. When the candidate views their online offer, they will see an option to *Accept and eSign* where eSignature is enabled, along with the options to decline the offer or e-mail the recruiter.

   If the candidate clicks *Accept & eSign* they can choose to sign the offer at a later time. If the candidate does not want to eSign the offer, they can decline the eSignature and contact the recruiter to sign a hard copy of the offer.

   Once the candidate has accepted and eSigned the offer, the recruiting user can view the eSignature Offer or eSignature certificate by clicking on the appropriate link in the Offer Letter portlet. You can also view the candidate response and eSignature response status separately. ESignature is reportable. All other fields follow Online Offer reportability.

15 Hire & Onboard

At the end of the selection process, recruiting participants decide on an applicant to hire. The next steps in the process vary depending on the client's business process and core HRIS.

15.1 New Hire Processing

New hire processing transfers the pertinent details about the hired applicant into the client's HRIS tool.

15.1.1 Employee Central (RCM to EC Integration)

The Recruiting to Employee Central Integration (RCM to EC) provides a seamless way to transition an External Candidate record into a new Employee account, including issuing an Employee ID. Customers using both RCM 2.0 and EC 2.0, can hire internal and external candidates and automatically sync them into their Employee Central database.

Map the data from Recruiting Management directly to the equivalent fields in Employee Central, which requires Professional Services Configuration in both the Recruiting and Employee Central modules. External Candidate Profile background elements are synched to the Employee Profile automatically when correctly mapped.

With this functionality enabled and configured, recruiting users can:

- Stage a Candidate in a prehire status in the Recruiting module
- Access the Employee Central page for creating a new employee
- Review and edit new hire account data pulled directly from Recruiting module
- Submit New Hire for approval (for example, creation and routing of new Employee account)
- Receive automated notifications of the process progress (for example, final approval received)
- Update the Candidate Profile with the Employee ID
- Auto-synch background element information from candidate profile to employee profile after the hire

> **Tip**
>
> Background elements do not pass to EC, they are synched directly from external candidate profile to employee profile only.

15.1.1.1 Quick Facts

- The integration template can pull from the candidate application, job requisition, and offer letter. To maximize data transfer, please make sure the Requisition, Application and Offer Details XML templates are configured to include the EC fields supported in the RCM-EC Transformation Template.
- Because the 'Manage Pending Hires' list is populated based on Offer Approval information, a candidate must go through an approved Offer Approval prior to being set to 'Ready to Hire' (Hirable).
- Permission to view applicants in Manage Pending Hires is based on the requisition operators, not applicant data

15.1.1.2 Prerequisites

- Recruiting must be enabled and configured
- Employee Central V2 must be enabled and configured

15.1.1.3 Configuration

15.1.1.3.1 (Optional) Configure instructions in the Application XML

Add one or more instructional fields in the Application XML describing the integration process and providing instructions to recruiting users on how to complete the hire process into Employee Central. Recruiting users usually need to explicitly see the set of conditions that must be met for the candidate to appear in Manage Pending Hires, or there can be confusing during new hire processing.

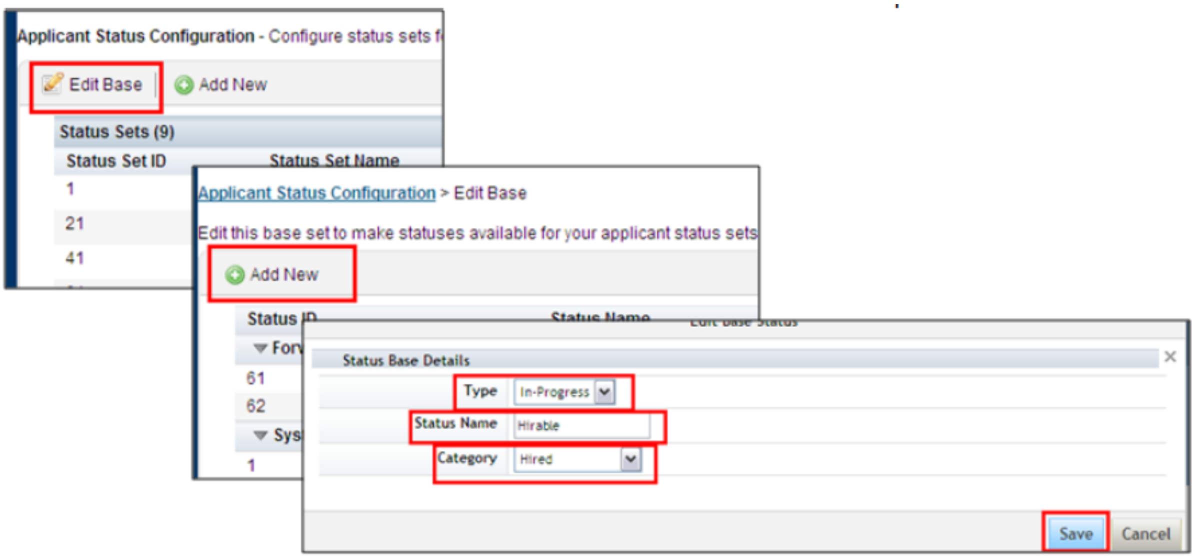
If using multi-stage application, configure these fields to only be visible in the appropriate offer/hire statuses.

15.1.1.3.2 Configuring Applicant Status

Context

Procedure

1. Provisioning > Applicant Status Configuration
2. Edit Base status set to include the additional Hirable status.

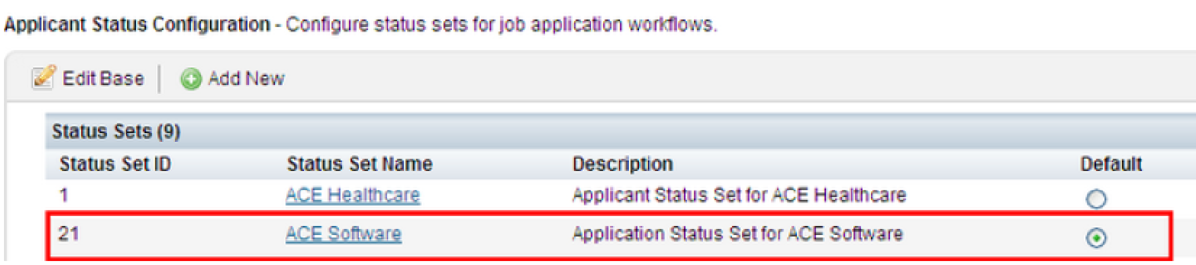


Edit Base Status Set to Include "Hirable" Option

3. Save changes and click 'Applicant Status Configuration' to return to the previous page.

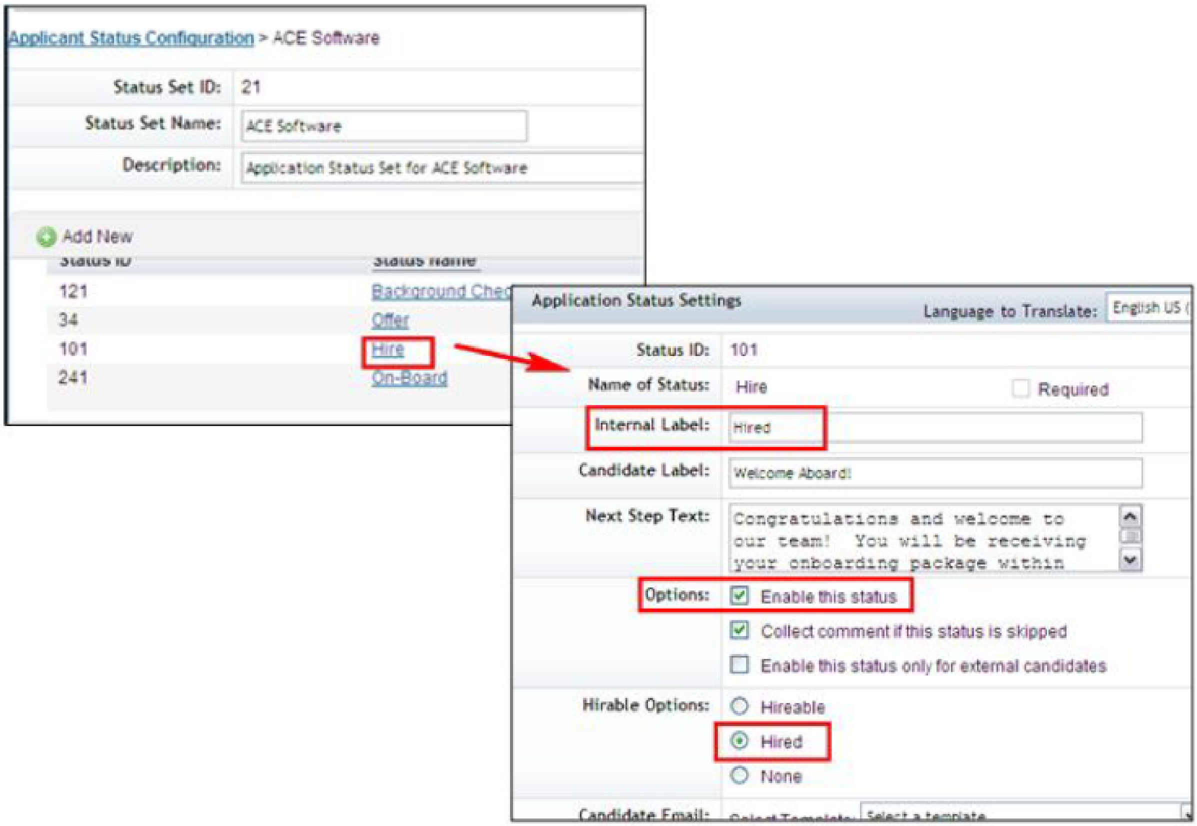
Return to Applicant Status Configuration

4. Edit the default set to update the Hired/Hirable statuses. To edit, click the Status Set Name.



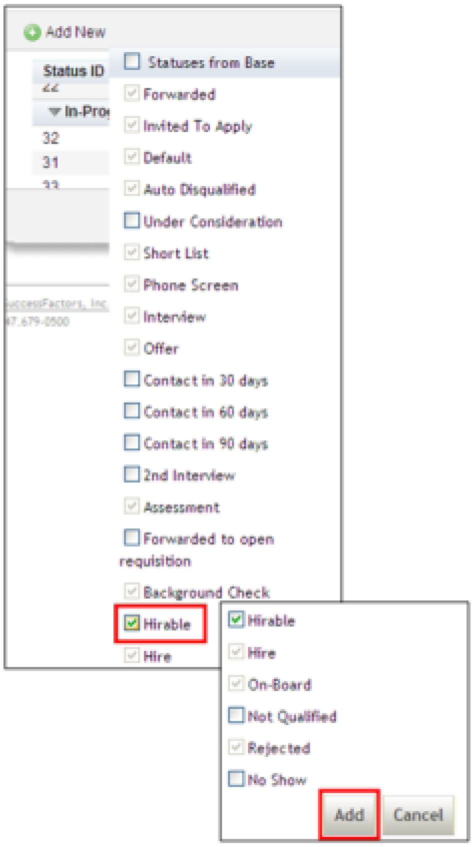
Edit the Default Status Set to Include Hired/Hirable

5. Status set opens, edit the Hire status by clicking *Hire*.
   a. Update Labels
   b. Enable this status
   c. Select 'Hired' as the Hirable Options



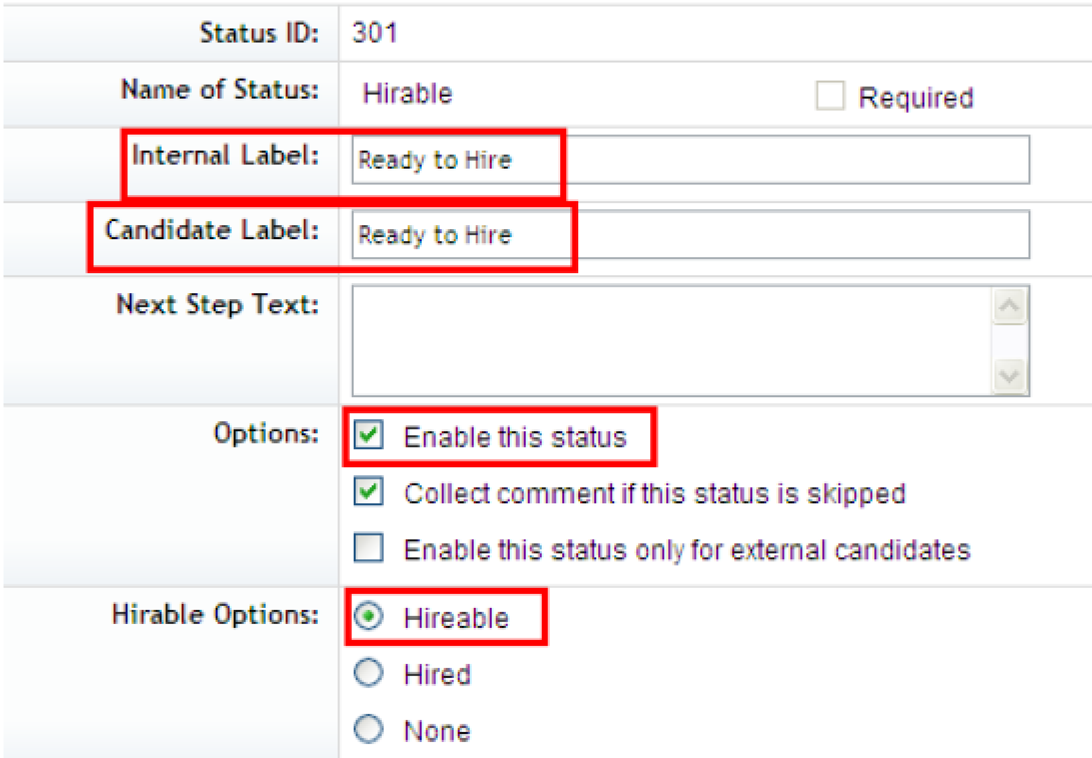
Edit the Hire Status

6. Create a new status for the Hirable Option:
   a. Add New
   b. Hirable
   c. 'Add'



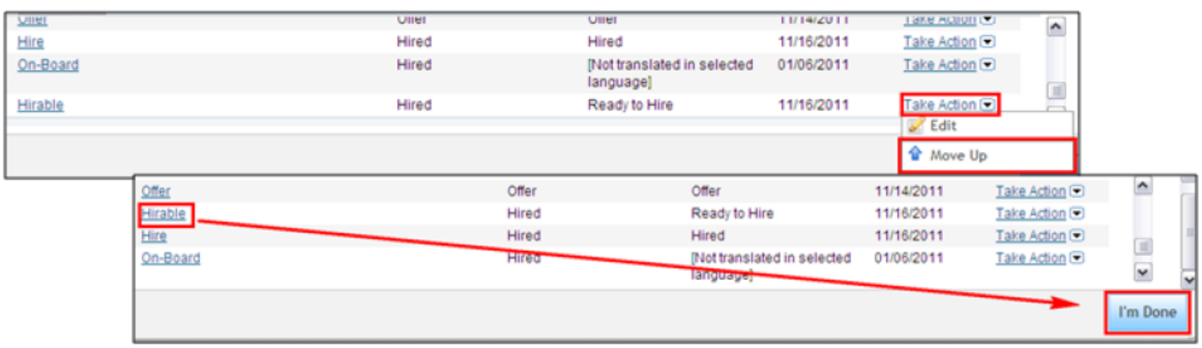
Add New Hirable Status

7. Edit *Hirable* status by clicking on *Hirable*:
   a. Add Internal Label
   b. Add Candidate Label
   c. Enable this status
   d. Select 'Hireable' as the Hirable Option



Edit the Hirable Status

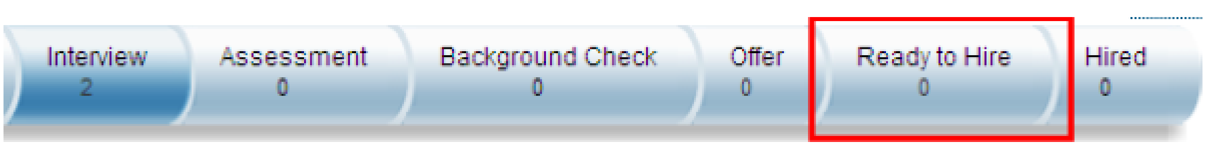
8. Move 'Hirable' above 'Hire' to keep a consistent applicant status trail
9. Click *I'm Done* to save.



Update Status Order and Save Changes

Results

This additional status, Ready to Hire (Hirable), is now available in the applicant status trail in the application.



Ready to Hire Status Available in the Applicant Status Trail

15.1.1.3.3 Configuring Transformation Template

- *Provisioning* > *Managing Recruiting* > *Import/Export Candidate to Employee Integration Template*

object-mappings Element and entity-details-mapping Element

Always declare these elements and attributes at the top of the RCM-EC Transformation XML Template.

```
<object-mappings source = "RCM" target = "EC" integration-type =
"CandiDateToEmployee">
<entity-details-mapping>
```

mapping-attribute Element

Declare one mapping-attribute element for every field that you intend to map from Recruiting to Employee Central.

```
<mapping-attribute>
 <source refid="firstName" entity-type="application"/>
 <target refid="personalInfo.first-name" />
</mapping-attribute>
```

source Element

Each mapping-attribute Element must contain one source Element. This declares the origin of the data in Recruiting Management.

```
<mapping-attribute>
 <source refid="firstName" entity-type="application"/>
 <target refid="personalInfo.first-name" />
</mapping-attribute>
```

refid Attribute

Each source element must contain one refid attribute. This declares the field in Recruiting Management that will be sent to Employee Central. Any discrete field defined in the Requisition, Application or Offer XML may be mapped to Employee Central. Special fields that contain complex data, such as application comments, questionResponse, competencies, etc. are not presently supported.

```
<source refid="firstName" entity-type="application"/>
```

entity-type Attribute

Each source element must also contain one entity-type attribute. This declares which object the field data pulls from when it is sent to Employee Central. Allowable values are application, jobrequisition and offerletter.

```
<source refid="firstName" entity-type="application"/>
```

Each mapping-attribute Element must contain one source element. This declares the origin of the data in Recruiting Management.

target Element

The target element defines the mapping of the Recruiting Data into Employee Central.

```
<mapping-attribute>
 <source refid="firstName" entity-type="application"/>
 <target refid="personalInfo.first-name"/>
</mapping-attribute>
```

Only certain EC objects can receive data from RCM:

- personalInfo
- personInfo (for date_of_birth)
- emailInfo (multiple email can be sent simply by mapping a different key for each entityType)
- phoneInfo (multiple phone can be sent by simply mapping a different key for each entityType)
- imInfo (multiple im info can be sent by simply mapping a different key for each entityType)
- recurringPayComponents (multiple can be sent by mapping a different key for each entityType)
- nonRecurringPayComponents (multiple can be sent by mapping a different key for each entityType)
- addressInfo (support only ONE type "home")
- jobInfo
- compInfo
- employmentInfo
- emergencyContactInfo
- nationalId

refid Attribute

The refid attributes defines what object and field the data will be placed into in Employee Central. The refid must be in the format hrisElementName.hrisFieldName.<entityName>

```
<target refid="personalInfo.first-name"/>
```

When data is sent from Recruiting to Employee Central, certain validations and transformations occur. Familiarize yourself with the transformation template rules and data handling:

- The template is not validated during upload, but on the ECT side elements and fields are validated while processing the hire.

- The entityName is optional and is only specified for certain entities like "emailInfo", "phoneInfo", "addressInfo", "paycomponentsRecurring" and "payComponentsNonRecurring." For address, the type has to be specified only for the "address1" field
- For phone, email the entityName/type (example "H", "P" in the example template above) has to match the externalCode of the phone/email type picklist
- For address, RCM sends the two character country code which converts to a three character country code and identifies the right country from the Territory table.
- For payComponents, the entityName identifies the payComponent used for mapping the value. The payComponent must exist and be valid for the hire date.
- For frequency, a single frequency is used for all payComponents sent by RCM. The frequency sent has to match the externalCode of the frequency from the FO_FREQUENCY foundation object table. If this does not match, the value from RCM cannot be displayed due to incompatible data types
- The currency sent is used for all payComponents sent by RCM
- If the field is a foundation object, ECT attempts to identify the FO to be used in the autocomplete dropdown by searching by NAME, CODE, NAME (CODE) and DESCRIPTION of the foundationobject. The NAME (CODE) handles the case where a FO from ECT has been synched over to users_sys_info and that value is being used by RCM.
- If the field is a picklist in RCM and a picklist in ECT, the value sent is the localized value and ECT will set the optionID in the corresponding ECT field by querying the picklist table for that localized value.
- If the field is a picklist in RCM and not a picklist in ECT, the RCM value displays in the field.
- To determine the CSF fields for address, job and Comp, EC uses the Country from the "address" field of RCM. This is a reference to the personal address country. During the new hire process, the user is free to change the LEGAL Entity on the new hire page, at which point the CSF fields resets. The value from RCM will still be displayed in/below the field
- For national-id, EC cannot determine either the country or the type for the national-id as RCM does not store that value. The national-id is displayed and EC allows the country and type to be selected during the hire

role-mapping Element

The RCM-EC Transformation Template must include a role-mapping element. This element contains two sub-elements. One is used to control the permissions used in Manage Pending Hires, and the second is used to identify which requisition operator is the new employee’s manager.

```
<role-mapping>
<target-roles>
    <role>O</role>
    <role>V</role>
    <role>R</role>
    <role>T</role>
    <role>G</role>
</target-roles>
<manager-roles>
    <role>G</role>
</manager-roles>
</role-mapping>
```


target-roles Element

Each role-mapping Element must contain one target-roles element.

In other areas of the BizX suite, the target permissions in role-based permissions are based on the employee data. Since the applicant in Manage Pending Hires is not yet an employee, the permissions cannot be based on their data. Instead, the user attempting to process the applicants in Manage Pending Hires can view only the pending hires where one or more of the requisition operators are included in their allowable Target Population.

> **Tip**
>
> Designating the "O" recruiting operator as the target role can cause complications, because if originating user is inactivated, the originating user will not be changed and the process will fail.

Multiple roles can be specified within target-roles.

```
<target-roles>
 <role>O</role>
 <role>V</role>
 <role>R</role>
 <role>T</role>
 <role>G</role>
</target-roles>
```

manager-roles Element

Each mapping-attribute Element must contain one manager-role element. This declares which requisition operator EC considers to be the manager role. Based on this operator, RCM identifies the manager and returns the manager's information. Only one role should be specified in manager-roles.

```
<manager-roles>
 <role>G</role>
</manager-roles>
```

XML Sample

```
<object-mappings source = "RCM" target = "EC" integration-type =
"CandiDateToEmployee">
<entity-details-mapping>
<mapping-attribute>
 <source refid="firstName" entity-type="application"/>
 <target refid="personalInfo.first-name" />
</mapping-attribute>
<mapping-attribute>
 <source refid="middleName" entity-type="application"/>
 <target refid="personalInfo.middle-name" />
</mapping-attribute>
<mapping-attribute>
 <source refid="lastName" entity-type="application"/>
 <target refid="personalInfo.last-name" />
```

```
</mapping-attribute>
<mapping-attribute>
 <source refid="contactEmail" entity-type="application"/>
 <target refid="emailInfo.email-address.P" />
</mapping-attribute>
<mapping-attribute>
 <source refid="homePhone" entity-type="application"/>
 <target refid="phoneInfo.phone-number.H" />
</mapping-attribute>
<mapping-attribute>
 <source refid="cellPhone" entity-type="application"/>
 <target refid="phoneInfo.phone-number.C" />
</mapping-attribute>
<mapping-attribute>
 <source refid="fax" entity-type="application"/>
 <target refid="phoneInfo.phone-number.F"/>
</mapping-attribute>
<mapping-attribute>
 <source refid="dateOfBirth" entity-type="application"/>
 <target refid="personInfo.date-of-birth" />
</mapping-attribute>
<mapping-attribute>
 <source refid="ssn" entity-type="application"/>
 <target refid="nationalIdCard.national-id" />
</mapping-attribute>
<mapping-attribute>
 <source refid="address" entity-type="application"/>
 <target refid="homeAddress.address1.home" />
</mapping-attribute>
<mapping-attribute>
 <source refid="city" entity-type="application"/>
 <target refid="homeAddress.city.home" />
</mapping-attribute>
<mapping-attribute>
 <source refid="stateProvince" entity-type="application"/>
 <target refid="homeAddress.state.home" />
</mapping-attribute>
<mapping-attribute>
 <source refid="country" entity-type="application"/>
 <target refid="homeAddress.country.home" />
</mapping-attribute>
<mapping-attribute>
 <source refid="zip" entity-type="application"/>
 <target refid="homeAddress.zip-code.home" />
</mapping-attribute>
<mapping-attribute>
 <source refid="jobStartDate" entity-type="jobrequisition"/>
 <target refid="employmentInfo.start-date" />
</mapping-attribute>
<mapping-attribute>
 <source refid="jobCode" entity-type="jobrequisition"/>
 <target refid="jobInfo.job-code" />
</mapping-attribute>
<mapping-attribute>
 <source refid="title" entity-type="jobrequisition"/>
 <target refid="jobInfo.job-title" />
</mapping-attribute>
<mapping-attribute>
 <source refid="department" entity-type="jobrequisition"/>
 <target refid="jobInfo.department" />
</mapping-attribute>
<mapping-attribute>
 <source refid="division" entity-type="jobrequisition"/>
 <target refid="jobInfo.division" />
</mapping-attribute>
<mapping-attribute>
 <source refid="location" entity-type="jobrequisition"/>
 <target refid="jobInfo.location" />
```



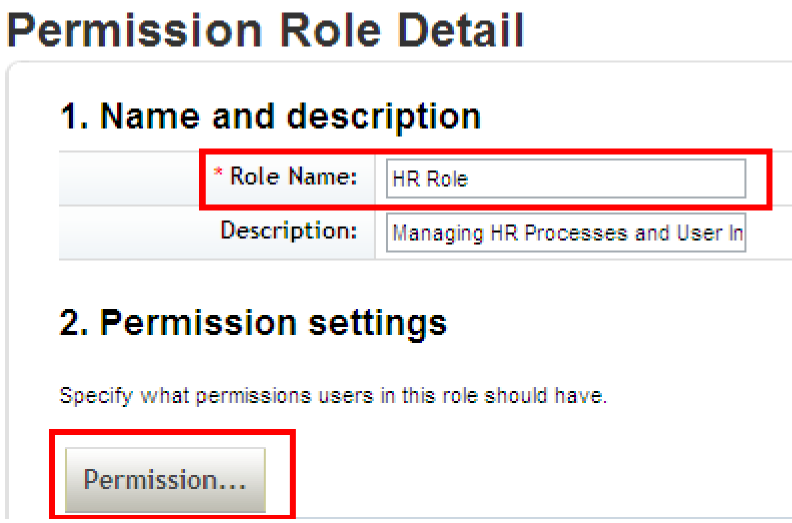
```
</mapping-attribute>
<mapping-attribute>
 <source refid="jobGrade" entity-type="jobrequisition"/>
 <target refid="jobInfo.pay-grade" />
</mapping-attribute>
<mapping-attribute>
 <source refid="manager" entity-type="jobrequisition"/>
 <target refid="jobInfo.manager-id" />
</mapping-attribute>
<mapping-attribute>
 <source refid="jobLevel" entity-type="jobrequisition"/>
 <target refid="compInfo.job-level" />
</mapping-attribute>
<mapping-attribute>
 <source refid="salaryBase" entity-type="offerletter"/>
 <target refid="payComponentRecurring.paycompvalue.Base Salary" />
</mapping-attribute>
<mapping-attribute>
 <source refid="targetBonusAmount" entity-type="offerletter"/>
 <target refid="payComponentRecurring.paycompvalue.BNS-USA" /> <!-- This is
actually the percent -->
</mapping-attribute>
<mapping-attribute>
 <source refid="targetBonusPercent" entity-type="offerletter"/>
 <target refid="payComponentRecurring.paycompvalue.BNS-USA-PERCENT" /> <!-- This is
actually the percent -->
</mapping-attribute>
<mapping-attribute>
 <source refid="relocationCost" entity-type="offerletter"/>
 <target refid="payComponentNonRecurring.value.RELOCATION"/>
</mapping-attribute>
<mapping-attribute>
 <source refid="salRateType" entity-type="offerletter"/>
 <target refid="payComponentRecurring.frequency.Base Salary" />
</mapping-attribute>
 <mapping-attribute>
 <source refid="currency" entity-type="offerletter"/>
 <target refid="payComponentRecurring.currency-code.Base Salary" />
</mapping-attribute>
</entity-details-mapping>
<role-mapping>
<target-roles>
 <role>O</role>
 <role>V</role>
 <role>R</role>
 <role>T</role>
 <role>G</role>
</target-roles>
<manager-roles>
 <role>G</role>
</manager-roles>
</role-mapping>
</object-mappings>
```

15.1.1.3.4 Permissioning Manage Pending Hires

Context

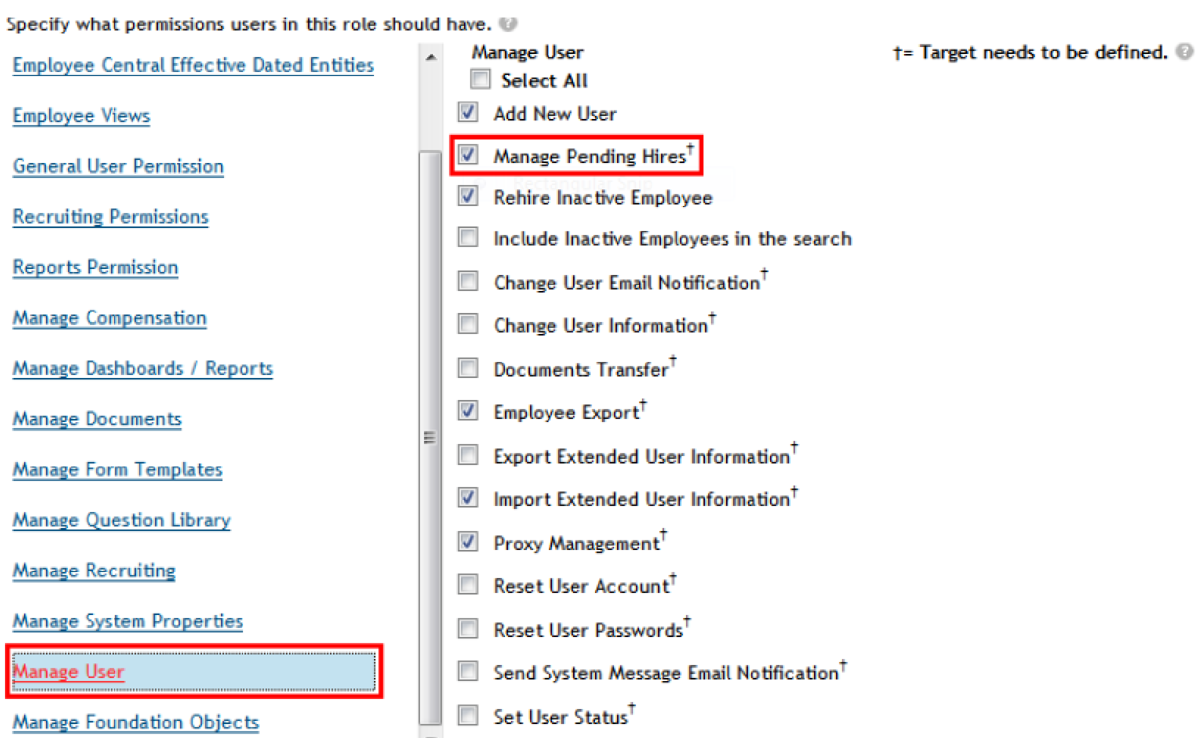
Procedure

1. Click on the *Permission Role* that needs to access the *Manage Pending Hires* option then click on *Permission*.



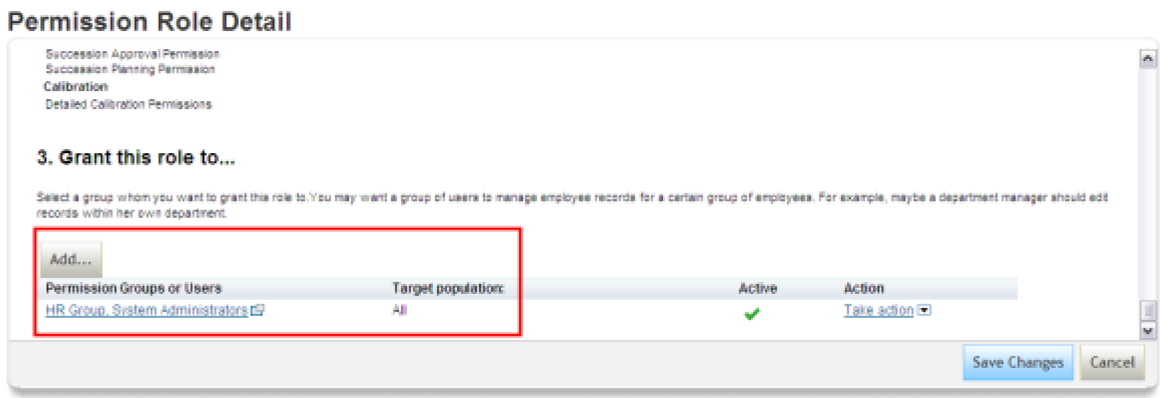
Permissioning Manage Pending Hires

2. Go to *Manage Users*, select *Manage Pending Hires* and click *Done* to close the screen.



Manage User > Manage Pending Hires

3. This permission requires the user to 'Grant this role to...' Select a group to grant this role and specify the target population for the role. To access this setting, scroll to the bottom of the role permission box.



Grant Role to Group of Users

15.1.1.4 Working with RCM to EC Integration

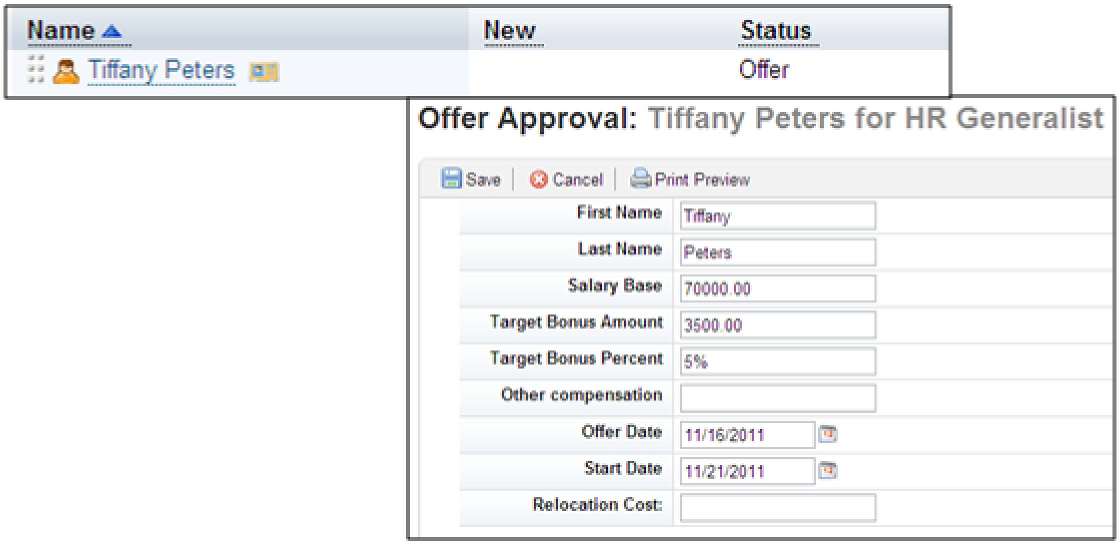
Context

Procedure

1. Ensure the applicant has a completed and approved Offer Details record.

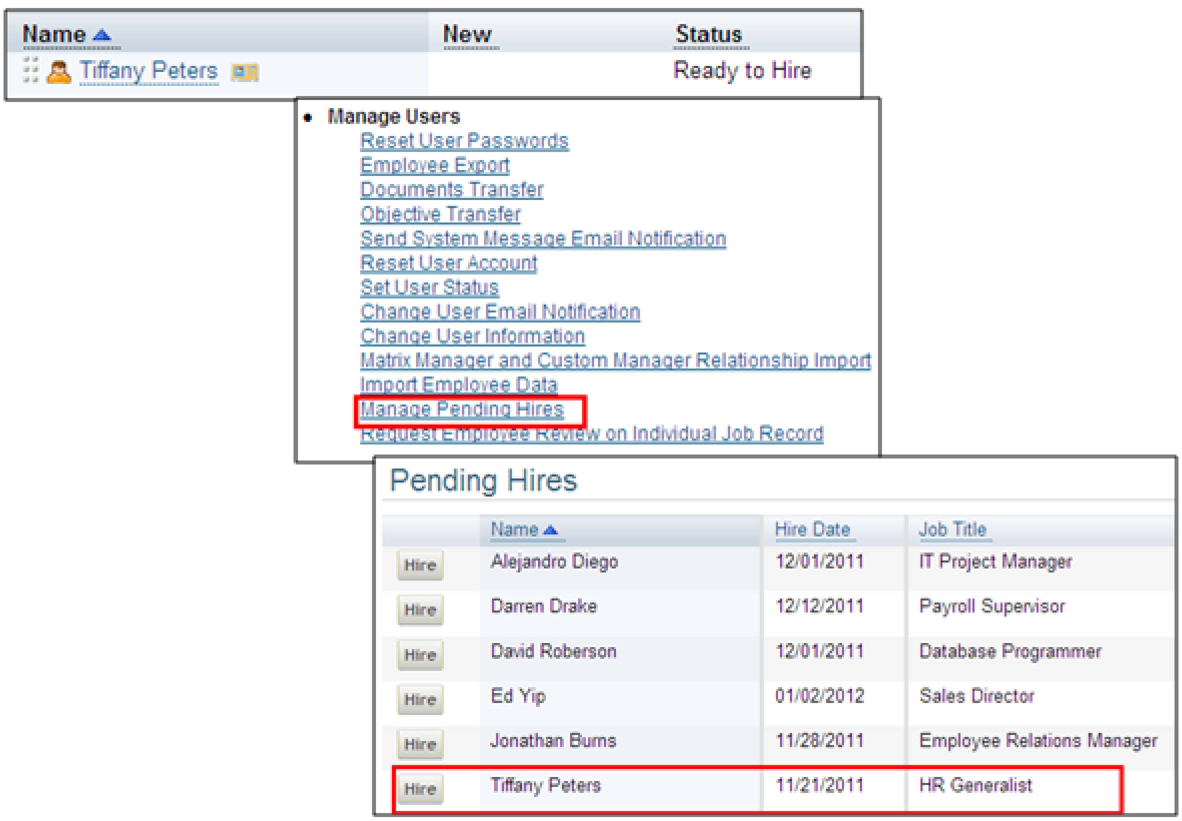
   Tip

   ○ Offer Approval populates the *Manage Pending Hires* table in Admin Tools. If an applicant does not receive an offer approval that is approved before entering the *Ready to Hire* (Hirable) status, they will NOT show up in the *Manage Pending Hires* list.



Ensure a Completed and Approved Offer Details Record

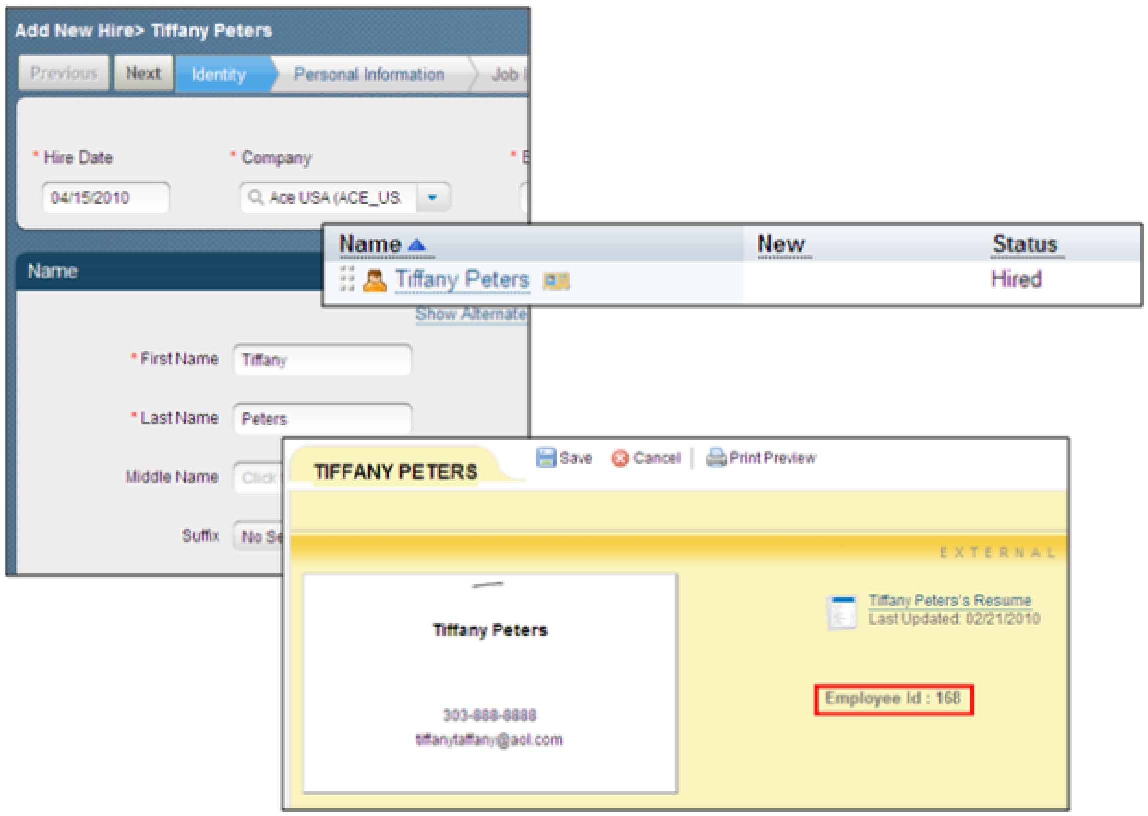
2. Change the applicant's status to the *Ready to Hire* (Hirable) status. The applicant appears in the *Manage Pending Hires* list in Admin Tools.



Change Applicant Status to "Ready to Hire"

3. In *Manage Pending Hires*, the user can then *Hire* the appropriate candidate. Once the candidate is hired:
   a. Candidate is added to Employee Central and all data outlined in the integration template is transferred to employee central.

b. As long as the employeeId is a field on external candidate profile, the candidate's new employee ID will be visible.
c. The candidate now has an internal candidate profile. The new internal candidate profile contains minimal data and duplicates the external candidate profile unless Candidate to Employee Conversion is configured. See the Handling of Candidate Profile Records [page 436].
d. Candidate to Employee Conversion section of this guide for more information.



New Hire with Visible employee ID and Internal Candidate Profile

15.1.2 SAP New Hire Integration

SAP provides new hire integration for clients using both SAP HCM and SuccessFactors Recruiting Management (RCM) via an integration pack. The integration pack allows the transfer of hired applicant data from SuccessFactors into SAP.

To facilitate this integration, SAP HCM and SF RCM must include certain prescribed configuration. This section of the guide describes the expected functionality and prescribed configuration required in SF RCM for a client to use the integration pack out of the box.

SAP provides an additional guide that details the HCM pre-requisites and configuration necessary to support the new hire integration. In case of contradiction in any details, the SAP guide supersedes this guide. For more information about the installation, security, and functionality of the add-on integration pack see the SAP Administrator's Guide:

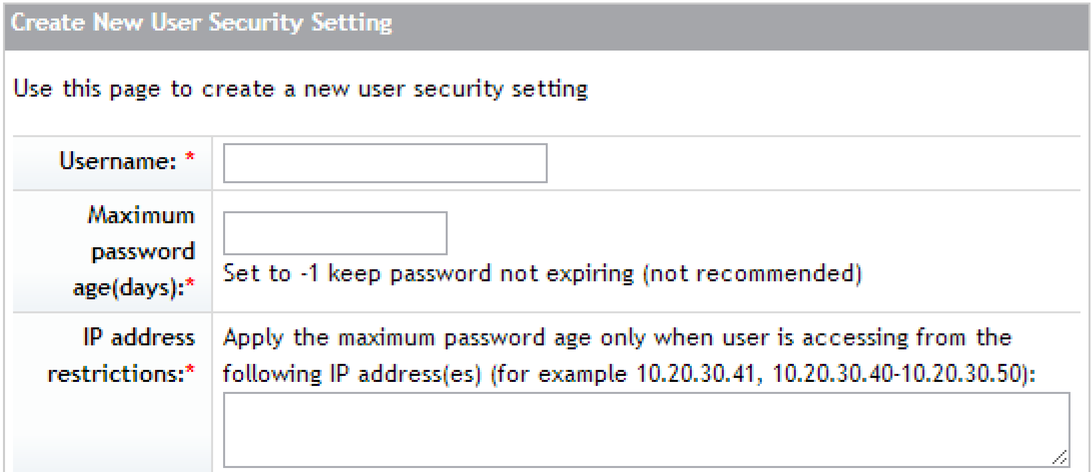
- Navigate to the SAP Service Marketplace and choose http://service.sap.com/instguides, then *SAP Business Suite Applications* > *SAP ERP Add-Ons* > *Integration Add-On for SAP ERP HCM and SuccessFactors BizX*.

15.1.2.1 Quick Facts

- The pre-built integration pack contains the minimum required fields and a set of commonly used fields. Clients can choose to remove any fields not part of the minimum requirements. Clients can also set up their integration to include additional fields not part of the default integration.
- Because the integration pack uses SAP PI as middleware, the client must have resources knowledgeable in all three technologies (SAP HCM, SAP PI and SF RCM with an SF PS engagement to change the configuration of RCM) to make changes to the pre-built integration.
- Position management integration to create requisitions automatically based on position vacancies is out of scope. A pre-requisite to use the new hire integration pack is client willingness to create requisitions and maintain necessary position or organizational data on the requisitions manually.

15.1.2.2 Prerequisites

- *Provisioning* > *Company Settings* > *SFAPI*
- *Provisioning* > *Company Settings* > *Recruiting Application* > *Enable SFAPI Webservices*
- A dummy integration user must be set up with:
  1. API login privileges
     a. *RBP:* *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *General User Permissions* > *API User Login*
     b. *Non-RBP:* *Admin Tools* > *Manage API Login Permission*
  2. Recruiting Permissions to access the Recruiting objects via API
     a. *RBP:* *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *Recruiting Permissions* > *grant permissions for all SFAPI functionalities (18 total)*
     b. *Non- RBP:* *Admin Tools* > *Recruiting Permissions* > *grant permissions for all SFAPI functionalities (18 total)*
  3. Set API Login Exceptions
     - *Admin Tools* > *Password & Login Policy Settings* > *Set API Login Exceptions* > *Add* > *Set the following settings*
       1. Username - The dummy integration user
       2. Maximum password age (days) – Set to -1 days
       3. IP address restrictions – Designated IP address(es) or address range for use with the integration.



15.1.2.3 Configuration

15.1.2.3.1 Configuring and permissioning the Application XML

Define the fields that will be mapped to SAP. All the fields listed in the below XML sample must be defined. Clients can choose to define additional standard or custom fields. If additional fields are defined for use in the integration, the client must customize the SAP integration to map these fields to fields in SAP.

Any custom fields added must be added to reportable custom fields in order for them to be available in ad hoc reporting. For more information see Reportable Custom Fields [page 66].

> **Tip**
>
> The SAP integration manages the content of the sapError and sapExportedOnDate fields so generally no operators should have “write” privileges to this field. At the very least the operator responsible for placing the applicant in the SendToSAP status should have read permissions to these fields for informational and troubleshooting purposes.

```
<field-definition id="statusId" type="picklist" required="true" custom="false"
public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Status: ]]></field-label>
  <field-description><![CDATA[Status ]]></field-description>
    <picklist-id>CandidateStatus</picklist-id>
  </field-definition>
  <field-definition id="firstName" type="text" required="true" custom="false"
public="true" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[First Name: ]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Vorname: ]]></field-
label>
  <field-description><![CDATA[First Name ]]></field-description>
  </field-definition>
  <field-definition id="middleName" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
```

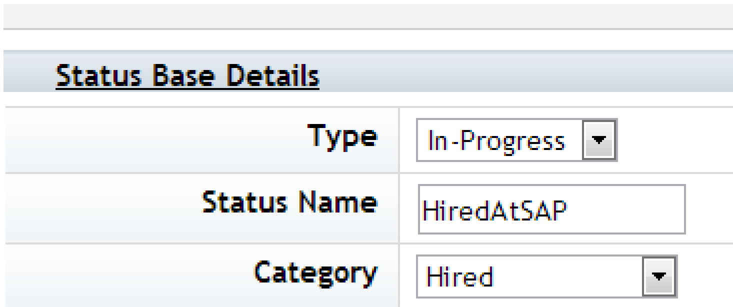
```
  <field-label mime-type="text-plain"><![CDATA[Middle Name: ]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Zweitname: ]]></
field-label>
  <field-description><![CDATA[Middle Name ]]></field-description>
  </field-definition>
  <field-definition id="lastName" type="text" required="true" custom="false"
public="true" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Last Name: ]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Nachname: ]]></field-
label>
  <field-description><![CDATA[Last Name ]]></field-description>
  </field-definition>
  <field-definition id="gender" type="picklist" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Gender: ]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Geschlecht: ]]></
field-label>
  <field-description><![CDATA[]]></field-description>
    <picklist-id>gender</picklist-id>
  </field-definition>
  <field-definition id="dateOfBirth" type="date" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Date of Birth: ]]></field-label>
    <field-description><![CDATA[Date of Birth]]></field-description>
  </field-definition>
  <field-definition id="address" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Street Address: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Strasse: ]]></
field-label>
    <field-description><![CDATA[address]]></field-description>
  </field-definition>
  <field-definition id="address1" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Street Address: ]]></field-labe
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Strasse: ]]></
field-label>
    <field-description><![CDATA[address]]></field-description>
  </field-definition>
  <field-definition id="city" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[City: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Stadt: ]]></field-
label>
    <field-description><![CDATA[city]]></field-description>
  </field-definition>
  <field-definition id="state" type="picklist" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[State: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Bundesland: ]]></
field-label>
    <field-description><![CDATA[state]]></field-description>
    <picklist-id>state</picklist-id>
  </field-definition>
  <field-definition id="zip" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Zip / Postal Code: ]]></field-
label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[PLZ: ]]></field-
label>
    <field-description><![CDATA[zip]]></field-description>
  </field-definition>
  <field-definition id="country" type="picklist" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Country: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Land: ]]></field-
label>
    <field-description><![CDATA[country]]></field-description>
```



```
    <picklist-id>country</picklist-id>
  </field-definition>
  <field-definition id="homePhone" type="text" required="false" custom="false"
public="true" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Evening Phone: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Telefon
abends: ]]></field-label>
    <field-description><![CDATA[eve phone]]></field-description>
  </field-definition>
  <field-definition id="contactEmail" type="text" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Email Address: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Email: ]]></field-
label>
    <field-description><![CDATA[email]]></field-description>
  </field-definition>
  <field-definition id="formerEmployee" type="bool" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Former Employee: ]]></field-label>
    <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[ehem.
Mitarbeiter: ]]></field-label>
    <field-description><![CDATA[forEmp]]></field-description>
  </field-definition>
  <field-definition id="startDate" type="date" required="false" custom="false"
public="false" readOnly="false" anonymize="false">
    <field-label mime-type="text-plain"><![CDATA[Start Date]]></field-label>
    <field-description><![CDATA[Start Date]]></field-description>
  </field-definition>
  <field-definition id="sapError" type="text" required="false" custom="true"
public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[SAP Error]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[SAP Error]]></field-
label>
  </field-definition>
  <field-definition id="sapExportedOnDate" type="date" required="false"
custom="true" public="false" readOnly="false" anonymize="false">
  <field-label mime-type="text-plain"><![CDATA[Exported On]]></field-label>
  <field-label mime-type="text-plain" lang="de_DE_SF"><![CDATA[Exported On]]></
field-label>
  </field-definition>
```

15.1.2.3.2 Configuring the Applicant Status Set

- *Provisioning* > *Applicant Status Configuration* > *Edit Base* > *Add New*
  - Add the following statuses with exactly these names (no spaces or changes):
    - SendToSAP
    - TransferredToSAP
    - TransferredToSAPError
    - HiredAtSAP



Status Base Details for SAP New Hire Integration

- All of the above statuses should be set to a category of “Hired.” There is not required value for Type, but “Onboard” is recommended.
  - *Save* > *I’m Done*
- *Admin Tools* > *Edit Applicant Status* > *select status set name*
  - *Add New* > *select the four new statuses* > *Add*
  - *Open the newly added status* > *define labels and preferences according to the client’s needs*

> **Tip**
>
> Define status-triggered email notifications on these statuses to ensure participants involved in new hiring activity will be notified about the progress of the applicant during integration processing.

15.1.2.3.3 Configuring the Offer Details XML

Offer details must be configured in order to use SAP New Hire Integration, whether or not the client is routing the offer for approval. Define the fields that will be mapped to SAP. The field listed below must be included, and clients may choose to define additional standard or custom fields. If additional fields are defined for use in the integration, the client must customize the SAP integration to map these fields to fields in SAP.

```
<field-definition id="startDate" type="date" required="false" custom="true"
template-type="job-application">
    <field-label mime-type="text-plain"><![CDATA[Start Date]]></field-label>
    <field-description><![CDATA[Start Date]]></field-description>
</field-definition>
```

15.1.2.3.4 Identifying the scenario that best meets the client’s needs

SAP’s pre-built integration pack includes an extensive set of fields mapped to SuccessFactors requisition fields, but using this full configuration places a significant burden on the SucessFactors’ client to create and maintain a very complex set of picklists. As such, SuccessFactors recommends Scenario A as the optimal configuration. Scenario A requires the client to adjust the integration pack to remove unused fields.

- *Scenario A: The client uses SAP org management and maintains all related data*
  Detailed data such as personnel area, cost center and other data is associated to a unique position id number in SAP. That is, as long as SF sends the position number from the requisition over to SAP, SAP can look up and populate all the additional organizational data for the hire.
- *Scenario B: The client uses SAP org management but does NOT maintain all related data*
  Some detailed data such as cost center may be associated to a unique position id number in SAP but other necessary data such as personnel area is not associated; OR the client wishes to allow this data to be overwritten with data specified on the requisition. That is, SF must send both the position number and a many other fields of organizational data in order to process the new hire.

Discuss how much data the client needs transmitted from SF to SAP to process the hire based on their current use of SAP and the administrative maintenance burdens involved in maintaining data for the fields in Recruiting Management.

15.1.2.3.5 Configuring and permissioning the Requisition XML

Define the fields that will be mapped to SAP, based on the configuration scenario that the client has chosen. All the fields listed in the scenario must be included, and clients may choose to define additional standard or custom fields. If additional fields are defined for use in the integration, the client must customize the SAP integration to map these fields to fields in SAP. Permission these fields according to the client's preference.

Scenario A - SF sends the position number to SAP

```
  <field-definition id="title" type="text" required="true" custom="false">
  <field-label><![CDATA[Job Title]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Job Titel]]></field-label>
  <field-description><![CDATA[Position Title]]></field-description>
  </field-definition>
  <field-definition id="sapPositionName" type="text" required="true" custom="true">
  <field-label><![CDATA[SAP Position Name]]></field-label>
  </field-definition>
  <field-definition id="sapPositionID" type="text" required="true" custom="true">
  <field-label><![CDATA[SAP Position ID]]></field-label>
  </field-definition>
  <field-definition id="country" type="derived" required="true" custom="false">
  <field-label><![CDATA[Country]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Land]]></field-label>
  <field-description><![CDATA[Country]]></field-description>
  </field-definition>
  <field-definition id="hiringManagerName" type="operator" required="true"
custom="false">
  <field-label><![CDATA[Hiring Manager]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Einstellender Manager]]></field-label>
  <field-description><![CDATA[This is the hiring manager]]></field-description>
  </field-definition>
```

Scenario B - SF sends the position number and organizational data to SAP

Configure all the fields from Scenario A and also configure the client's choice of the following (the integration pack includes all, so anything the client chooses to omit needs to be removed from the SAP integration mapping):

```
<field-definition id="division" type="enum" required="true" custom="false">
  <field-label><![CDATA[Area]]></field-label>
```

```
  </field-definition>
  <field-definition id="department" type="enum" required="true" custom="false">
  <field-label><![CDATA[Department]]></field-label>
  </field-definition>
  <field-definition id="location" type="enum" required="true" custom="false">
  <field-label><![CDATA[Location]]></field-label>
  </field-definition>
  <field-definition id="sapOrgUnitName" type="text" required="true" custom="true">
  <field-label><![CDATA[SAP Org Unit Name]]></field-label>
  </field-definition>
  <field-definition id="sapOrgUnitID" type="number" required="true" custom="true">
  <field-label><![CDATA[SAP Org Unit ID]]></field-label>
  </field-definition>
  <field-definition id="sapPersonnelArea" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP Personnel Area]]></field-label>
    <picklist-id>sapPersonnelArea</picklist-id>
  </field-definition>
  <field-definition id="sapPersonnelAreaID" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP Personnel Area ID]]></field-label>
    <picklist-id parent-field-id="sapPersonnelArea">sapPersonnelAreaID</picklist-id>
  </field-definition>
  <field-definition id="sapPersonnelSubArea" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP Personnel Sub Area]]></field-label>
    <picklist-id parent-field-id="sapPersonnelAreaID">sapPersonnelSubArea</picklist-
id>
  </field-definition>
  <field-definition id="sapPersonnelSubAreaID" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP Personnel Sub Area ID]]></field-label>
    <picklist-id parent-field-id="sapPersonnelSubArea">sapPersonnelSubAreaID</
picklist-id>
  </field-definition>
  <field-definition id="sapEEGroup" type="picklist" required="true" custom="true">
  <field-label><![CDATA[SAP EE Group]]></field-label>
    <picklist-id>sapEEGroup</picklist-id>
  </field-definition>
  <field-definition id="sapEEGroupID" type="picklist" required="true" custom="true">
  <field-label><![CDATA[SAP EE Group]]></field-label>
    <picklist-id parent-field-id="sapEEGroup">sapEEGroupID</picklist-id>
  </field-definition>
  <field-definition id="sapEESubGroup" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP EE Sub-Group]]></field-label>
    <picklist-id parent-field-id="sapEEGroupID">sapEESubGroup</picklist-id>
  </field-definition>
  <field-definition id="sapEESubGroupID" type="picklist" required="true"
custom="true">
  <field-label><![CDATA[SAP EE Sub-Group]]></field-label>
    <picklist-id parent-field-id="sapEESubGroup">sapEESubGroupID</picklist-id>
  </field-definition>
  <field-definition id="costCenterId" type="picklist" required="false"
custom="false">
  <field-label><![CDATA[SAP Cost Center]]></field-label>
  <field-label lang="de_DE_SF"><![CDATA[Kostenstelle]]></field-label>
    <picklist-id>jobReqStatus</picklist-id>
  </field-definition>
```

If the client wishes to define additional, fewer or different fields in the integration, the client must customize the SAP integration to map these fields to fields in SAP.

Advise the client that if the position name or data fields from Scenario B are configured as “write” on the requisition and users change the data on the requisition, the data changes do not reflect in SAP HCM until the time of the new hire integration.

The client should consider:

- The circumstances under which each system stores different data for the same field
- Whether any issues may arise if there is a discrepancy between data in those systems during the hiring
- Which data they desire to become the master data at the point the new hire is processed in SAP HCM

Example

Personnel Area is a position-associated field in SAP HCM storing the value “HR” and Personnel Area is also a field in the requisition. A recruiting user on the requisition manually changes the Personnel Area to “Legal”. What problems does it cause to have this data set up as “Legal” on the requisition and “HR” in SAP HCM during the period when recruiting is actively in progress? An applicant is hired and SF RCM sends the value “Legal” over to SAP HCM. Does SAP ignore “Legal” or use “Legal” to overwrite “HR”?

15.1.2.3.6 Creating an Ad Hoc Report

Under a dummy admin user account, create an Ad Hoc Report named “Importing Recruiting Data from SFSF”.

1. *Define the following fields as columns:*
   From the Application folder:
   - Application ID
   - Application Status
   - Application Template ID
   - First Name
   - Last Name
   - Gender
   - Date of Birth
   - Any other application fields the client has mapped to SAP

   From the Last Offer Details folder:
   - Start Date
   - Any other offer detail fields the client has mapped to SAP

   From the Requisition folder:
   - All the requisition fields the client has mapped to SAP
   - SAP Position ID
2. *Define the following fields as filters, with the specified filter criteria:*
   From the Application folder:
   - Application Status = SendToSAP
   - Template ID = whatever template ID is being used

If the client uses more than one template, create multiple versions of this report and alter the report name to specify which report refers to template A.

15.1.2.4 Working with the SAP New Hire Integration

1. A scheduled job set up by SAP regularly queries SuccessFactors for applications in the applicant status of “SendToSAP”, then extracts the requisition, application and offer data for the resulting applicants and transfers that data to SAP.
    - If this operation is successful, the integration updates the applicant status to “TransferredToSAP” and enters a date into the “Exported On” field.
    - If this operation fails, the integration updates the applicant status to “TransferredToSAPError”, leaves the Exported On field empty and provides a more detailed error message in the sapError field on the application. The user can correct any issues with the data and re-status the candidate to “SendToSAP” to try again.
2. After successful completion of the transaction, the applicant record will be transferred to a staging area in the SAP HCM tool for further data entry and processing. After data entry and processing on the SAP side, the integration will update SuccessFactors Recruiting by updating the applicant status to “HiredAtSAP”.

> **Tip**
>
> Once the applicant transfer to SAP is successful, their data cannot be changed and they cannot be transferred again.

If a user places an applicant in “SendToSAP” status after the successful applicant transfer and if the applicant currently exists in SAP HCM, the integration will recognize this as a process failure and place the applicant in TransferredToSAPError status with an error message.

If a user needs to change an applicant’s data subsequent to successful data transfer, the user should work with the SAP data administrators to make those changes directly in SAP HCM.

15.1.3 Third Party HRIS

15.1.3.1 Pre-Built New Hire Export

SuccessFactors Recruiting Management includes a pre-built new hire export capability. For more information see the Third Party HRIS [page 434] section of this guide.

Because of the limitations of this pre-built export, most clients do not choose to use this method.

15.1.3.2 Ad Hoc Report New Hire Export

The majority of third party HRIS clients use an ad hoc report defined to their specifications to facilitate new hire processing.

15.1.3.3 Prerequisites

- *Provisioning* > *Company Settings* > *Ad Hoc Report Builder* > *Recruiting*
- Recruiting Management fully configured.
- Set up an SF or client owned FTP site, with secure username and password.

15.1.3.4 Configuration

1. Under a dummy admin user account, create an Ad Hoc Report.
2. Configure the columns the client wishes to include.
   The client must specify the data their HRIS requires to process a new hire. All the necessary fields should already be configured and planned for as part of the Requisition, Application and Offer Details XML templates and data collection in the recruiting process.
3. Configure the filters the client wishes to use
   Clients can specify any approach to filtering that they prefer. One common method is to filter on a selected list of applicant statuses. The business process in this model flows as follows:
   - Recruiting user places the applicant in a filtered status
   - The applicant is left in this status for the appropriate duration necessary to ensure the scheduled report runs
   - The scheduled report runs and exports the data to the FTP site
   - The HRIS picks up the file from the FTP site and processes the new hire
   - A recruiting user changes the applicant's status to a status that is not included in the filter
   - The next run of the report no longer includes that applicant

   There is no variable date filter option such as "Today" or "Last 24 hours" or "Last 7 days", so all new hire export filtering must be done on current status or field data. This also means that the data needs to be maintained in order to eliminate the applicant from the export after processing.
   Alternatively, the export can be set up to continuously add new hires as part of a running total of hires, and the HRIS can be made responsible to filter out applicants who were previously received and processed. This has the advantage of reducing post-processing data maintenance for the recruiting user, but does require additional work on the HRIS side.
4. *Provisioning* > *Manage Scheduled Jobs* > *Create New Job*
   a. Job Type: Ad Hoc Reports Export
   b. Report ID: select the user/report
   c. File available in FTP: check
   d. Enter the Server Access details as preferred by the client
   e. Enter the File Access options as preferred by the client
   f. Enter the Job Occurrence & Notification options as preferred by the client
   g. Save the job
5. Provisioning > Manage Scheduled Jobs > Actions > Submit

15.1.3.5 Web Services Integration

New Hires can be extracted and processed via custom web services integration, if desired. For more information, please consult the Professional Services Web Services expert team.

15.2 Handling of Candidate Profile Records

15.2.1 Candidate to Employee Conversion

When an external candidate is hired and is processed as a new BizX user, the system spawns an Employee Profile and, depending on the Careers tab, permissions and data privacy consent statement permissions may also automatically spawn an Internal Candidate Profile. In this case, the External Candidate Profile remains intact, and the new Internal Candidate Profile is a duplicate – that is, one person has two candidate profile records, one external and one internal. The new Internal Candidate Profile usually contains relatively little data.

When Candidate to Employee Conversion is configured, a process runs to delete the empty new Internal Candidate Profile and associate the Employee Profile to the existing External Candidate Profile, while adjusting the profile so it becomes Internal instead of External. The sm-mapped data from the Candidate Profile will sync into the Employee Profile.

15.2.2 Quick Facts

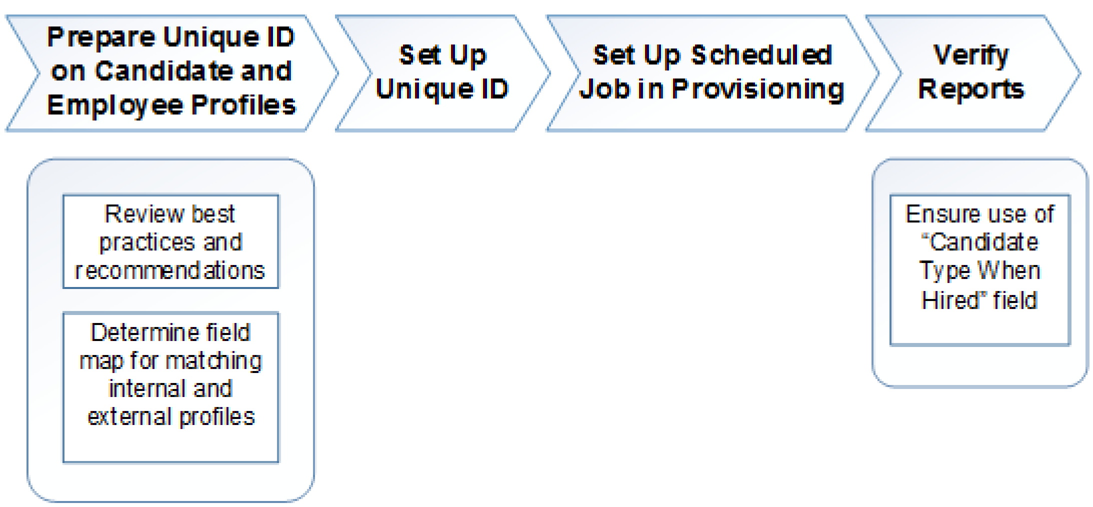
- A new reportable field called “Candidate Type When Hired” is populated when the candidate is moved into a Hired-category status so reliable historical reporting is available
- After an external Candidate Profile is converted, the candidate can no longer log in via the external career site. If the client is using RMK, the candidate can log into their RMK profile in the Talent Community but will not be able to access RCM external career site via candidate SSO
- Conversion will work for clients with DPCS 1.0, DPCS 2.0 or without DPCS. Conversion does not depend on the Employee accepting the data privacy consent statement; the external Candidate Profile will convert and sm-mapping of data will work even prior to the internal candidate’s acceptance of the DPCS
- If the conversion runs and finds a match between Employee Profile and a hired external Candidate Profile, but the existing internal Candidate Profile has one or more applications associated to it, the conversion is designed to fail to ensure that no important historical application data is overwritten
- When the candidate conversion job runs, it looks for a hidden flag on hired external candidates, and tries to find a matching Employee Profile for the candidate. If no Employee Profile is found, the user sees the following error message: *johndoe@yahoo.com - No match found*. If the Employee Proile is found, the external candidate profile is converted and the flag disabled. with a a flag Only employee profiles created since the last run of the scheduled job will attempt to convert.

- The user's hire date on the Employee Profile must be after the external candidate's hired date. If the Employee Profile hire date is before the external candidate hired date, the conversion job cannot convert the candidate.
- In *Admin Tools* > *Manage Recruiting Settings* > *External to Internal Candidate Profile Conversion Settings* the first run date of the conversion job displays. This allows for easier troubleshooting of the conversion job.

15.2.3 Prerequisites

- *Admin Tools* > *Edit Applicant Status* > *select the client's hired status* > *set Hirable Options value to "Hired"*
- New Hire Processing set up and running successfully in the client's instance to manage BizX user creation/updates/inactivation. For more information see the New Hire Processing [page 410] section of this guide.
- *Candidate Profile XML* > *configure standard field postConvExtContactEmail text field as read only*. This field stores the external candidate email address after conversion, so it can be later used in deconversion to re-issue the candidate's login username.

15.2.4 Configuration



Candidate to Employee Conversion

15.2.4.1 Preparing a Unique ID that works with the client's process

In order to associate an external Candidate Profile with a newly created Employee Profile, there must be a common piece of unique data present on both records.

Because each client has a unique business process, SuccessFactors does not prescribe a standard field for this data. Instead you should discuss the client's business process with them as part of configuration planning. Based on their process, advise them on the best way to capture a unique ID.

Consider the following important factors and best practices for selecting a unique ID:

- *Unique* The Employee Profile attempts to look up a matching external Candidate Profile. If multiple Candidate Profile matches are found during the lookup, this may cause an error or conversion of an incorrect Candidate Profile.
- *Well-maintained* Candidate to Employee Conversion is a process that relies on good data and proper timing. The client should plan carefully to ensure the unique ID is present in accordance with the new hire process. It is preferable to work with unique IDs managed via automated processes to eliminate possible human error.

Although you may use any field on the Employee Profile in the lookup against any field defined on the Candidate Profile XML, the fields listed below are best practices.

With Employee Central:

- *Employee ID* When the RCM to EC integration runs successfully, EC issues a unique Employee ID number for the new employee, which is added automaticallyto the external Candidate Profile. No manual process is required, making it an ideal unique ID for the Candidate to Employee Conversion process.
  To use this field in the Candidate to Employee Conversion, employeeId standard field must be configured on the Candidate Profile XML. The empId field must be configured on the succession data model and contain the Employee Id issued by EC. You can map other fields for the RCM to EC integration, including user ID. Refer to the individual client's user directory to find the best field for mapping.

With SAP HCM and the pre-built New Hire Integration:

- *Employee ID* If an SAP client chooses to use all the features provided in the SAP-provided pre-built integration packs, SAP HCM updates the Employee ID field on the external Candidate Profile upon successful processing of a new hire external candidate. No manual process is required, making it an ideal unique ID for the Candidate to Employee Conversion process.
  - To use this field in the Candidate to Employee Conversion, employeeId standard field must be configured on the Candidate Profile XML. The userId field must be configured on the succession data model and contain the userSysId.
    - Navigate to *Admin Tools* > *E-Mail Notification Templates Settings* > *Enable External To Internal Candidate Profile Conversion Success Notification*.

Tip

The above setting must be enabled, or the conversion will not take place.

With a Third Party HRIS:

- *Username* The external candidate's username is guaranteed to be unique, making this the ideal unique ID recommendation.

This field can be explicitly declared in the XML as the standard primaryEmail field. It can contain either an email address or a candidate-invented unique alphanumeric string, depending on the client's Provisioning settings.

If the client is willing, it is a best practice to include primaryEmail in the new hire export file, capture this data in the HRIS, and include the data as part of the user import file from the HRIS to the SuccessFactors BizX suite. The primaryEmail would be present on both the external Candidate Profile and the Employee Profile and can be used as the unique ID for the Candidate to Employee Conversion process.

- *HRIS Employee ID* If the client wants to use the HRIS-issued Employee ID, the client must design processes to ensure the HRIS Employee ID is added to the Candidate Profile after the new hire is processed in the HRIS. This may be a manual process or some clients may choose to build a custom web-services based integration and insert this data into either the extCandUserId database column (appears as the standard employeeId field on the XML) or a custom field on the Candidate Profile. Maintaining this data using manual processes is prone to human error in the accuracy and timing of the data maintenance, and is not best practice.
- *Contact Email Address or Phone Number* While these fields can be used, they are not best practice because SuccessFactors does not verify for the uniqueness of the content in these fields. It would be possible for this selected field to be non-unique during the match process.

15.2.4.2 Set Up the Unique ID in Admin and Enable E-Mail templates

Context

Procedure

1. *Admin* > *Manage Recruiting Settings* > *External To Internal Candidate Profile Conversion Settings*. If a hired External Candidate profile <x> matches Employee profile <y>, then merge these profiles into a single profile.

Recommendation

After the initial job runs, this setting displays the date of the first run of the job. Candidates hired after the displayed date are eligible for conversion.

2. Select from the drop downs to specify the appropriate fields to be used in the conversion lookup.
3. *Admin Tools* > *E-Mail Notification Templates Settings* > *Enable External To Internal Candidate Profile Conversion Success Notification*

15.2.4.3 Setting Up and Run Scheduled Job in Provisioning

Context

Procedure

1. Navigate to *Provisioning* > *Manage Scheduled Jobs* > *Create New Job*.
2. Configure the settings using the explanations in Table 17.
3. Run the job once. No candidates will convert but this sets the baseline so the next time the job runs it will look for candidates to convert who have had an employee profile created since the initial run.

Results

Table 31: Table 17 Provisioning settings for Candidate Conversion

Field	Expected Data
Job Name	Any descriptive text
Job Owner	Select a user in the client's instance. This should be a dummy user; if a live user is selected and later becomes inactive it may cause the job to fail. This user should be tied to an email address that is monitored regularly so confirmation and failure notifications are being received by an appropriate client contact.
Job Type	External to Internal Candidate Profile Conversion

Occurrence	Recurring Set this job up to immediately follow the user import job, allowing for enough time for the user import job to fully complete (this may vary depending on the size of the client; small clients may take minutes, larger clients may take hours.) If the client is not doing flat file imports but instead is doing manual user creation or web-services based user creation, discuss the ideal timing with the client. Nightly conversion jobs are recommended, but more frequent scheduling can be accommodated by setting up multiple recurring jobs at different points during the day. The primary consideration on scheduling is to try to keep the conversion job as closely-timed to user creation as possible to ensure a seamless experience for users and prevent any recruiting users from accessing the to-be-deleted internal candidate profile prior to conversion.
Start Date	Enter the date and time upon which the conversion process should begin running.
Additional E-Mail Recipients	The Job Owner will receive email notifications related to the success or failure of the conversion job. If other email addresses should also receive a notification, specify those recipients.
Send E-Mail when Job Starts	If the client wishes to receive notification at the point when the job begins, check this box.

15.2.4.4 Verify Reports

Remind clients they will want to base certain reports off the *Candidate Type When Hired* field that reflects data from a point in time, rather than on any field that reflects the candidate's current external or internal status.

15.2.5 Working with Candidate to Employee Conversion

To convert profiles, a conversion scheduled job runs and checks for conditions. Once conditions are met, the system deletes the new internal candidate profile and replaces it with the external candidate profile.

Candidate to Employee Conversion is NOT a merge of the internal and external candidate profiles. See Manage Duplicate Candidates [page 490] for more information on how to merge existing duplicate external and internal Candidate Profiles.

Conversion Scheduled Job and Conditions

How is candidate to employee conversion triggered?

1. Verify all the necessary unique ID data is present on the Candidate Profile.
2. Move the external candidate into a status set up as “Hired” in the Hirable Options (as defined in *Admin Tools* > *Edit Applicant Status*).
3. Allow the user import to run and create a new BizX user for the new hire.
4. Allow the candidate to employee conversion job to run.
5. The external candidate is converted to an internal candidate.

Why are no matches found when the scheduled job runs?

- The unique ID fields may not contain exactly matching data.
- The new BizX user was created prior to the most recent run of the Candidate to Employee Conversion scheduled job.

Does the candidate receive an email notification after the profile is converted?

Yes. The content of this email can be configured in *Admin Tools* > *E-Mail Notification Templates Settings* > *External To Internal Candidate Profile Conversion Success Notification*.

Will Candidate to Employee Conversion work if the newly hired employee does not have Career tab privileges?

No. By design if the employee does not have Career tab permissions, Candidate to Employee Conversion will be unsuccessful.

Will Candidate Profile data populate the Employee Profile after conversion?

Yes. If fields and/or background elements are sm-mapped between the Candidate Profile and Employee Profile, at point of conversion the data will sync from the converted internal Candidate Profile to the Employee Profile automatically.

Will converted candidates be searchable?

Internal candidate searchability depends on the client’s DPCS settings. If internal candidate DPCS is enabled, the converted candidate will not be searchable until the DPCS is accepted.

When the conversion is first set up, will it convert all previous hires in the system?

No. The conversion scheduled job will run only on new hires from the point the scheduled job is enabled; it is not retroactive to past hires. Existing duplicate external and internal Candidate Profiles are not affected when the conversion feature is enabled.

If an external candidate is erroneously converted to an internal candidate on an unrelated employee is there a way to undo the conversion?

No. There is no way to manually split a converted internal Candidate Profile back into two separate external and internal Candidate Profiles if an erroneous conversion is performed.

What happens to applications made by an external candidate prior to conversion?

The candidate continues to be tied to their previous applications. Any applications the external candidate made prior to being converted continue to show as external applications. The application status is unaffected by the conversion. These applications appear on the Jobs Applied portlet for the converted internal candidate. The internal candidate can access the applications from their Job Applications tab as they normally would.

Does conversion work for candidates when the application status is updated by the SFAPI?

Does conversion work for candidates when the application is created already existing in a Hired-category status by the flat file data migration import?

Is conversion logged in the audit trail?

Yes. The conversion activity, including before and after field values, is included in the Candidate Profile audit trail if field-level auditing is enabled.

15.2.6 Employee to Candidate Deconversion

When a BizX user is inactivated, their internal candidate profile is usually inactivated as well, and subject to any data purges rules that are set up. If clients wish to preserve the internal candidate profile data for use in future recruiting activity, Employee to Candidate Conversion must be configured. This causes the internal candidate profile to be switched to an external candidate profile and be disassociated from the inactivated Employee Profile.

Clients should consider the privacy implications of employee to candidate conversion before choosing to implement this feature in their instance. At the very least the client may wish to adjust the language in their Data Privacy Consent Statement to ensure there are no legal concerns of maintaining recruiting data on former employees.

15.2.6.1 Quick Facts

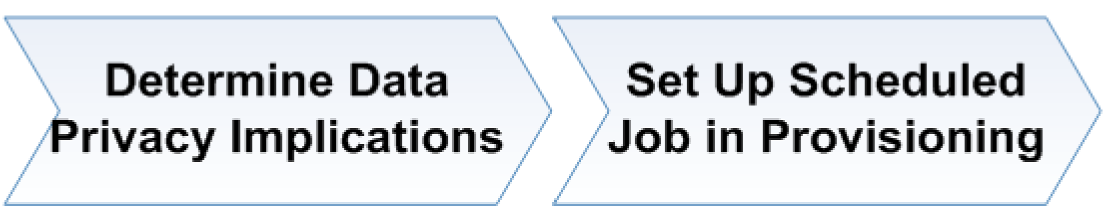
- If DRM 2.0 is enabled, the scheduled job must run before the DRM purge job runs to assure the data is not purged before it is converted.
- When an internal candidate is converted to an external candidate, the system issues a primaryEmail value that becomes the user's login to the external career site.
- If field-level auditing is enabled, conversion activity is included in the Candidate Profile audit trail.

15.2.6.2 Prerequisites

- User data handling processes set up and running successfully in the client's instance to manage BizX user creation/updates/inactivation.
- *Candidate Profile XML* > *configure standard field postConvExtContactEmail text field as read only*. This field will store the external candidate email address after conversion, so that it can be later used in deconversion to re-issue the candidate's login username.

15.2.6.3 Configuration

Context



Employee to Candidate Conversion

Procedure

Setting Up the Scheduled Job

a. Navigate to *Provisioning* > *Manage Scheduled Jobs* > *Create New Job*.
b. Configure the settings using the information in Table 18.

Results

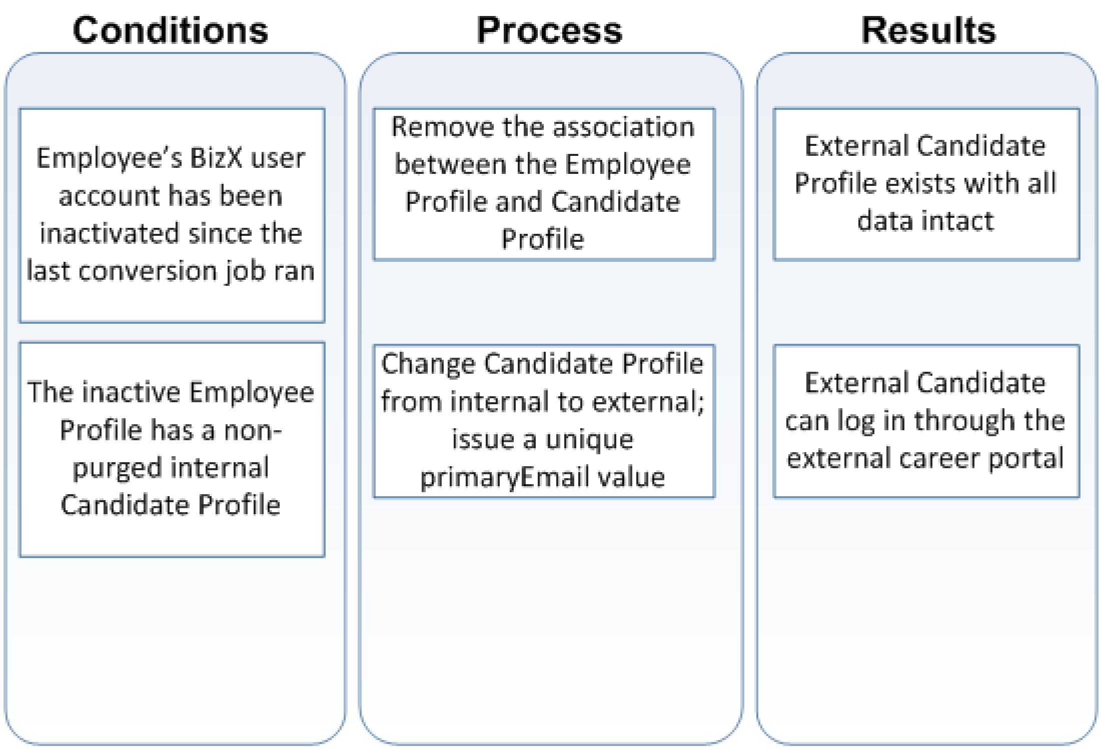
Table 32: Table 18 Provisioning settings for Employee to Candidate Conversion

Field	Expected Data
Job Name	Any descriptive text
Job Owner	Select a user in the client's instance. This should be a dummy user; if a live user is selected and later becomes inactive it may cause the job to fail. This user should be tied to an email address that is monitored regularly so confirmation and failure notifications are being received by an appropriate client contact.
Job Type	Internal to External Candidate Profile Conversion
Occurrence	Recurring Set this job up to immediately follow the user import job, allowing for enough time for the user import job to fully complete (this may vary depending on the size of the client; small clients may take minutes, larger clients may take hours.) If DRM 2.0 is enabled, ensure that the conversion job is scheduled so that it completes before the DRM 2.0 purge job runs. If the Candidate Profile data is purged before it is converted, no subsequent conversion will be possible; there is no way to restore purged data If the client is not doing flat file imports but instead is doing manual user inactivation or web-services based user inactivation, discuss the ideal timing with the client. Nightly conversion jobs are recommended, but more frequent scheduling can be accommodated by setting up multiple recurring jobs at different points during the day. The primary consideration on scheduling is to try to keep the conversion job ahead of the DRM 2.0 purge job to prevent any data loss.
Start Date	Enter the date and time upon which the conversion process should begin running.

Additional E-Mail Recipients	The Job Owner will receive email notifications related to the success or failure of the conversion job. If other email addresses should also receive a notification, specify those recipients.
Send E-Mail when Job Starts	If the client wishes to receive notification at the point when the job begins, check this box.

15.2.6.4 Working with Employee to Candidate Conversion

To convert profiles, a conversion scheduled job runs and checks for conditions. Once conditions are met, the system disassociates the Candidate Profile from the Employee Profile and converts it to an external Candidate Profile.



Conversion Scheduled Job

How is employee to candidate conversion triggered?

1. Inactivate the BizX user account.
2. Allow the scheduled job to run.

How is the user's primaryEmail (username) value selected when they are converted to external?

The system uses a set of hard-coded, non-configurable business rules to select the most reasonable username possible:

- It will first attempt to restore the candidate's original primaryEmail value (Lorna@gmail.com), which is only possible if the candidate was originally converted from external to internal.
- If this is not available or unique, the system will attempt to use the candidate's internal email address (lokamoto@client.com).
- If this is not available or unique, the system will use the system username value (lokamoto).
- If this is not unique, the system will append an integer to make it unique (lokamoto3).

15.2.6.5 Does the candidate receive an email notification after the profile is converted?

This is possible, if the client enables it. Set this email up in *Admin Tools* > *E-Mail Notification Templates Settings* > *Internal To External Candidate Profile Conversion Success Notification*.

This email attempts to send to the contact email address on record. There may be no external email address stored for an internal candidate converted to an external candidate, so advise the client the email may not reach the candidate. This may affect how the client thinks about the data privacy implications of this feature.

15.3 SuccessFactors Onboarding Integration

15.3.1 Prerequisites

- Onboarding Module must be configured before configuring the Recruiting Integration.
- v12 UI Framework
- When configuring KMS fields on the onboarding side, you must assign the field to its *entity* so the mapping tool knows which tab fields should appear on. Click on the *Fields* icon Once the field is created (or for a standard field that already exists) – you must then assign it to its *ENTITY*. This is how the mapping tool in BizX knows which tab it should appear on. To do this click on the *Fields* icon, then change the Namespace to *Entities* and assign the field to application, job requisition or offer.

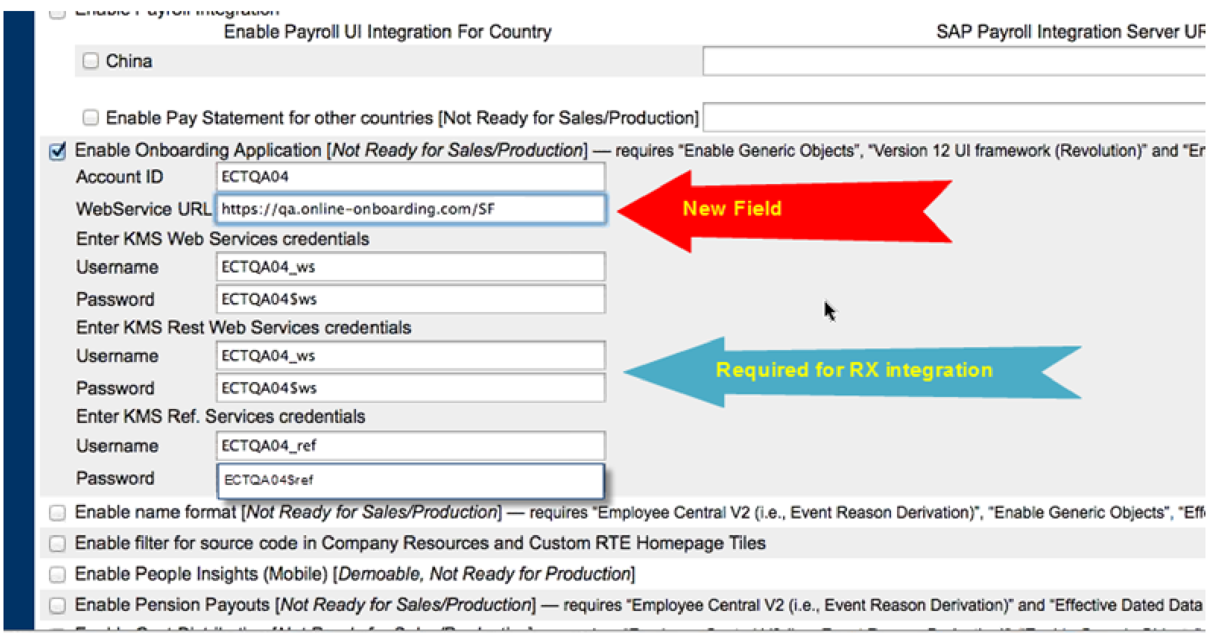
15.3.2 Configuration

Context

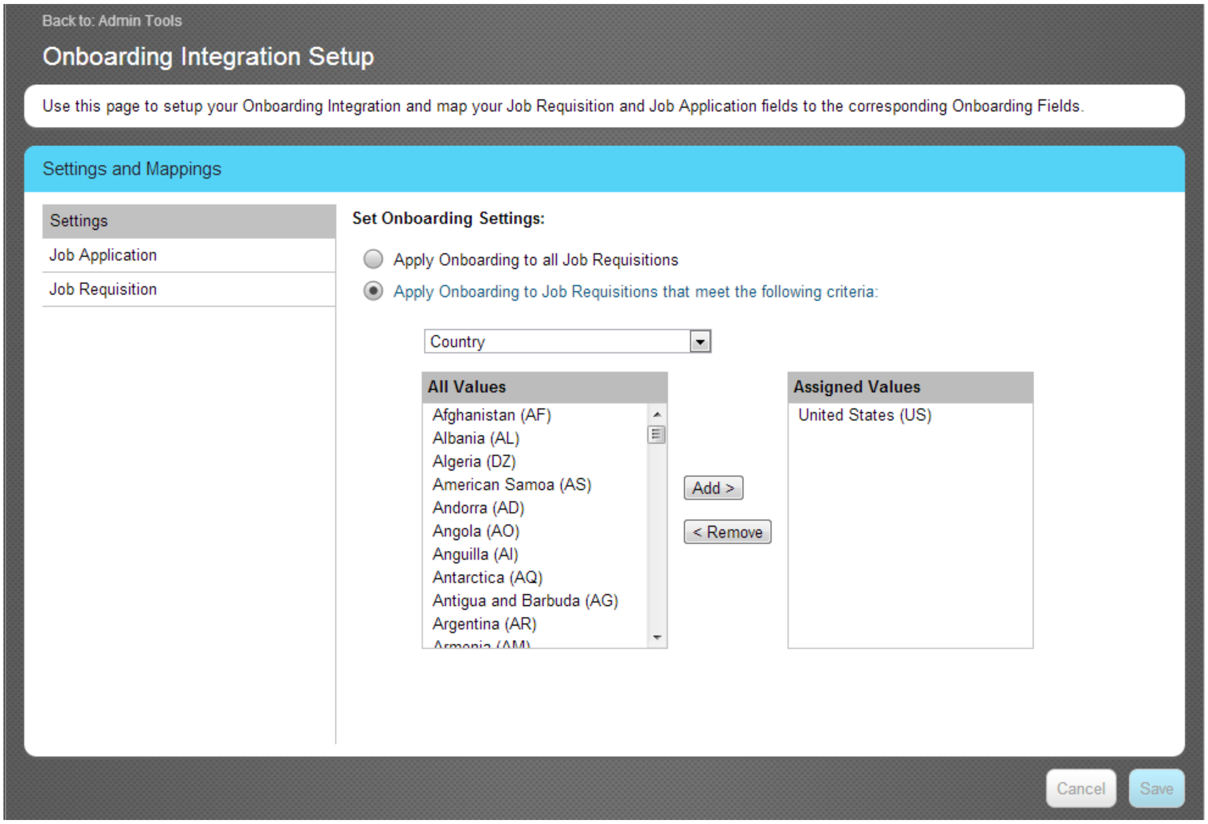
Procedure

1. Provisioning > Manage Recruiting > Recruiting V2 Application > Enable Onboarding Integration > Select BizX Onboarding Integration

   Provisioning > Company Settings > Recruiting V2 Application > Enable Onboarding Application . Enter the WebService URL and KMS Rest Web Services credentials (see below). Both are required for the RX – Onboarding Integration.

   Enable Onboarding Application Settings
2. Grant feature permissions for Onboarding in the Application XML. For more information on feature permissions, see feature-permission Elements [page 293].
3. Permission admin users to access Setup Onboarding Integration [page 538] Admin Page.
   a. *RBP:* Admin Tools > Manage Permission Roles > Role > Permissions > Setup Onboarding Integration
   b. *Non-RBP:* Admin Tools > Manage Recruiting Administration > grant Setup Onboarding Integration permission
4. Navigate to Admin Tools > Setup Onboarding Integration . The Settings tab allows the recruiting user to enable Onboarding for either all Job Requisitions, or only certain Requisitions. The recruiting user can use the provided drop-down menu to set criteria for the requisitions which will have Onboarding applied. You can only limit Onboarding to Requisitions based on one field or criteria. For example, a client may only want to onboard hires in the United States, and so could make the Onboarding options available only on US requisitions.

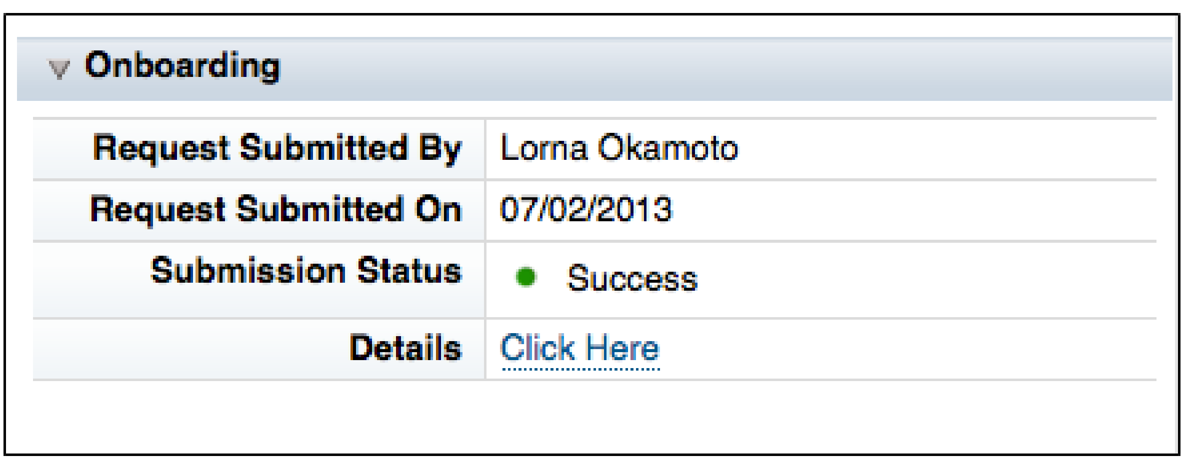


Setup Onboarding Integration - Settings

5. Map Job Requisition & Job Application fields via Admin Tools. For more information about configuring onboarding integration and mapping, see Setup Onboarding Integration [page 538].

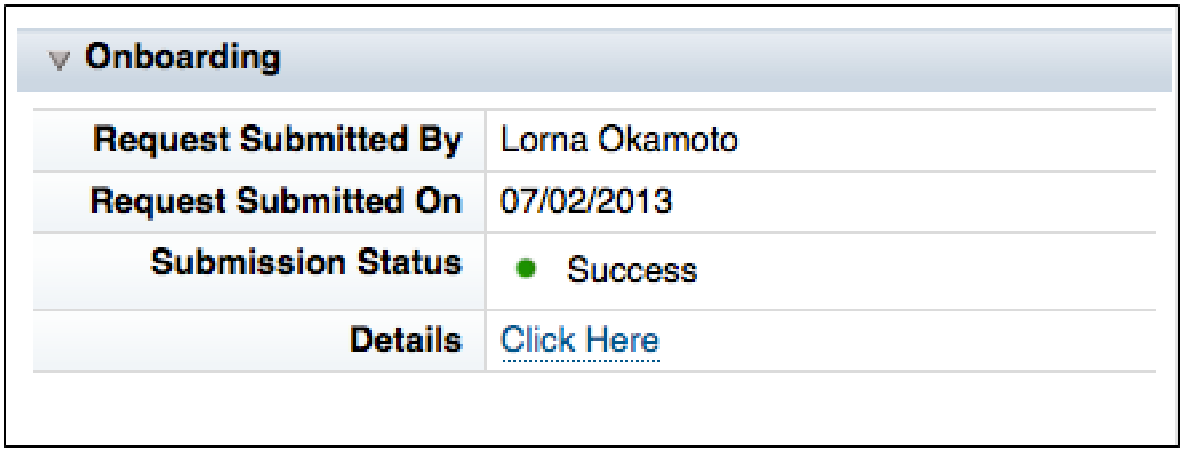
15.3.3 Working with Onboarding

Once Onboarding is configured, a recruiting user can click *Initiate Onboarding* on the application when the applicants are in applicant statuses configured to support the initiate onboarding feature.



Initiate Onboarding

Once the onboarding is initiated there is a one-time send of data based on the Admin Mapping to the onboarding module. The onboarding portlet appears & shows the following information. Note this portlet only appears with the SuccessFactors Onboarding Integration, not the Verifications Inc. onboarding.

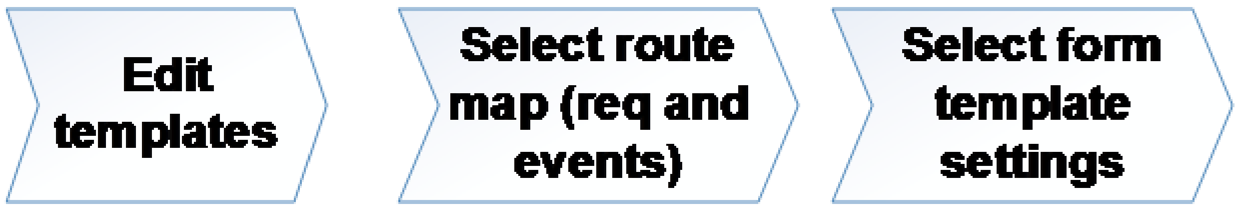


Onboarding Portlet

> **Tip**
>
> A candidate can only be sent to Onboarding once. If a user attempts to onboard a candidate more than once, they will see a pop-up saying the candidate has already been onboarded for a job.

> **Tip**
>
> Forms configured as part of third-party onboarding display in the portlet in the order they were updated. The most recently updated form appears first, followed by the second most recently updated, and so on. The display of forms in the Onboarding Portlet may differ from their display in Verification Inc. because of this functionality.

16 Form Templates



Form Templates

16.1 Feature Summary

Form Templates include a great number of settings that span across multiple modules. Not all options are relevant to Recruiting.

16.2 Prerequisites

- *Provisioning > Company Settings > Recruiting Application*
- *Admin Tools > Manage Form Templates > Grant Form Templates permissions to the user who will manage Form Template changes*

16.3 Configuration

Context

Procedure

1. Edit templates in Admin Tools > Form Templates > *select requisition template*.
2. Specify the route map that will be used to approve requisitions created from this template.
3. Select form template settings.

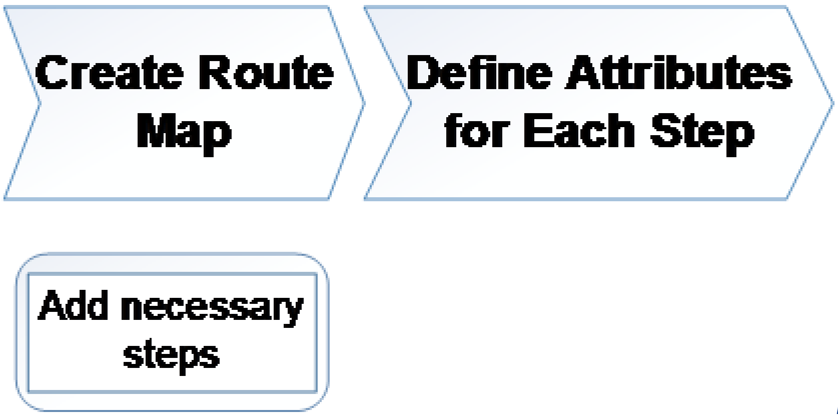
Results

Table 33: Recommended Form Template Settings

Field	*Behavior*
Template Name	• Automatically populates with the template name from the XML. For information about translating form template names, see the Translation [page 652] section of this guide.
Default Dates for Form Creation	
Default Start Date	Irrelevant to Recruiting
Default End Date	Irrelevant to Recruiting
Default Due Date	Should be set to Relative and defaulted to X days from the Form Create Date based on the client's preference for how long they wish to wait before Document Due email notification reminders begin going out.
Default Due Notification Date	Set the interval in days between document due notification emails.
Template Status	Set to Enable unless the requisition form is being retired
Disable Spell Check on Route	Always check this option; spell check on route is designed to check Performance Form content and while it does pop up the spell checker, it does not properly check the content of Requisition fields.
Disable Legal Scan on Route	Always check this option; legal scan on route is designed to check Performance Form content and while it does pop up the legal scan, it does not properly check the content of Requisition fields.
Disable Ask for Comment Routing	Always check this option
Disable Ask for Edit Routing	Uncheck this option if the client prefers to allow an approver to Get Feedback from additional users within a given route map step.
Allow Add Modifier	Check this option if the client prefers to allow an approver to add additional users into the route map. After a new route map step is added it cannot be removed. All approvers will have the ability to add other approvers; the permission cannot be restricted to only certain operators.
Hide Add Signer buttons	Always check this option; Signature steps are not supported in Recruiting route maps

Disable All Toolbar Buttons	Check this option if the client prefers to limit user access to toolbar options
Disable Print Button	Set this option up per the client's preference
Disable Delete button	Originators for for pre-approved state requisitions can delete requisitions if this is unchecked. Set this up per the client's preference.
Disable Note button	Check this option.
Disable Info button	Uncheck this option.
Disable Due Notification	Uncheck this option unless the client prefers to avoid Document Due Notifications.

17 Route Map



Route Maps

17.1 Feature Summary

Recruiting uses route maps to determine the approval path of a new requisition. The user who creates the requisition completes initial data and then sends the requisition to the user who owns the next step. That user reviews the requisition, may add or adjust requisition data and then sends the requisition to the user who owns the next step.

Route maps are a Platform feature, so not all route map functionality applies to Recruiting.

17.2 Quick Facts

- Route maps are not supported on offer detail approval forms.
- Signature steps are not formally supported in Recruiting Management. This means even if they seem to function, they should not be used.
- Only the “Currently With’ user can also send the requisition back one step in the route map. This applies for all route map step types and users. If a “Currently With” user sends back a requisition, the action will be captured in the audit trail, including any comments When all steps in a requisition route map are completed, the record changes from the pre-approved to the approved state.
- There is no way to send an approved requisition back into pre-approval or send it through the route map again.
- There is no way to remove a route map step after it was added into the route map via Add Modifier.
- Conditionality is not supported in route maps (if x, route to a. If y, route to b.)

- The operators specified in the route map will appear on the short requisition creation page when a new requisition is initiated.
- Route maps cannot be associated to offer approval forms, even though it appears in Form Templates that it is possible.
- Only one route map can be associated to a requisition template, but multiple requisition templates may be associated to a single route map.
- All new requisitions which were created from this Requisition template will use the new routing map. Any existing requisitions will be unaffected by the change in route map.

17.3 Prerequisites

- *Provisioning* > *Company Settings* > *Workflow*
- The Requisition XML is configured with the appropriate operator fields.

17.4 Configuration

Context

Procedure

1. *Admin Tools* > *Routing Maps*
2. Add New Route Map.
3. Provide a name.
4. Add as many Modify steps as are needed to facilitate the client's desired routing process.
5. Fill out the appropriate data in the steps.

Table 34: Route Map data

Field	Purpose
Step ID	Unique ID the system uses to identify the step internally.
Step Name	Name of the step the user sees before it is completed. This name appears on the representing step on the form.

Step Name After Completion	Name of the step the user sees after the step is completed. If you leave this field blank, the step name remains the name specified in Step Name.
Step Introduction & Mouseover Text	Text users see when they point the mouse at the step. This text only appears before the step is completed. Use this field to provide a brief description of what users are expected to do during this step.
Step Type	Specifies which operators will be involved in the step. For example, R for the recruiter on the requisition or GM, for the hiring manager's manager. All Recruiting roles (O,G,R,S,T,W,Q) are supported in route maps, along with relational roles (GM, RH, etc.) Employee-centric roles (E) are not supported. For more information about operator roles, see the Decide on Recruiting Operators [page 50] section of this guide. If you want to specify a specific user instead of a role, enter U in this field then enter the user's username in the Username field.
Username (U step only)	Complete this field only if you entered a U in the Step Type field. In this case, this field is required. Specify the username of person you want. If you don't know the person's username, click Find User to search for the user.
Step Mode	Should always be set to Full Edit for Recruiting route maps
Entry User	This field is used only for iterative and collaborative step types and is optional for those step types. In the Entry User field, you can specify which of the roles specified in the Step Type field receives the form first. You must specify a role already specified in the Step Type. You might specify an Entry User and Exit User in a situation when three users are specified in a step, but only two are required. For example in the following step: Step Type = I R G GM Entry User = R Exit User = GM The recruiter (R) and hiring manager's manager (GM) must work on the step, but the hiring manager (G) is optional.

Exit User	This field is used only for iterative and collaborative step types and is optional for those step types. In the Entry User field, you can specify which of the roles specified in the Step Type field receives the form first. You must specify a role already specified in the Step Type. You might specify an Entry User and Exit User in a situation when three users are specified in a step, but only two are required. For example in the following step: Step Type = I R G GM Entry User = R Exit User = GM The recruiter (R) and hiring manager's manager (GM) must work on the step, but the hiring manager (G) is optional.
Exit Button Text	The text for sending the form to the next step. This text appears on the routing button or dropdown menu for the step. This text also appears on the button on the confirmation page.
Step Exit Text	This field is optional. When the user sends the form to the next step, a confirmation page opens before the form is sent. The text you specify in this field appears on that confirmation page. Use this field to let users know what they need to do and what their action means.
Start Date	Do not use in Recruiting route maps
Due Date	Do not use in Recruiting route maps
Exit Date	Do not use in Recruiting route maps

6. Save the route map.
7. In *Admin Tools* > *Form Templates*, select the Requisition template.
8. In the *Routing Map* field, select the appropriate route map.
9. Click *Update Form Template*.

17.5 Working with Route Maps

17.5.1 Creating the Requisition and Selecting Route Map Users

The short requisition create page displays the operators defined as part of the route map, in addition to the title and due date. There is no way to have other fields appear on this page and there is no way to re-order those fields other than re-ordering the route map steps.

Short Requisition Create Page

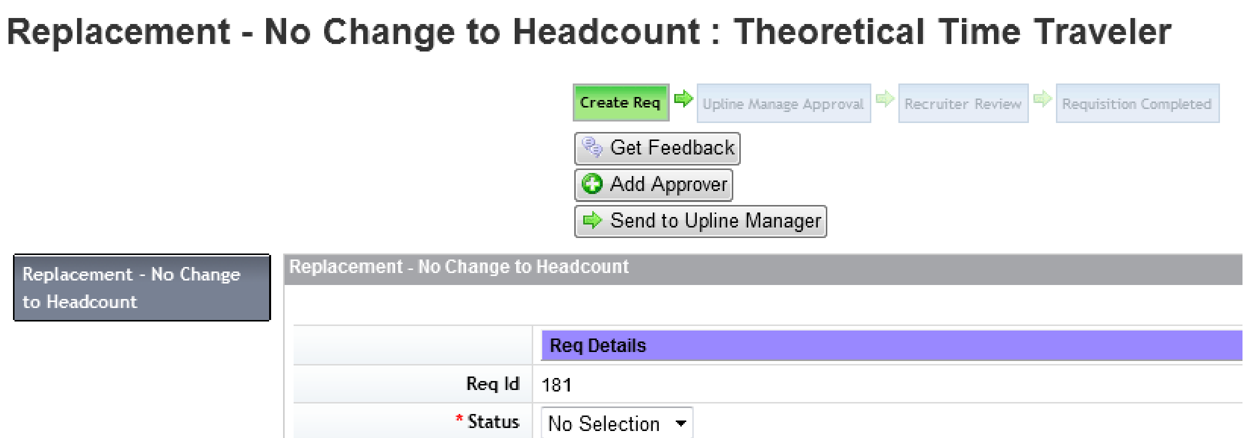
17.5.2 “Currently With” user manages the requisition

The requisition originator completes the requisition create page, saves and the Requisition Details page loads. The route map is shown at the top of the Details page as long as the requisition is in pre-approved state. The form toolbar also appears while the requisition is in pre-approved state.

The “Currently With’ user can also send the requisition back one step in the route map. This applies for all route map step types and users. If a “Currently With” user sends back a requisition, the action will be captured in the audit trail, including any comments.

If the form has an iterative step, and the entry user is defined in route map, the user can choose the entry user to send the form back to. If entry user is not defined in the route map, the system will allow the user choose any user within “I” step to send the form back to.

After the button is clicked, the system sends a notification to the step user(s) of the prior step letting them know of the availability of the form (document routing notification). If a collaborative step is being used as the step the form is being sent back to, then all users in that step will receive the document routing notification.



Pre-Approved Requisition with Route Map

> ➜ Tip
>
> If the V10 UI is not enabled the form toolbar may improperly show up twice.

Only one user holds the requisition form at a time. This user is referred to as the “Currently With” user.

The user’s field visibility and permissions are defined in the Requisition XML. For more information see the Requisition [page 248] section of this guide. Even if other users can open the requisition and have field level permissions, they cannot make changes to the Requisition Details unless they are the “Currently With” user.

By default, a pre-approved requisition record is only available to users to whom it has been sent in the route map. It can be made available to any user associated to the requisition record via *Admin Tools* > *Recruiting Settings* > *Allow users to view pre-approved requisitions without regard to route map status*.

17.5.3 Route Requisition to Next Step

When a user is satisfied with the field content, they select the option to route the requisition to the next step. A confirmation page displays where the user can enter comments. The user will be required to confirm the requisition step change. Requisitions can be approved using the BizX mobile application if Mobile is enabled in Provisioning and set up in the Requisition XML template.

Mobile Requisition Routing

When a requisition is moved between routing steps, the system sends the receiving user an email notification using the template in *Admin Tools* > *E-Mail Notification Templates Settings* > *Document Routing Notification*. If this email template includes a [[DOC_COMMENT]] token the user will be able to enter comments during the step change that are included in the email notification sent to the next step owner, and will be included in the requisition audit trail.

The Document Routing Notification can be adjusted so each form template uses a different set of email language. The email notification can also be adjusted via the Customize Settings for Form Templates so that document routing notifications for some form templates are disabled, consolidated and/or have Additional Recipients. Only Recruiting-related operators should be selected as additional recipients on Recruiting-related document routing notifications.

17.5.4 Requisition Approval Reminders

The Due Date field on the short requisition create page interacts with the settings in *Admin Tools* > *Form Templates* to trigger email reminders about pending requisition approvals using *Admin ToolsE-Mail Notification Templates Settings* > *Document Due Notification*.

17.5.5 Requisition Completed Notification

When a requisition has passed through all route map steps, the requisition state changes from pre-approved to approved. When this happens, it is possible to configure an email notification using the *Admin Tools* > *E-Mail*

Notification Templates Settings > *Document Completed Notification template*. There is no way at present to de-select the roles in the Recipients box; in this case Employee = G, Manager = GM.

Although other modules may be able to Carbon Copy multiple users upon completion of a route map, as set up in the Routing Map settings, Recruiting does not support this feature.

18 Admin Tools for Recruiting

18.1 Manage Recruiting Settings

18.1.1 Configuration

Context

Procedure

1. Grant access to the feature:
   a. *RBP:* ▶ *Admin Tools* ▶ *Manage Permission Roles* ▶ *select Role* ▶ *Permission* ▶ *Manage Recruiting* ▶ *Manage Recruiting Settings permission*
   b. *Non-RBP:* ▶ *Admin Tools* ▶ *Manage Recruiting Administration* ▶ *select a user or group of users and grant Manage Recruiting Settings permission*
2. ▶ *Admin Tools* ▶ *Recruiting Settings*

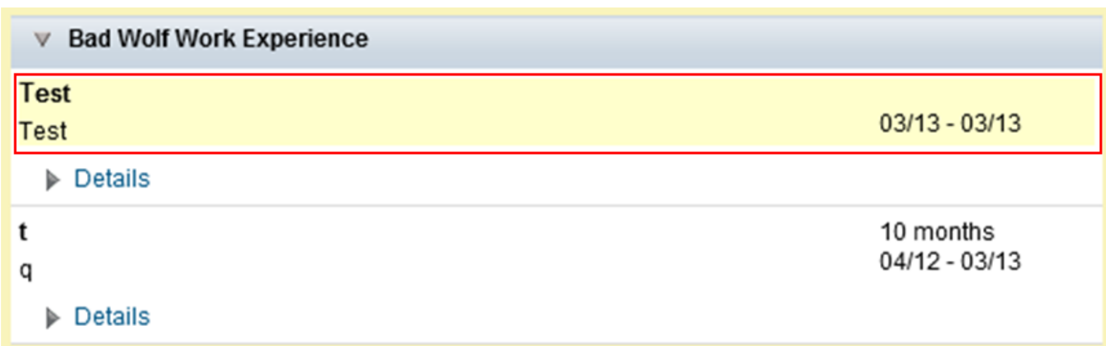
Table 35: Recommended feature list

Option name	*Recommended State*	*Critical?*	*Details*	*Available in Upgrade Center?*
Company Contact Information	Unpopulated	No	This data is passed to eQuest in case the company wants to provide contact information on the third party job postings. The Postal Code field will accept both alpha and numerical characters.	
Return Email Address Information				
	Client Preference	No	If this option is checked, end users sending ad hoc emails to candidates can change the "From" email address to a free text value.	
Return address for system-generated emails to candidates	Populate with an email address provided by the client	Yes	Status-triggered emails and some system and ad hoc emails sent from the system default to a generic "from" email address. Advise the client to use something like "jobs@client.com" or "careers@client.com" or "noreply@client.com" (email address can be real or fake but should be at client's domain so no unintended recipient receives a response from the client.) If this is not set up, some emails will not send from the system properly.	

Option name	Recommended State	Critical?	Details	Available in Upgrade Center?
Display Name	Populate with an email address provided by the client	Yes	Status-triggered emails and some ad hoc emails sent from the system default to this name as the “sent from” name. Advise the client to use something like “Client Careers” or “Client Talent Acquisition”. If this is not set up, some emails will not send from the system properly.	

Option name	Recommended State	Critical?	Details	Available in Upgrade Center?
Delay Emails to Disqualified Candidates (in hours)			If this option is checked and hours are set, all disqualification emails (auto-disqualification and manual disqualification, regardless of the method used to disqualify the candidate) will be delayed by x hours. Enabling this check box schedules a Quartz Job to run every half hour and check for applicants who are disqualified, have not yet received a disqualification email and were disqualified x hours ago. It then triggers the email tied to the applicant's disqualification status (if any). If the applicant disqualification status does not have a candidate-facing email tied to it, no email will be sent whether or not the delay setting is enabled.	
Don't send emails older than (in days)	Recommended set at no greater than 7 days	Yes if delay is used	This option is a safeguard to ensure if the delay job fails and then later picks up again that disqualification emails are not retroactively sent if an unreasonable period of time has passed.	

Option name	*Recommended State*	*Critical?*	*Details*	*Available in Upgrade Center?*
Job Owner	Set to an administrative dummy user	Yes if delay is used	This user owns the delay job; if an active user is selected and later de-activated, the delay job will fail.	
Candidate Profile Settings				
Set background elements to highlight current value (based on start/end date)	Client Preference	No	If the client prefers, the most recent row on the background element (including a row without an end date) can be highlighted in the manila folder color to make it easily identifiable to a reviewer as the newest applicable record.	



Highlighted Most Recent Row

Table 36:

Option name	*Recommended state*	*Critical?*	*Details*	*Available in Upgrade Center?*
Applicant Profile Settings				
Hide skipped statuses in application audit trail	Client Preference	No	By default the application status audit trail tracks every status the candidate enters and all skipped statuses in between. If the client prefers, the audit trail can omit the skipped statuses in the display and reporting of the audit trail.	

Enable forwarding with job application data intact			If this option is enabled, when an applicant is forwarded to another requisition, the system populates corresponding fields with data previously provided by the applicant. Then, when the invited candidate comes to complete their application, the pre-populated data is displayed for the applicant to review, change and submit. Late Stage applications must also be enabled in order for jobs to forward with application data intact. This option is not available if Late State Application is not enabled. For more information see Late Stage Application [page 105].	

Time to Hire	No Recommendation	No	Populates a value "Time to Hire field" in reportable application fields. Automatically calculates a job requisition's "Time to Hire" based on the Start Date and End Date selected from the provided drop-down menus: ○ Date Created ○ Approved Date ○ Closed Date ○ External Posting Start Date ○ External Posting End Date ○ Internal Posting Start Date ○ Internal Posting End Date ○ Latest Hold Removal Date ○ Job Start Date ○ Due Date ○ Actual Start Date ○ Application Date ○ Candidate Review Date ○ Date of Availability ○ Start Date ○ Hired on Date If the drop-down values are not set, this calculation will be blank. Additionally, if the record does not store a value for one of the selected drop-down values (for example, apply date where no date is provided) the value will be blank.	

			Time to Hire is calculated to two decimal places. Checking the “exclude time spent in hold statuses” checkbox exclude hold status time from the calculation. For more information see Manage Requisition State and Status [page 343]. Enabling this setting will calculate Time to Hire for all Applicant Profiles retroactively, but the calculation will take longer for clients with more records to calculate. Time to Hire is available in the Recruiting and Recruiting v2 Secured schemas.	

Automatically disposition non-selected in-progress applicants on closed requisitions to status “Requisition Closed”	No Recommendation	No	If enabled, when the requisition is moved into a closed state the non-hired applicants on the requisition will be dispositioned into a new system status "Requisition Close" for the closed requisition. For more information on system statuses, see Create new status set [page 71] This behavior applies to all applicants in the In-Progress, non-Hired status in the current requisition (Screen Shot Provisioning- In progress=status type. Hired category- not hired/hirable options) The “Requisition Close” status is automatically enabled when this option is checked and the status will automatically display in the pipeline. In order to disable this status, you must disable the feature, then disable the status. Recommend manually turning the status on & configuring labels. Without it status has no email triggers, etc.	

Automatically disposition non-selected in-progress applicants on closed requisitions to status 'Hired On Other Requisition.'	No Recommendation	No	When enabled, when a candidate has applied to multiple requisitions and is hired on one of them, and that job requisition is closed if the candidate is in an In Progress status on any other requisitions, the product will automatically disposition them into the the status "Hired on Other Requisition" for those requisitions. The "Hired on Other Requisition" Status is automatically enabled when this option is checked and the status will automatically display in the pipeline. If the automatically disposition feature is enabled, you cannot disable the "Hired on Other Requisition" status. In order to disable this status, you must disable the feature, then disable the status.	
When number of remaining openings becomes less than one, Automatically close requisitions with status [SELECT STATUS].	No Recommendation	No	[SELECT STATUS] populates with the list of 99999 job requisition statuses, where enabled. For more information see Configuration of Closed Status (99999) [page 343]. If no 99999 statuses are enabled, all job requisition statuses will display.	

If a hired External Candidate profile <field> matches Employee profile <field>, then merge these profiles into a single profile.	Recommended to enable – with additional setup	No	Determines the fields to be used to match hired external candidates with SuccessFactors HCM user profiles so the external candidate profile can be converted to an internal candidate profile. Additional setup is required; see the Candidate to Employee Conversion [page 436]section.	
Hide standard job application Social Security Number from Ad Hoc Reports	No Recommendation	No	Hides the job application Social Security Number data from Ad Hoc Reporting. When this setting is enabled, SSN data is still accessible via SFAPI and the new hire integration report.	
Hide standard job application Date Of Birth from Ad Hoc Reports	No Recommendation	No	Hides the job application date of birth field from Ad Hoc Reporting. When enabled, date of birth data is still accessible via the SFAPI and new hire integration report.	
Job Requisition				

Enable change tracking and display for Job Requisition data and Job Postings	Recommended to enable	No	The requisition audit trail will always track the progress of a requisition through the route map and the posting actions taken on the requisition (accessible in the UI through the little blue circle i icon.) If this setting is enabled, all field-level changes to the requisition data will also be tracked and available in the audit trail for the requisition The req status and req posting audit trails are reportable in Ad Hoc Reporting but field level audit tracking is not available in Ad Hoc Reporting.	
Use originator's preferred language as the default language of a new job requisition	Client preference	No	In a multi-language instance, when the requisition is created a default language must be specified. This default language pack can be hard-coded in the XML or this setting can be used to override that XML default. If this setting is enabled, the language pack currently selected by the user creating the requisition will be the default language for the requisition.	

Allow forwarding of candidates to un-posted jobs	Client preference	No	By default, a user forwarding a candidate to a requisition can only select requisitions posted to that candidate type (internal v external). If this setting is enabled, it is possible to forward the candidate to any open requisition, posted or unposted. These unposted jobs will return in a recruiting user's search results when forwarding to requisition. If the candidate attempts to access the unposted job through other means, such as link from a job board after the link was removed or via a link in an invite to apply email, the candidate will not be able to access the posting.	

Enable private postings of jobs	Recommended to enable	No	When a requisition is posted internally or externally, it is available in the search results for any searching candidate on the relevant internal or external site. You may want to distribute a job to a potential applicant without making the job searchable, such as inviting the candidate to apply. By configuring the private posting options in the Requisition XML (link to the Requisition XML config instructions) and enabling this setting, it is possible for an end user to post a job privately. This means the job posting will not return in the search results but will have a custom-created URL that can be sent out to applicants via email or copied and pasted elsewhere and be accessible to only selected potential applicants. When viewed in Internet Explorer there is a “hyperlink” chain icon available where a user can click and have the URL copied to the clipboard. This link icon is not available in Firefox due to Firefox browser limitations. There is no possibility of changing this unless Firefox	

			changes their browser support capabilities.	
Show job description to Applicants even after the job posting is taken down	Client preference	No	When a candidate applies to a job they are able to return to their Job Applications / Job Management tab (internal v external naming) and are able to view the job description details by clicking the job title as long as the job is still posted. By default, if the job is unposted the candidate will no longer have access to view the job description. If this setting is enabled, the applicant will be able to return to their Job Applications / Job Management tag and may choose to view the job description by clicking the job title even after the posting has been removed. Attempts to access the job posting by any other means (email link, link from third party job board, etc.) will be unsuccessful.	

Disable "Add Role" on Forward to Requisition dialogue	No recommendation	No	Normally the “Add Role” option that appears in the “forward to requisition” search enables a user to use Families and Roles in assembling their search criteria. If this setting is selected, that Add Role option does not appear.	
Allow users to view pre-approved requisitions without regard to route map status	Recommended to enable	No	By default, pre-approved requisitions are only accessible to users who are part of the route map and where the requisition has already reached their step in the route map. If this setting is enabled any user who is related to the requisition will have access to the requisition even in a pre-approved state.	Yes
On the v12 Home page, alert hiring managers if their requisitions haven't been advanced for x days	Recommended to enable at 3 days	No	Controls the reminder alert related to the home page tile	
Disable Department, Division, and Location filter options on Job Requisition Tab	Check if these fields are not configured in the XML.	No		

Time to Fill	No recommendation	No	Populates a value for Time to Fill Field in reportable requisition fields. Data is automatically calculated based on the Start Date and End Date selected from the provided drop-down menus. These menus have a pre-selected list of dates: ○ Date Created ○ Approved Date ○ Closed Date ○ External Posting Start Date ○ External Posting End Date ○ Internal Posting Start Date ○ Internal Posting End Date ○ Latest Hold Removal Date ○ Job Start Date ○ Due Date ○ Actual Start Date ➔ Recommendation Job Start Date and Actual Start Date are standard fields on the requisition, and in order to use them a client must have them configured in the XML and must populate them with data from the calendar widget. Checking the “Exclude time spent in hold statuses” checkbox ex-	

			cludes hold status time from the calculation. For more information see Manage Requisition State and Status [page 343]. Time to Fill is calculated for all Requisitions retroactively, but the calculation will take longer for customers with more records to calculate. Time to Fill is calculated to two decimal places. Time to Fill is available using Ad Hoc reports.	

Age of Requisition	No recommendation	No	Populates a non-default value for "Age of Requisition" field in reportable requisition fields. Automatically calculates requisition age based on the Start Date selected from the provided drop-down menus: ◦ Date Created ◦ Approved Date ◦ Closed Date ◦ External Posting Start Date ◦ External Posting End Date ◦ Internal Posting Start Date ◦ Internal Posting End Date ◦ Latest Hold Removal Date ◦ Job Start Date ◦ Due Date ◦ Actual Start Date Preferences control the Age of Requisition until the requisition is closed, when Age becomes Time to Fill. Age of Requisition is calculated to zero decimal places – i.e. whole days only. Checking the "exclude time spent in hold statuses" checkbox exclude hold status time from the calculation. For more information see Manage Requisition State and Status [page 343].	

			Enabling this setting will calculate Age of Requisition for all Requisitions retroactively, but will take longer for customers with more records to calculate. Age of Requisition is available using Ad Hoc reports. If an admin user does not configure Age of Requisition, the default age calculation of current date minus approved date (closed date minus approved date if requisition is closed) persists.	

Job Requisition Template	No Recommendation	No	Chose a requisition template from the dropdown menu. Jobs created with this template can be assigned to a default status based on requisition state (pre-approved and approved). When the job requisition is created, the default status assigned to the pre-approved state will pre-populate on the req. When the job requisition is approved, the default status assigned to the approved state will pre-populate on the req. Users can override default statuses in either state by picking a new option from the picklist as required. **Recommendation** The default requisition status per state feature only works if the same picklist is used for requisition status on all templates in the instance. The habit of configuring different picklists for the same field on various templates is a bad configuration practice and may cause data issues in reporting. There is no substitute field for "status." You must use the standard field with id="status" on all req templates, and use the same picklist on every template. Also note,	

			you can only pre-populate values from the FIRST req status picklist associated with this field. If the field used to be associated to one of the other picklists, change it back to the original picklist id in the template and add the new picklist options to the original picklist, and deactive the old options by making them OBSOLETE or DELETED. It is not a good habit to replace picklist Ids with new picklist Ids – if the picklist options change then you should always disable all the old options (in whichever way is fit per the picklist configuration instructions) and add the new options required for the list.	
Default Status for Pre-approved jobs	No Recommendation	No	Select a default status for candidates in pre-approved jobs. Only statuses configured in the route map will appear in the dropdown menu.	
Default Status for Approved jobs	No Recommendation	No	Select a default status for candidates in approved jobs. Only statuses configured in the route map will appear in the dropdown menu.	
Interview Central				

Enable document attachments for interview notes	Recommended to enable	No	When an interviewer is completing the Interview Assessment by default it is possible to enter free text comments. If this setting is enabled, the interviewer also has the opportunity to upload a document of their notes.	
Grant Interviewers the access level of <operator>	Recommended to enable	No	By default interviewers can only access content in Interview Central unless they have an additional relationship to the requisition. If a selection is made in this setting, the interviewers are able to open the Application record and view fields equivalent to the permissions granted to the operator specified in this setting.	
Candidate Summary				
Display Interview Result and Overdue Interviews in candidate summary page	Recommended to enable if Interview Central is used	No	As long as interviewResult and overdueInterviews fields are not configured in the Application XML, this setting enables both fields to appear in the application list page display options.	
Offer Approval				

Enable Job Code Entity fields to be editable	Recommended to enable	No	If job code entity fields are used in the offer approval they are, by default, read only. If selected, this setting makes all job code entity fields referenced in the offer approval from the requisition writeable. It is not possible to pick and choose which job code entity fields will be writeable. Either all are or all aren't.	
Instructions				
Instructions above job requisitions list	Client preference	No	On the requisitions tab there is a placeholder space between the YouCalc widget and the requisition list that can contain custom instructional rich text configured by the client. Translated content is supported. HTML and flash content is also supported.	
Deletion of Attachments				

Delete any document that are attached to the candidate's profile	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the candidate profile purge is triggered, this setting determines whether additional documents on the profile will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	
Delete any document that are attached to the application	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether additional documents on the application will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	

Delete any document that are attached to the offer letter	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether additional documents on the offer letter correspondence will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	
Delete any document that are attached to the offer approval	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether additional documents on the offer approval will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	

Delete any document that are attached to the correspondence email	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether additional documents on the correspondence will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	
Deletion of Correspondence				
Delete all the email and print correspondence available for candidate	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether email correspondence portlet contents will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	

Delete all the offer letters available for candidate	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether offer letter portlet contents will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	
Anonymize all the request/response info of background check available for candidate	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether VI background check content will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	

Anonymize all the request/response info of onboarding available for candidate	Recommend to enable	No	If Data Retention Management 2.0 is enabled and the application purge is triggered, this setting determines whether VI onboarding content will be deleted as part of the purge. Due to the unpredictable nature of personally identifying data that these attachments may contain, it is recommended that they be included in the data retention purge.	
Enable field level validation on standard Phone Number fields (cellPhone & homePhone) on Candidate Profile & Application	No Recommendation	No	Validate the phone number fields on the Candidate Profile and Job Application. Validation prevents users from entering alpha characters.	
Enable field level validation on standard Social Security Number field on Application	No Recommendation	No	Validates data on the Job Application SSN field. Validation prevents users from entering alpha characters.	

18.2 Manage Duplicate Candidates

Candidates sometimes create more than one candidate profile, and in that situation clients want to merge the profiles into a single profile.

18.2.1 Quick Facts

- You cannot undo a candidate merge
- Only one pair of candidates can be merged at a time. It is not possible to mass merge candidates or merge all candidates found by the duplicate search results at once
- Duplicates can only be merged from the admin menu, not from the candidate profile user interface

- Internal candidates can be merged with external candidates, or externals can be merged with externals, but internals cannot be merged with internals
- A combination of first name, last name and address fields are used to identify potential duplicates

18.2.2 Configuration

Context

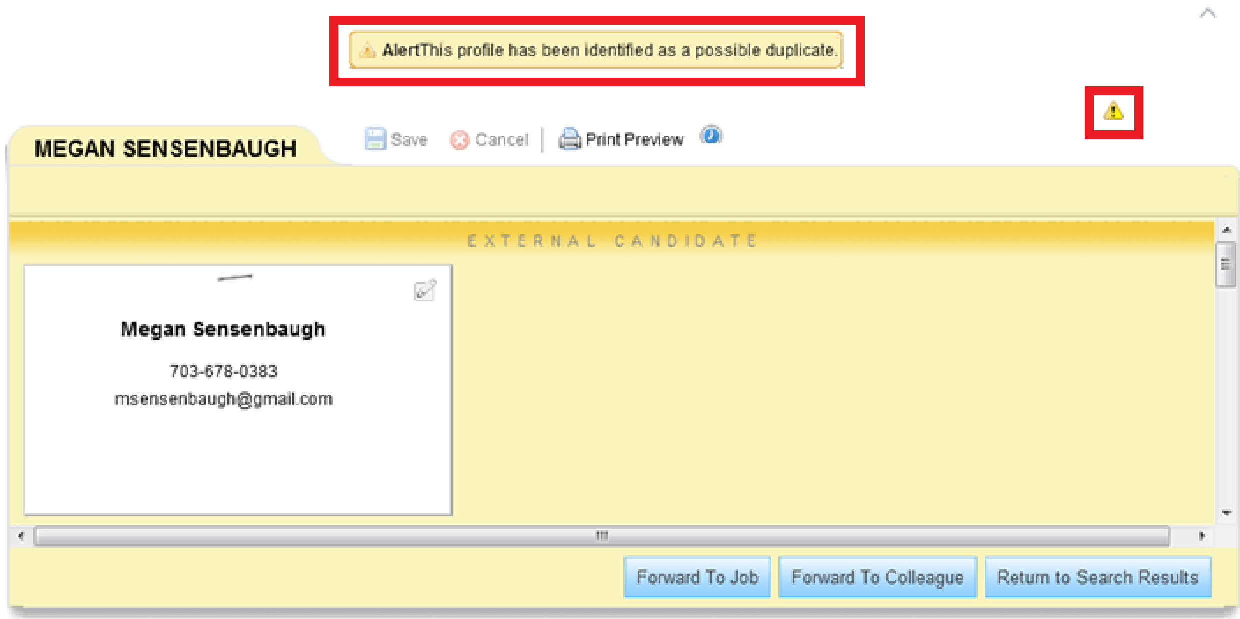
Procedure

1. *Provisioning* > *Company Settings* > *Enable Merge Duplicate Candidate Profiles*
2. Grant access to the feature:
   a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage Duplicate Candidates permission*
   b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *select a user or group of users and grant Manage Duplicate Candidates permission*
3. *Admin Tools* > *Manage Recruiting Administration* > *Manage Duplicate Candidates*

18.2.3 Working with Duplicate Candidates

This feature manifests in both the recruiting user view and, depending on permissions, in the administrative user view.

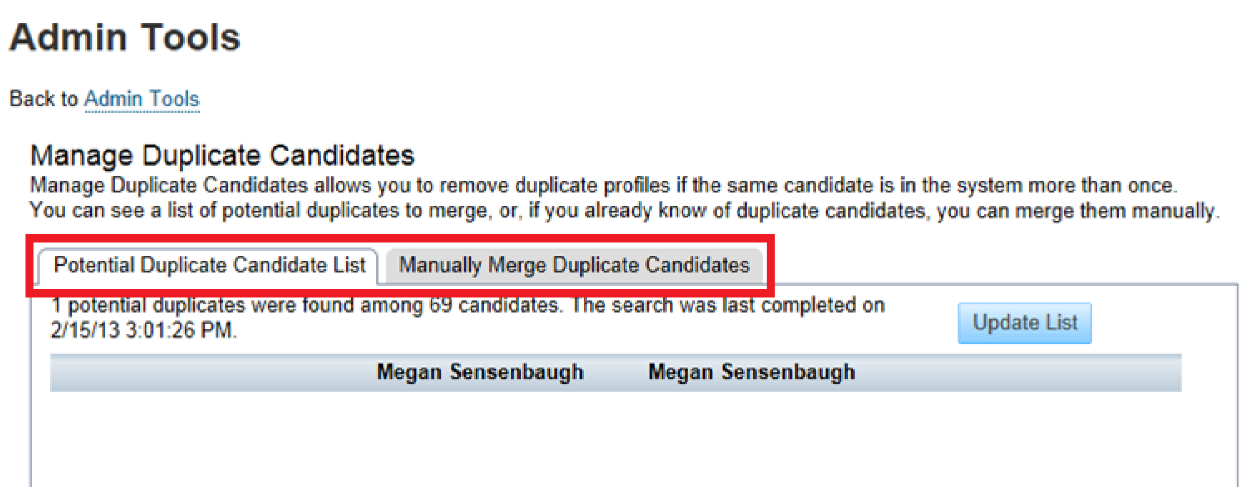
In the recruiting user view, a user viewing a candidate profile may be warned if the profile appears to be a possible duplicate of another profile. This appears as a yellow warning sign in the upper right hand corner of the Candidate Profile record. If the recruiting user mouses over the profile they receive a warning message stating "*Alert* This profile has been identified as a possible duplicate."



Duplicate Candidate Profile Warning

Users who have permissions to the “Manage Duplicate Candidates” option in Admin Tools can merge candidate profiles. There is no functionality to merge candidate profiles from the Candidate Profile user interface itself — merging is reserved as an administrative function.

In *Admin Tools* > *Manage Duplicate Candidates* feature there are two sub-tabs.

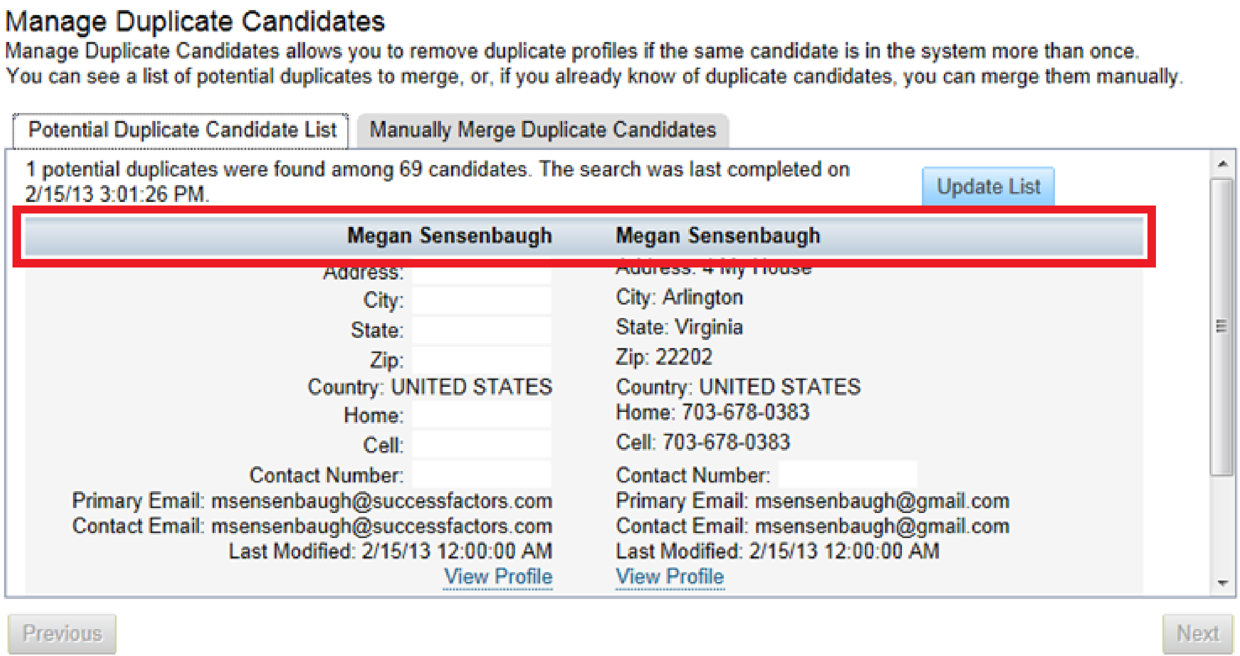


Manage Duplicate Candidate Sub-Tabs

Potential Duplicate Candidate List

Clients who wish to be proactive about their duplicate candidate management can come to this tab, click “Update List” and the system will search through the entire candidate database and attempt to find possible duplicate candidates. This comparison job can take a long time to run. Clients should be trained to initiate this job as part of their regular system maintenance if they wish to use it and plan to come back in a few hours or the next day to work with the list of duplicates.

Clicking on a line of matched candidates allowed the user to compare the candidates' basic data side by side to help the user confirm that the candidates are actual duplicates.



Select a Set of Potential Duplicates

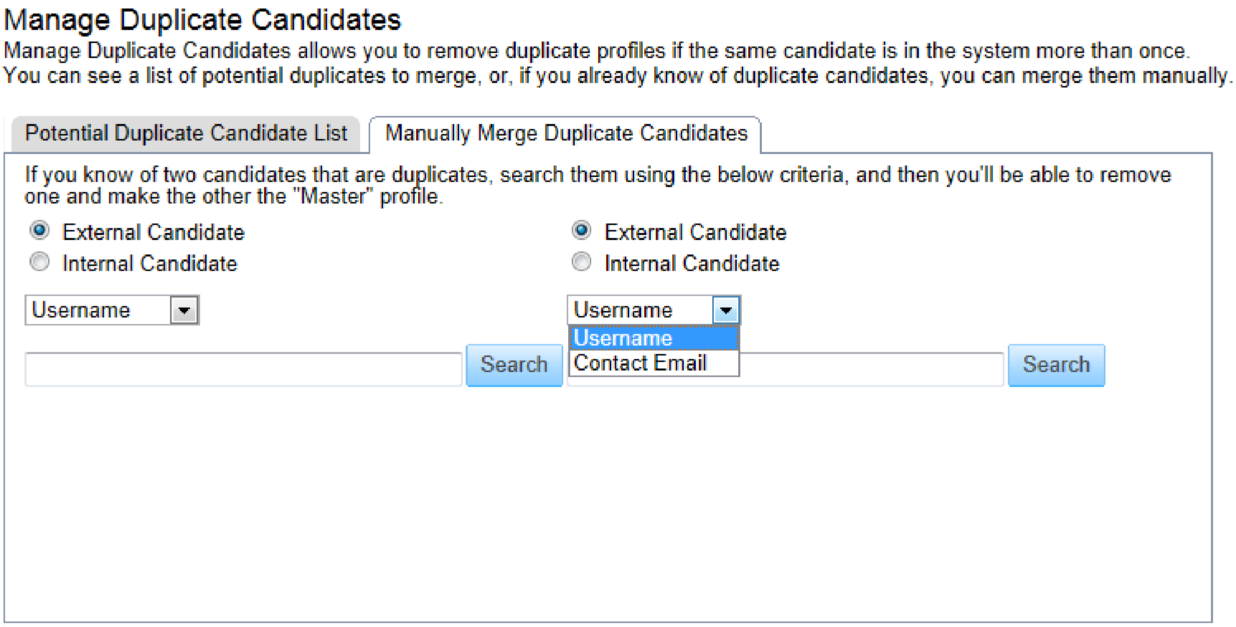
Once a potential set of duplicate candidates is identified and selected the user is presented with the question "Are these duplicate candidates?"

If the user selects "No" the candidates is marked off so they will not continue to appear in the Potential Duplicate Candidate List, and they will no longer show the duplicate candidate warning message on the Candidate Profile user interface.

If the user selects "Yes" the user will then be prompted to select which candidate will become the master candidate. If merging an external and internal candidate, only the internal candidate may be made the Master Candidate.

Manually Merge Duplicate Candidates

Alternatively, if the client is aware of a specific duplicate the user can come into the Manually Merge Duplicate Candidates tab, search for each of the candidate profiles and perform a merge. The recruiting user can specify whether to search for an internal or external candidate and then search by either email (contactEmail) or username (primaryEmail). The candidate's primaryEmail and contactEmail may be the same value, especially in clients who do have "Use Email as Username" checked in Provisioning.



Search for Potential Duplicate Candidates

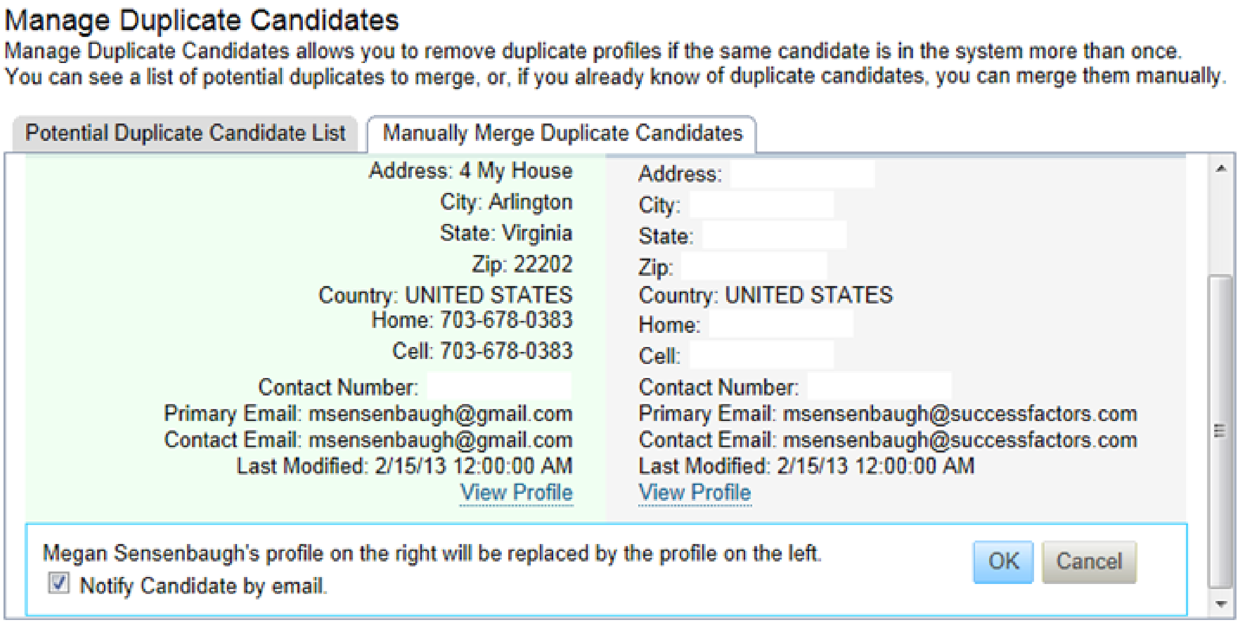
Select Master Candidate

The user will be prompted to select which candidate will become the master candidate. If merging an external and internal candidate, only the internal candidate may be made the Master Candidate.

The master candidate profile is the profile retained after the merge. If there is conflicting data, such as differing phone numbers stored in the same cell phone number field, the data from the master candidate record will be retained. The primaryEmail (username) and password from the master candidate record will be retained. If any fields on the master candidate profile are blank but the secondary candidate profile has data in those fields, that data will be transferred into the master candidate profile so the maximum amount of data is retained.

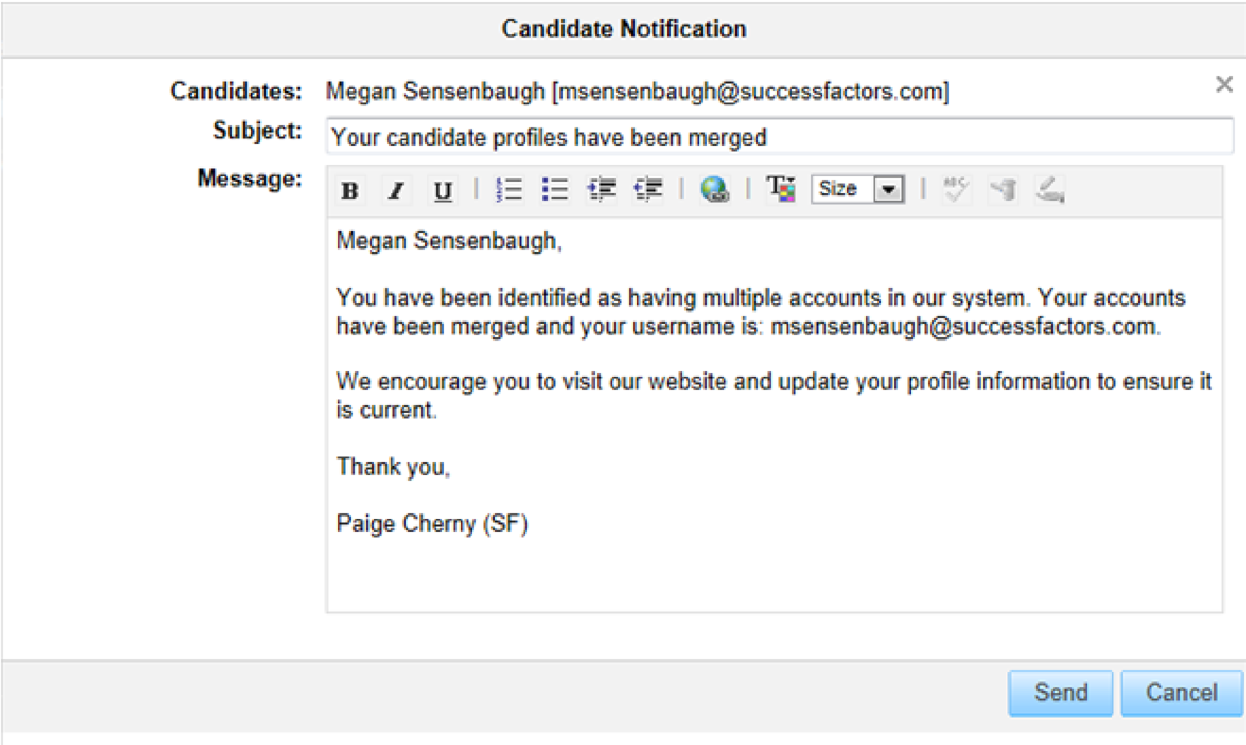
If merging an internal and external candidate profile together, the internal candidate profile will necessarily be the master candidate and the external candidate cannot be selected as the master.

Once the user selects a master candidate, the user will be prompted to choose whether they wish to notify the candidate of the merge activity via email. There are options to notify the master candidate, secondary candidate or both.



Merge Confirmation

The user has the opportunity to edit the candidate notification email prior to sending. The default email language is set in Admin Tools > E-Mail Notification Templates Settings under Candidate Merge Notification.



Merge Email Notification

Once merged, only the master candidate appears in the candidate search results. All applications associated with both profiles will now be associated to the master profile. If the candidate applied to the same requisition twice with different profiles, the duplicate applications will still exist. The client recruiting user should disposition one and proceed in the hiring process with the other.

Potential duplicate candidates are flagged based on the following criteria:

- First Name
- Last Name
- City
- Country
- First 10 letters of address or phone number or first 5 digit of zip code

The City, Address, Phone Number and Zip Code fields will be normalized to remove spaces, dashes, and periods.

Only the first 10 letters of the Address field are compared, which helps avoid missing a duplicate simply because the street address is spelled out differently, such as “Lane” vs. “Ln”, “Street” vs. “St”, “Boulevard” vs. “Blvd”, and “Avenue” vs. “Ave”, etc.

(If the administrative user has reviewed the potential duplicate candidate set, determined they are not duplicates and marked them off, the criteria above is void; the candidates will not be presented as potential duplicates even though the data matches.)

The comparison criteria are not configurable.

18.3 Manage Recruiting Languages

All languages enabled in the instance should be enabled for Recruiting. Language packs have an associated cost, so if the client asks for additional languages, or if there is a discrepancy between the languages in the Schedule A and the languages enabled for the instance in Provisioning > Company Settings consult your Practice Manager.

Languages must be enabled to allow proper requisition posting, editing of applicant statuses, etc.

18.3.1 Configuration

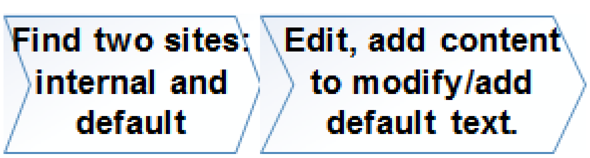
Context

Procedure

Grant access to the feature:

a. *RBP: Admin Tools > Manage Permission Roles > select Role > Permission > Manage Recruiting > Manage Recruiting Languages permission*
b. *Non-RBP: Admin Tools > Manage Recruiting Administration > select a user or group of users and grant Manage Recruiting Languages permission*

18.4 Manage Recruiting Sites



Manage Recruiting Sites

Recruiting sites (also called microsites) are a standalone RCM feature that allows the client to define multiple different search landing pages for candidates, complete with unique logos, text, and pre-set search filters.

Every client instance has both a Default career site (default for external candidates) and an Internal site (default for internal candidates).

When Recruiting Management is used in conjunction with Recruiting Marketing microsite functionality still works but mostly goes unused because the Recruiting Marketing sites are superior. The Internal site and Default site still should be set up and carefully considered because they will still receive a fair amount of candidate traffic, even with Recruiting Marketing enabled.

18.4.1 Quick Facts

- There is no way to disable or prevent external candidates from accessing the Default site. This will always be available to them after they create or log in to their account.
- Only one career site can exist for internal candidates; additional microsites cannot be configured.
- The page layout (search box on the left, configurable content on the right) cannot be changed.
- The background color of the search box is not configurable.
- If events functionality is used, posted events will appear as “posters” at the bottom of the main search screen. The filters selected in the career site setup affect which events appear on the screen.

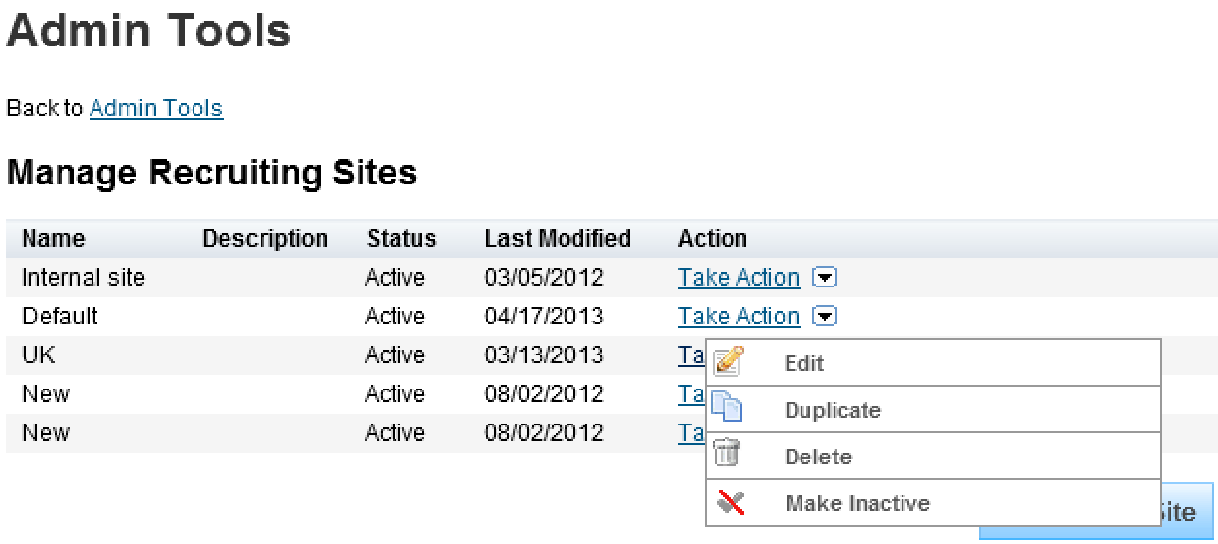
18.4.2 Configuration

Context

Procedure

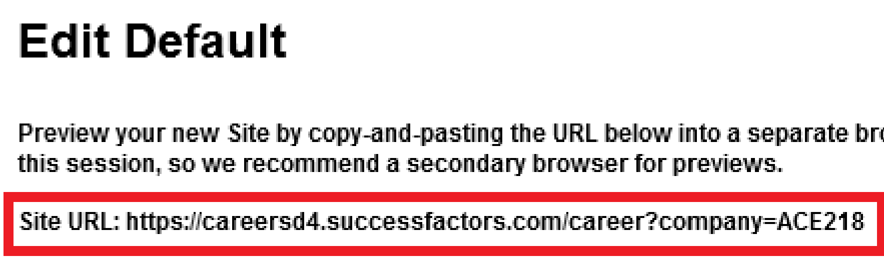
1. Grant access to the feature:
    a. *RBP: Admin Tools > Manage Permission Roles > select Role > Permission > Manage Recruiting > Manage Recruiting Sites permission*
    b. *Non-RBP: Admin Tools > Manage Recruiting Administration > select a user or group of users and grant Manage Recruiting Sites permission*
2. *Admin Tools > Manage Recruiting Sites*
3. Edit the Internal site and Default site by selecting *Take Action > Edit*.
4. Create, duplicate, delete or make inactive additional microsites.
5. Update the site settings according to the client’s need.

18.4.3 Working with Recruiting Sites



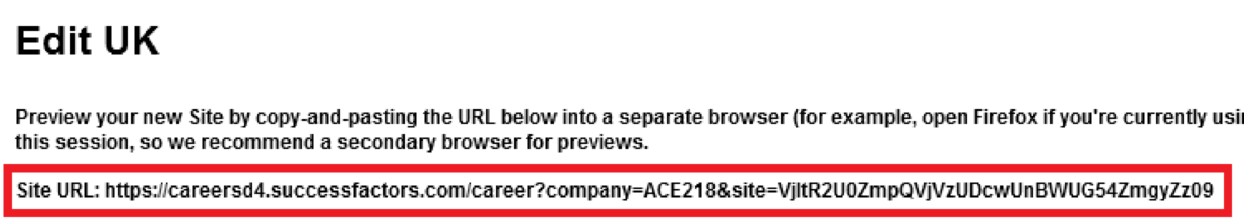
Manage Recruiting Sites

The site marked as default has the instance-specific URL. Note the Default site does not respect filter settings. All job postings can be searched on the Default site.



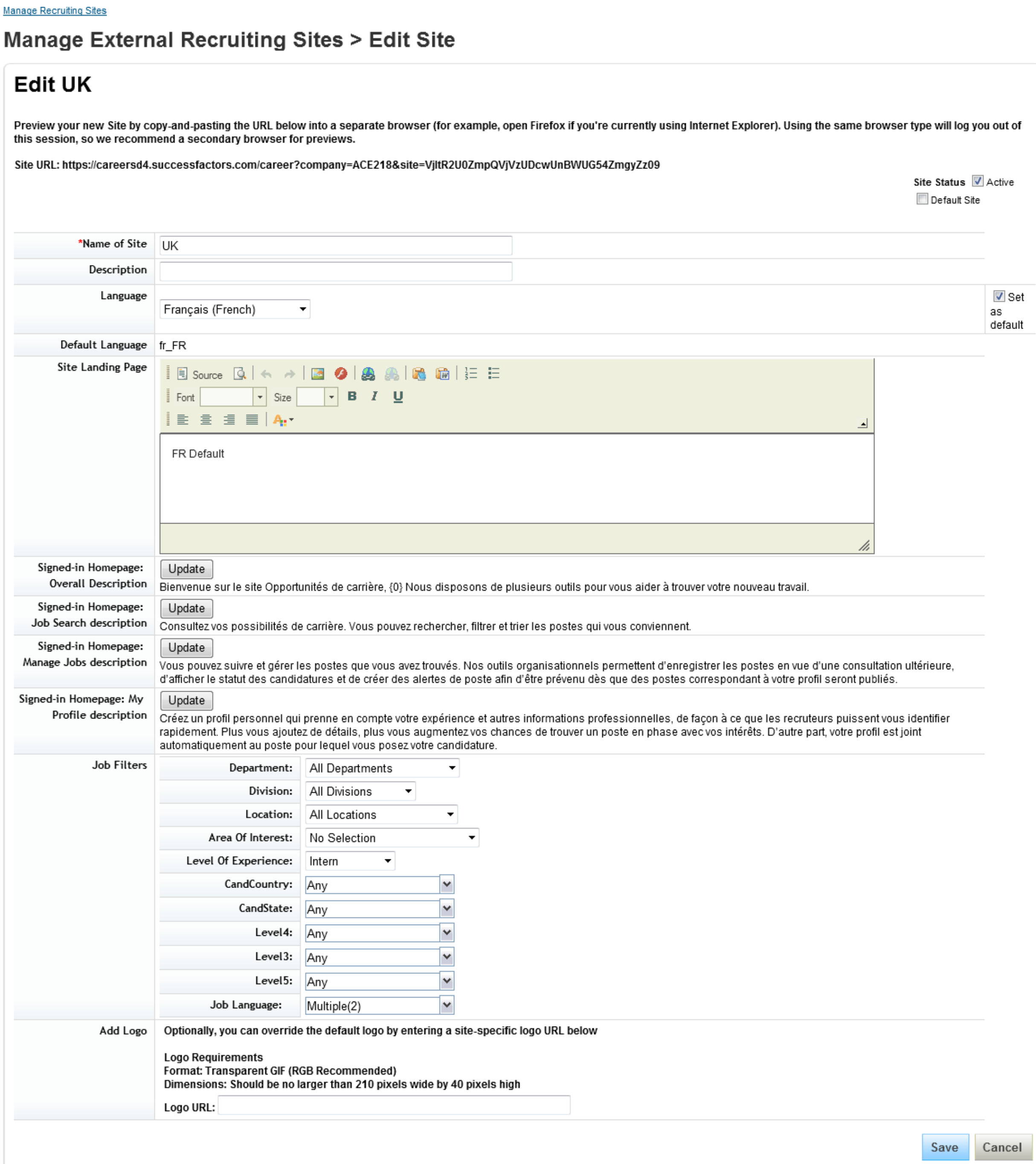
Instance Specific Site URL

Each microsite has a uniquely-generated URL. This URL links the candidate to a microsite with the admin-specified filters already applied and locked in place.



Unique Microsite URL

The admin user can adjust the settings on each site.



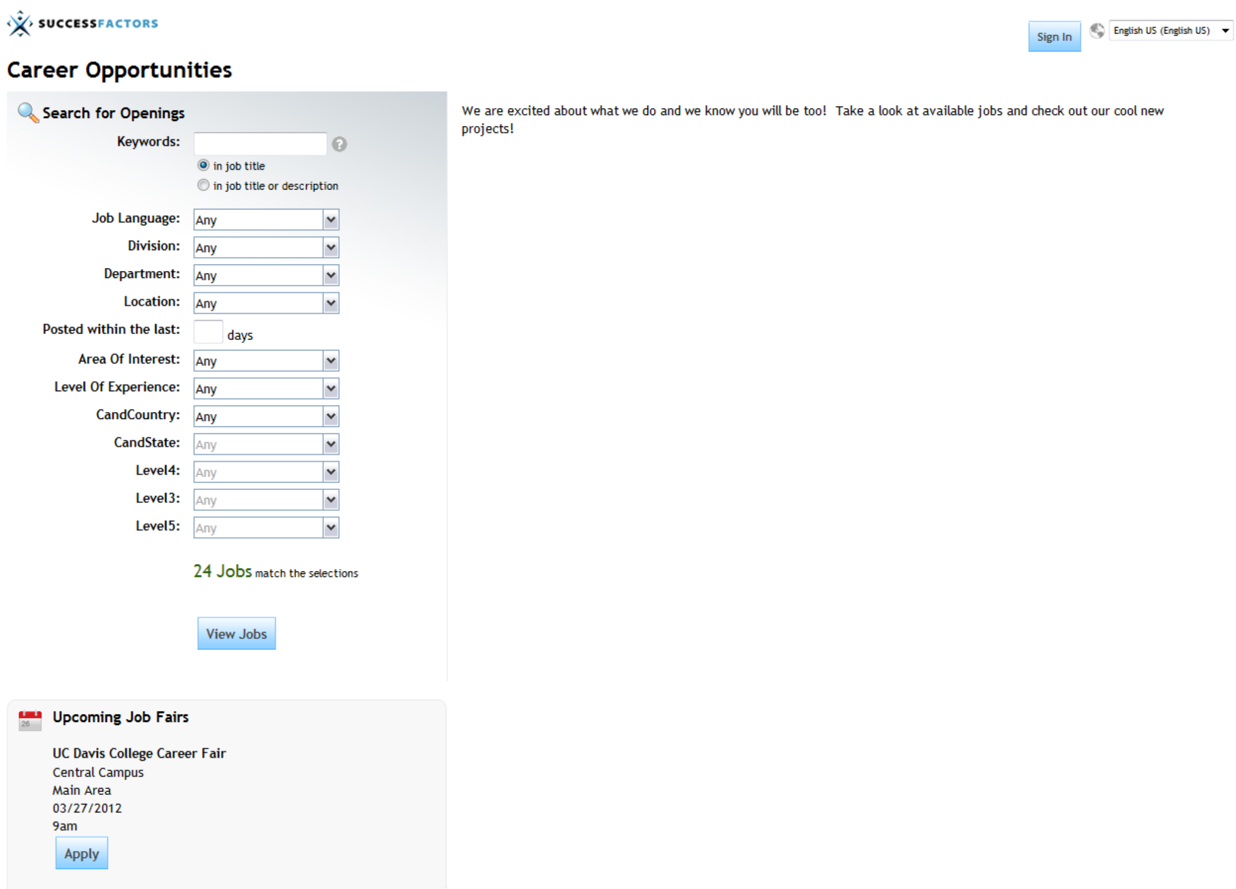
Manage Recruiting Site Edit Page

Table 37: Table 22 Manage Recruiting Site Edit Options

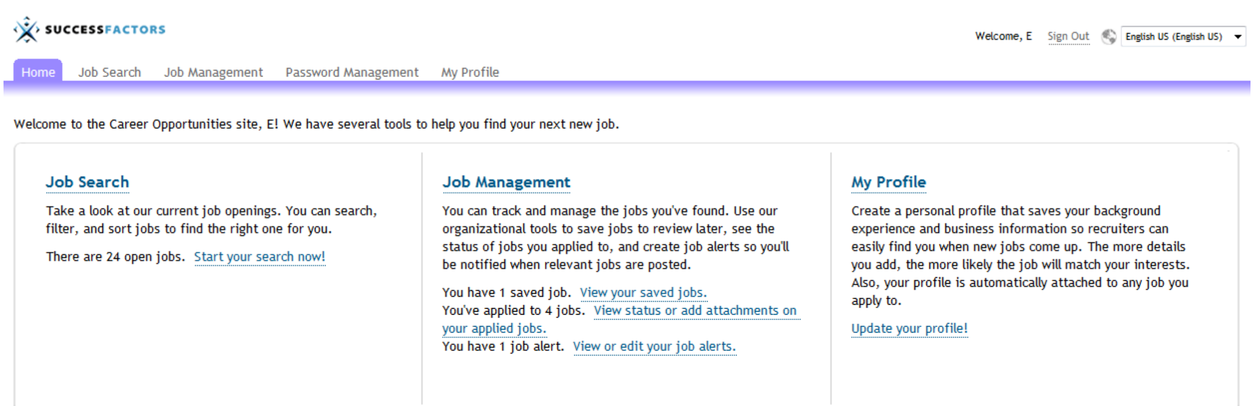
Field	*Purpose*

Site URL	Unique auto-generated URL linking the user to the site. This URL cannot be adjusted manually. Whichever career site is designated as the Default will have the shorter URL that ends in the company instance ID, such as: https://salesdemo4.successfactors.com/career?company=INSTANCEID
Site Status	Sites can be de-activated by unchecking this box if they are in preparation or temporarily decommissioned
Default Site	One site at a time can be selected as the Default by selecting this checkbox. When this is selected, it will uncheck the box from the site previously designated as Default
Name of Site	A configurable value only used by the admin to identify sites
Description	A configurable value only used by the admin to identify sites
Language	Each career site can contain various translations of the content, which allows a candidate to select their chosen for viewing the site. This language drop down is a toggle used to switch between languages and set up the various translated copies of the content.
Set as default	When a candidate visits a career site, the system attempts to present the candidate with the best language pack possible. 1. It will first attempt to ascertain the language of the candidate’s browser and will, by default, display the site in that language if it is enabled. 2. If the system cannot determine the candidate’s language from the browser, it will use the language selected as the default
Default Language	This indicates the career site’s present default language
Site Landing Page	This determines the text, html, images and Flash content presented on the right side of the career site page. Embedded video and audio files are not supported.
Signed-in Homepage: Overall Description	Determines the text, html, images and Flash content at the top of the candidate Home tab
Signed-in Homepage: Job Search description	Determines the text, html, images and Flash content in the left-hand Job Search grid on the candidate Home tab. The action links in this part of the grid are not configurable.
Signed-in Homepage: Manage Jobs description	Determines the text, html, images and Flash content in the center Job Management grid on the candidate Home tab. The action links in this part of the grid are not configurable.
Signed-in Homepage: My Profile description	Determines the text, html, images and Flash content in the right-hand My Profile grid on the candidate Home tab The action links in this part of the grid are not configurable.

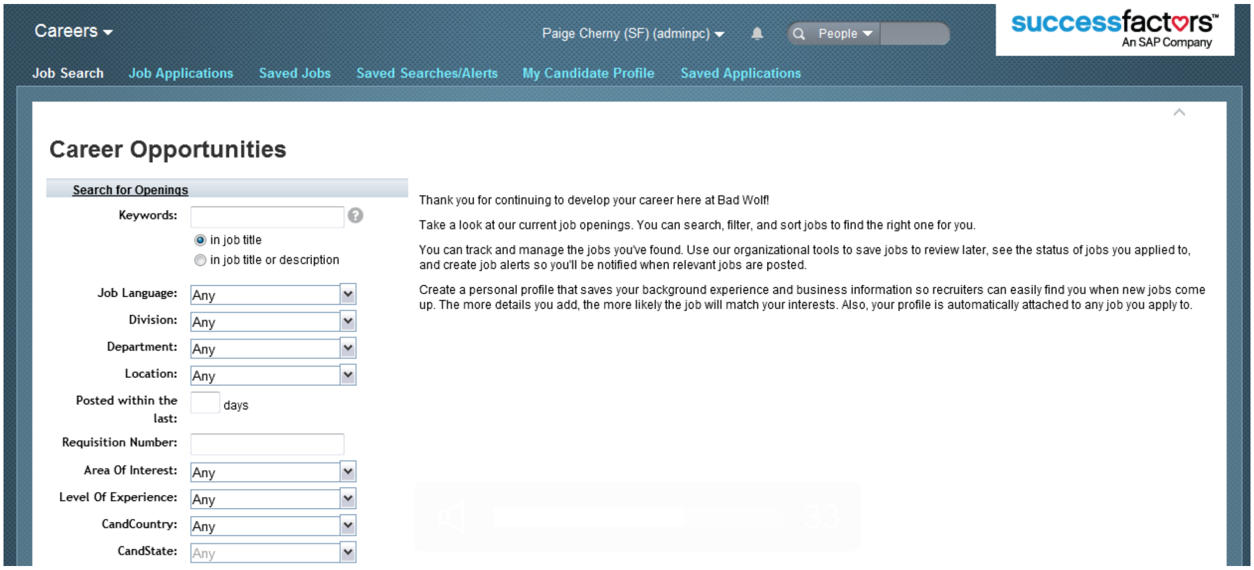
Job Filters	The filters available are based on the configuration in Provisioning > Internal and External Search Settings. In multi-language environments the language field will always appear as well. The Default career site does not respect selected filters; all externally posted jobs will always be available on the Default career site. If filters are set up on a career site, a user accessing that site will not be able to remove the filter; all other options in the picklist will be hidden. The selected option will be checked and greyed out. There is presently no way to multi-select filter options on the career site setup page.
Add Logo	Each career site can have a unique logo specified. The image file used for the logo should be first hosted in the same datacenter in which the client's instance is hosted or there could be browser security warning pop ups for users who access the career site. Logos should be 40x210 pixels to fit into the space provided in the upper left hand corner of the application. Transparent GIF (RGB recommended)



External Career Site for a Logged-Out User



External Career Site for a Logged-In User



Internal Career Site

18.5 Detailed Requisition Reporting Privileges

Tip

This feature is only supported in instances that do NOT have role-based permissions (RBP) turned on.

This feature is used in combination with Recruiting V2 Secured reports. While V2 Secured reports usually allow a user to report on data to which they have a specific relationship like recruiter or hiring manager, a user may need to report on more data than they have a relationship to, but less data than everything in the system. For example, a user like an HR Generalist supporting the Finance division may need to report on recruiting data for only the division they support.

An admin must set up this special additional access for users.

18.5.1 Prerequisites

- *Provisioning > Company Settings > uncheck Role-based Permission* *(This should not be done lightly, since it alters the entire permission model for all modules in the instance)*
- *Provisioning > Company Settings > check Recruiting V2 Secured*

18.5.2 Configuration

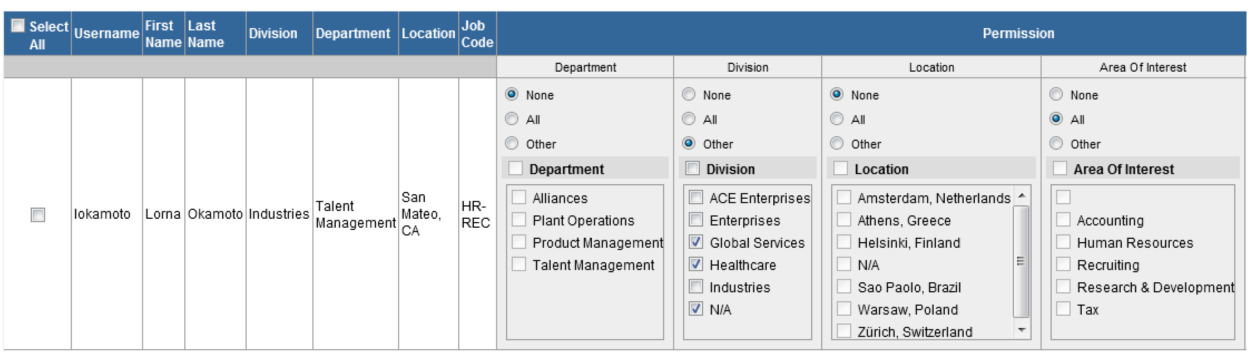
Context

Procedure

1. *Provisioning* › *Recruiting Security Field Setup* › *select the fields that will be available as special filters*
2. Grant access to the feature:
    a. *RBP:* *Admin Tools* › *Manage Permission Roles* › *select Role* › *Permission* › *Manage Recruiting* › *Manage Detailed Requisition Reporting Privileges permission*
    b. *Non-RBP:* *Admin Tools* › *Manage Recruiting Administration* › *select a user or group of users and grant Manage Detailed Requisition Reporting Privileges permission*

18.5.3 Working with Detailed Requisition Reporting Privileges

- *Admin Tools* › *Detailed Requisition Reporting Privileges* › *look up a user or group of users* › *select the values to which the users should have access in each special filter when running Recruiting V2 Secured reports*



Detailed Requisition Reporting Filters

For more information on using special filters in reports see the Recruiting V2 Secured [page 616] section of this guide.

18.6 Manage External Password Policy

This feature allows a different set of rules to be specified for the password strength on passwords set up by external candidates than the rules applied to internal candidates.

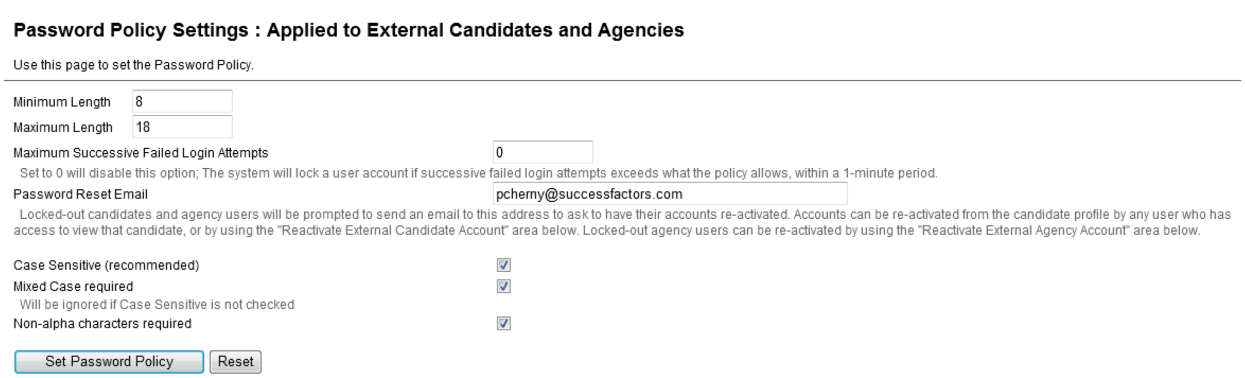
18.6.1 Configuration

Context

Procedure

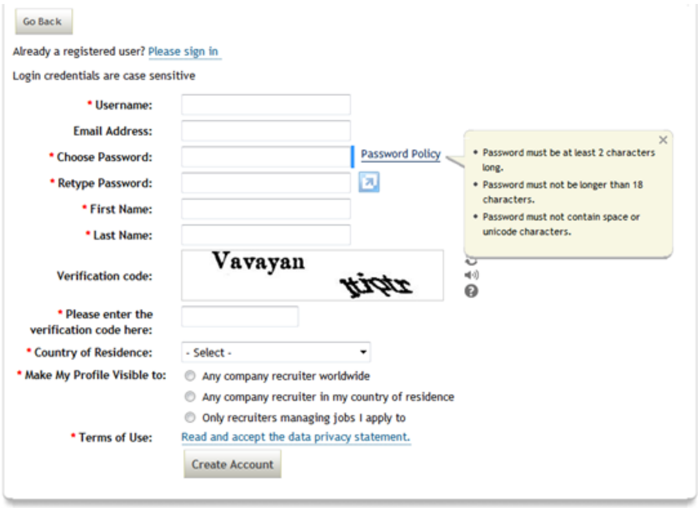
1. *Provisioning* > *Company Settings* > *check Enable Separate Password Policy for External Candidates*
2. Grant access to the feature:
   a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage External Password Policy permission*
   b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *select a user or group of users and grant Manage External Password Policy permission*

18.6.2 Working with the External Password Policy page



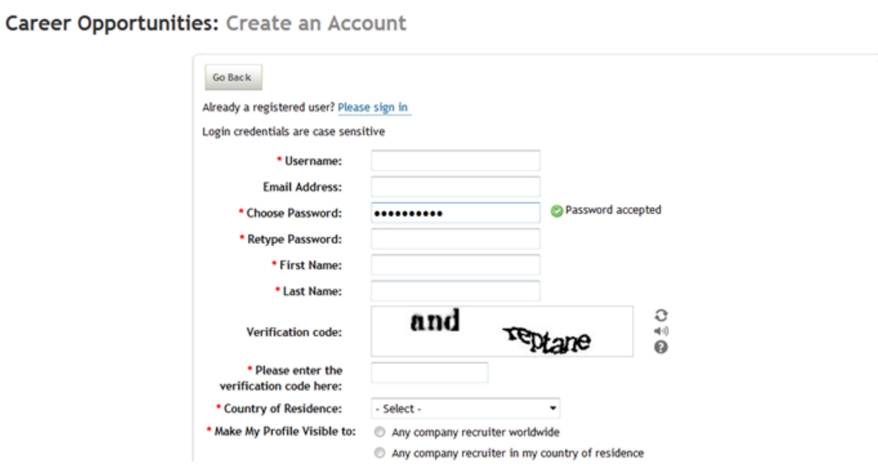
Password Policy Settings

The rules specified will be made visible to candidates on the account creation screen if the candidate hovers over the Password Policy link.



Password Policy Display to Candidates

When this is used, the candidate will see a bar next to their password field indicating their password strength and the point where their password becomes acceptable.



Display of Password with Acceptable Strength

Table 38:

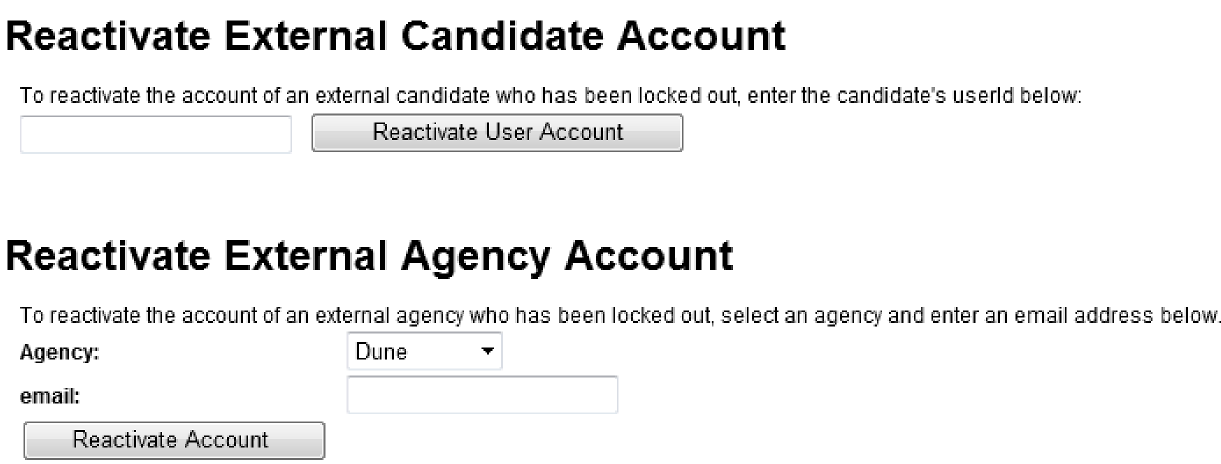
Option	Recommended	Function
Minimum Length	8	Minimum number of characters the password must contain to be acceptable
Maximum Length	18	Maximum number of characters the password may contain
Maximum Successive Failed Login Attempts *Set to 0 will disable this option; The system will lock a user account if successive failed login attempts exceed what the policy allows, within a 1-minute period.*	5	Specifies how many attempts can be made within 60 seconds before the account is locked It is not advisable to use this setting for most clients because it then requires admin action to unlock a candidate or agency account

Case Sensitive (recommended)	Checked	Causes the password to distinguish between capitalized and non-capitalized letters
Mixed Case required *Will be ignored if Case Sensitive is not checked*	Checked	Requires that the password contain at least one capitalized and at least one non-capitalized letter
Non-alpha characters required	Checked	Requires that the password includes at least one character other than a letter

The options available in the External Password Policy are pre-set; no additional options are available.

If Maximum Successive Failed Login Attempts is set to greater than zero then it is possible for an external candidate or agency user to accidentally lock their account with too many failed login attempts. On this page the admin can re-set the account so that it can once again be accessed.

For the external candidate the primaryEmail field value must be used to look up the candidate. This may or may be the same as the contactEmail value that is widely displayed on the candidate profile and application records. The primaryEmail field should be configured on the Candidate Profile XML to ensure the admin can locate and use it to reactivate the account.



Reactivation of External Accounts

18.7 Manage Recruiting Groups

Recruiting Groups are used in the Requisition XML to restrict the users who can be picked from primary operator and recruiting team fields on a requisition, set up by the admin to be automatically added to recruiting team fields on a requisition, and may be used in the Candidate Profile XML to grant additional permissions to candidate profile data.

Manage Recruiting Groups

Process Overview

18.7.1 Configuration

Context

Procedure

1. Grant access to the feature:
   a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage Recruiting Groups*
   b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *select a user or group of users and grant Manage Recruiting Groups*
2. Set up groups according to the client's need.

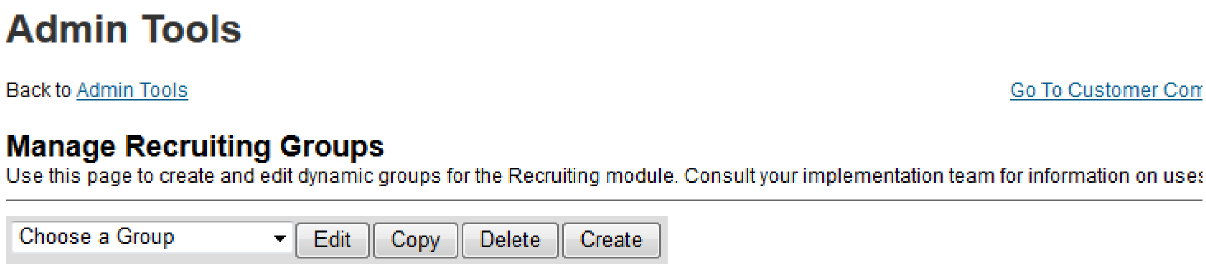
18.7.2 Working with Recruiting Groups

Each group can include multiple People Pools. People Pools are defined by the filtering criteria they contain. For instance, a People Pool can include users where the Employee Profile contains a Department value of Sales and a Location value of San Francisco. Use one pool for AND conditions, such as all Sales employees who are also in a San Francisco location. Use multiple pools for broader OR conditions, such as including all Sales staff (one People Pool) OR staff located in the San Francisco location (additional People Pool).

Recruiting Groups are only visible to the user who creates them, so you should always proxy in as a dummy admin user when creating or managing groups. If this is not done, it would be possible for a Recruiting Group to be created under a real user who may later be subject to inactivation, which would render the group inaccessible for future edits.

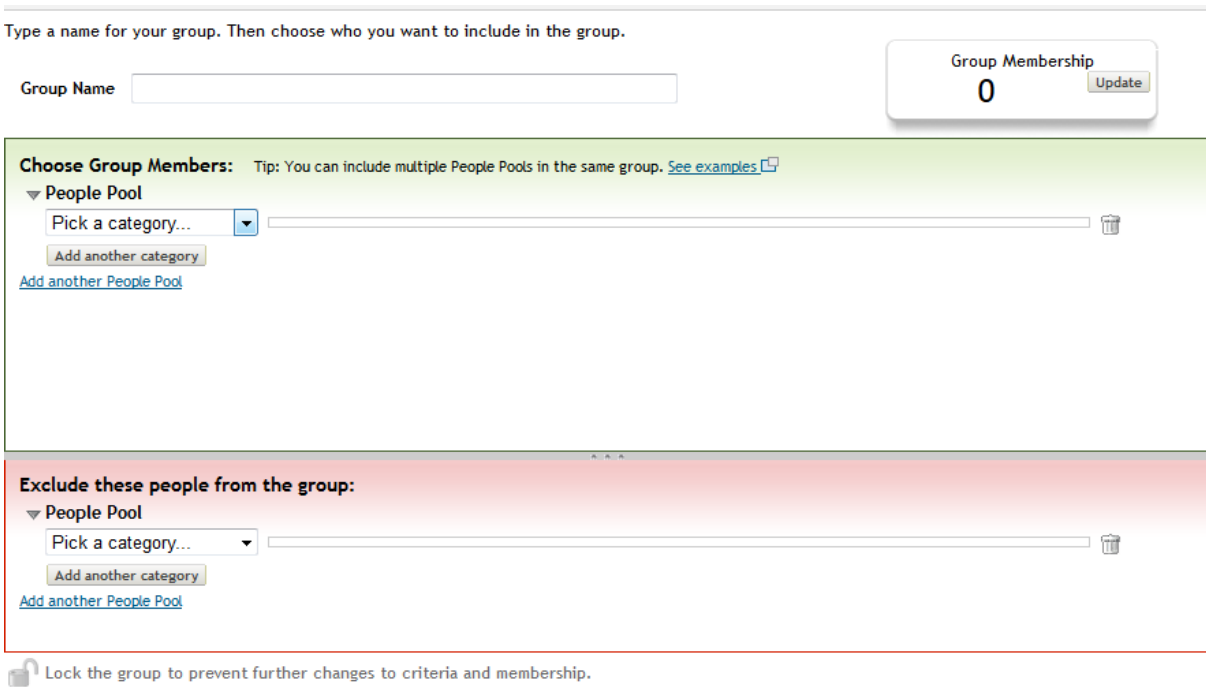
To add or edit a group

- Proxy in as a dummy admin user
- *Navigate to Admin Tools* > *Managing Recruiting* > *Manage Recruiting Groups*.
- Select a group from the Choose a Group dropdown and click Edit. Alternatively, click Create to create a new group.



Create or Edit Recruiting Group

- In the group edit window, select your inclusion and exclusion categories per people pool.



Recruiting Group Configuration

- Categories are defined in the succession data model XML in Provisioning. The field type to configure categories is filter-module.

Tip

If filter-module configuration is changed after you define a group using that filter/category, an error can occur, saying, “The filter specification of this group cannot be restored. This can be caused by a new data model or internal changes. Please delete this group and re-create it.” To fix this, restore the filter-module configuration, edit the group, remove the dependence on that filter-module value, and then change the data-model XML to again remove that filter-module.

For more information on how to apply Recruiting Groups to the configuration, see the Configuring field permissions [page 134] in the Candidate Profile XML, the group-name Attribute [page 278] in the Requisition XML, and the Manage Recruiting Team Settings [page 557] sections of this guide.

18.8 Manage Recruiting Administration

In an instance with role-based permissions (RBP) disabled, this page allows the administrator to grant privileges to certain recruiting administrative features to other administrative users. Each option on the Manage Recruiting Administration page corresponds to an actual link on the Admin Tools page. The permissions available vary depending on the features and options configured for the instance.

18.8.1 Configuration

Context

Procedure

Grant access to the feature:

a. *Non-RBP:* *Admin Tools* > *Administrative Privileges* > *select a user or group of users* > *Managing Recruiting* > *grant Manage Recruiting Administration*
b. *RBP:* No special configuration needed; any user with Manage Permission Roles access may adjust the settings in Manage Recruiting

18.8.2 Working with Recruiting Administration

Once a recruiting user has access to Manage Recruiting Administration, they have the ability to grant certain administrative privileges to other users.

Table 39:

Recruiting Admin options that can be permissioned to users
Detailed Requisition Reporting Privileges

Employee Referral Program Setup
Edit Applicant Status Configuration
Export New Hire Candidates
Manage Recruiting Custom Help Text
Manage Duplicate Candidates
Manage external data privacy consent statements
Manage External Password Policy
Manage External User Accounts
Manage internal data privacy consent statements
Manage Job Posting Header and Footer
Manage Offer Letter Templates
Manage Onboarding Templates
Manage Recruiting Email Templates
Manage Recruiting Groups
Manage Recruiting Languages
Manage Recruiting Settings
Manage Recruiting Sites
Set Up Agency Access
Set up Company Information
Set up Internal Candidate Search
Set up Job Board Options
Configure Legal Minimum Obligation Period
Delete Candidate
Manage Recruiting Team Settings
Configure Standardization Mapping
Manage Assessment Vendors
Setup Recruiting Marketing Job Field Mapping

18.9 Recruiting Permissions

This page allows the administrator to grant privileges for certain recruiting features to end users. Each option on the Recruiting Permissions page corresponds to something a user can do or access as part of the Recruiting product. The permissions available vary depending on the features and options configured for the instance.

18.9.1 Configuration

Context

Procedure

Grant access to the feature:

a. *Non-RBP:* *Admin Tools* › *Administrative Privileges* › *select a user or group of users* › *Managing Recruiting* › *grant Recruiting Permissions access*
b. *RBP:* No special configuration needed; any user with Manage Permission Roles access may adjust the settings in Recruiting Permissions

18.9.2 Working with Recruiting Permissions

Once a recruiting user has access to Recruiting Permissions, they have the ability to grant certain administrative privileges to other users.

Table 40: Table 23 Recruiting Features and Permissions

Recruiting features that can be permissioned to users	*Grants*
Report Permission	Access to the “Reports” link on the Recruiting tab
Source Quality Portlet Permission	Access to the “Source” sub-tab on the Recruiting tab
Standalone Search Permission	Access to the “Candidates” tab and candidate search, whether or not the user has an open requisition
Candidate Search Within Job Req	Access to the “Candidates” tab and candidate search only if the user has an open requisition (contrary to the intuitive interpretation of the option, this does not allow the user to search only within candidates that have already applied to the requisition; that functionality is not presently supported)
Candidate Tagging Permission	Ability to add tags to a candidate and/or applicant
Grant eQuest Job Postings Permission	Ability to post to third party job boards via eQuest (eQuest must be enabled and configured, and external user accounts must be properly loaded for the users receiving the permission)
Jobs Applied Portlet Permission	Access to view the Jobs Applied portlet on the Candidate Profile and Application records

SFAPI Insert Candidate Permission SFAPI Update Candidate Permission SFAPI Retrieve Candidate Permission	Provides the user the ability to access and perform this action on Candidate Profiles (typically only granted to a dummy user set up specifically for integration purposes)
SFAPI Insert Job Application Permission SFAPI Update Job Application Permission SFAPI Retrieve Job Application Permission	Provides the user the ability to access and perform this action on Applications (typically only granted to a dummy user set up specifically for integration purposes)
SFAPI Insert Job Requisition Permission SFAPI Update Job Requisition Permission SFAPI Upsert Job Requisition Permission SFAPI Retrieve Job Requisition Permission	Provides the user the ability to access and perform this action on Requisitions (typically only granted to a dummy user set up specifically for integration purposes)
SFAPI Insert Job Code Permission SFAPI Update Job Code Permission SFAPI Upsert Job Code Permission SFAPI Retrieve Job Code Permission	Provides the user the ability to access and perform this action on Requisition Job Code Entity fields (typically only granted to a dummy user set up specifically for integration purposes)
SFAPI Retrieve Job Posting Permission	Provides the user the ability to access and perform this action on Requisition Job Postings (typically only granted to a dummy user set up specifically for integration purposes)
SFAPI Retrieve Assessment Order Permission SFAPI Update Assessment Report Permission SFAPI Retrieve Job Applicant Permission	Provides the user the ability to access and perform this action on Application Assessments (typically only granted to a dummy user set up specifically for integration purposes)
Careers Tab Permission	Provides the user access to the Careers tab. This permission is granted automatically to all newly-created users. It is only necessary to adjust this permission if the user is re-activated (in a non-RBP environment) or if the client wishes to restrict access to the careers tab to a given population of employees

18.10 Edit Applicant Status Configuration

See the Applicant Status setup information in How to Configure a Baseline Instance section of this guide [page 29].

18.11 Set up Job Board Options

The allowable values for the industry, country and stateProvince fields on the requisition are set up using Job Board Options.

18.11.1 Prerequisites

Set Up Job Board Options requires initial configuration in Provisioning by Professional Services.

- *Provisioning* > *Company Settings* > *Enable Job Board Posting*

18.11.2 Configuration

Context

Procedure

Grant access to the feature:

a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Set up Job Board Options*

b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Set up Job Board Options*

18.11.3 Setting Up Job Board Options

Context

Procedure

1. *Admin Tools* > *Set up Job Board Options*

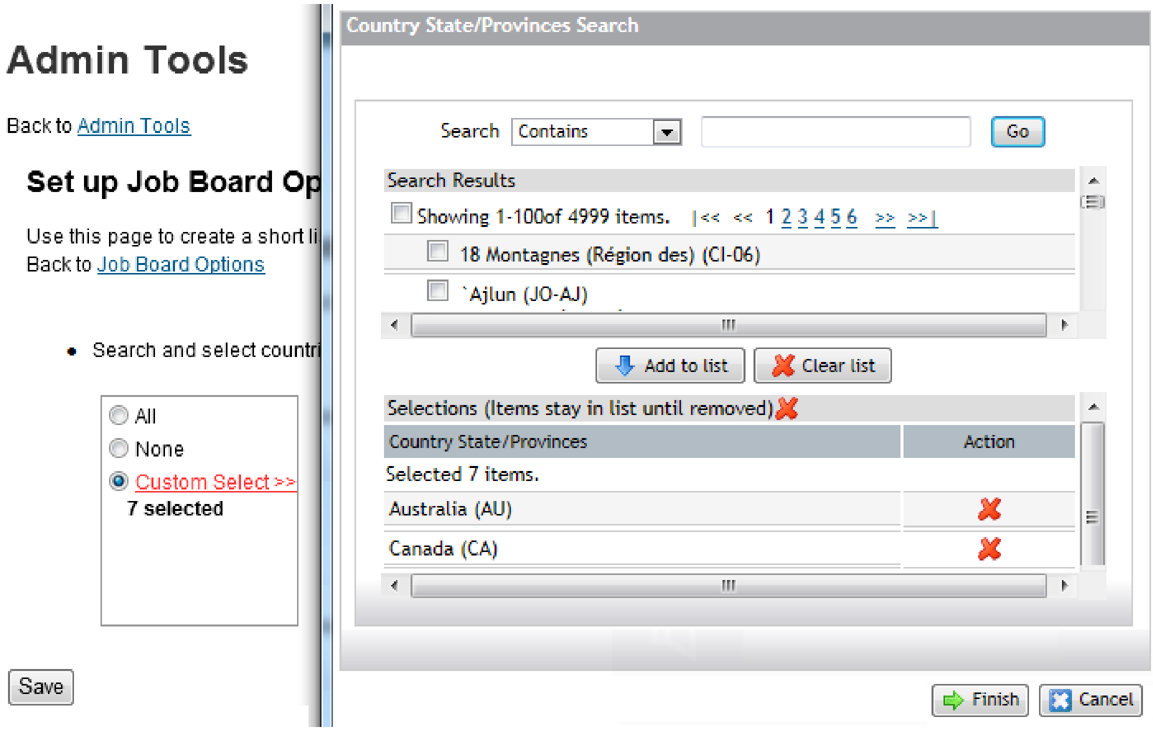
Set Up Job Board Options Menu

2. Industry Values Set up > select options

Industry Values Set Up Page

3. *Country and State/Province Values Set up* > *Custom Select* > *Search for countries by name or two-digit code*

   a. When a country is selected, all states/provinces/regions in that country are automatically selected. If not all states are desired, take the additional step of selecting only the desired states/provinces/regions within a selected country



Country and State/Province Values Set Up Page and Value Selector

18.12 Manage External User Accounts

Occasionally third party systems integration partners issue their own usernames and passwords. In order to facilitate seamless login with those tools, SuccessFactors Recruiting maintains the third party username and password and associates it to a BizX account.

18.12.1 Configuration

Procedure

Grant access to the feature

- RBP: *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage External User Accounts*
- Non-RBP: *Admin Tools* > *Manage Recruiting* > *Administration* > *Manage External User Accounts*

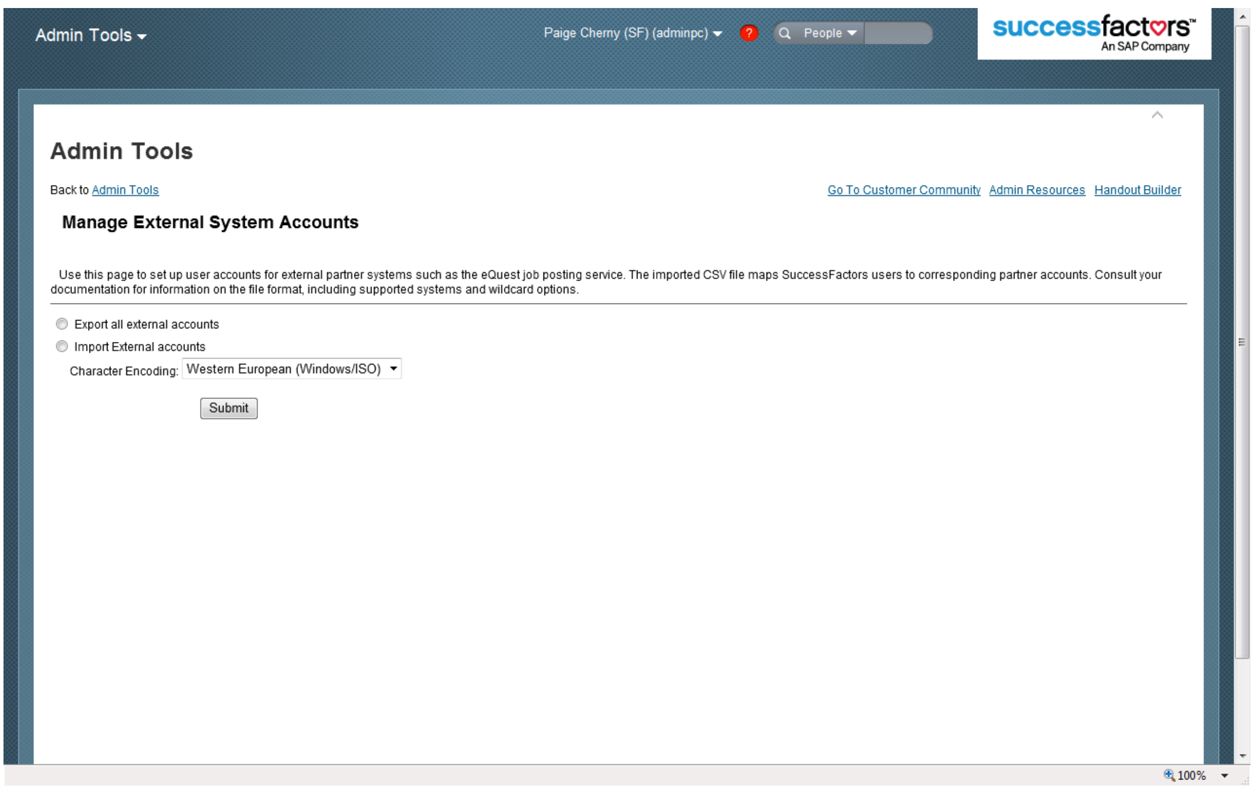
18.12.2 Working with External User Accounts

External user accounts are managed via CSV file imports. The CSV import must include the following data:

Table 41:

Column header	*Expected content*
USER_NAME	BizX account that will be associated to this third party user account. Must contain a user ID or, if the third party account should be associated to all user accounts, it is possible to enter * as a value
EXTERNAL_PARTNER_CODE	Indicates which third party vendor this account comes from
PARTNER_USERNAME	Account username provided by the third party vendor
PARTNER_PASSWORD	Account password provided by the third party vendor

External user accounts can be imported or exported.



Manage External User Accounts

If external user accounts are exported, the password will export blank. This is done for security purposes and is expected behavior. The client should keep a record of their passwords in a secure location.

18.13 Set up Agency Access

18.13.1 Prerequisites

- *Provisioning* > *Company Settings* > *Recruiting V2 Application* > *Enable Recruitment Agency Access*
- *Provisioning* > *Company Settings* > *Recruiting V2 Application* > *Agency advanced ownership setting* > *select a setting according to the client's preference*

18.13.2 Configuration

Context

Procedure

Grant access to the feature:

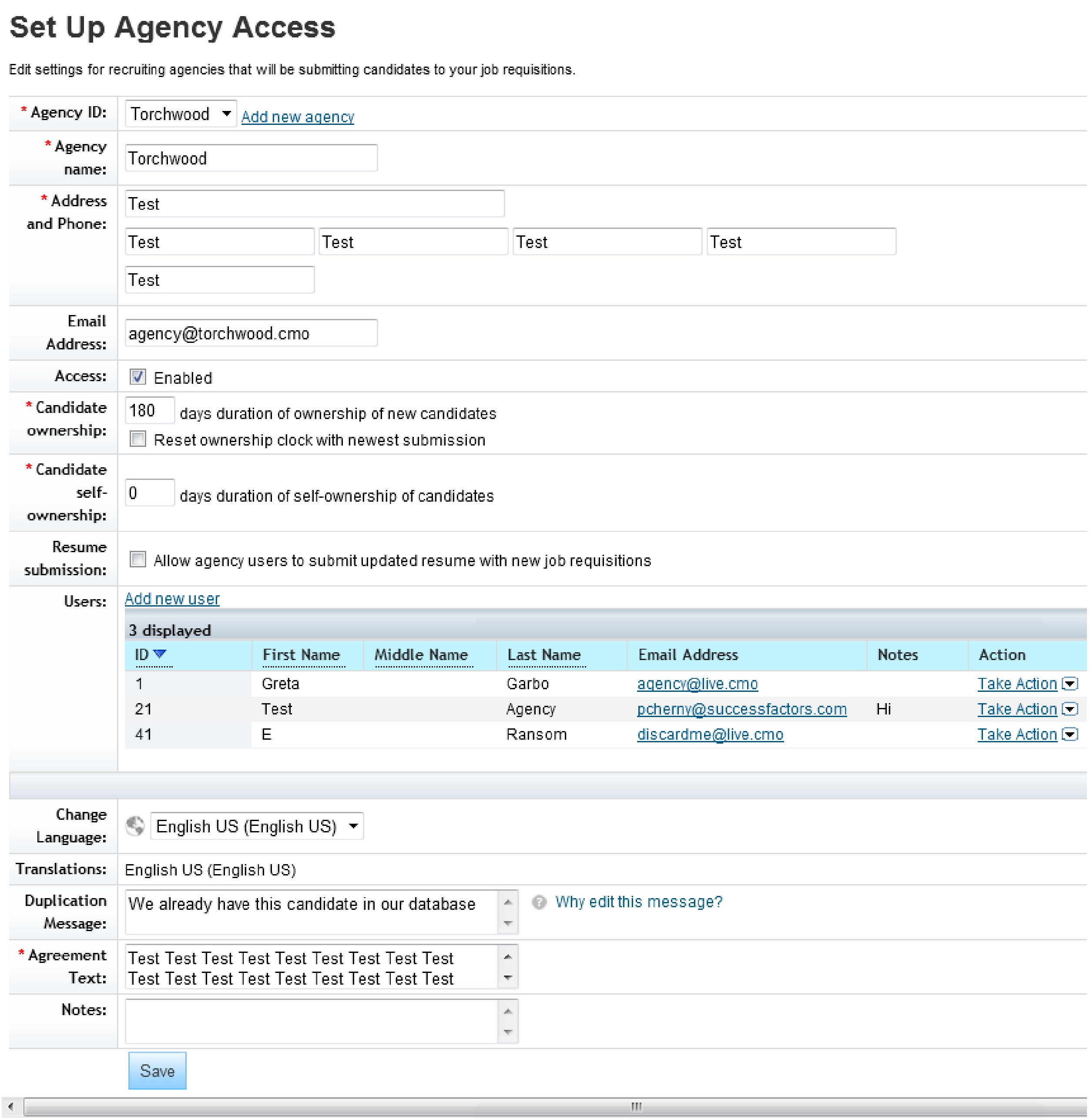
a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Set Up Agency Access*
b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Set Up Agency Access*

18.13.3 Managing Agencies

An administrative user can set up multiple agencies, and each agency can contain multiple users.

The admin can switch between various agencies to manage them and make changes by clicking the Agency ID drop down. The agencies appear alphabetically within the drop down list.

Recruiting users with permissions to manage agencies have access to all agencies. You cannot permission agency users to access only a sub-set of agencies. There are presently no options for different navigation methods to sort through the agency list.



Manage Agencies

Table 42: Table 24 Set Up an Agency

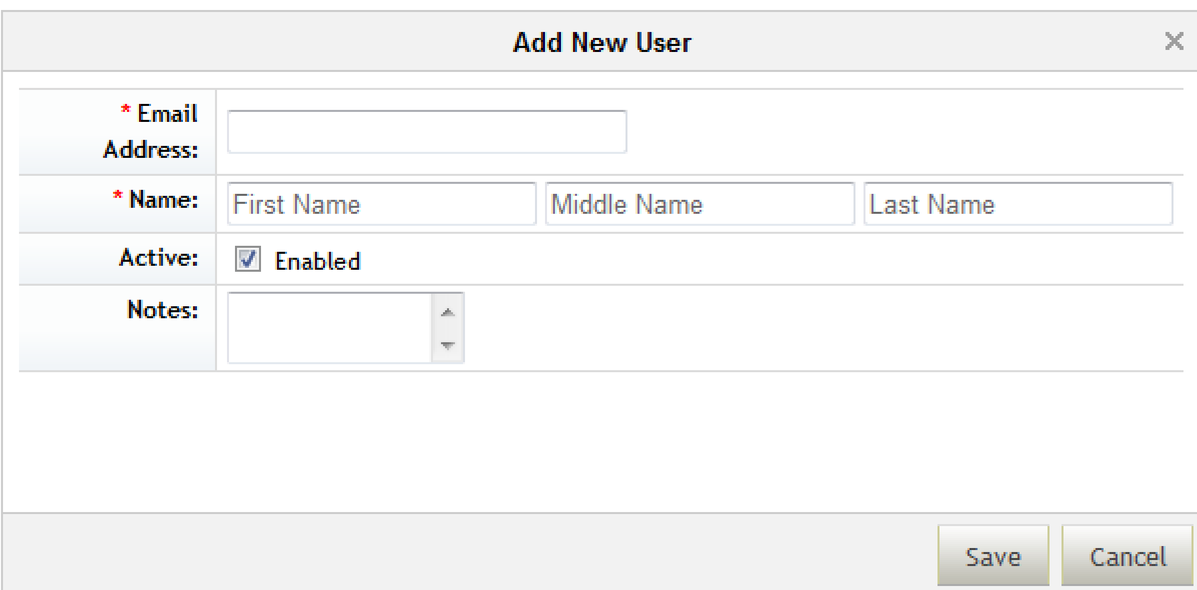
Field	*Function*
Agency ID	Unique ID for the Agency; the agency users will use this as part of their login credentials. Once this is created it cannot be changed. This value should not include spaces or special characters.

Agency name	Agency Name appears in several places in the user interface. This value may include spaces. Special characters should be avoided.
Address and Phone	Enter the information of the agency company headquarters or relevant branch.
Email Address	Enter the contact information of the company.
Access	Check this box to enable the agency in the instance. If this is unchecked the agency will be disabled in the instance and no agency users will be able to log in.
Candidate ownership	Appears when *Provisioning* > *Company Settings* > *Agency advanced ownership setting* > *Ownership for duration* is selected. The agency will be listed as owning the candidate in the database for the length of time specified in this setting. After this period of time has elapsed, the agency's ownership over the candidate will show as expired.
Reset ownership clock with newest submission	Appears when *Provisioning* > *Company Settings* > *Agency advanced ownership setting* > *Ownership for duration is selected*. If this is unchecked, the agency ownership will be tracked from the earliest date that the candidate is submitted by the agency into the database. If this is checked, the agency ownership will be tracked from the latest date that the candidate has been submitted by the agency into the database.
Candidate self-ownership	Appears when *Provisioning* > *Company Settings* > *Agency advanced ownership setting* > *Ownership for duration* is selected. The candidate will be listed as owning themselves in the database for the length of time specified in this setting and agencies will not be able to submit this candidate. After this period of time has elapsed, the candidate's ownership over the candidate profile will expire and agencies will be able to submit the candidate.
Resume submission	Allows agency to attach a new resume whenever they submit an existing candidate to a new job.
Users	A table that lists all agency users. See below for more information.
Change Language	Used to switch between languages so the admin can provide translated contents for text presented to the agencies.

Translations	Displays which languages already store values for the fields below.
Duplication Message	Message that is presented to the agency when they attempt to submit a candidate that is ineligible for submission because it is already present on the requisition or in the database and currently owned. The conditions under which this message is displayed vary depending on which Advanced agency ownership setting is selected in Provisioning.
Agreement Text	Message that is presented to the agency when they attempt to submit a candidate. The agency must click to indicate their agreement to these terms. This field has a 512 character limit; it is not intended to store the entire agency contract. If desired the client can provide a link to a hosted copy of the agency contract.
Notes	Admin-facing notes about the agency; the agency cannot see this information.

18.13.4 Set Up an Agency User

Each person working at the agency should have their own log in account.



Set Up Agency User

Table 43:

Field	*Function*

Email Address	The email address at which the agency user will receive communications. The agency users will use this as part of their login credentials.
Name	The agency user’s name
Active	Check to enable this agency user, allowing them to log in to the system.
Notes	Admin-facing notes about the agency user; the agency user cannot see this information.

18.13.5 Agencies Working with Recruiting Management

For more information about agencies working with the system and recruiting users working with agency candidates, see the Agency [page 569] section of this guide.

18.14 Manage Recruiting Email Templates

See the Recruiting Email Templates [page 63] section earlier in this guide.

18.14.1 Configuration

Context

Procedure

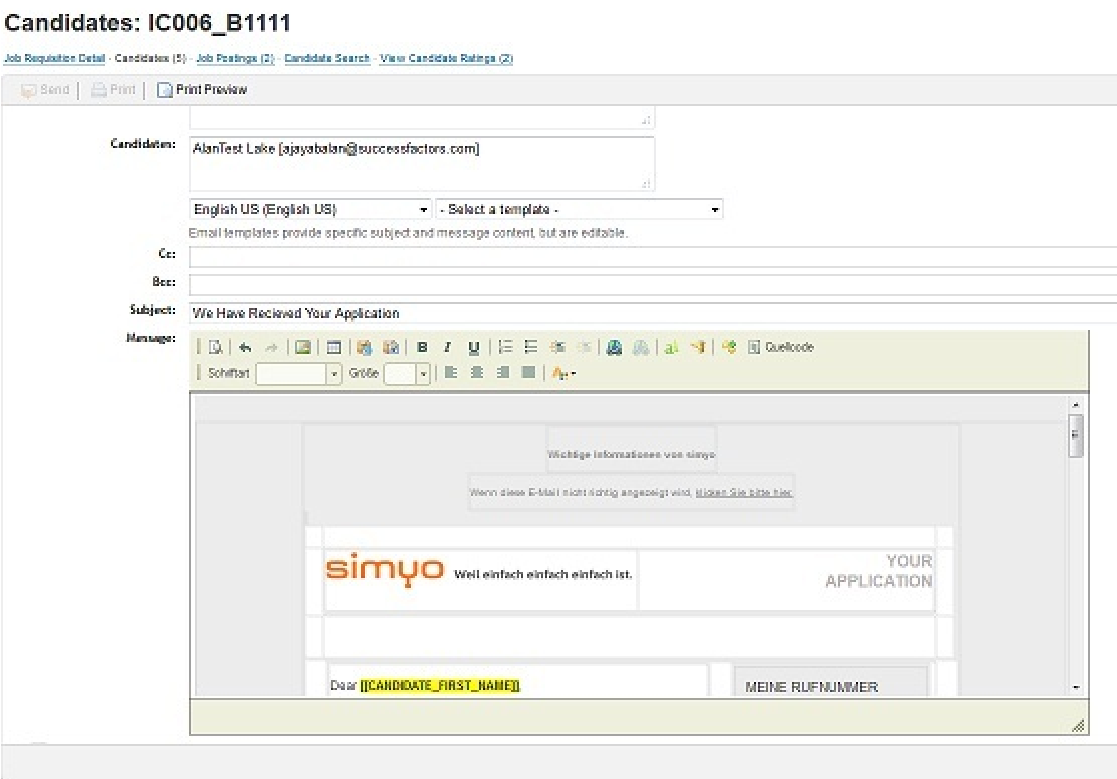
Grant access to the feature:

a. *RBP: Admin Tools > Manage Permission Roles > select Role > Permission > Manage Recruiting > Manage Recruiting Email Templates*
b. *Non-RBP: Admin Tools > Manage Recruiting Administration > Manage Recruiting Email Templates*

18.14.2 Working with Recruiting Email Templates

Email Template Rich Text Editor

The rich text editor allows a recruiting user to format email templates and insert tokens. The rich text editor also allows a recruiting user to edit the HTML source of the email. Customization of emails is not supported, but clients with HTML resources may be able to create branded email templates more tailored to their needs using this feature.



Email Template Customized by Editing HTML Source

Table 44:

Heading	*Token*	*Notes*
Candidate Email	[[CANDIDATE_EMAIL]]	contactEmail must be configured in the Candidate Profile and Application XML
Candidate First Name	[[CANDIDATE_FIRST_NAME]]	firstName must be configured in the Candidate Profile and Application XML
Candidate Full Name	[[CANDIDATE_FULL_NAME]]	candidateName must be configured in the Candidate Profile and Application XML

Candidate Last Name	[[CANDIDATE_LAST_NAME]]	lastName must be configured in the Candidate Profile and Application XML
Hiring Manager Full Name (as defined by Requisition)	[[HIRING_MGR_FULL_NAME]]	hiringManagerName must be configured in the Requisition XML
Job Requisition Number	[[JOB_REQ_ID]]	id must be configured in the Requisition XML
Location (of Job Requisition location)	[[JOB_REQ_LOCATION]]	location (standard field) must be configured in the Requisition XML. If a custom location field is configured, use the custom token instead.
Job Title	[[JOB_REQ_TITLE]]	title and extTitle must be configured in the Requisition XML
Company's Logo	[[LOGO]]	Logo image must be uploaded in *Admin* > *Company System and Logo Settings*
Originator Full Name	[[ORIGINATOR_FULL_NAME]]	originatorName must be configured in the Requisition XML
Recruiter Full Name	[[RECRUITER_FULL_NAME]]	recruiterName must be configured in the Requisition XML
Second Recruiter Full Name	[[SECOND_RECRUITER_FULL_NAME]]	secondRecruiterName must be configured in the Requisition XML
Sourcer Full Name	[[SOURCER_FULL_NAME]]	sourcerName must be configured in the Requisition XML
Today's date (e.g. January 31, 2009)	[[TODAY]]	
Home Address	[[USER_ADDR1]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Business Phone	[[USER_BIZ_PHONE]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
City	[[USER_CITY]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Country	[[USER_COUNTRY]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Service Line	[[USER_CUSTOM01]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile

Business Unit Description	[[USER_CUSTOM02]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Company Description	[[USER_CUSTOM03]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Department Description	[[USER_CUSTOM04]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Position Number	[[USER_CUSTOM05]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Birth Month and Day (MM/DD)	[[USER_CUSTOM06]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Tier Level	[[USER_CUSTOM07]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Compensation Rate	[[USER_CUSTOM08]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Minimum Salary	[[USER_CUSTOM09]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Maximum Salary	[[USER_CUSTOM10]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Leave Status	[[USER_CUSTOM11]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Customizable Field 12	[[USER_CUSTOM12]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Alternate Email Address	[[USER_CUSTOM13]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile

Customizable Field 14	[[USER_CUSTOM14]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Customizable Field 15	[[USER_CUSTOM15]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Email	[[USER_EMAIL]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Business Fax	[[USER_FAX]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
First Name	[[USER_FIRSTNAME]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Last Name	[[USER_LASTNAME]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Middle Name	[[USER_MI]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
State	[[USER_STATE]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Job Title	[[USER_TITLE]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
Zip Code	[[USER_ZIP]]	The succession-data-model must be configured to contain this field, and the field must be populated in the Employee Profile
VP of Staffing Full Name	[[VP_STAFFING_FULL_NAME]]	hiringManagerName must be configured in the Requisition XML
Job Requisition Custom Tokens	[[JOB_REQUISITION_CUSTOM1]]-[[JOB_REQUISITION_CUSTOM25]]	Create additional tokens by mapping standard or custom Requisition fields in *Provisioning* > *Configure Custom Tokens*

Job application tokens	[[JOB_APPLICATION_CUSTOM1]]-[JOB_APPLICATION_CUSTOM25]]	Create additional tokens by mapping standard or custom Application fields in *Provisioning* > *Configure Custom Tokens*
Job Offer Detail Tokens	[[JOB_OFFER_DETAIL_CUSTOM1]]-[[JOB_OFFER_DETAIL_CUSTOM25]]	Create additional tokens by mapping standard or custom Offer fields in *Provisioning* > *Configure Custom Tokens*
Application ID	[[APPLICATION_ID]]	
Candidate ID	[[CANDIDATE_ID]]	
Agency ID	[[AGENCY_ID]]	Renders as Instance:AgencyID.
Career Site Forgot Password URL	[[CAREER_SITE_FORGOT_PASS-WORD_URL]]	
Career Site URL	[[CAREER_SITE_URL]]	External Career Site URL.
Company Name	[[COMPANY_NAME]]	
Login URL	[[LOGIN URL]]	BizX URL for the client's instance login page.
Sender User	[[SENDER]]	Name of the user performing the action that causes the email to be sent.
Signature	[[SIGNATURE]]	Pulls the signature text configured in *Admin Tools* > *E-Mail Notification Template Settings* > *Email Signature*.
Application Resume	[[ATTACHMENT_RESUME]]	Renders on an email as a .zip file with the appropriate attachment.
Application Cover Letter	[[ATTACHMENT_COVER_LETTER]]	Renders on an email as a .zip file with the appropriate attachment.
Agency Name	[[AGENCY_NAME]]	Resolved in Agency trigger and Application status configuration scenarios only.
Agency Ownership Status	[[AGENCY_OWNERSHIP_STATUS]]	Resolved in Agency trigger and Application status configuration scenarios only.
Agency Portal URL	[[AGENCY_PORTAL_URL]]	Resolved in Agency trigger and Application status configuration scenarios only.
Agency Posting URL	[[AGENCY_POSTING_URL]]	Resolved in Agency trigger and Application status configuration scenarios only.
Agency User	[[AGENCY_USER]]	Resolved in Agency trigger and Application status configuration scenarios only.

Tip

Currently the product does not support a recipient token.

18.15 Recruiting Email Triggers

Recruiting email triggers manage emails that can be sent out at various points in the recruiting process. Email triggers are circumstances in the system that send an email automatically to a candidate. Similar to the system email notification templates, but are specific to recruiting.

18.15.1 Configuration

Context

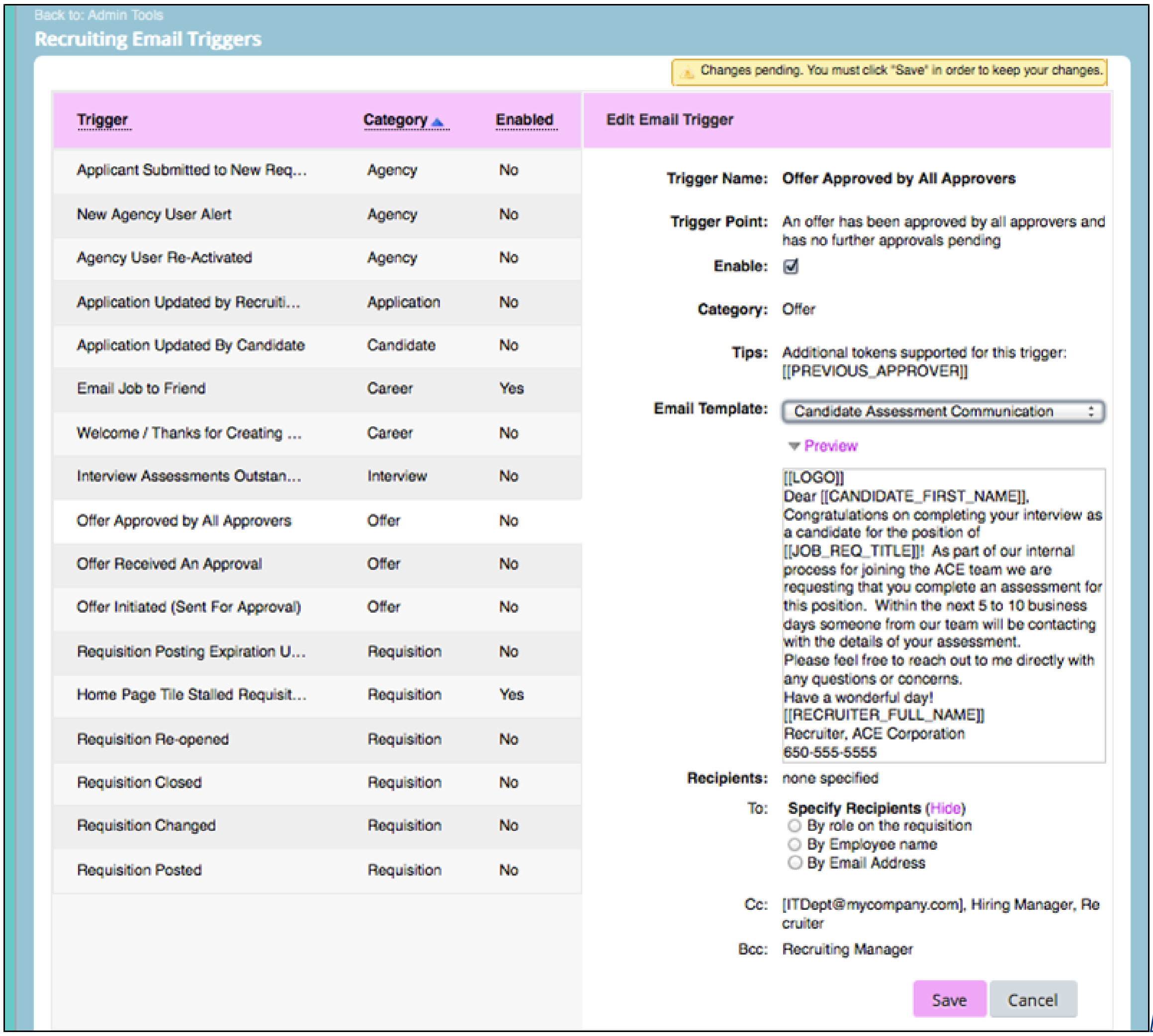
Procedure

Grant access to the feature:

a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Recruiting Email Triggers*
b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Recruiting Email Triggers*

18.15.2 Working with Recruiting E-mail Triggers

Some e-mail triggers have editable e-mail templates contained in the e-mail triggers menu. The recruiting user can select an e-mail template from the dropdown menu and edit it in the same window. Tokens will not resolve in the editing window. You can send email to recipients based on role on the requisition, employee name, or email address.



Editable email templates in Email Triggers Menu

Table 45: Available E-mail Triggers

Email Trigger	Trigger Point
Applicant Submitted to New Requisition by Agency	When an agency successfully forwards an applicant to a requisition
New Agency User Alert	A new agency user is created by the Admin
Agency User Re-Activated	When an agency user state is changed from inactive to active, send this e-mail template
Application Updated by Recruiting Operator	A non-candidate user has edited and changed data on the application
Job Requisition (Candidate)	Notification to Candidate when a job requisition is deleted
Application Updated by Candidate	The candidate has edited and changed data on the application after (not including) the initial apply
Candidate Merge Notification	Emailed to a candidate whose multiple accounts are merged
Candidate Merge Notification - Master	Emailed to a candidate whose multiple accounts are merged

Email Trigger	Trigger Point
	An offer has been approved by all approvers and has no further approvals pending
Career Site Password Reset for external candidates	Additional tokens supported for this trigger: [[CAREER-SITE_USER_NAME]]. Note: Make sure that you include [[LOGIN_URL]] token in the chosen template.
Job Alert Expired Notification	Sent when a Job Alert is left unmodified for a long period of time. The job alert expires in the number of days entered in the *Job Alert Expiration Days* field. The candidate receives the e-mail on the day of expiration to notify them that the job alert is over, so they can configure a new alert, if desired.
Job Alert Invalidated Notification	Sent when the filters specified in a Job Alert are no longer visible.
Job Alert Notification	This message is sent according to the schedule defined in the Job Alert.
Invite Candidate to Apply	This message is sent to a forwarded candidate once they've been invited to apply for a Job
Email Job to Friend	A candidate uses the “Email Job to Friend” feature in the career site. User can select a template to populate the default e-mail text, which can then be changed by a user. The Admin user can also select templates that populates a noneditable header and footer text appended to the e-mail and set a character limit for text entered by the sender. If the template exceeds the set character limit, the text will be truncated at the character limit. The max value for the character limit is 1000.
Welcome / Thanks for Creating Account	The external candidate has successfully created an active user account
Interview Assessments Outstanding	If an interview assessment form has been incomplete for [N] days, send an e-mail at regularly defined intervals, until the defined maximum number of emails is reached. If no interview data is set, this e-mail will not send.
Offer Approved by All Approvers	An offer has been approved by all approvers and has no further approvals pending
Offer Received an Approval	An offer has been approved by an approver who is not the last approver, and has been passed to the next approver in queue
Offer Initiated (Sent for Approval)	An offer has been sent to the first approver in queue

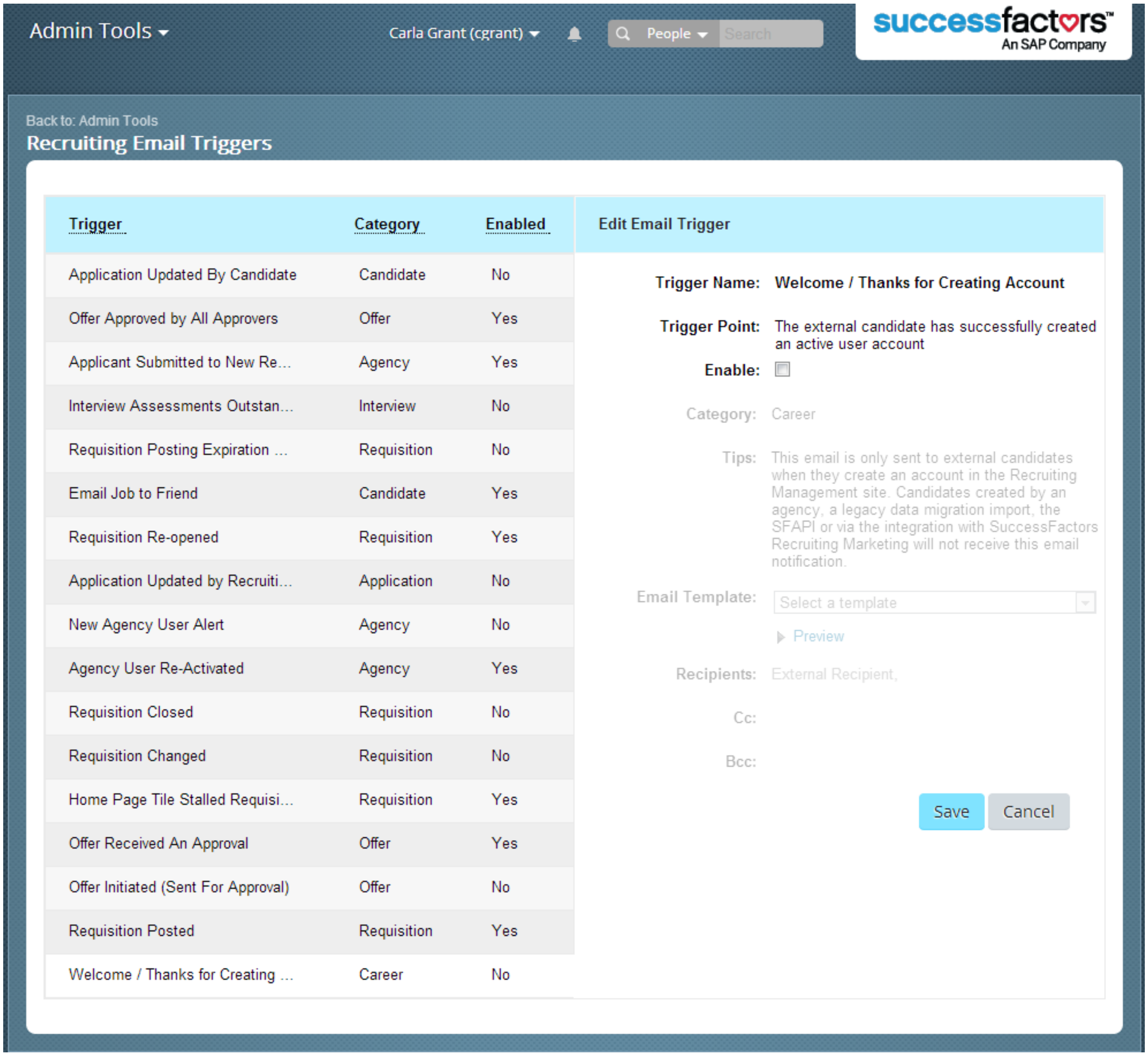
Email Trigger	Trigger Point
Requisition Posting Expiration	A job requisition has one or more postings within [N] days of expiration **Tip** Important Tip: When configuring Requisition Posting Expiration e-mail templates, you MUST enclose job requisition tokens inside [[BEGIN_REPEAT]] and [[END_REPEAT]] tokens. For example: Dear recruiter, The following reqs have expiring job postings: [[BEGIN_REPEAT]] [[requisition]]: expires [[date]] [[END_REPEAT]] Regards, The System
Home Page Tile Stalled Requistion Nudge	A user clicks the “nudge” feature on the Home Page Tile of the v12 homepage
Requisition Re-opened	The job requisition has changed from a closed state to an approved state
Requisition Closed	The job requisition has changed from an approved state to a closed state
Requisition Changed	The job requisition data has been updated

Email Trigger	Trigger Point
Requisition Posted	The job requisition has postings (internal, external, internal private, external private, agency/agencies, eQuest) that has been newly initiated by an operator. To send consolidated email content, the email template must have the [[BEGIN_REPEAT]] and [[END_REPEAT]] tokens defined. Any text or requisition-related tokens included within these tokens repeats. [[POSTING_TYPES]] is a custom token supported only in this trigger. It cannot be used for any other trigger or template. This token resolves all the posting types about to expire for therequisition. ➜ Tip Important Tip: When configuring Requisition Posting Expiration e-mail templates, you MUST enclose job requisition tokens inside [[BEGIN_REPEAT]] and [[END_REPEAT]] tokens. For example: Dear recruiter, The following reqs have expiring job postings: [[BEGIN_REPEAT]] [[requisition]]: expires [[date]] [[END_REPEAT]] Regards, The System
Job Requisition Deleted (Internal)	Notification to Internal user when a job requisition is deleted
Approve Job Requisition restored	Notification to be sent out on restoring an approved job requisition.
Candidate Self-Schedules Interview	E-mail sent to candidates who have been invited to interview, telling them to login and confirm an interview time. Required for Interview Scheduling.
Interview Confirmation to Candidate	E-mail set to a candidate when they have confirmed an interview.
Interview Confirmation to Organizers	E-mail sent to the organizers when a candidate confirms an interview.
Interview Confirmation to Interviewers	E-mail sent to the interviewers when a candidate confirms an interview
Interview Delete Notification	Notification to all participants when an interview is deleted by an assigned user. Required for Interview Scheduling.
Interview Availability Notification	E-mail request for interviewers to add availability for a certain time. Required for Interview Scheduling.
Interview Cancellation to Organizers	E-mail sent to the organizers when a candidate declines an interview. Interview Scheduling.

Email Trigger	Trigger Point
Booked Interview Cancellation to Interviewers	E-mail sent to the interviewers when a candidate cancels a booked interview. Interview Scheduling.
Booked Interview Cancellation to Organizers	E-mail sent to the organizers when a candidate cancels a booked interview. Required for Interview Scheduling.
Booked Interview Reschedule Email to Candidate	E-mail sent to candidate to confirm they have rescheduled their interview.
Candidate Interview Response Reminder	E-mail sent to candidates in the status of "Not Booked" who have been sent an invitation to interview but have not re-sponded yet. Required for Interview Scheduling.
Booked Candidate Interview Update	E-mail sent to booked candidates if details of the interview are changed, for example, location or attachments. Required for Interview Scheduling.
Cancel Interview Notification	E-mail sent to all participants when an interview is canceled by interviewers.
Offer Approval Declined	An offer has been declined by an approver
Online Offer Cancelled by Sender	Operator has cancelled the Online offer which was in pending state
Online Offer Cancelled by Sender Candidate Notification	Candidate will get notified when pending online offer is cancel-led by sender

➜ Tip

Additional e-mail triggers and migration of recruiting specific e-mail templates are scheduled to be added to this page in upcoming releases.



Recruiting Email Triggers Window

Clicking on one of these triggers opens a window where the recruiting user can enable/disable the trigger, select an e-mail template, see the system-specified recipient, specify additional recipients, and view the CC/BCC users specified on the Recruiting Email Template. For more information on e-mail templates see Recruiting Email Templates [page 63].

18.16 Manage Offer Letter Templates

Offer Letter Templates are rich text templates used to generate offer letters by end users.

In order for a recruiting user to access and use Offer Letter Templates, certain configurations and permissions must be set up to enable the Offer Letter feature. For more information see the Offer Letters [page 401] section of this guide.

18.16.1 Configuration

Context

Procedure

Grant access to the feature:

a. *RBP:* *Admin Tools* › *Manage Permission Roles* › *select Role* › *Permission* › *Manage Recruiting* › *Manage Offer Letter Templates*

b. *Non-RBP:* *Admin Tools* › *Manage Recruiting Administration* › *Manage Offer Letter Templates*

18.16.2 Working with Offer Letter Templates

A recruiting user can create new templates or manage existing templates in *Admin Tools* › *Manage Offer Letter Templates*.

The full list of offer letter templates, while organized by country and language, is available to any user creating an offer letter. Groupings of these templates cannot be individually permissioned (for example, US recruiting users see only US templates, etc.)

Offer letter templates order alphabetically. There is no way to change the sort order by configuration.

Manage Offer Letter Templates

Use this page to add or edit offer letter templates. Recruiting users will have access to these templates when preparing correspondence to applicants.

Create New Template

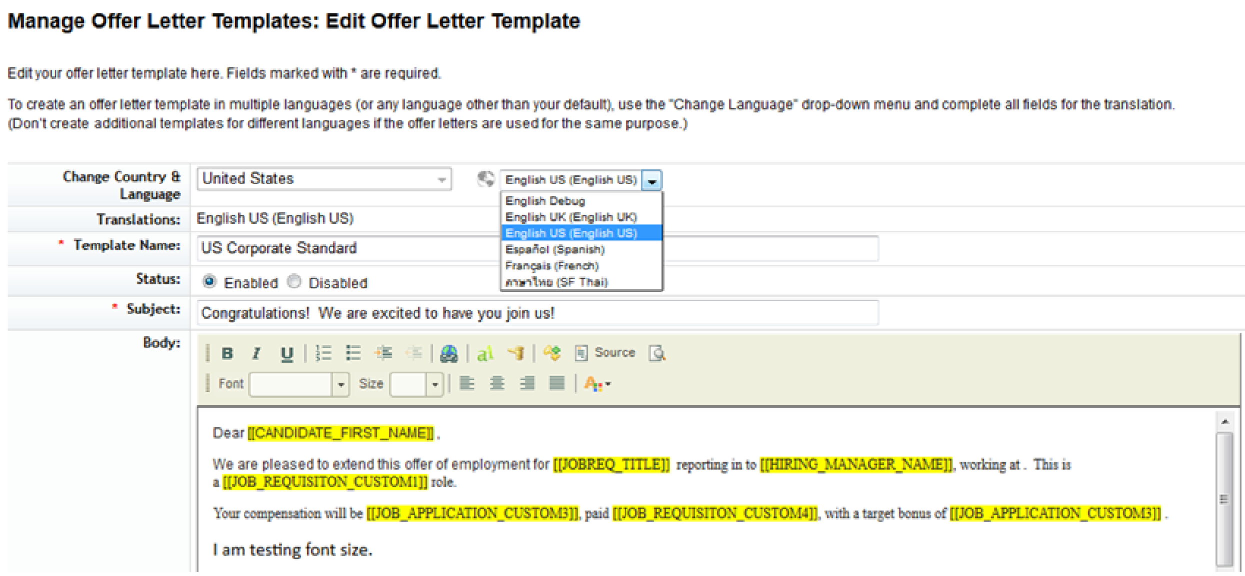
Template Name	Status	Translated In	Last Modified	Action
A	Enabled	en_US	2012-09-01	
T	Enabled	en_US	2012-09-01	
Test	Enabled	en_US	2012-08-06	
US Corporate Standard	Enabled	en_US	2013-04-30	
Z	Enabled	en_US	2012-09-01	

Manage Offer Letter Templates

To open the template editing page, click the template name, Action icon or Create New Template.

Conditional language assembly is not supported in offer letters (for example, it is not possible to set up a rule stating “if relocation = yes, insert relocation paragraph”.)

Offer letter templates can be set up in multiple languages. For more information see the LinkedIn [page 626] section of this guide.



Edit an Offer Letter Template

18.16.3 Offer Letter Template Tokens

Offer Letter Templates can contain “tokens” (variables) that auto-populate with data from requisitions, applications and the offer detail approval, plus a few that populate from the user profiles of the operators.

Tokens with no data to populate will simply show up as the token placeholder and need to be manually removed.

Tokens often appear with yellow highlighting when inserted. The yellow highlighting may vanish upon print preview but it is safer to manually adjust the formatting of the letter so there is no highlighting.

18.16.4 Images in Offer Letter Templates

A logo token is available to populate the default logo of the company or images can be copied and pasted into the offer letter. Images should be hosted in the same data-center of the client so there are no browser warning pop ups.

“Letterhead” functionality is not currently supported. This means margins cannot be adjusted, page number presence and formatting cannot be adjusted, images cannot be inserted behind the offer letter text, etc.

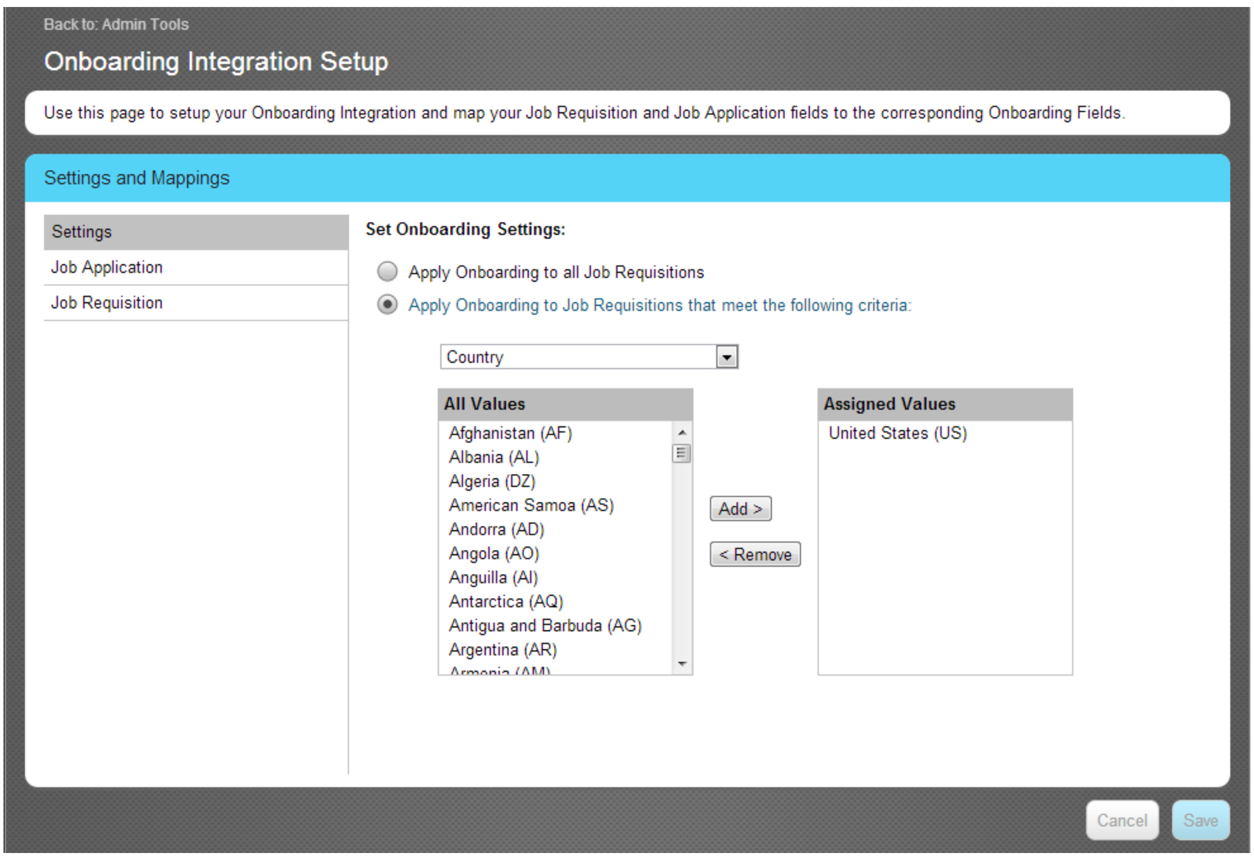
18.17 Manage Twitter Integration Settings

Twitter Integration coming in Recruiting Handbook 2.0.

18.18 Setup Onboarding Integration

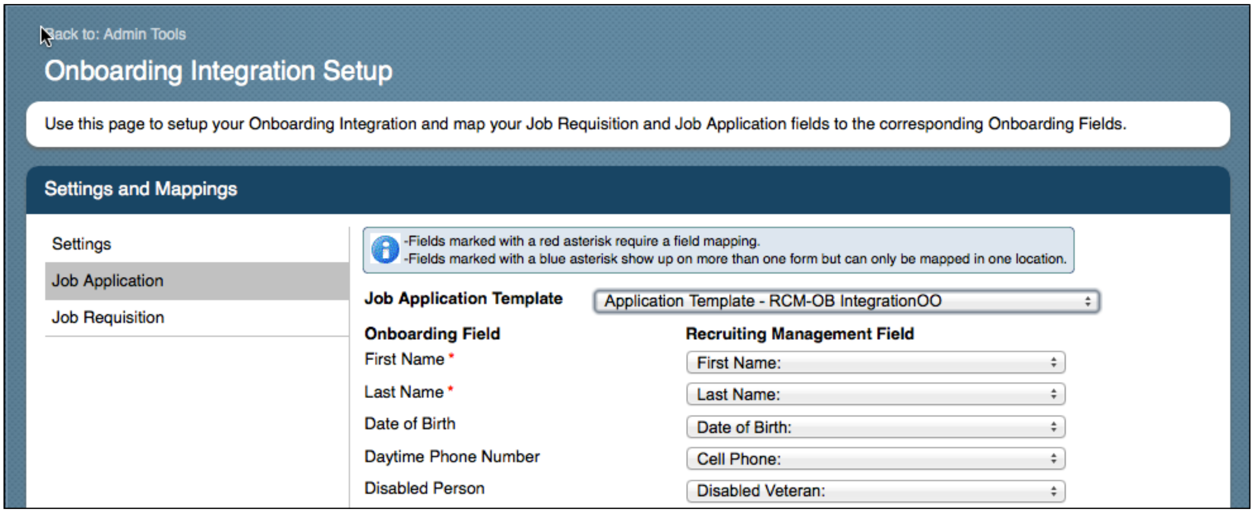
In the Setup Onboarding Integration menu, a recruiting user can configure settings for the Onboarding Integration and map Job Requisition, Job Application and Job Offer fields to Onboarding fields.

The Settings tab allows the recruiting user to enable Onboarding for either all Job Requisitions, or only certain Requisitions. The recruiting user can use the provided drop-down menu to set criteria for the requisitions which will have Onboarding applied. You can only limit Onboarding to Requisitions based on one field or criteria.



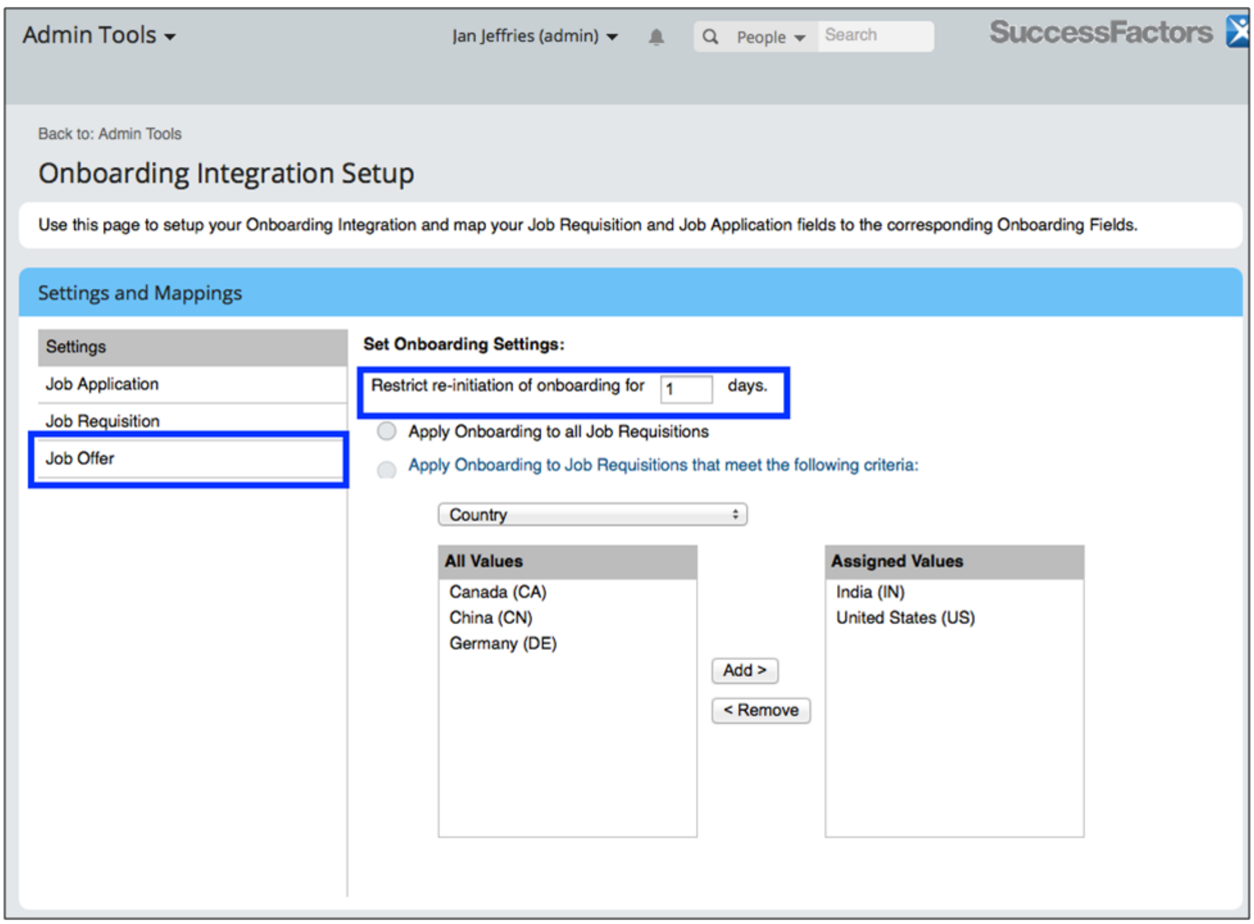
Setup Onboarding Integration - Settings

Note the fields marked with a red asterisk in the tool require a job mapping. Fields marked with a blue asterisk show up on more than one form, but can only be mapped to one location.



Onboarding Field Mapping

When configuring Onboarding mapping for Job Offer, the recruiting user can also define a restriction on the re-initiation of onboarding by entering their chosen period in days in the appropriate box. This prevents the same candidate from being onboarded multiple times in the set timeframe.



Onboarding- Job Offer Mapping

Table 46: Default Onboarding Field mapping – Job Requisition

Onboarding Field ID	RCM Template Field	Notes
RecruiterID	Recruiter operator	recruiterName
RecruiterFullName	N/A	Onboarding will fetch these fields automatically
RecruitingTitle	N/A	
RecruiterEmail	N/A	
ManagerID	N/A	
ManagerFullName	N/A	
ManagerTitle	N/A	
ManagerEmail	N/A	

Table 47: Default Onboarding Field Mapping- Job Application

Onboarding Field ID	RCM Template Field
Basic Employee Data	
LastName	lastName
FirstName	firstName
MiddleName	middleName
Suffix	No Mapping
EMail	contactEmail/primaryEmail
Address1	address
Address2	address
City	city
CountryTownship	No Mapping
State	state
Zip	zip
Zip4	zip
Country	country
PostCode	zip
PhoneAC	cellphone/homePhone
EveningPhoneCountryCode	No Mapping
DaytimePhoneCountryCode	No Mapping
PhoneNum	cellPhone/homephone
MailAddress	address
MailAddress2	address
MailCity	city
MailZip	zip
IsMailingAddressSamePhysical	Nom Mappping

MailAddressState	state
MailAddressState_Text	state
MailCountry	country
MailCountry_Text	country
MailZip4	zip
EEO Information	
DateofBirth	dateOfBirth
HispOrLat	race
EthnicGroupCode2	No Mapping
Ethnicity_text	ethnicity
Gender	gender
GenderDesc	gender
VeteranVietnam	No Mapping
VeteranRecentlySeparated	
VeteranDisabled	
VeteranAnother	
Campaign	
MilitaryEra	
SeparationDate	
ArmyBranch	
ArmyBranch_text	
VeteranStatus	veteranStatus
Emergency Contact Details	
EmergencyCountry	No Mapping
EmergencyState	
EmergencyFirstName	
EmergencyLastName	
EmergencyAddress	
EmergenceyCity	
EmergencyZip	
EmergencyZip4	
EmergencyDaytimemPhoneCountry	
EmergencyDaytimePhoneNum	
EmergencyDaytimePhoneCountry	
EmergencyPhoneAC	
EmergencyEveningPhoneCountry	

EmergencyEveningPhoneAC	
EmergencyEveningPhoneNum	
EmergencyWorkPhoneCountry	
EmergencyWorkPhoneAC	
EmergencyWorkPhoneNum	
EmergencyEmail	
EmergencyRelationship_Code	
Standard Disability	
DisabledPersion	disabilityStatus
NeedAccomodation	No Mapping
DisabilityStatusText	disabilityStatus
Job Information	
JobReferralSource	referralSource
JobReferralSourceOther	No Mapping
JobRefferedByEmployee	
HireDate	
OrientationDate	
OrientationTime	

Tip

There are 54 hard-coded fields which come from the Onboarding Module. These fields show on the Requisition and Application and are not updated based on customer. For a list of hard-coded fields see Sharepoint.

18.19 Export New Hire Candidates

The New Hire Export functionality allows clients to export a pre-built CSV export of candidates in a Hired-category status.

Many clients do not find this pre-built export to be sufficient to meet their needs. For more information about alternative approaches, see the New Hire Processing [page 410] section of this guide.

18.19.1 Configuration

Context

Procedure

Grant access to the feature:

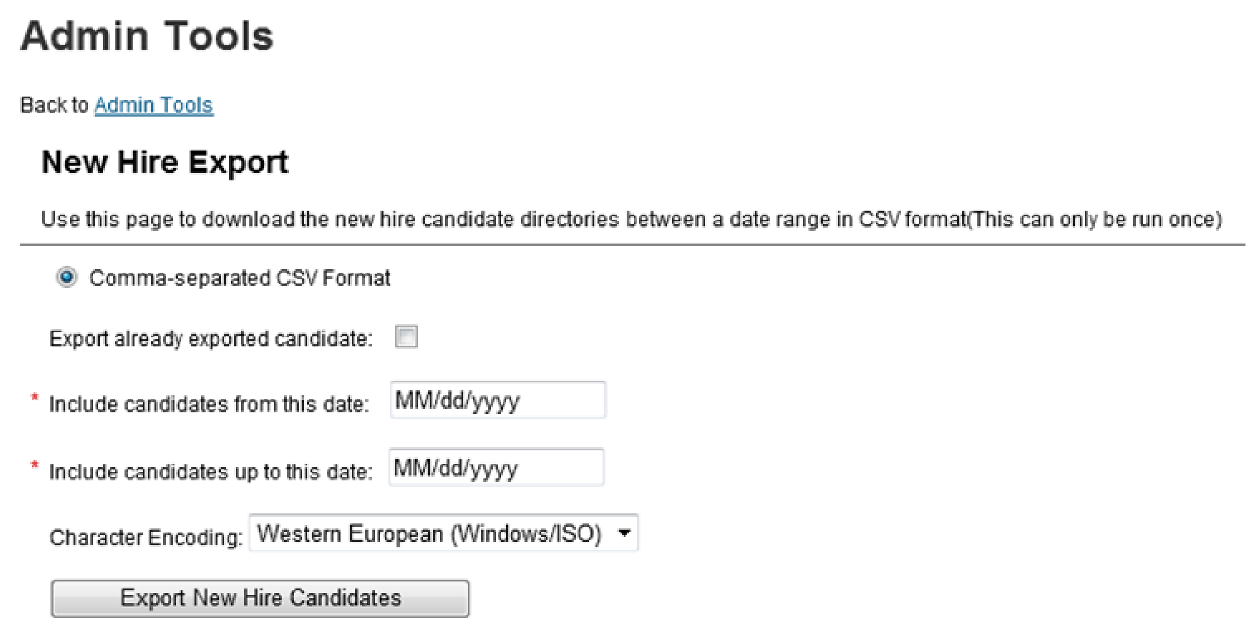
a. *RBP: Admin Tools > Manage Permission Roles > select Role > Permission > Manage Recruiting > Export New Hire Candidates*
b. *Non-RBP: Admin Tools > Manage Recruiting Administration > Export New Hire Candidates*

18.19.2 Working with the Pre-Built New Hire Export

It is possible to specify the time period from which you wish to extract hired candidates. The dates check against the system-captured hire date, which is recorded when the applicant moves into a status in the Hired category.

When candidates are exported this way, the system sets a hiredOn date. This allows the report to export only candidates who have not previously been exported. (Note that the pre-built SAP new hire integration manages this same data via SFAPI, so it is possible that this date may be set even if the New Hire Export admin feature is not used.)

The “Exported already exported candidate” checkbox determines whether the criteria used to select the content of the report is restricted to only hired applicants where hiredOn = null or allows all hired applicants, regardless of “exported on” date.



New Hire Export Page

The new hire export includes a pre-set list of standard fields. The field content of this report is not configurable and cannot be re-mapped. Often these fields are insufficient to meet a client's needs and so clients choose to build a custom Ad Hoc Report and have a SuccessFactors representative schedule this in *Provisioning* > *Manage Scheduled Jobs* to export on a scheduled basis to an ftp site for pickup. Alternatively some clients may choose to use the SAP New Hire integration pack, or build a custom web-services-based integration.

Table 48: Table 27 Standard New Hire Export fields

Standard New Hire Export fields
CANDIDATE_USERID
CANDIDATE_FIRSTNAME
CANDIDATE_MIDDLENAME
CANDIDATE_LASTNAME
CANDIDATE_CONTACTEMAIL
CANDIDATE_GENDER
CANDIDATE_ETHNICITY
CANDIDATE_RACE
CANDIDATE_ADDRESS
CANDIDATE_DATEOFAVAIL
CANDIDATE_CELLPHONE
CANDIDATE_HOMEPHONE
CANDIDATE_FAXNUMBER
CANDIDATE_CITY
CANDIDATE_STATE

CANDIDATE_ZIP
CANDIDATE_DATEOFBIRTH
CANDIDATE_DISABILITYSTATUS
CANDIDATE_MINANNUALSAL
CANDIDATE_PREFERREDLOC
CANDIDATE_SSN
CANDIDATE_VETERANSTATUS
CANDIDATE_CURRENTTITLE
CANDIDATE_CURRENTCOMPANY
APPLICATION_CANDIDATEID
APPLICATION_FIRSTNAME
APPLICATION_MIDDLENAME
APPLICATION_LASTNAME
APPLICATION_JOBREQID
APPLICATION_JOBTITLE
APPLICATION_DATEOFAPPLICATION
APPLICATION_LASTMODIFIED
APPLICATION_REVIEWDATE
APPLICATION_SOURCE
APPLICATION_STATUS
APPLICATION_REFERRELSOURCE
APPLICATION_CONTACTEMAIL
APPLICATION_GENDER
APPLICATION_ETHNICITY
APPLICATION_RACE
APPLICATION_ADDRESS
APPLICATION_DATE_OF_AVAILABILITY
APPLICATION_CELLPHONE
APPLICATION_HOMEPHONE
APPLICATION_FAXNUMBER
APPLICATION_CITY
APPLICATION_STATE
APPLICATION_ZIP
APPLICATION_DATE_OF_BIRTH
APPLICATION_DISABILITY_STATUS
APPLICATION_MINANNUALSAL

APPLICATION_PREFERREDLOC
APPLICATION_SSN
APPLICATION_VETERANSTATUS
JOBREQ_ID
JOBREQ_TITLE
JOBREQ_JOBCODE
JOBREQ_FORM_ORIGINATOR_USER_ID
JOBREQ_RECRUITER_USER_ID
JOBREQ_HIRING_MANAGER_USER_ID
JOBREQ_DEPARTMENT
JOBREQ_DIVISION
JOBREQ_LOCATION
JOBREQ_COUNTRY

18.20 Set Up Internal Candidate Search

The searching of internal candidates can be disabled entirely or limited to where a date field on the Employee Profile is X number of days from today or earlier. For example, clients may wish to only allow internal candidates to be found in candidate search if the “ready to develop” date on their Employee Profile was 30 days from today or earlier.

18.20.1 Configuration

Configure at least one userinfo-element field on the succession-data-model XML with type="date"

```
<userinfo-element id="origHireDate" type="date" required="false">
  <label>HireDate</label>
</userinfo-element>
```

18.20.2 Working with Set Up Internal Candidate Search

Check the desired setting. Only one setting may be selected at a time, or both settings may be de-selected.

Candidate Search Settings

- *Disable searching of internal candidates:* No internal candidates will return in the candidate search results

- *Find candidates where <select> is <x> days from today or earlier:* Internal candidates will only return in the candidate search results if the specified date on their Employee Profile matches the criteria specified by the administrator. Note that if no userinfo-element date fields are set up on the succession-data-model, this option will be greyed out and unavailable.

18.21 Manage Job Posting Header and Footer

Header and Footer Templates are used to populate data onto a requisition that displays to candidates viewing a job posting. Generally these templates are standardized and recruiting users want to pick from a pre-defined list rather than create a new set of header and footer text from scratch. The Job Posting Header and Footer section of Admin Tools allows the admin to set up templates with various sets of standardized text.

18.21.1 Prerequisites

- *Admin Tools* > *Recruiting Languages* > *select applicable languages*

18.21.2 Configuration

Before configuring *Manage Job Posting Header and Footer* in*Admin Tools,* Professional Services must enable the feature in Provisioning.

Context

Procedure

1. *Provisioning* > *Company Settings* > *Enable Job Description Header and Footer*
2. Grant access to the feature:
   a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage Job Posting Header and Footer*
   b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Manage Job Posting Header and Footer*
3. Additional configuration is required to allow end users to use the header and footer templates.
4. For more information see the Headers and Footers [page 337] section of this guide.

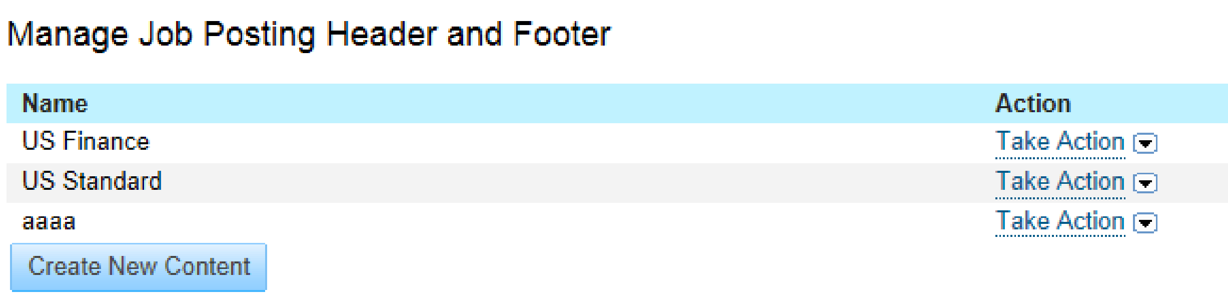
18.21.3 Working with Job Posting Header and Footer Templates

Context

Procedure

1. *Admin Tools* > *Manage Job Posting Header and Footer*
2. Click *Take Action* > *Edit or Create New Content* to open a template for editing

Next Steps



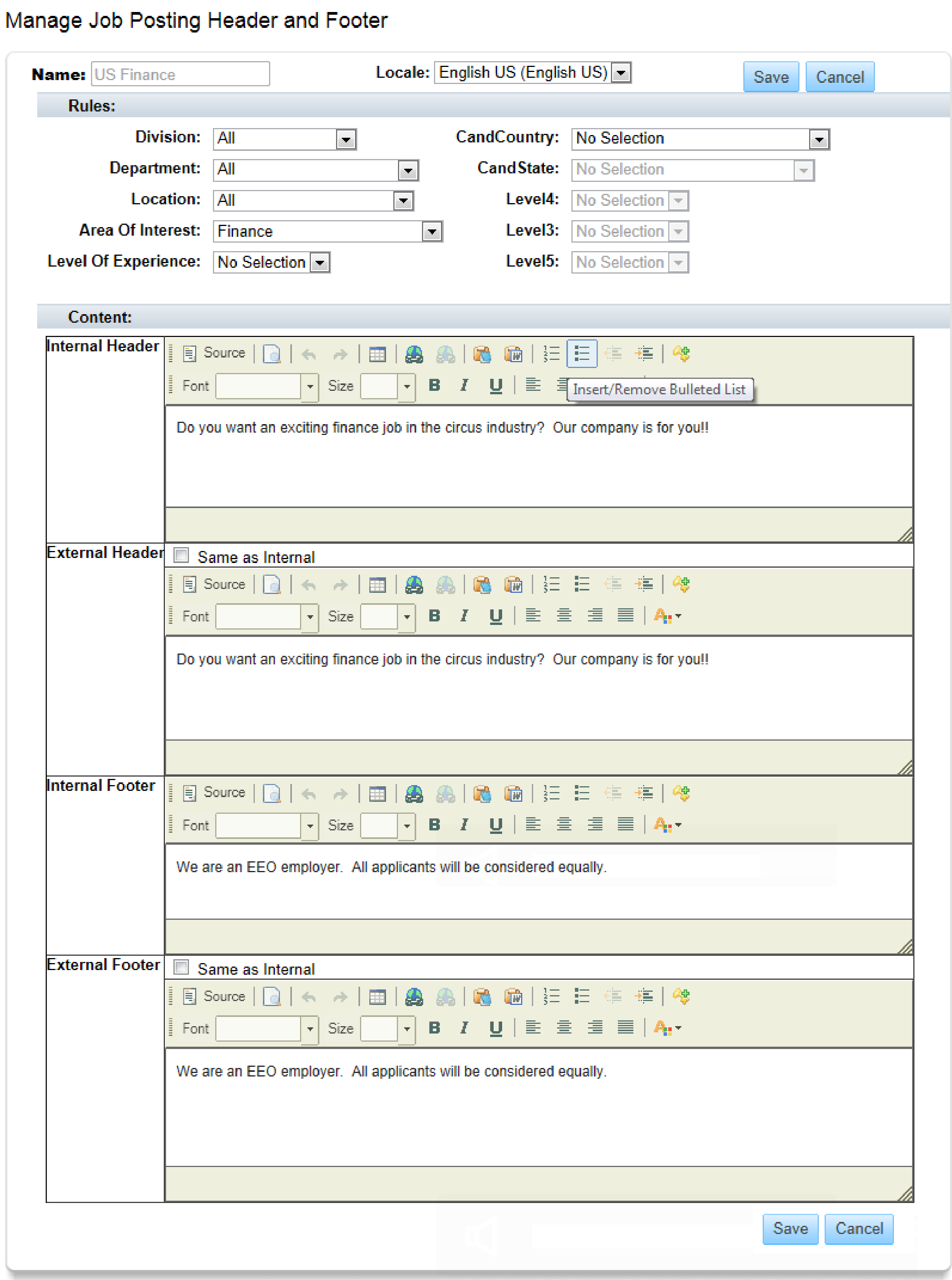
Manage Header and Footer List

In each template the admin can specify the following:

Table 49:

Field	Function
Name	Name appears in several places in the user interface. This value may include spaces. Special characters should be avoided. Once this is created it cannot be changed.
Locale	Used to switch between languages so the admin can provide translated contents for text.

Filters	These fields populate from *Provisioning* > *Internal and External Applicant Search Settings*. Values set in these filters on the template are compared to the values set in the filter fields on the requisition when a recruiting user selects a template. The template that has the most matching values appears as the [Recommended] template. If some templates are equal in the number of matching values, or if all templates are equally mismatched, the top alphabetized template appears as the [Recommended] template. There is no way to disable the [Recommended] functionality.
Internal Header	This is the text the internal candidates will see at the top of posted jobs.
External Header	This is the text the internal candidates will see at the bottom of posted jobs.
(Header) Same as Internal	Check this box to cause the text from the internal field to populate into the external field. This functions the same way as the “Same as Internal” button on the requisition.
Internal Footer	This is the text the external candidates will see at the top of posted jobs.
External Footer	This is the text the internal candidates will see at the bottom of posted jobs.
(Footer) Same as Internal	Check this box to cause the text from the internal field to populate into the external field. This functions the same way as the “Same as Internal” button on the requisition.



Header and Footer Template Edit Page

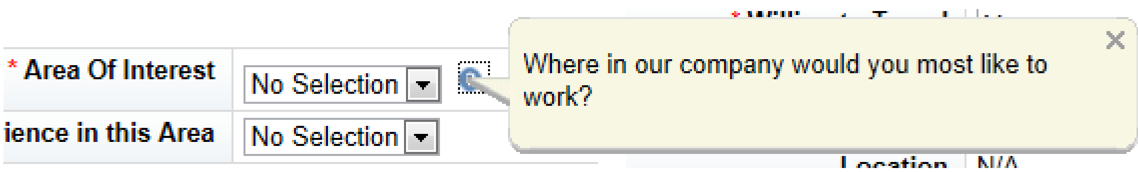
18.22 Setup Employee Referral Program

Referral Ownership rules and Employee Referral Program Information can be set by navigating to *Admin Tools* > *Managing Recruiting* > *Setup Employee Referral Program*

1. Ownership Options
   - Ownership by Requisition for Employee Referral Program
   - Ownership by Duration for Employee Referral Program. Ownership by Duration should not be configured for more than 1875 days (five years).
   - Employee shall maintain ownership over a referral for N days
2. Ownership start date should use:
   - Initial submission date
   - Most recent submission date
3. Employee Referral Program- Program Information
   - Add up to 300 characters that will populate at the top of the Referral Tracking page

18.23 Manage Recruiting Custom Help Text

Custom Help Text is used to provide additional information about the purpose of a field for users doing data input into the field.



Recruiting Custom Help Text on a Field

18.23.1 Prerequisites

- *Admin Tools* > *Recruiting Languages* > *select applicable languages*

18.23.2 Configuration

Context

Procedure

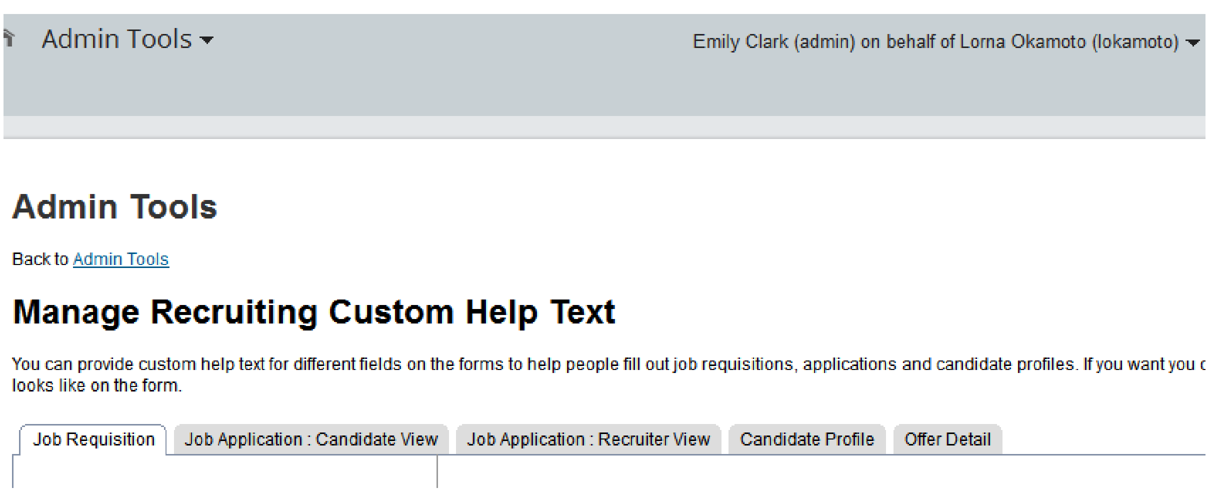
1. Grant access to the feature:
   a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Manage Recruiting Custom Help Text*
   b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Manage Recruiting Custom Help Text*
2. Additional configuration is required to allow end users to use the header and footer templates. For more information see the Headers and Footers [page 337] section of this guide.

18.23.3 Working with Custom Help Text

Context

Procedure

1. *Admin Tools* > *Manage Recruiting Custom Help Text*
2. Select the appropriate object tab – Job Requisition, Job Application: Candidate View, Job Application: Recruiter View, Candidate Profile, Offer Detail, or Offer Approval. Other recruiting objects do not support custom help text.



3. Provide the text that should appear in the help text bubble.

Next Steps

> **Note**
>
> Note that Job Application custom help text appears to candidates, not recruiting users. There is no way to provide help text on the recruiting user-facing view of the application record.

18.24 Setup Recruiting Marketing Job Field Mapping

For customers using real-time job sync, jobs posted externally are sent to RMK in real-time. The Recruiting Management platform also sends real-time updates and closings to RMK.

18.24.1 Prerequisites

Setup Recruiting Marketing Job Field Mapping requires initial configuration in Provisioning by Professional Services.

- *Enable Provisioning* > *Company Settings* > *Recruiting* > *Use email as external applicant userId*
- *Enable Provisioning* > *Company Settings* > *Recruiting* > *Enable Social Sourcing* > *Jobs2Web (Recruiting Marketing)*

18.24.2 Configuration

Setup Recruiting Marketing Job Field Mapping requires initial configuraiton in Provisioning by Professional Services.

Context

Procedure

1. Navigate to *Provisioning* > *Shared Services* > *Job2Web (Recruiting Marketing) settings*
    a. Add API Key for Job Post Sync
    b. Add Username for Job Post Sync
    c. Add Password for Job Post Sync

    > **Tip**
    >
    > These credentials come from the PS team who configure API credentials in the RMK system, Command Center. PS and RMK engagement is required to produce these credentials.

    After you have updated the API key, username, and password in Provisioning, you must grant Admin user permissions for the RMK Mapping page.
2. Once permission has been granted, the Admin user will need to map their RCM custom and/or standard Job Requisition fields to the RMK hard coded fields.

    > **Tip**
    >
    > The customer must complete the mapping for every Job Requisition XML template.

Table 50: Table 28 Mapping RMK fields to RCM fields for real time job sync

RMK Field	Required?	Supported RCM field types
Job Title	Yes	text, picklist
Job Description	Yes	richtext, textarea, text
City	Yes*	derived, text, picklist
State	Yes*	derived, text, picklist
Country	Yes*	derived, text, picklist
Zip/Postal Code	Yes*	text, picklist (Note: If a client is using radial search, Postal Code cannot be set to type="picklist")
Department	No	enum, text, picklist
Category	No	enum, text, picklist
Shift	No	enum, text, picklist
Job Type	No	enum, text, picklist
Facility	No	enum, text, picklist
Product Service	No	enum, text, picklist
Business Unit/Division	No	enum, text, picklist
Compensation/Salary	No	currency
Required Travel	No	text, picklist
Adcode	No	text, picklist, multi-select picklist

Recruiter Name	No	operator
Brand	No	text, picklist
Employee Referral Amount	No	currency
Custom Field 1	No	text, picklist
Custom Field 2	No	text, picklist
Custom Field 3	No	text, picklist
Custom Field 4	No	text, picklist
Custom Field 5	No	text, picklist

18.25 Configure Standardization Mapping

There are certain functionalities, like LinkedIn Integration, Resume Parsing and the RMK Social Apply (b1402), which require the third party to know exactly where data will be placed upon receipt. Since client instances are highly configurable, these third party sources are mapped to standardized fields. These standardized fields then need to be mapped to the client's configuration.

If these features are not in use the standardization mapping does not need to be performed.

18.25.1 Configuration

Context

Procedure

Grant access to the feature:

a. *RBP:* *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Configure Standardization Mapping*

b. *Non-RBP:* *Admin Tools* > *Manage Recruiting Administration* > *Configure Standardization Mapping*

18.25.2 Mapping Standard Fields

Context

Procedure

1. *Admin Tools* > *Configure Standardization Mapping*
2. Select an object. Only the Candidate Profile is supported for standardization mapping at present.
3. The standardized fields and background elements display. From each drop down, select a configured field.
4. In some cases picklist value mapping is necessary as well. From each drop down, select a configured picklist value.

Next Steps

It is not necessary to map all fields. There may be more standardized fields than fields the client has chosen to configure and in that case the fields can be left unmapped.

All configured fields are available to be mapped but the system does ensure that fields can only be mapped to their same type. That is, only date fields can be mapped to dates; it is not possible to map a text field to a date, etc.

It is not possible to map any field type to a picklist field, even if it displays as an option.

It is not possible to have more fields added to the standardization mapping page.

18.26 Reassign Job Requisition

Permissioned admin users can reassign job requisitions to other recruiting users if there is a change in assignment or a user becomes inactive. Requisitions pending approval will be routed to the new *Currently With* approver upon reassignment.

18.26.1 Configuration

Prerequisites

Grant access to the feature:

- RBP: *Admin Tools* > *Manage Permission Roles* > *select Role* > *Permission* > *Manage Recruiting* > *Reassign Job Requisitions*
- Non-RBP: *Admin Tools* > *Manage Recruiting Administration* > *Reassign Job Requisitions*

Procedure

1. Navigate to *Admin Tools* > *Manage Recruiting* > *Reassign Job Requisitions*
2. Select a requisition template or search for a job requisition by entering the requisition ID number.
3. Select requisitions you'd like to reassign by enabling the check box to the left of the requisition. Click *Continue*.
4. Choose an operator (or operators) you'd like to reassign the requisitions to, then click *Reassign*.
5. Operators who have been reassigned to these job requisitions will receive an email notifying them of the change. The Admin user will also be notified of the changes.
6. For instances where Recruiting Teams are configured, if the Hiring Manager is changed, and that Hiring Manager has preferences set for a Recruiting Team, those preferences will populate into the operate fields on the reassignment screen. Once the Hiring Manager's team preferences have been applied, you can keep them or edit them. Team preferences for any operator will be applied by default. You can reassign multiple operators (for example, the Hiring Manager, Recruiter and Sourcer) in one action.

18.27 Manage Recruiting Team Settings

On the Requisition XML it is possible to define operatorTeam fields that can contain recruiting groups and/or multiple users, allowing many users to access a requisition record and the applicants on that record. Recruiting Team Settings are used by the admin to default values and settings on operator and operatorTeam fields.

The Team Recruiting functionality requires a thorough understanding of many different aspects of the Recruiting Management configuration. Additional recommended reading includes these sections of the guide:

- Decide on Recruiting Operators [page 50]
- Recruiting Groups [page 63]
- Requisition XML field setup, focusing on:
  - id Attribute [page 258]

- type Attribute [page 276]
- group-name Attribute [page 278]

- Requisition XML and Application XML permission setup, including:
  - field-permission Elements [page 281]
  - button-permission Element [page 283]

Be cautious when removing or changing the picklists associated to a filter or mfield. Candidate saved searches and job alerts that rely on that field configuration may cease to function if the configuration is changed.

18.27.1 Requisition XML required Element

```
<field application-field-id="baseSalary" required="true"/>
```

Certain fields may need to be made unrequired and available in most statuses, but then become required at a certain point in the status workflow. The required attribute can be added to the field application-field-id element to specify that the ordinarily non-required field should be required in that status.

- required Element [page 291]

  ```
  <field application-field-id="baseSalary" required="true"/>
  ```

  Certain fields may need to be made unrequired and available in most statuses, but then become required at a certain point in the status workflow. The required attribute can be added to the field application-field-id element to specify that the ordinarily non-required field should be required in that status.
- feature-permission Elements
- Application XML field-permission Element [page 291]

If enabling Team Recruiting for an existing client, these workbooks are a good way to discuss and capture the client's needs: PS Scoping Team Recruiting and PS Scoping Team Recruiting Key

18.27.2 Prerequisites

- *Provisioning* > *Company Settings* > *Enable Recruiting Team Functionality*
- *Requisition XML* > *Configure and permission the operatorTeam fields*

18.27.3 Configuration

Context

Procedure

Grant access to the feature:

a. *RBP:* ▶ *Admin Tools* ▶ *Manage Permission Roles* ▶ *select Role* ▶ *Permission* ▶ *Manage Recruiting* ▶ *Manage Recruiting Team Settings* ▶

b. *Non-RBP:* ▶ *Admin Tools* ▶ *Manage Recruiting Administration* ▶ *Manage Recruiting Team Settings* ▶

18.27.4 Working with Recruiting Team Settings

There are various settings that can be adjusted on this page.

18.27.4.1 Upline Manager Access

Context

Generally users only have access to requisitions with which they are associated. Some clients may wish to allow managers to review requisitions that are associated with managers downstream of them in the BizX user reporting hierarchy.

This can be enabled or disabled for the overall instance.

Procedure

1. ▶ *Admin Tools* ▶ *Manage Recruiting Team Settings* ▶ *check Allow managers above Hiring Manager to have access* ▶

   When this is checked, all users upline in the reporting hierarchy from the user listed in the hiringManagerName (G) field will have access to the requisition records.

2. Add GM+ in the Requisition XML and Application XML permissions.

   The field level permissions for upline managers are set by using the GM+ designator in the Requisition XML and Application XML. If this permission is not specified then upline manager users will receive V permissions on the records (unless they happen to be associated to the requisition in another operator field.)

```
<field-permission type="read">
  <description>
   <![CDATA[Hiring Manager and Upline Manager Access]]>
  </description>
  <role-name><![CDATA[G]]></role-name>
```

```
    <role-name><![CDATA[GM+]]></role-name>
    <status><![CDATA[pre-approved]]></status>
    <field refid="instrReqDetails"/>
    <field refid="id"/>
    <field refid="status"/>
  </field-permission>
```

18.27.4.2 Add Default Primary User

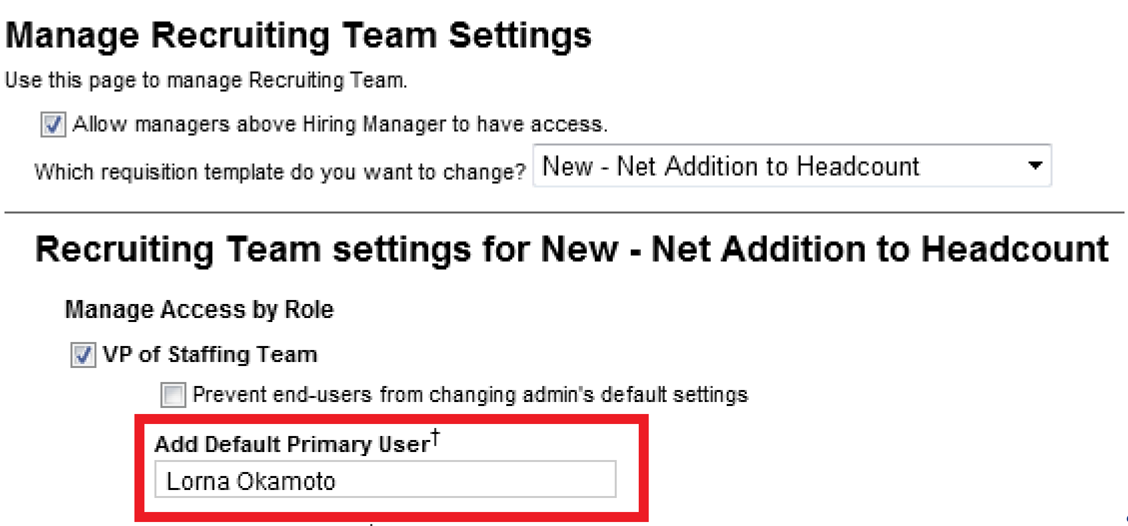
Context

It is possible to pre-populate users in the short operator fields on the short requisition create page if the following configuration is used:

Procedure

1. *Admin Tools* > *Manage Recruiting Team Settings* > *Select a requisition template*
2. Check the box next to the operatorTeam field.
3. Provide a value in the Add Default Primary User field.

Next Steps



Set -Up to Auto-Populate a User in an Operator Field on the Short Requisition Create Page

It is not presently possible to conditionally select the user that populates into the operator field, so this functionality is presently limited in usefulness. This functionality is useful in circumstances where all requisitions created from a particular template involve the same user. For example, the client may have a “New Headcount” requisition template, and the client wishes to have the CFO receive every requisition for approval. Or the hiring manager may not know who their recruiter is, so the client could set the recruiter field up to populate to a recruiting coordinator, who then assigns the correct recruiter, removing the burden on the hiring manager.

18.27.4.3 Add Users to Team

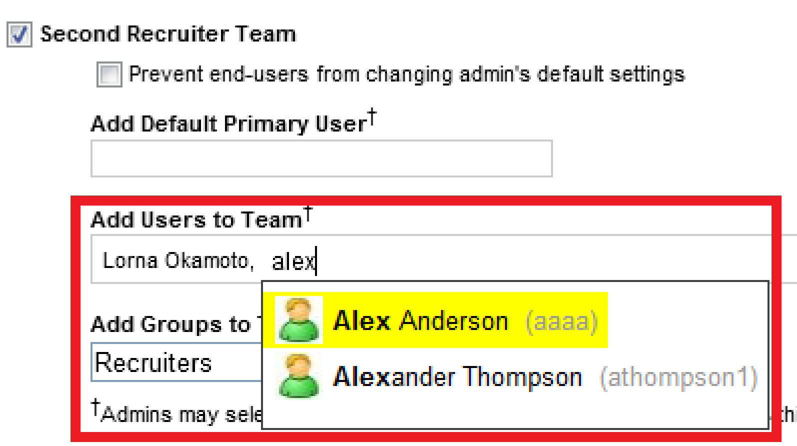
Context

It is possible to pre-populate users in the operatorTeam fields if the following configuration is used:

Procedure

1. *Admin Tools* > *Manage Recruiting Team Settings* > *Select a requisition template*
2. Check the box next to the operatorTeam field
3. Provide a value in the Add Users to Team field

Next Steps



Admin Setup to Auto-Populate Users in an operatorTeam Field

The group-name constraint configured on the operatorTeam field does not apply during this setup; the admin can select any active users regardless of whether or not those users are included in the group-name constraint on the Requisition XML operatorTeam field. For more information about the group-name constraint, see the group-name Attribute [page 278] section of this guide in Requisition XML configuration.

Admin setup changes only apply to new requisitions created after the changes are saved. Any existing requisitions will not be affected.

18.27.4.4 Add Groups to Team

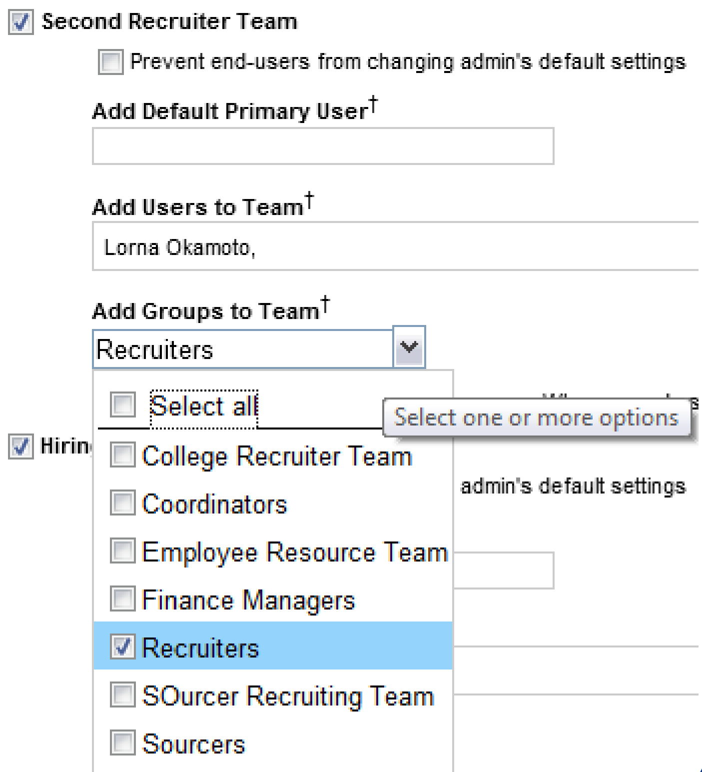
Context

It is possible to pre-populate groups in the operatorTeam fields if the following configuration is used:

Procedure

1. *Admin Tools* > *Manage Recruiting Team Settings* > *Select a requisition template*
2. Check the box next to the operatorTeam field.
3. Provide a value in the Add Groups to Team field.

Next Steps



Admin Setup to Auto-Populate Groups in an operatorTeam Field

The group-name constraint configured on the operatorTeam field does not apply during this setup; the admin can select any groups containing any active users, regardless of whether or not those users are included in the group-name constraint on the Requisition XML operatorTeam field. For more information about the group-name constraint, see the group-name Attribute [page 278] section of this guide in Requisition XML configuration.

Admin setup changes only apply to new requisitions created after the changes are saved. Any existing requisitions will not be affected.

Do note however that changes to the Recruiting Group definition will take effect on any requisitions that list that group as part of the operatorTeam field.

18.27.4.5 Prevent end-users from changing admin's default settings

Context

It is possible to have operatorTeam fields permissioned so that some recruiting users have write access to the fields. It is possible that a client may want to allow a recruiting user to edit the contents of the field to add and remove additional users, but at the same time the client may wish to protect the admin-specified users and groups so that they cannot be changed.

It is possible to lock down the admin-specified contents of operatorTeam fields if the following configuration is used:

Procedure

1. *Admin Tools* > *Manage Recruiting Team Settings* > *Select a requisition template*
2. Check the box next to the Prevent end-users from changing admin's default settings

Next Steps

Locking Admin Settings so Recruiting Users with Write Permissions Cannot Change Them

18.28 Question Libraries

The question libraries can be used by recruiting users selecting pre-screen questions on a requisition. For more information about working with pre-screen questions on a requisition, see the Requisition Pre-Screen Questions [page 322] section of this guide.

18.28.1 Prerequisites

Question Libraries require initial configuration in Provisioning by Professional Services.

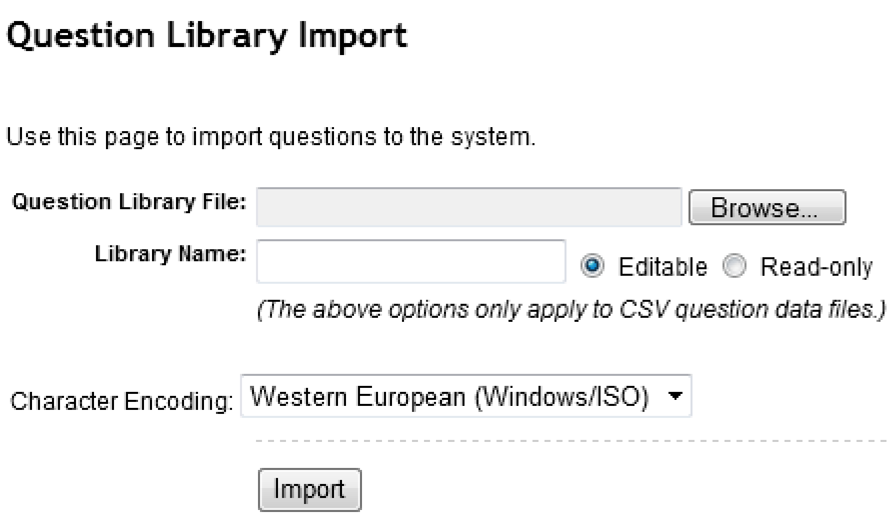
- *Provisioning* > *Company Settings* > *Question Object Management*

18.28.2 Configuration

Context

Procedure

1. Admin Tools > Import New Question Library
2. Select and import a CSV file containing the desired questions.



Question Library Import Page

The Question Library import file must be set up as follows, with no header row (that is, row 1 should be an actual question you wish to import).

Table 51:

Column	*Content Type*	*Details*
A	Question Type	Only four question types are presently supported : ○ QUESTION_MULTI_CHOICE ○ QUESTION_NUMERIC ○ QUESTION_TEXT ○ QUESTION_RATING

B	Category	All questions must be placed in a category. Either a new or existing category can be used. The category value can be any alphanumeric string, preferably short.
C	Parent Question	This is optional; only use when you intend to set this row up as a child question in a set of cascading questions. If used, specify the exact name of a question that already exists in the instance or is defined as a new question earlier in the file.
D	Name of Question	Any alphanumeric string.
E	Description of Question	Any alphanumeric string.
F	Valid Rating Scale ID	The exact name of a rating scale set up in the instance. Example: ○ Pre-Screen Rating Options
G	Answer Options	Use only for multiple choice questions. Specify a comma-separated list of values from which the applicant can pick. Example: ○ Yes,No,Maybe So,Probably
H	Expected Right Answer	Use for questions that have a right answer. Questions can only have a single right answer specified. Specify the right answer's place in the answer option list. The answer option list counts up from zero. Multiple Choice Example - If the answer "Maybe" in the prior list is the right answer, then the expected right answer would be: ○ 2 Numeric Example: ○ 150 Rating Scale Example: - specify the rating scale number that is the right answer: ○ 4

I	Expected Correct Answer Direction	For numeric and rating scale questions it is possible to specify that the right answer is “x or higher” or “x or lower”. Allowable values, therefore, are: ○ higher ○ lower These should be lower-case when included in the import file.
J	GUID for the Question	Any alphanumeric value. Spaces and special characters should be avoided.
K	Locale in which this copy of the question is translated	Any locale enabled in the instance in *Provisioning > Company Settings and Admin Tools > Recruiting Languages*. Example: en_US If translated questions are desired, define the question multiple times in the import file, using the same GUID each time but specifying a different locale value on each import row.
L	Parent Response	This is optional; only use when you intend to set this row up as a child question in a set of cascading questions. If used, specify the answer the applicant needs to give to the parent question in order to reveal this row as a child question. A child question can only be tied to a single right parent answer. This means if multiple parent answers need to reveal the child question, the child question actually needs to be set up multiple times in the library, once per right parent answer.

See this sample file.

Once the question library has been created it is possible to make some edits to the questions.

3. *Admin Tools > Question Libraries*
4. Select *library > optionally filter by Category > select Question Name*
   a. Edit Description to access the Rename feature.
   b. Update Answer Format and answer details.

Next Steps

> **Tip**
>
> It is not possible to manage cascading question parent-child relationships directly in the user interface. Parent-child setup may only be managed via question library imports.
>
> When creating a multi-language question library you have to assign a value (this value can be whatever you chose) for the GUID, then load all desired languages into the same import into a new library.
>
> If you do not follow this configuration, you will see an error like the following:
>
> “QUESTION:
>
> System error encountered:
>
> Line: [2], Import type: [QUESTION], Info: [LBI NL Library | Basic Screening | Heeft u een eigen bedrijf? | QUESTION_MULTI_CHOICE]
>
> Line: [1], Import type: [QUESTION], Info: [LBI NL Library | Basic Screening | Heeft u op dit moment een concurrentiebeding? | QUESTION_MULTI_CHOICE]
>
> Line: [3], Import type: [QUESTION], Info: [LBI NL Library | Basic Screening | Is er nog andere informatie over u waardoor u wellicht niet bij ons zou kunnen komen werken? | QUESTION_MULTI_CHOICE]”

18.29 Competency Libraries

For more information on Competency Libraries, see the Platform documentation.

19 Agency

Clients may work with recruiting agencies that are used to source and submit applicants for certain jobs. An admin may set up new agencies and agency users who can then log in through the agency portal.

Enabling the agency feature provides a separate portal for External Recruiting Agencies. Allows external agencies and recruiters to create and see their candidates, see job requisitions open for agency access and forward candidates to those job requisitions.

19.1 Quick Facts

- There is one agency portal URL for each data center; this agency portal is shared across clients and cannot be branded for a specific client. Examples:
    - https://agency4.successfactors.com/xi/ui/agency/pages/home.xhtml
    - https://agency5.successfactors.eu/xi/ui/agency/pages/home.xhtml
    - https://agencysd4.successfactors.com/xi/ui/agency/pages/home.xhtml
    - Etc.
- Agency users can only see jobs that have been posted to their agency

More information about Agency will be included in the Recuiting Handbook Version 2.0. In the meantime, reference the Confluence documentation .

19.2 How to Configure Agency

Procedure

1. Add the following field to the Requisition XML and define permissions. The agencyPosting field is required if agency posting will be part of the legacy data migration import process.

```
<field-definition id="agencyPosting" type="bool" required="false" custom="false">
        <field-label mime-type="text-plain"><![CDATA[Agency Posting]]>
        </field-label>
       </field-definition>
```

2. Grant permissions for each role/status that should have access to post to the agency site. Add the agencyPosting reference to all roles you want to have access to posting to the agency site. You cannot define this permission as `field-permission type="read"`. You must grant write permissions for this field.

```
<field-permission type="write"><description>
        <![CDATA[For recruiter, sourcer and sourcer can write these fields in
approved reqs]]>
        </description> <field refid="intranetPosting"/>
        <field refid="corporatePosting"/>
        <field refid="agencyPosting"/>
         </field-permission>
```

3. Configure Agency Provisioning Settings a. The following Provisioning settings are required:
    - Provisioning > Company Settings > Enable Recruitment Agency Access
    - Agency Advanced Ownership Settings – Select either option
        - Ownership for requisition
        - Ownership for duration

    If ownership is set at the requisition level, the same candidate can be submitted to unique requisitions by unique agencies. If ownership is defined as duration, the user can define a time period (i.e. 30 days) and only the agency which owns a candidate can submit that candidate to requisitions for that time period. The value can be changed in Provisioning after it has been selected. The new rules will carry from that point forward (not be retroactively applied) and a warning should be presented to the user informing them of this
4. The following Provisioning settings are optional:
    - Disable Agency filtering by locale (show all jobs regardless of posting locale).
    - Display Powered By SuccessFactors Logo.
    - Enable Posting to specific agencies If this is option is enabled, a user can choose to post to any of the configured agencies, separately. If not enabled, jobs are posted to all configured agencies.

    Consult the client and get formal signoff before enabling posting to specific agencies, because it is not possible to disable this setting once it has been enabled. Users can view all configured agencies when posting jobs. You cannot restrict viewing of agencies using permissions. The available agencies all display, and cannot be filtered, ordered or sorted. You can only post to all users within an agency, not only one user within an agency. You cannot have different start start/end dates for a job for different agency users
5. Grant admin permissions a. Grant admin permissions to manage agencies
    - Non-RBP: *Admin Tools* > *Recruiting* > *Manage Recruiting Administration* > *Set up Agency Access*
    - RBP: *Admin Tools* > *Manage Permission Roles* > *Role* > *Permission* > *Managing Recruiting* > *Set up Agency Access.*
6. Navigate to *Admin Tools* > *Setup Agency Access.*
7. Click the *Add New Agency* link to create a new agency. The Agency ID cannot contain any special characters.
8. Enter the information for the new agency and click *Save*.
    - *Candidate Ownership*: set the duration for the period of agency ownership of new candidates. This is only for agency ownership by duration; if ownership by job requisition is enabled, this option is not available.
    - *Use most recent submission as starting date for agency ownership duration period*: For Agency Ownership by duration, the customer can choose whether the duration period uses the first submission date or the most recent submission date as the starting date for the duration

- *Candidate Self-Ownership*: A candidate can “own themselves” and cannot be submitted by an Agency for a set time period. This time period will restart every time a candidate applies to a job and, if no jobs have been applied to, will use the date the candidate created their account.
- Checking the box under *Resume submission* enables the ability for agency users to submit an updated resume for existing candidates when submitting the candidate to a new job requisitions.
- You can add instructions per agency for users to receive when they try to add a duplicate candidate in the system. Add these instructions under *Duplication Message*. You cannot add a candidate with the same email address to the system more than once.
- Under *Agreement Text* enter the message an agency user must agree to before submitting candidates.

9. To add agency users, click “Add new user” in the “Users” section, and enter a valid email address, first name and last name for the user. Ensure the box next to “Active” is checked in order for the user to be able to access the Agency Portal. Once the user is created, they will receive an email with details about accessing the Agency Portal. Important Tip: You cannot add a user with the same email address more than once for any of the configured agencies.

> **Note**
>
> You cannot add a user with the same email address more than once for any of the configured agencies.

20 Career Portals

Candidates interact with the Recruiting Management product through the career portals. Internal candidates have access to the career portal through the Careers tab of the BizX suite, and external candidates have access to the career portal through externally-facing microsites.

20.1 Quick Facts

- Internals can only access the Careers tab within the BizX suite
  - All employees who the client wishes to recognize as internal must be set up with a BizX user account
  - If the client applies SSO to the BizX suite so that it is only accessible to employees on the client's network, there is no way for those internal candidates to access the internal career portal when they are off-network (at home, at a library, etc.)
- Jobs posted externally will all appear on the Default microsite and will appear on any other microsite where the requisition data matches the microsite's filters
- Placing a SuccessFactors Recruiting Management career site within an iFrame is not supported and will result in errors under certain conditions
- A single brand color can be specified for the career site, but management of the setting is only available when V11 is enabled and V12 is disabled. *Admin Tools* > *Company System and Logo Settings* > *Company Custom Color*

20.2 Working with Career Portals

20.2.1 Career Tab Permissioning

Clients may wish to restrict access to the Careers tab for some users. This is commonly used to prevent contractors from appearing as internal candidates, or if the client uses different applicant tracking systems for different employee populations.

20.2.1.1 Configuration

- Non-RBP: Newly created users automatically receive the Careers tab permission. (Re-activated users do not automatically receive the Careers tab permission). Manage the permissions in *Admin Tools* > *Recruiting Permissions* > *Careers Tab Permission*.
- RBP: *Admin Tools* > *Manage Permission Roles* > *Role* > *Permissions* > *Recruiting Permissions* > *Careers Tab Permission*

20.2.2 Search for Openings

The fields in the Search for Openings box are configurable. For instructions on configuring requisition fields that are eligible to be used in job search, see the Requisition field-definition Elements [page 258] section of this guide, with particular focus on the Internal and External Applicant Search Settings [page 279] section.

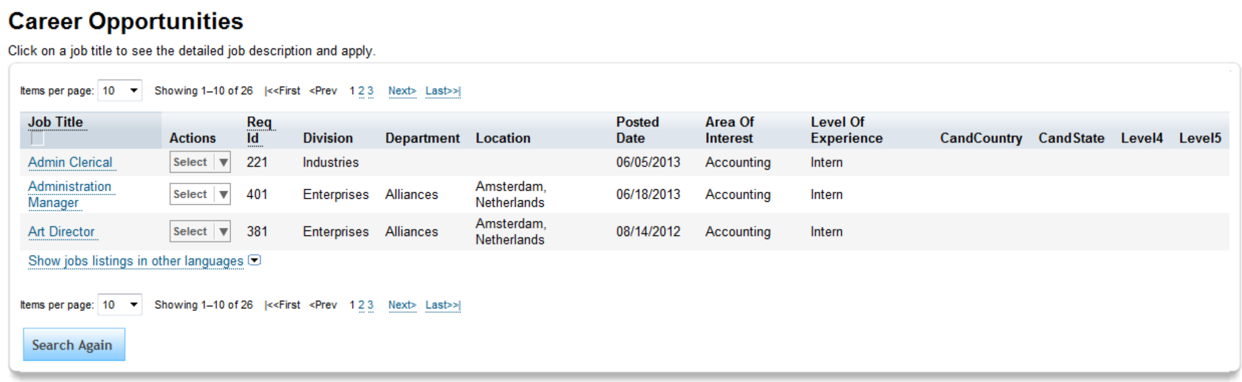
The content to the right of the Search for Openings box is also configurable. For more information see Manage Recruiting Sites [page 497].

20.2.2.1 Quick Facts

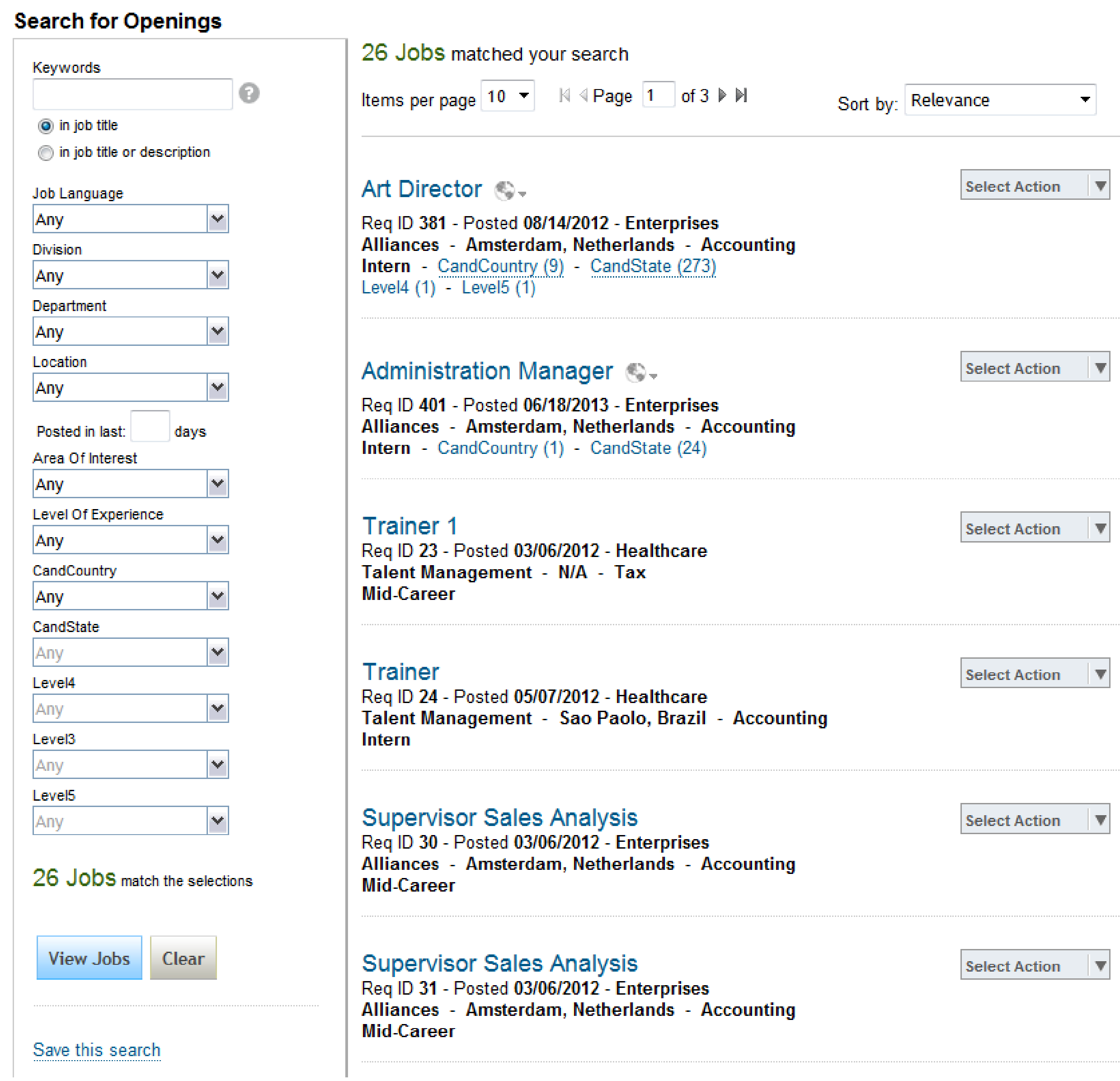
- The Search for Openings box cannot be moved to another place on the page or configured with client-specific branding
- Job search results pagination supports displaying 10, 20, 50 or 100 jobs per page. View All jobs in the list is not supported, due to the impact on system speed that occurs when displaying a large number of job postings on a single page. The default number of job postings per page cannot be configured
- Boolean search (such as enclosing phrases in quotes, use of AND / OR operators, asterisk as a wild card, and other Boolean standards) is supported in the keyword field
- If a Candidate searches for jobs using the “word or part of a word in the job title and/or job description” all jobs containing these characters will be returned. For example, a search for “Manage” will return results containing “Manage,” “Manager” and “Management” (b1402).

20.2.3 Job Search User Interface

SuccessFactors Recruiting Management offers two different candidate-facing job search user interfaces.



Original Job Search Interface



Enhanced Job Search Interface

Features included in the enhanced job search interface:

- Automatic pre-count of jobs that match the filter criteria
- Filter panel remains on the left side after searching so candidates can easily refine their filter criteria
- Additional searches can be performed without reloading the entire page
- The search results are presented in a more contemporary format

The enhanced job search user interface should be enabled for all clients.

Optional features that are may be enabled when the enhanced job search interface is enabled:

- Multi-Language Job Search
- Radial Job Search

20.2.3.1 Configuration

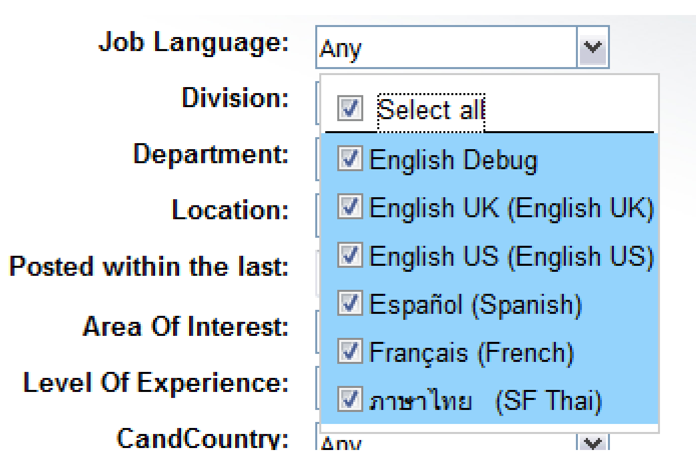
Context

Procedure

Provisioning > *Company Settings* > *Enhanced Job Search UI*

20.2.4 Multi-Language Job Search

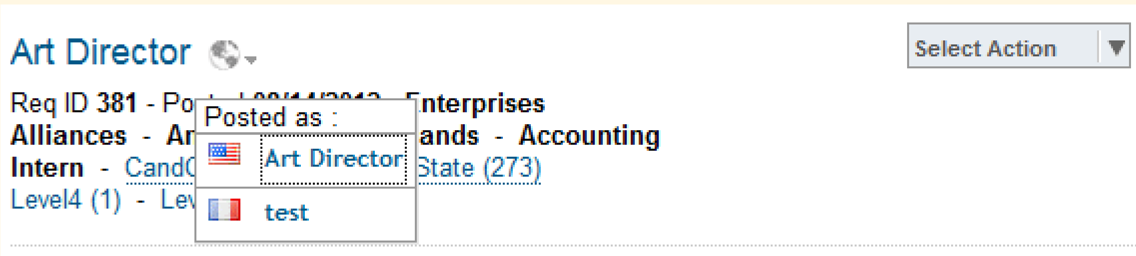
Clients with multi-language instances may wish to allow their candidates to use job posting language as a search filter.



Filter Job Search by Posting Language

When multi-language job search is enabled, the client can choose to have it configured so that the job search defaults to the candidate's language, or so that the job search defaults to select all languages.

When multi-language job search is enabled, candidates can toggle between languages in which the job was posted.

> **Tip**
>
> Enabling multi-language job search treats U.S. English (en_US) and UK English (en_GB) as one language. Disabling this setting will decouple the two languages.
>
> 
>
>
> *Toggle between postings in multiple languages*

20.2.4.1 Quick Facts

- The flag icon on the language pack is not presently configurable and it cannot be disabled

20.2.4.2 Pre-Requisites

- *Provisioning* > *Company Settings* > *Enhanced Job Search UI*
- The defaultLanguage and jobPostLanguage fields are defined in the Requisition XML.
- Requisition records are posted in multiple languages.

20.2.4.3 Configuration

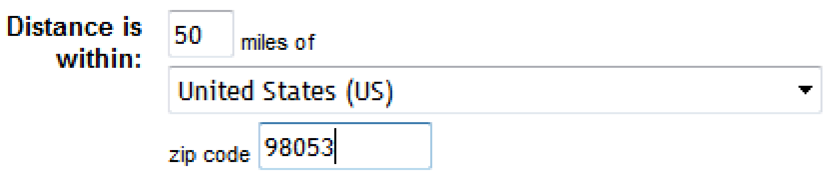
Context

Procedure

1. *Provisioning* > *Company Settings* > *Enable Multi-language Job Search*
2. *Provisioning* > *Company Settings* > *Enable Default Search to All Languages*

20.2.5 Radial Job Search

When candidates are searching through posted jobs, they can use radial search options to enter a zip or postal code and a distance and view only jobs posted within the specified distance from the zip code.



Radial Search Filters

20.2.5.1 Quick Facts

- The radial search is only available to candidates searching jobs, not to recruiters search jobs on the Recruiting tab.
- The radial search will switch between miles and kilometres based on the user's locale. It is not possible to have miles and kilometres turned with only English_US configured. If the customer is only using English_US, only miles are supported.
- Distance must be greater than 0.
- If a client is using radial search, the zip/postal code field of their job requisition cannot have a type of "picklist." The zip/postal code field must be a text type field.

20.2.5.2 Prerequisites

- *Provisioning* > *Company Settings* > *Enhanced Job Search UI*
- The postalcode and country fields are defined in the Requisition XML.

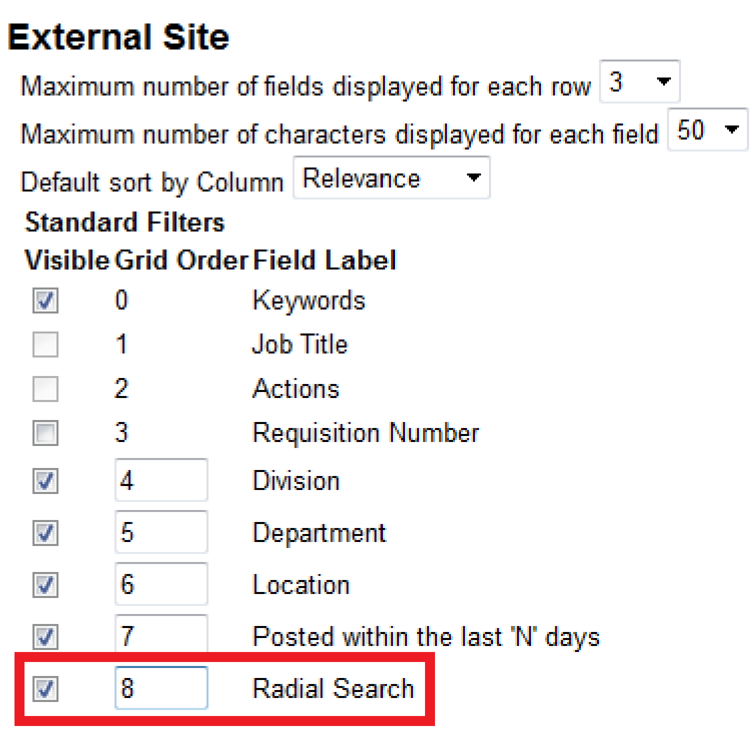
20.2.5.3 Configuration

Context

Procedure

1. *Provisioning* > *Company Settings* > *Enable Radial Job Search*
2. *Provisioning* > *Internal and External Applicant Search Settings* > *Check Radial Search and assign a gridOrder number*
3. Request a re-index of the instance.

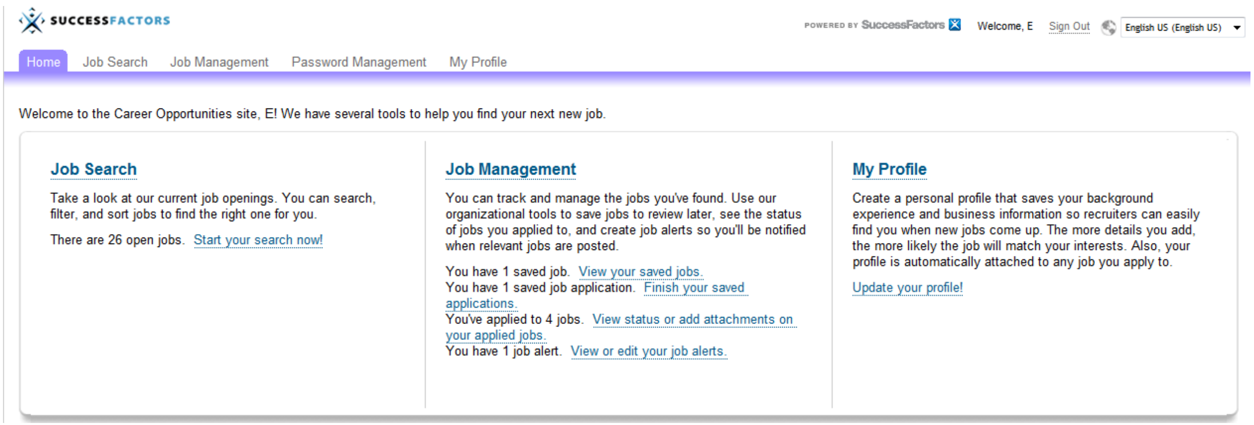
Next Steps



Enable Radial Job Search in Provisioning

20.2.6 External Career Site Home Page

To provide the candidate an easy navigation experience, it is possible to enable a landing page with three panels of text.



External Career Site Home Page

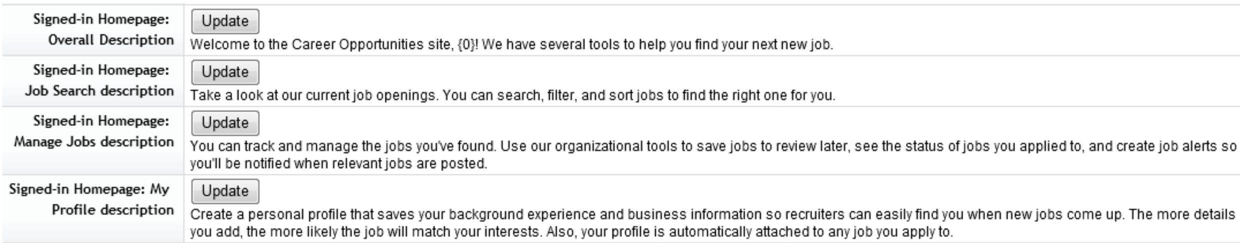
20.2.6.1 Configuration

Context

Procedure

1. *Provisioning* > *Company Settings* > *Enable External Career Site Home Page*
2. *Admin Tools* > *Manage Recruiting Sites* > *Select site* > *Click Update to edit content*

Next Steps



Edit Content on the External Career Site Home Page

Most of the text is configurable by the system administrator. The lines that have actionable links are not presently configurable.

Note the count of open jobs is based on the number of jobs posted in the default language of the instance. This is not configurable.

20.2.7 External Career Site Theme Manager

20.2.7.1 Prerequisites

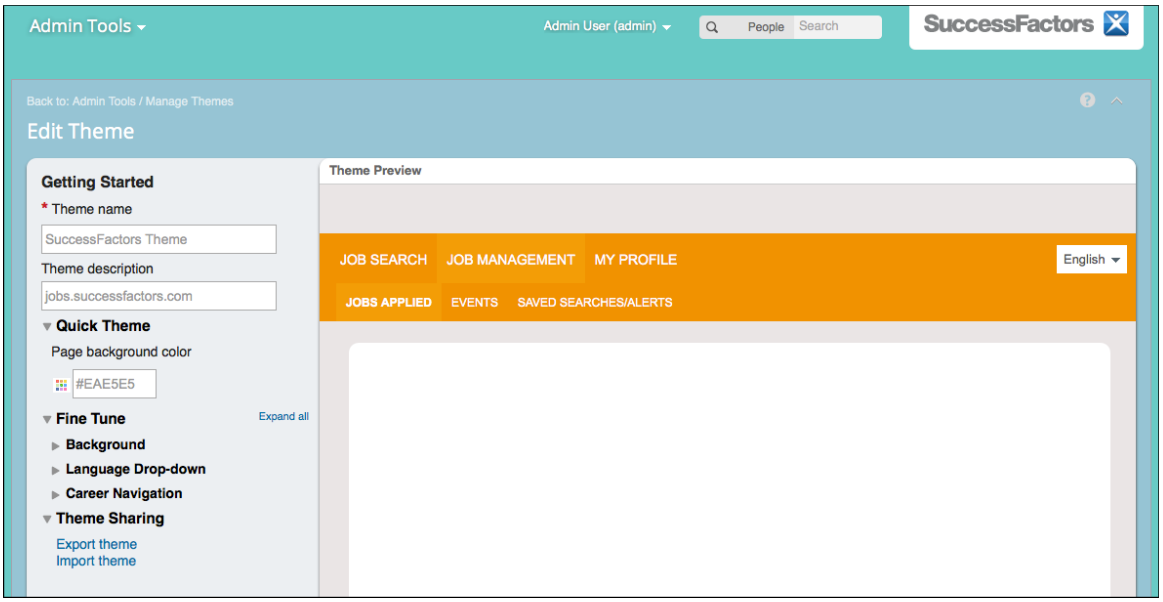
- *Provisioning* > *Company Settings* > *Version 12 UI framework (Revolution)*
- Grant Manage Recruiting Sites Permission
  - *Non-RBP:* *Manage Recruiting Administration* > *Manage Recruiting Sites*
  - **RBP:** *Manage Permission Roles* > *Administrator Permissions* > *Manage Recruiting* > *Manage Recruiting Sites*
-
  - *Non-RBP:* *Administrative Privileges* > *System Properties* > *Company System and Logo Settings*
  - *RBP:* *Manage Permission Roles* > *Administrator Permissions* > *Manage System Properties* > *Company System and Logo Settings*

20.2.7.2 Configuration

Context

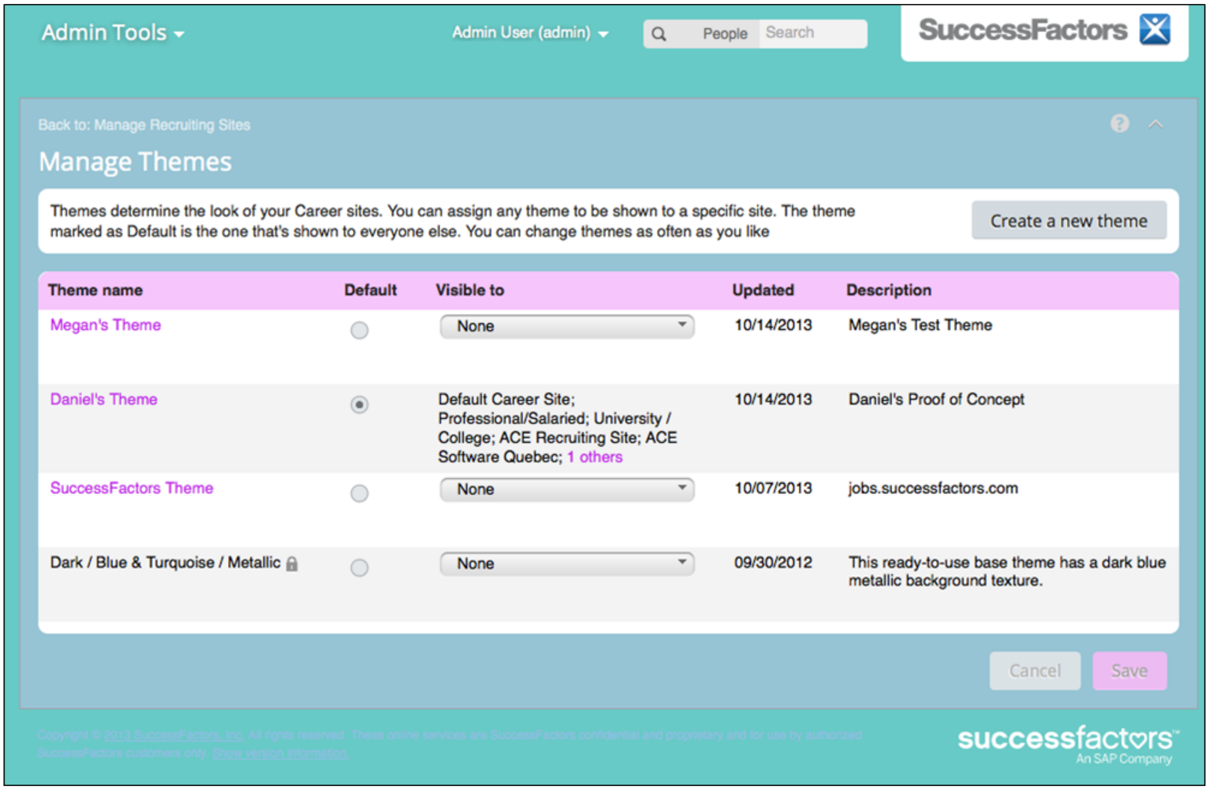
Procedure

1. Enable v12 External Career Site. Admin Tools > Manage Recruiting Sites > Enable V12 External Career Site.
2. Once the V12 External Career Site is enabled, a link “Manage Recruiting Site Themes” will appear on the Manage Recruiting Sites page.
3. Create External Career Site Themes
    a. *Manage Recruiting Site Themes* > *Create a new theme*



Create External Career Site Themes

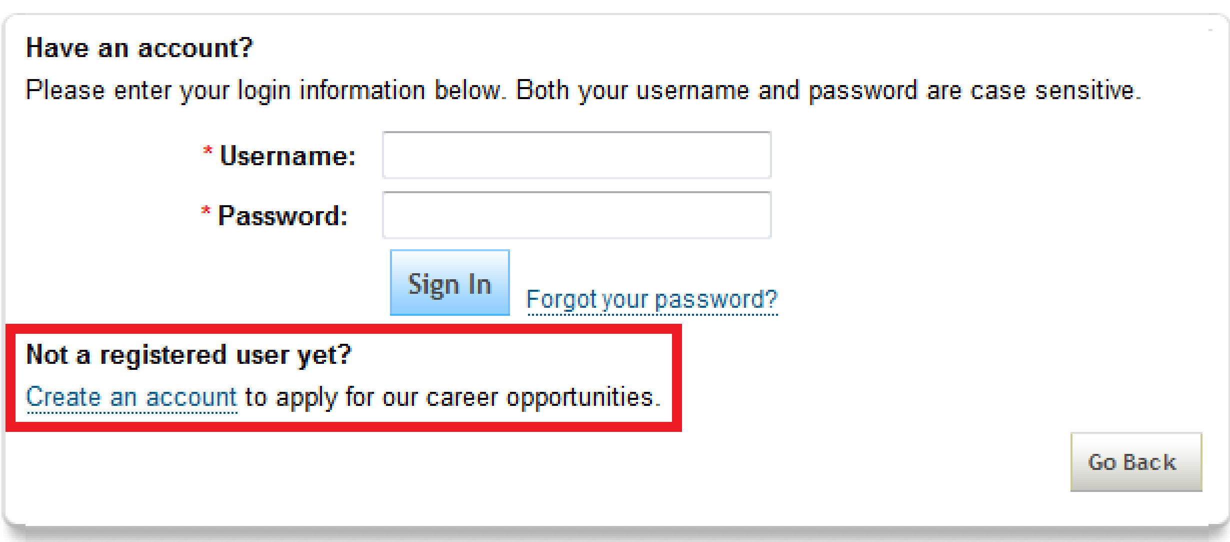
    b. Use the Theme Manager to create a company theme
    c. Click *Save*
    d. Manage Themes
4. On the Manage Themes Page, apply the created theme to the specified career site and microsite by applying them in the *Visible to* column.



Manage External Career Site Themes

20.2.8 Create an External Candidate Account

A candidate who wishes to enter data in the Recruiting Management system must first create an account.



Created an External Candidate Account

20.2.8.1 Quick Facts

- There is presently no way to directly link to the Create an account page; it is only available as a link on the Sign In page.
- The fields on the account page may vary based on Provisioning settings but otherwise the fields on the account creation screen are not configurable.

20.2.8.2 Configuration

Context

There are several options that affect the "Create an Account" screen.

Procedure

1. *Standard Fields*

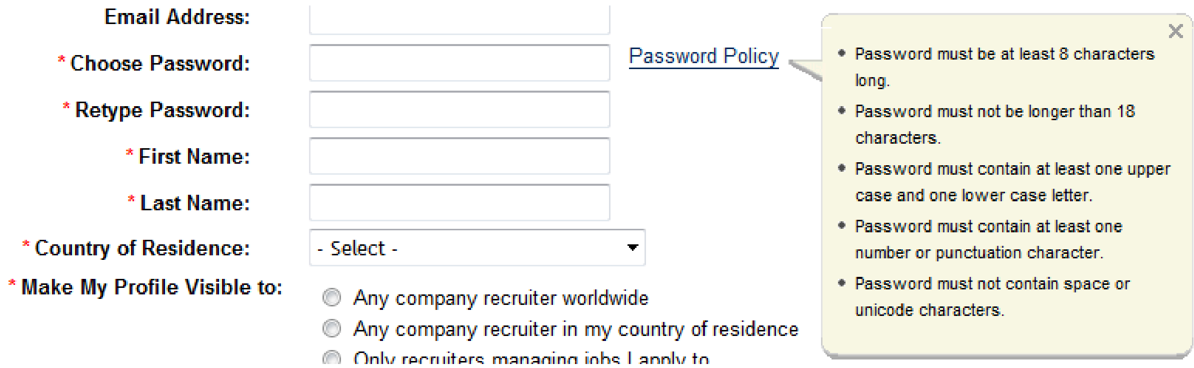
   The Create an Account screen includes the following non-configurable fields:

   - First Name
   - Last Name
   - Country of Residence
   - Terms of Use

   The First Name, Last Name and Country fields are related to the Candidate Profile XML. For more information about configuring these fields, see the Candidate Profile field-definition Element [page 115] section of this guide.

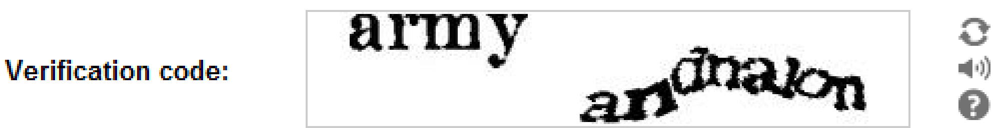
   The Terms of Use link is populated by data from the Data Privacy Consent Statement.
2. *Username and Email Address*
   - *Provisioning* > *Company Settings* > *Use email as external applicant userId*
     - When this option is disabled, the primaryEmail (username) and contactEmail (email) fields are both available on the create account screen.
     - When this option is enabled, only the contactEmail (email) field is available on the create account screen, and the primaryEmail (username) field is hidden and will be set to the same value by default. This is the preferred setting for most client instances.
     - The primaryEmail field is the unique identifier for the external candidate. It is not possible to create two external candidates in a single instance with the same primaryEmail value.
3. *Password*
   - *Provisioning* > *Company Settings* > *Enable Separate Password Policy for External Candidates*

- Candidates must specify a password when creating an account. Clients may choose to provide different password creation rules for external candidates than are enforced for employees with SuccessFactors HCM user accounts.



View External Candidate Password Policy

4. *CAPTCHA*
   - *Provisioning* > *Company Settings* > *Disable CAPTCHA for external candidate account creation*
     - A CAPTCHA is the scrambled letters that serve as a verification code to ensure that the candidate creating an account is a real person and not a bot, hacker or other automated attack.



CAPTCHA Verification

In general it is recommended that the CAPTCHA is disabled unless the client has a particular security concern. SuccessFactors uses the Google-provided CAPTCHA, which is visually distorted to the point where an automated program cannot easily read it. As technology has improved, the line between what a human being can read and what a computer can read has become very close, and some candidates report difficulty interpreting the CAPTCHA. Note that switching to an easier-to-read CAPTCHA basically is equivalent to disabling the CAPTCHA, since anything easier for a human being to read also becomes easy for a computer to read.

20.2.9 Profile Before Application

When candidates apply for a job the product can either take them directly to the application page or can take them first to the candidate profile page and then to the application page.

Since the Candidate Profile data is searchable, it is advisable to present the candidate with the profile page when applying to collect as much data as possible and confirm the existing data on the profile to ensure it is accurate and up to date.

When Profile before Application is used, a Next button appears on the lower right hand corner of the Candidate Profile page. Most or all fields that appear on both the Application and Candidate Profile XML should be de-permissioned from the candidate view of the Application. This ensures that the candidate has a smooth two- page data entry experience where they are not presented with fields to complete on the second page that they have just finished completing on the first page.

20.2.9.1 Configuration

Context

Procedure

Provisioning > *Company Settings* > *Complete Profile before Application*

20.2.10 Apply with LinkedIn

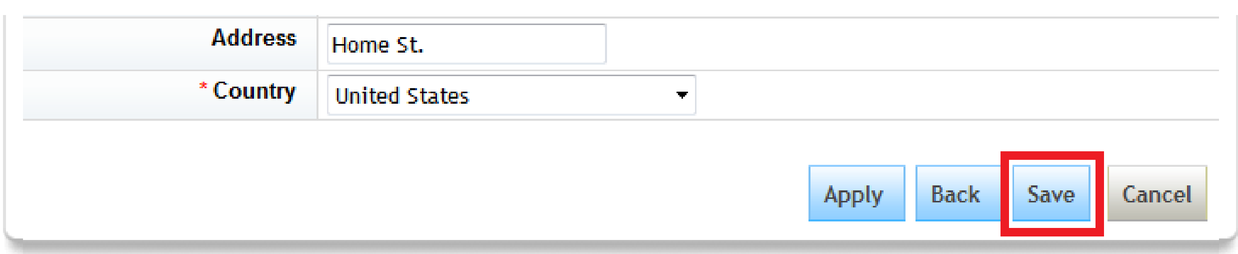
For more information and configuration instructions, see the LinkedIn [page 626] section.

20.2.11 Save Application As Draft

Candidates may want to partially complete an application, leave and return later to finish it.

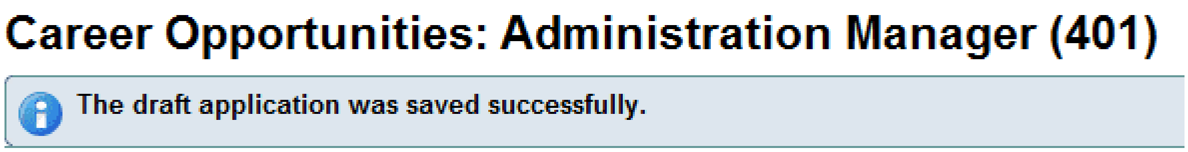
20.2.11.1 Working with Draft Applications

When this feature is enabled, a Save button appears on the bottom of the application page.



Saving a Draft Application

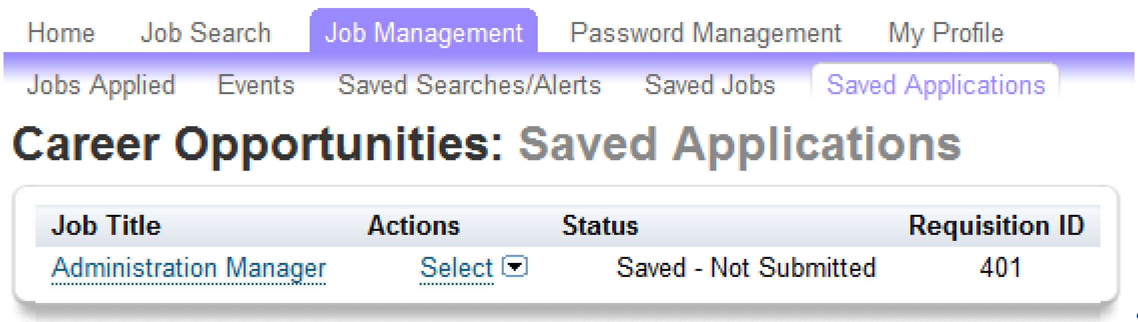
If the candidate clicks Save, a confirmation message appears noting that, “The draft application was saved successfully.”



Draft Save Confirmation Message

When the feature is enabled, there is a Saved Jobs tab that appears on the Job Management tab. Once a draft application is saved, it can be found on this page. The candidate can use the Actions menu to apply or delete the draft application.

If the job posting is removed and the candidate tries to apply from Saved Applications they will be informed that the job is no longer posted and accepting applications.



Saved Jobs and Saved Applications Tabs on the Job Management Tab

20.2.12 Add Attachments Post Application

Some clients may wish to allow candidates to add attachments to an existing application, to collect reference letters, work samples or other supplementary materials. For more information on this feature, see the Add Attachments to a previously-submitted application [page 212] section of this guide.

20.2.13 Job Alerts

Candidates may choose to set up saved searches so they can easily re-use search criteria they like, and can set up these saved searches as job alerts to inform them when new jobs are posted that match their interests.

20.2.13.1 Quick Facts

- The Recruiting Marketing job agent functionality duplicates and supercedessupersedes the Recruiting Management job alerts functionality; clients using RMK may choose to disable RCM job alerts. Note that there is a tradeoff here, because RMK does not provide job agent functionality on internally posted jobs, but disabling RCM job alerts disables them for both external and internal candidates

- Job alert emails include an unsubscribe link. Candidates must log in to confirm the unsubscribe action
- Job alerts that rely on a particular filter or mfield will fail if that field configuration is removed from the Internal and External Applicant Search Settings

20.2.13.2 Prerequisites

Provisioning > *Company Settings* > *Enhanced Job Search UI*

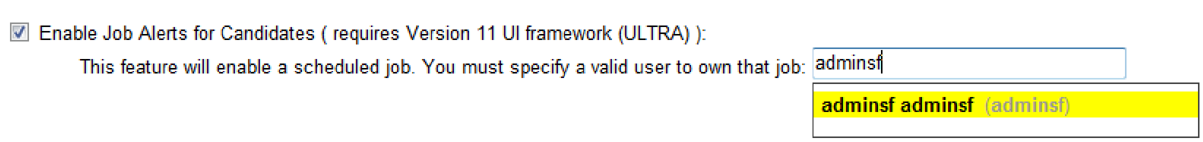
20.2.13.3 Configuration

Context

Procedure

1. *Admin Tools* > *Recruiting Email Triggers* > *enable and configure Job Alert Expired Notification, Job Alert Invalidated Notification, Job Alert Notification*
2. *Provisioning* > *Company Settings* > *Enable Job Alerts for Candidates*
3. If you are changing this from disabled to enabled, complete the next option: “This feature will enable a scheduled job. You must specify a valid user to own that job:”

   Enter a dummy user that will never be inactivated; if you specify an actual employee user and the user later becomes inactive, the job alerts job will fail. You can check the status of the scheduled job in *Provisioning* > *Monitor Scheduled Jobs*.

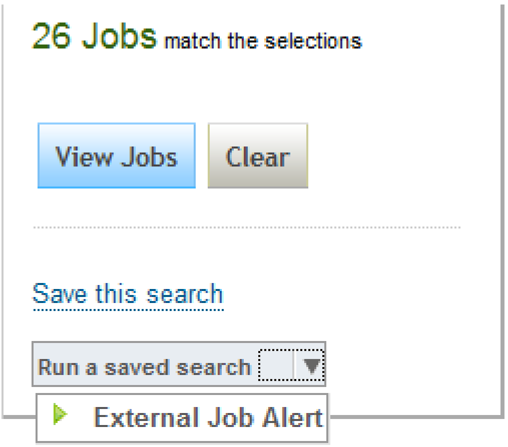
   

   Enable Job Alerts and Scheduled Job

   Note that the specify user option is not visible after job alerts have been enabled and saved. If the client wishes to change the user that owns the Job Alerts job, the job alerts feature must be disabled, saved and then re-enabled with the new owning user.

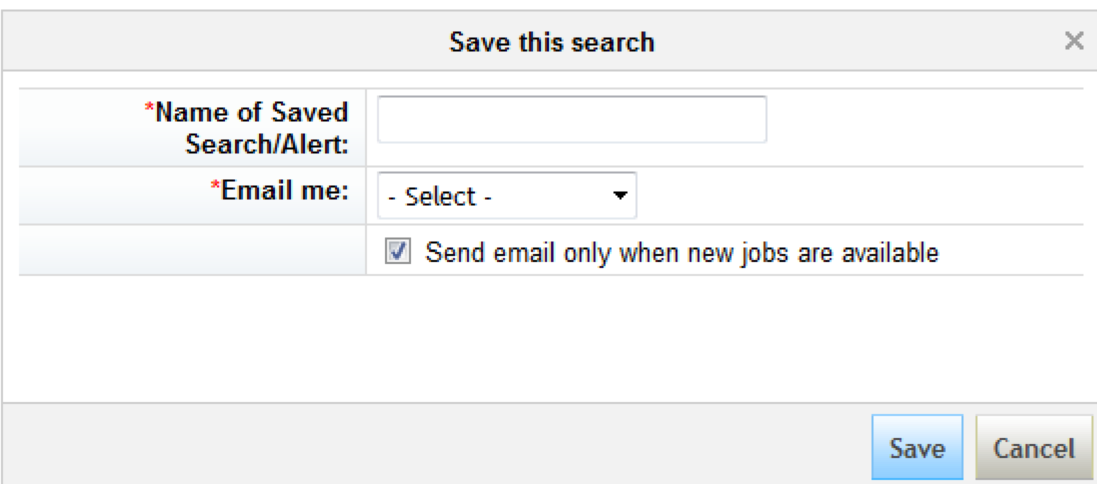
20.2.13.4 Working with Saved Searches / Job Alerts

When candidates run a search, they can choose to Save this search, or run a saved search they set up previously.

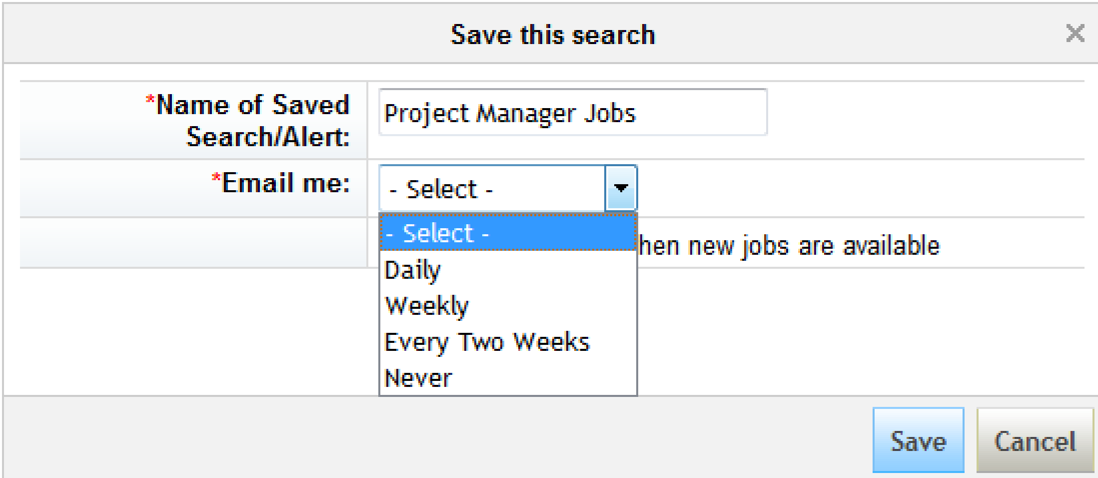


Run a Saved Search

When the candidate chooses to save a search, they can specify a name for the saved search, set up an email frequency and whether they wish to receive emails only when new jobs are posted or on a regular basis with new and previously posted jobs.

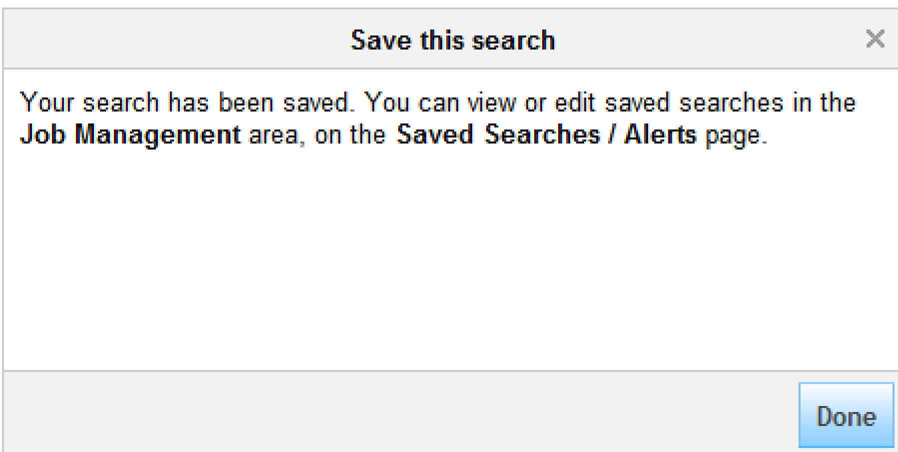


Save this Search Options



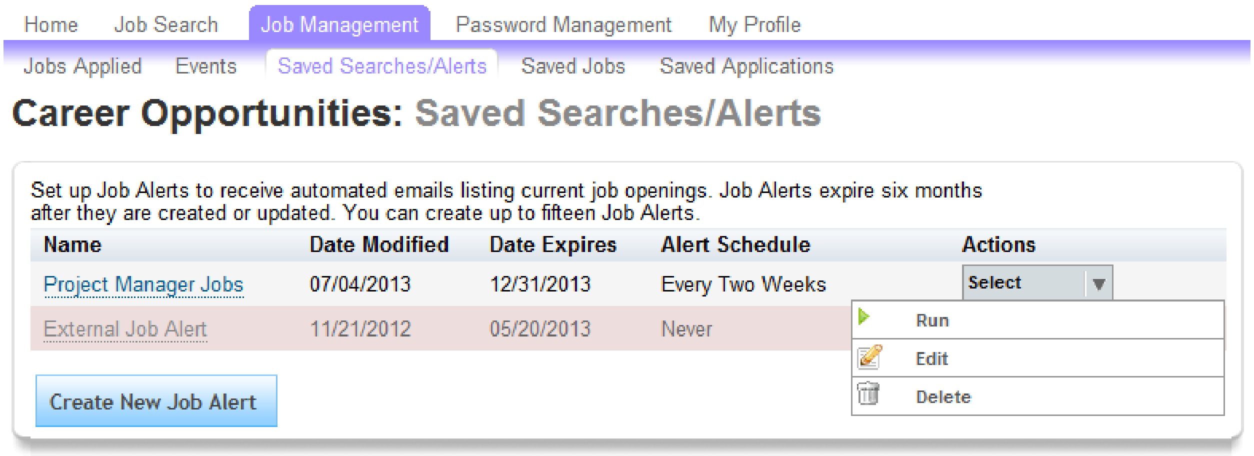
Saved Search Frequency

After saving the search, the candidate receives a confirmation notification.



Saved Search Confirmation Message

The candidate is able to access their list of Saved Searches/Alerts at any time from the Job Management tab. If the candidate wishes to change the name or frequency of an alert, run a saved search or delete it altogether, they can do so from this page. This is how a candidate would "unsubscribe" from a job alert.



Delete a Saved Search

20.2.14 Show Job Description to Applicants on an Unposted Job

When a candidate applies to a job, they can access the list of applications on the Job Management > Jobs Applied tab and click the job title to view the job description. Clients can choose whether to continue to make this feature accessible even after the job posting has been removed.

20.2.14.1 Configuration

Context

Procedure

Recruiting Settings > *Show job description to Applicants even after the job posting is taken down*

21 Legacy Data Migration

For new clients migrating from a different applicant tracking system, the implementation project may include data migration from their legacy tool into SuccessFactors. This scope involves significant effort from both the client and Professional Services and therefore as an associated cost.

Data migration is done via CSV flat file imports. The import files must be hand-created by the Professional Services representative using the final signed-off XML configuration for the instance. For this reason, data migration projects cannot begin until after the client accepts their configuration.

Requisitions, candidates (profile, background element attachments, and tags), and applications (records and attachments), can be imported.

21.1 Quick Facts

- Flat file data imports can only be done as part of data migration with assistance from Professional Services and Operations. This is not supported as an ongoing process.
- Only external candidates can be imported; internal candidate imports are not supported
- Data migration imports only create records. It is not possible to update or delete records using a data migration import.
- Applications can only be imported when the related requisitions and candidates were also imported; it is not possible to import applications against requisitions manually created in the UI or by the SFAPI

21.2 Prerequisites

- Be sure that the cost is included in the Schedule A before undertaking any data migration work.
- Client has signed off on instance configuration; no additional configuration change is planned.

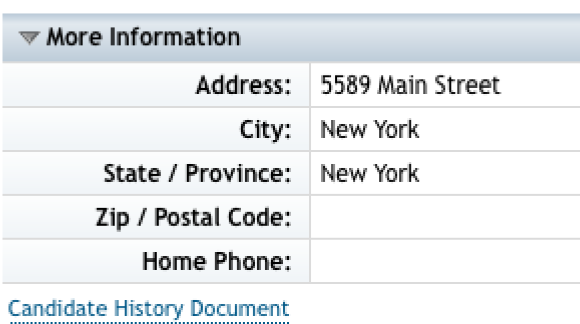
21.3 Configuration

21.3.1 Create Data Migration Templates

See the attached files to get an idea what a sample import includes. Often it is advisable to provide the client with a clean Excel version of these files, formatted, with friendly labels, with validations, to help them ensure they input clean data. The “sample” files should the actual import format. The “template” files show what was provided to a client for their input. See the Data Migration template files.

21.3.1.1 Quick Facts

- Date format in the import file must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time: 2012-04-01T00:00:00
- Date/time values are stored in the server date/time. For example, for an instance hosted in the US East Coast data center, to accurately reflect a last login date/time of January 1 2010 at 8:00 AM Pacific Time, the value imported should use 2010-01-01T11:00:00.
- Picklist fields should use the picklist label value of the locale specified on the import job. The system will look up the appropriate picklist option ID based on this label and store the ID internally, for proper multi-lingual handling. Picklist values that are not found in the picklist definitions will generate an error that fails the record
- Parent-child picklist values will be validated during the import, and mismatched values will cause the import to fail
- The data in the file must be in only one locale; different locales will require different files
- When importing objects that have multiple templates available in the system (such as Job Requisitions and Applications), each import file should only include the data for one template
- Operator fields must use the user ID (not username) of the account
- The operatorTeam fields are not presently supported in the data migration import, nor will the admin settings populate automatically on requisitions created via data migration import
- Fields of type “jobCode” are not presently supported in the data migration import, nor will the values automatically populate from the job classification foundation object
- Candidates do not receive any email notification as a result of data migration imports
- Imported attachments will appear as a Candidate History Document link



Candidate History Document

21.3.1.2 Configuration

See the following tables for details about data migration import file formats.

21.3.1.2.1 Requisition Import

Table 52:

Required field	Sample data	Description
jobReqGuid	Test1_201202061316	Make up a unique ID. Recommended to append the exact date/time (_130416_1301) to the legacy req ID to ensure a unique ID number.
jobReqTemplateId	302	This is the template ID number assigned to the Requisition XML template in Provisioning when you import the Requisition XML
jobReqLocale	en_US	Reqs can only be imported in a single language; this captures the default locale of the requisition. This essentially populates the defaultLanguage field in the req. Must match the selected “Supported Locale” in the Job Parameters in the Quartz Scheduled Job upon import.
templateType	JOB_REQ	Always use JOB_REQ. This basically corresponds to the value in the XML header: job-req-template type="jobReq"
lastUpdatedDate	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. Last updated date will reflect in several places in the UI. The last updated date from the legacy system could be used, or the date of the import.

Required field	*Sample data*	*Description*
creationDate	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. Last updated date will reflect in several places in the UI. The created date from the legacy system could be used, or the date of the import.
jobOpenDate	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. This is the req approval date. If the requisition status is approved, this date must be provided. If the requisition is pre-approved, this date can be left blank. Typically clients are advised to migrate only approved requisitions that are actively recruiting, and re-create in the system manually any pending approval requisitions.
jobCloseDate	Can be blank	This is the date the requisition is closed.
formDueDate	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. Due date will be used to trigger approval reminder emails if the requisition is still pre-approved. Any date can be used.
originator	P132345	This is the user ID (not username) of the account that should be tracked as the originator of the requisition.
status	Open	Any value from the requisition “status” field id. Import the picklist label in the language specified in the jobReqLocale column.

Required field	Sample data	Description
jobReqStatus	Approved	This is the requisition state. Must be Pre-Approved, Approved or Closed. Generally only Approved reqs are imported. Reqs imported in pre-approved state will appear in the first route map step of the route map assigned to the form template. Reqs imported in approved or close state will appear to have passed through a single-stage route map.
country	US	Any two-digit ISO country code that corresponds to a country enabled in *Admin Tools* > *Setup Job Board Options*
intranetPosting	TRUE	Enter either TRUE or FALSE (all in caps) to indicate whether the req should be posted to this location.
corporatePosting	TRUE	Enter either TRUE or FALSE (all in caps) to indicate whether the req should be posted to this location.
agencyPosting	TRUE	Enter either TRUE or FALSE (all in caps) to indicate whether the req should be posted to this location.
intranetPrivatePosting	TRUE	Enter either TRUE or FALSE (all in caps) to indicate whether the req should be posted to this location.
externalPrivatePosting	TRUE	Enter either TRUE or FALSE (all in caps) to indicate whether the req should be posted to this location.
start	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. This sets the start date for all the posting locations above. If all the posting locations are set to FALSE, this should be left blank.

Required field	*Sample data*	*Description*
end	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. This sets the start date for all the posting locations above. If all the posting locations are set to FALSE, this should be left blank. End date is optional so this can be left to blank if the client does not wish to set a posting end date.
Operator fields	P132345	This is the user ID (not username) of the account that should be tracked as the originator of the requisition.
Team Recruiting fields	NOT SUPPORTED	Team Recruiting fields will autopopulate based on settings in the instance; they are not supported via data migration import.
JCE fields (fields of type="jobCode"	NOT SUPPORTED	JCE fields are not supported in data migration imports; if this is needed contact Tim Dachtera to consider a screen scrape approach to data loading. Engineering does not support JCE field imports via script.
division / department / location Standard Derived Fields	Human Resources	Use any value already defined in the field as derived from the user database.
Standard enum fields	Full-Time	Use the value stored as the enum-label in the XML.
Custom or standard text fields	Text	Use any short text value
Custom or standard rich text fields	Explicit HTML declarations on text	Use any long text value
Custom or standard picklist fields (including filter and mfields)	Picklist label	Use the picklist label defined for the picklist option in the default language of the requisition you are importing. If the picklist option is a child of another picklist, the parent-child relationships must be correct in the import file or the row will fail.

Required field	Sample data	Description
Custom or standard date fields	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown.
Custom or standard currency fields	45000.12	Value with decimal without any currency symbol.
Custom instructional fields	NOT SUPPORTED	Omit these from the import; they will be there based on the XML definitions and do not need to be on the import file.
jobRole	Information Technology|Network Specialist	If using the Job Profile Builder integration, this gives users with the appropriate permissions the ability to update the requisition and select a different role using “Browse Families and Roles” in the Job Profile Builder integration. Should always be in the format Family|Role with no spaces around the pipe character.
listingLayout	text block	When the Job Profile Builder integration is configured, you can import the listingLayout field to populate the Job Description. If listingLayout is included and left blank, the requisition will look up the Job Profile. If the Job Profile Builder integration is not configured, you should import both the listingLayout and extListingLayout fields.
intranetPostingStartDate		
intranetPostingEndDate		
agencyPostingStartDate		
agencyPostingEndDate		
corporatePostingStartDate		
corporatePostingEndDate		

21.3.1.2.2 Candidate Import

Candidate Profile Information:

Table 53:

Required field	Sample data	Description
primaryEmail	mylogin@loginemailaddress.com	CRITICAL!!! DO NOT PUT REAL EMAIL ADDRESSES IN TEST SYSTEMS! When working in test it is recommended to append the exact date/time (_130416_1301) to the primaryEmail to ensure a unique ID and void the email address. This is the candidate's username upon login; in most cases this will be an email address but if the client is not using email as username this could be some other unique value
contactEmail	myEmail@deliverMailHere.com	CRITICAL!!! DO NOT PUT REAL EMAIL ADDRESSES IN TEST SYSTEMS! When working in test it is recommended to append the exact date/time (_130416_1301) to the contactEmail to ensure a unique ID and void the email address. This is the candidate's contact email address.
country	US	Any two-digit ISO country code that corresponds to a country configured in the "country" picklist.
resume	resume.doc Connie_Kendall/resume.doc	Resume file name, including extension. If the resume will be placed in the same folder as the import file no folder name needs to be specified (first example). If the resume will be placed in a subfolder of the folder containing the import file, the folder name needs to be specified. Make sure the direction of the slash is correct.

21.3.1.2.3 Candidate Background Elements

Candidate Background Elements is planned for inclusion for Version 2.0 of the Recruiting Handbook.

21.3.1.2.4 Candidate Attachments

Resume can be imported as part of the Profile import; this is needed only if the client is importing additional documents.

Table 54:

Required field	Sample data	Description
primaryEmail	mylogin@loginemailaddress.com	Use the primaryEmail loaded on the candidate profile information to form an association to the record that should receive the attachment being imported.
fieldId	extraAttachments	Specify the candidate profile field to which this document should be attached.
uploadedBy	P132345	User ID of the user to whom the file upload should be attributed.
filePath	otherDoc.doc Connie_Kendall/otherDoc.doc	Attachment file name, including extension. If the document will be placed in the same folder as the import file no folder name needs to be specified (first example). If the document will be placed in a subfolder of the folder containing the import file, the folder name needs to be specified. Make sure the direction of the slash is correct. Note that resume and coverLetter imports must be done as part of the Candidate Profile import, not done on the Candidate Attachments import. This import is only intended for supplementary documents.

21.3.1.2.5 Candidate Tag Definitions

This file may be loaded even if the client did not purchase data migration. This sets up the library of tags used for the type-ahead when end users are tagging candidates.

This file must be loaded prior to loading the Candidate Tags file that is part of a data migration import.

Table 55:

Required field	Sample data	Description
tag	Great engineer	The text for the tag. Capitalization matters.
tagLocale	en_US	Multiple tag definition files can be loaded but each file should include tags from only one locale. This field specifies under which locale will these tags appear during the type-ahead when an end user tags a candidate. Must match the selected “Supported Locale” in the Job Parameters in the Quartz Scheduled Job upon import.
dateCreated	2012-03-29T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown.
userID	P132345	User ID of the user to whom the original creation of the tag should be attributed (does not appear anywhere in the UI at present).

21.3.1.2.6 Candidate Tags

Candidate Profiles and Tag Definitions must be loaded before tags are loaded.

Table 56:

Required field	Sample data	Description
primaryEmail	mylogin@loginemailaddress.com	Use the primaryEmail loaded on the candidate profile information to form an association to the record that should receive the tag being imported.
tag	Great engineer	The text for the tag. Capitalization matters.

Required field	Sample data	Description
tagLocale	en_US	Multiple tag files can be loaded and a candidate can be tagged differently in different locales, but each file should include tags from only one locale. This field specifies which tags will appear when the candidate is viewed by a user using a specific language pack. Must match the selected “Supported Locale” in the Job Parameters in the Quartz Scheduled Job upon import.
userID	P132345	User ID of the user to whom the original creation of the tag should be attributed (does not appear anywhere in the UI at present).
dateAssigned	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown.

21.3.1.2.7 Application Import

You can only import applications against requisitions and candidate profiles that were themselves imported.

Table 57:

Required field	Sample data	Description
jobAppGuid	Test1- mylogin@loginemailaddress.com _201202061316	Make up a unique ID. Recommended to combine the application unique ID and the req unique ID to ensure a truly unique ID. Recommended to append the exact date/time (_130416_1301) to the legacy req ID to ensure a unique ID number.
jobReqGuid	Test1_201202061316	Use the made up unique ID used on the req import file in the jobReqGuid column.
candidateEmailAddress	mylogin@loginemailaddress.com	Use the primaryEmail value used on the candidate profile import file.

Required field	Sample data	Description
jobAppLocale	en_US	Reqs can only be imported in a single language; this captures the default locale of the requisition. This essentially populates the defaultLanguage field in the req. Must match the selected “Supported Locale” in the Job Parameters in the Quartz Scheduled Job upon import.
internalstatusId	open	Applications should always be imported as open. The open/close feature on applicants is legacy; we use disqualification statuses instead of closed state on applicants today.
statusItem	Interview	Status name (not internal status label) of the applicant status in which the applicant should be imported.
applicationDate	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. This is the Date Applied date.
lastModified	2012-04-01T00:00:00	Date format must be YYYY-MM-DDThh:mm:ss and the capital letter T must be included between the date and time, as shown. This is the Last Modified date.
resume	resume.doc Connie_Kendall/resume.doc	Resume file name, including extension. This must be imported even if the resume was already imported on the profile, or the resume field on the application will not contain a document. If the resume will be placed in the same folder as the import file no folder name needs to be specified (first example). If the resume will be placed in a subfolder of the folder containing the import file, the folder name needs to be specified. Make sure the direction of the slash is correct.

> **Tip**
>
> If a client imports applications post go-live, it is possible to have applications with an older application_date, but a higher applicationId. This can cause difficulties when trying to find a candidate's most recent application.

21.3.1.2.8 Application Attachments

Resume can be imported as part of the Application import; this is needed only if the client is importing additional documents.

Table 58:

Required field	Sample data	Description
jobAppGuid	Test1- mylogin@loginemailaddress.com _201202061316	Use the jobAppGuid loaded on the application information to form an association to the record that should receive the attachment being imported.
fieldId	extraAttachments	Specify the candidate profile field to which this document should be attached.
uploadedBy	<no value>	This field heading must be included in the import file but the value should be left blank. If this field contains a value, the import will error with the following message: Invalid uploadBy user for jobAppGuId xxxxx and UserId xxxxx, this record is skipped null for the Record #: 1
filePath	resume.doc Connie_Kendall/resume.doc	Attachment file name, including extension. If the resume will be placed in the same folder as the import file no folder name needs to be specified (first example). If the resume will be placed in a subfolder of the folder containing the import file, the folder name needs to be specified. Make sure the direction of the slash is correct.

21.3.2 Client Provides Import Data

The client is responsible for putting together the data for import. The data must be absolutely clean; missing or incorrect data can cause that row of the import to fail. Because getting data absolutely clean is a challenging task, part of the data migration process should be planned to receive and test the quality of the client's data by running mini-imports and validating that no errors are received. Ideally by the time the actual data import is run in production all the import files have run through test at least once without any errors.

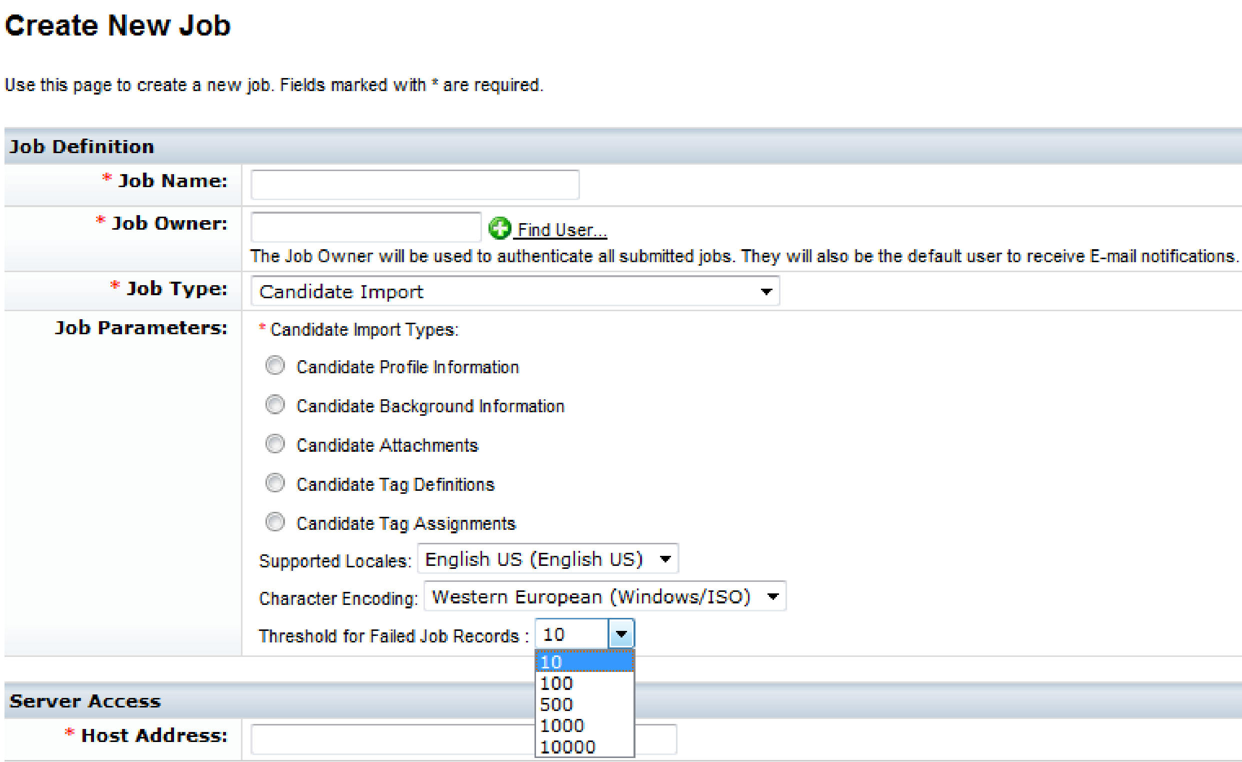
21.3.3 Adjust XML Configuration

If the client is importing records where they do not have all the data they will require in the future, it is possible to temporarily change the required="true" value on fields in the XML to be required="false", do the imports, and then restore the original required values.

21.3.4 Run Test Imports

There are Quartz Scheduler jobs that allow the consultant to do test loads. The available jobs are Candidate Import, Job Requisition Import and Application Import. For initial testing, begin with a few hundred or thousand records. Once those go smoothly some customers want to run the entire load in test. This may take a significant amount of time and resources. Be sure it's included in Statement Of Work.

When testing the imports, the scheduler provides a threshold for failed records. Each record succeeds or fails individually; if you import 100 records where 80 succeed and 20 fail, the 80 successes will actually be created in the instance and you only need to retry the remaining 20. However, during validation the tool stops validating each record based on the first error it finds. That is, if there is a line in the import that has three errors, the import validation will find the first error and fail the record without continuing to check and find the second and third errors. Because of this, multiple retries may be required to find all errors in the file.



Threshold for Failed Job Records

Note data migration is NOT a quick process. It typically takes several weeks of trial and error testing for clients to produce a clean set of import files. Ideally the client is using some sort of automated process on their exported data to apply rules to clean up the files so the trial and error refinement is contributing to an easily repeated cleanup of exported data, but not all clients have that capability and may be doing data cleanup manually.

21.3.5 Plan for Data Transfer

Data loads will be done using the Quartz Scheduler (Manage Scheduled Jobs in Provisioning). This will typically be done by the consultant assigned to the project. The job can be configured to pull data from the SFTP server or from a customer hosted server. Most customers send files to the SFTP server. If they files have a large number of attachments, loading them from a customer hosted server may negatively import performance. The CSV files and any attachments must not be zipped or encrypted on our SFTP server. It's recommended that the CSVs or attachments are located in the exact same folder (/incoming on our servers). Customers can successfully load with the attachments in sub folders but this often requires extra troubleshooting.

Operations will not load the actual data but they may handle some support tasks including

- Ensure there is enough room on the SFTP server for the customers data.
- Unzip attachment files if the customer sends them as a zip.
- Load the data to our SFTP server if the customer sends it to us on physical media (DVD, Memory Stick etc.)

Open a Cloud OPS JIRA if you need help with those items.

21.3.6 Freeze Client Legacy Environment

Once the client is ready to begin data migration they must supply the clean set of files to SuccessFactors. At this point the client should shut down their legacy system so no additional data is received and no existing data is changed. Any changes made after the files are supplied to SuccessFactors will not be reflected in the SuccessFactors Recruiting instance.

21.3.7 Transfer Migration data

The client then transfers the data to Operations (remember this may be a physical shipping process, so factor in that time) and Operations loads the data onto the servers. Depending on the size of the data this can take anywhere from hours to weeks. There is a maximum file size Operations can unzip and work with. Work with Operations in advance to ascertain the maximum zip file size and ensure the client provides the zip files broken into appropriate sizes. After the data is loaded on the servers, Operations can kick off the import jobs. Depending on the data, the import jobs may take anywhere from hours to weeks to run. Jobs also may need to be split if the file sizes are too large; work with Operations in advance to ascertain the maximum file size. If the client can provide the import files broken into the appropriate size this will save considerable time.

Work with Operations and the client well in advance to put together a timeline for the data migration process that includes the file format creation, data testing and cleaning, data transfer, server load and actual import run time. Advise the client of the need for a plan to redirect candidates while their old system is shut off.

22 Reporting

Ad Hoc Reports can be used to build data pulls and flat file exports in Excel, PDF or PowerPoint format, be run in the system, shared between users, etc. For more information about the core functionalities of Reporting, see the Reporting section of Sharepoint.

22.1 Quick Facts

- Data on forwarded candidates is not reportable until the candidate applies to the job
- Recruiting users cannot schedule regular report runs themselves, but Professional Services or Customer Success can schedule ad hoc report exports to drop to an FTP site, via the Quartz Scheduler

22.2 Prerequisites

- Set up Reportable Custom Fields. See the Reportable Custom Fields [page 66] section of this guide
- Enable Ad Hoc Reports 2.0 or Report Builder 3.0.

22.3 Configuration

Context

Procedure

1. *Provisioning* > *Ad Hoc Report Builder* > *Recruiting V2*
2. *Provisioning* > *Ad Hoc Report Builder* > *Recruiting V2 Secured*
3. Grant user permissions to create form

a. *Non-RBP:* *Admin Tools* > *Dashboard / List View / Spotlight View / Report Permission* > *Create Ad-Hoc Report and/or Run Ad-Hoc Report* > *Recruiting and/or Recruiting Secured*

b. *RBP:* *Admin Tools* > *Manage Permission Roles* > *Role* > *Permission* > *Reports Permission* > *Create Ad-Hoc Report and/or Run Ad-Hoc Report* > *Recruiting and/or Recruiting Secured*

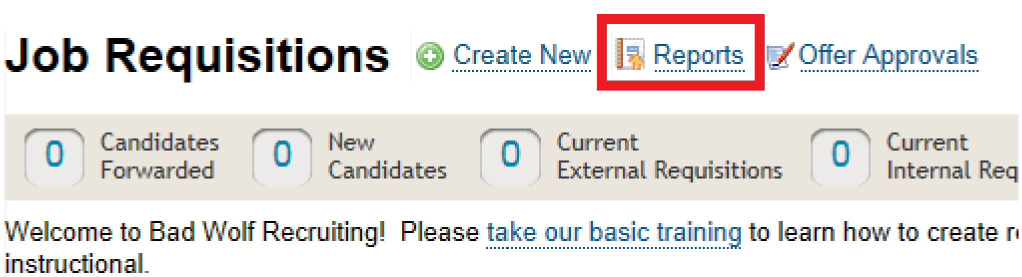
22.4 Working with Recruiting Reports

22.4.1 Requisition Reports Link

The Requisition Reports functionality is an older, legacy functionality dating to the days before robust Ad Hoc Reporting capability was added to the BizX suite. It is not recommended to use this functionality, but it is still possible.

Note that this feature allows users a great deal of access into requisitions, whether they are associated to that requisition or not. It is not possible to hide a requisition from a user when this feature is enabled. For clients who have a need to keep some requisitions confidential, this feature should definitely not be permissioned.

The J role controls which fields appear in the legacy Recruiting Reports link. If the J role is missing, Provisioning automatically adds all fields into the J role. J role permissions containing only a partial field list can cause errors. Removing the J permissions, reuploading the XML, and allowing Provisioning to restore the J permissions can fix the issues.



22.4.1.1 Configuration

Context

Procedure

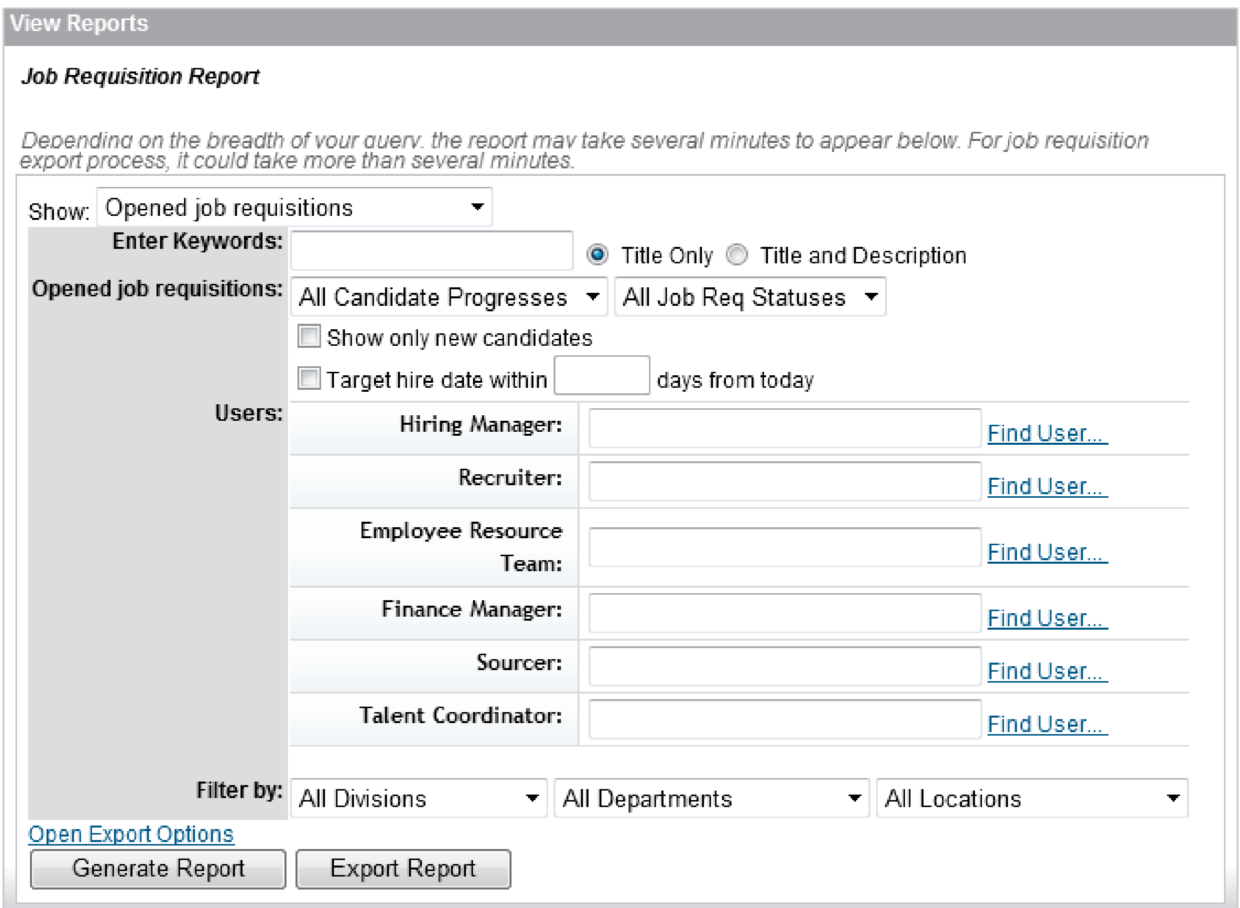
Set permissions using Admin Tools

a. *Non-RBP:* ▶ *Admin Tools* ▶ *Recruiting Permissions* ▶ *Report Permission* ▶

b. *RBP:* ▶ *Report Permission can be found in Manage Security* ▶ *Role Permissions under Manage Recruiting* ▶

22.4.1.2 Working with Requisition Reports

Filter on any requisitions using a set of pre-defined, standard fields. These fields are not configurable. All requisition records can be accessed through this feature, regardless of whether the recruiting user running the report is associated to the requisition or not.



Job Requisition Report Options

To view the resulting requisition list, click Generate Report.

Open Export Options

Generate Report | Export Report

Job Requisition Count: 12 Sat Jul 06 21:19:43 EDT 2013

Req Id	Internal Job Title	External Job Title	Internal Start	Internal End	External Start	External End	Status	System Status	Candidate Progress	Candidate Hired	Open Candidates	Closed Candidates	Disqualified Candidates	Hiring Manager
29	Supervisor Sales Analysis 2	Supervisor Sales Analysis					Open	closed	Negotiating Offer	0	0	0	0	Okamoto, Lorna
145	GVP	GVP					Open	pre-approved		0	0	0	0	Okamoto, Lorna
161	Test	Manager Security	04/15/2012		04/15/2012		Open	approved		0	2	0	0	Okamoto, Lorna
201	Test	Test					Canceled	closed		0	0	0	0	Okamoto, Lorna
202	Test 1	Test					Pending	pre-approved		0	0	0	0	Okamoto, Lorna
361	Test	Test					Pending	pre-approved		0	0	0	0	Okamoto, Lorna
381	Art Director	Art Director	08/14/2012		08/14/2012		Open	approved	Hired	0	3	0	0	Okamoto, Lorna
401	Administration Manager 2	Administration Manager	06/10/2013	06/14/2013	06/18/2013		Open	approved	Negotiating Offer	0	2	0	0	Okamoto, Lorna
421	EVP	EVP					Open	pre-		0	0	0	0	Okamoto,

Job Requisition Report

Approved and Closed requisitions are hyperlinks that can be opened. Unless the user is related to the requisition in an operator or operatorTeam field, the user will only see fields with V permissions. Pre-approved requisitions cannot be opened.

The user cannot see applications or posting data from this vantage point, but the report does show a sum of the number of applicants, based on applicant state.

The user can export a csv file of the report results. The file is only supported in csv format; if the client wants other formats, Ad Hoc Reports should be used.

The user can also click "Open Export Options" and select standard fields to include on the export.

Job Requisition Export Options

This field list appears the same regardless of the configuration of the Requisition XML. It is not really possible to export the requisition custom fields in a usable manner. There is a checkbox that allows custom fields to be included in the export, but if this is checked it has both a severe performance impact on the export and it dumps all the field labels and field values into a single csv cell. This especially does not work well since Excel has character limits regarding cell length.

For this among multiple reasons, it is recommended that clients use the more up to date reporting options.

22.4.2 Folders in Reporting

Most standard fields are reportable in Ad Hoc Reporting and custom fields can be made reportable in *Provisioning* > *Custom reportable fields*. If you follow the suggested process for configuring XML templates, all custom fields should be 8. Reportable Custom Fields

The number of custom fields that can be configured is not changeable. Field IDs should be placed in the configuration mapping. Fields have to be mapped to the correct field type (picklist to picklist, etc.) A succession sync (green confirmation message on screen and email with a non-zero record count) must be run for content to be reportable. The page does not function reliably in Internet Explorer; after saving or syncing, manually refresh the page before taking a next action.

Interview Central content is not reportable (but see two app fields that summarize interview results and are reportable). Pre-screen question content is not reportable. Job description and other rich text fields are not reportable.

Table 59:

Report Folder	Description
Job Req Templates	Contains basic information about the job requisition XML templates that exist in the instance, like system-generated template ID number.
Application Templates	Contains basic information about the application XML templates that exist in the instance, like system-generated template ID number.
Job Requisition	Contains data from requisition records that have been created in the instance.
Posting	Contains data regarding current job posting status on all requisitions that have been created in the instance. A requisition may have a 1-to-many relationship with the postings, so one requisition may show up multiple times in a report that uses this data if it has been posted to multiple locations.

Report Folder	Description
Offer Letter	Contains data regarding offer letters that have been created, such as the date of offer letter generation and the mode by which the offer letter was sent/recorded. Offer detail fields appear here in all instances but for clients using offer approval functionality, these fields are legacy and should not be used. This data should be reported on from the Offer Details folders instead.
Candidate Search Audit	Related to US OFCCP laws. Contains tracked search activity, such as criteria, searcher, results and actions taken on the search results. For more information on OFCCP tracking and reporting see the OFCCP Reporting [page 622] section of this guide.
Candidate	Contains data from the candidate profile records that exist in the instance. Does not include background element data.
Candidate Tags	Contains data on tags that have been applied to candidate profile records in the instance.
Application	Contains data from the application records that exist in the instance.
Family Role	N/A
App Status Audit Trail	Contains data on every applicant status through which the application has been moved, or has skipped past.
Job Req Status Audit	Contains data on every time the requisition status has been changed.
Job Req Operator	Contains data on all operators on the requisition. A requisition has a 1-to-many relationship with the operators, so one requisition will show up multiple times in a report that uses this data since there are multiple operators assigned to the requisition. In general it is preferable to report on operators using the operator-specific folders to maintain a 1-to-1 relationship between the operator and the requisition.
Job Req Originator	Contains data about the user who created the requisition.
Recruiter	Contains data about the user who is currently listed in the related operator field on the requisition.
Hiring Manager	
Talent Coordinator	
Sourcer	
Second Recruiter	
VP of Staffing	

Report Folder	Description
Job Family Expert	N/A
Approver	Contains data about the users who were approvers on the requisition. A requisition has a 1-to-many relationship with the approvers, so one requisition will show up multiple times in a report that uses this data since there are multiple approvers on a requisition.
HMM	Contains data about the user who is the manager of the user currently listed in the hiringManagerName operator field on the requisition.
Recruiter Team	Contains data about the users and/or groups who are currently listed in the related operatorTeam field on the requisition.
Hiring Manager Team	
Talent Coordinator Team	A requisition may have a 1-to-many relationship with the operatorTeam users/groups, so one requisition may show up multiple times in a report that uses this data if it has multiple users/groups associated to it.
Sourcer Team	
Second Recruiter Team	
VP of Staffing Team	
Approver Team	
Candidate Application Comments	Contains data from the comments that are made in the Comments portlet in the application record.
Candidate Profile Comments	Contains data from the comments that are made in the Comments portlet in the candidate profile record.
ecruitingOffer Detail	Contains data from the Offer Details approval forms. A requisition may have a 1-to-many relationship with the applications since multiple applicants may be hired on one requisition, so one requisition may show up multiple times in a report that uses this data if multiple candidates were hired. An application may have a 1-to-many relationship with the Offer Details forms since multiple versions of the form can be created, so one application may show up multiple times in a report that uses this data if it has multiple copies of an offer approval details form. In most cases it is better to use the Last Offer Detail folder to pull offer data.

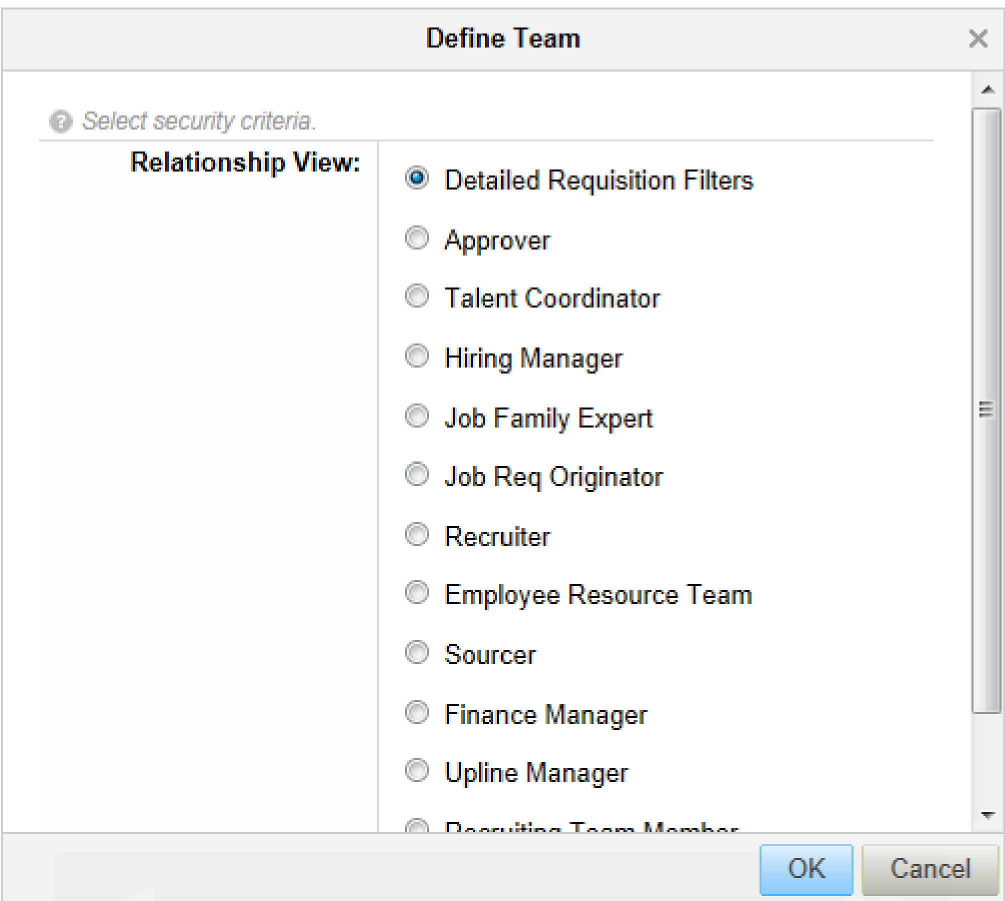
Report Folder	Description
Last Offer Detail	Contains data from the most recent Offer Details approval form. A requisition may have a 1-to-many relationship with the applications since multiple applicants may be hired on one requisition, so one requisition may show up multiple times in a report that uses this data if multiple candidates were hired.
Referral	N/A
Agency Recruiter	Contains data of agency users in Admin Tools setup agencies.
Agency	Contains data of agency record entries in Admin Tools.
Application History	Contains a history of all changes that were made on the application, as shown in the application audit trail data (including field-level change history if that field level auditing is enabled.)
JobReq Posting Audit History	Contains a full history of all job posting activity, including postings that were removed. A posting may have a 1-to-many relationship with the posting events, so one posting type like External may show up multiple times in a report that uses this data since the posting may have been added and removed multiple times.
WorkFlow Status	Contains the current route map step of the requisition.
Audit Trail	Contains the action history of the requisition.
Route Entry	Contains the full route map history of every step the requisition has passed through, is presently in or has yet to pass through.
Candidate Profile Fields Audit	Contains a history of all changes that were made on the candidate profile, as shown in the candidate profile audit trail data (including field-level change history if that field level auditing is enabled.)
Application Assessment Order	Contains the application record information about the order data on third party assessments, if the standard assessment integration is in use.
Assessment Result	Contains the application record information about the assessment results from third party assessments, if the standard assessment integration is in use.
Candidate: <background element>	One folder present per background element. Contains the candidate profile current background element data.
Application: <background element>	One folder present per background element. Contains the candidate profile background element data as captured (snapshotted) at the point a recruiting user first viewed the application.

22.4.3 Recruiting V2

Recruiting V2 is a report schema that provides the user full access to all Recruiting data. A user with create access to this reporting capability can put together a report with any columns from any folder and view all data in the results. In general this level of access would only be granted to an administrator, or to recruiters or recruiting management if the client has a relaxed data access policy within the recruiting department. This reporting schema is unlikely to be used for Hiring Managers, although some clients do grant Hiring Managers “Run” privileges to this schema and then only “Share” reports to those hiring managers where there are pre-defined filters built in to the report to restrict their data results.

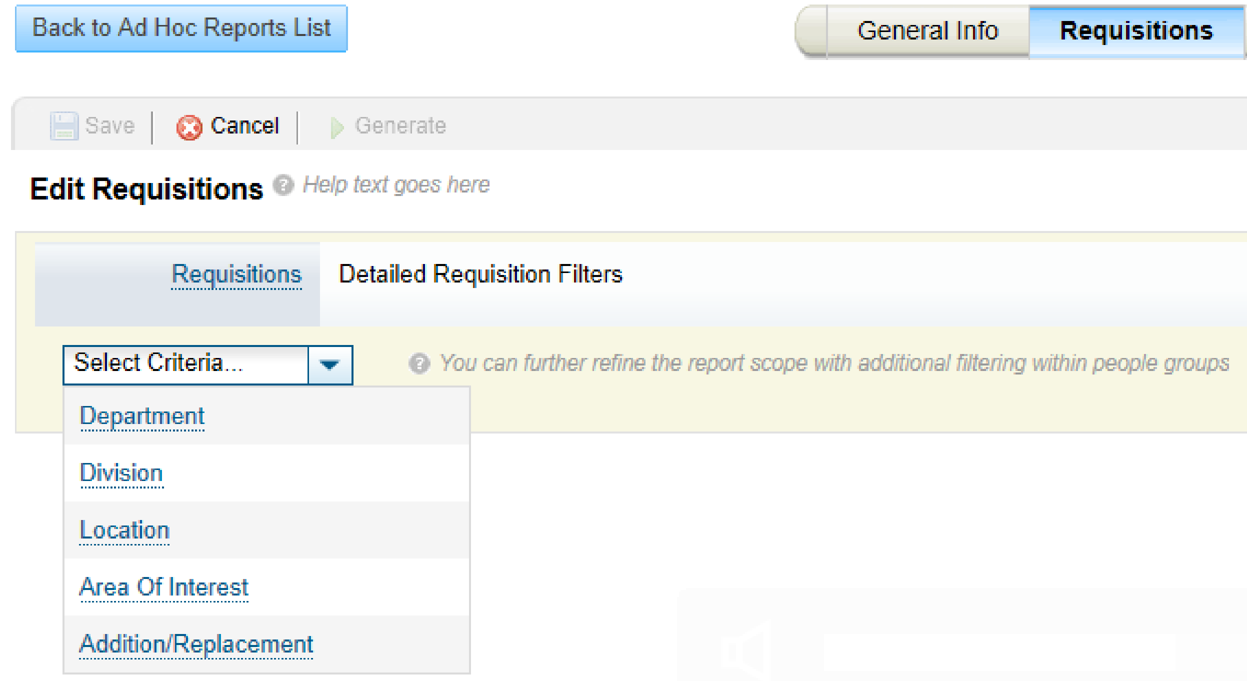
22.4.4 Recruiting V2 Secured

Recruiting V2 is a report schema similar to Recruiting V2 but with an extra layer of security. V2 Secured reports have a “Requisitions” option that forces the user to “Refine Criteria” and select their relationship to the data they want returned. This can be read as “Show me data where I am the... <select relationship> = Hiring Manager / Recruiter / etc.



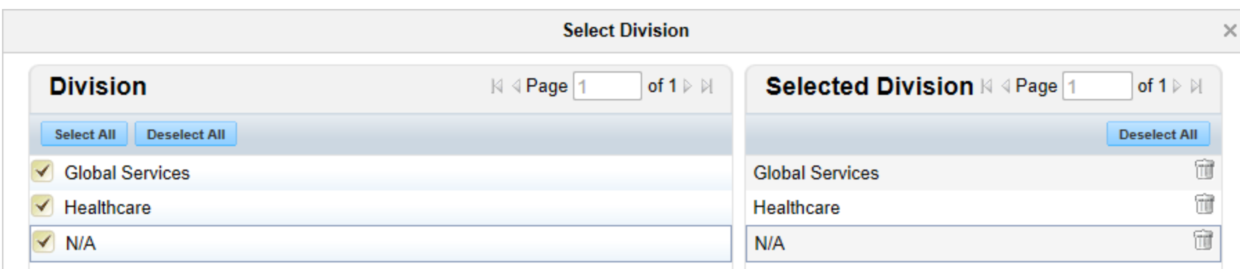
Relationship Definition

Because of this extra security, clients more frequently distribute this level of reporting access to their end users. There is also an option on the Requisitions pill for Detailed Requisition Filters.



Detailed Requisition Filters

Requisition filters enable the user to select criteria and select a field from the requisition and pick from a list of values they were permissioned to access. For more information about permissioning special filter values for selected users see the Detailed Requisition Reporting Privileges [page 504] section of this guide. This feature is not available in instances with RBP enabled. All other V2 Secured functionality works with RBP instances.



Selecting from a Limited List of User Permission Values

22.4.5 Recruiting Standard Reports

The SuccessFactors Reports team has produced several standard reports for client use. The client's instance must meet minimum standards of configuration in order for the reports to work. If those minimum standards of configuration are not met the reports will error, but it is possible to avert those errors by re-mapping the report so that it looks for custom fields, instead of the missing standard fields.

For more information, see the Analytics & Reporting section of Sharepoint.

22.4.6 Visual Publisher/BIRT

Visual Publisher (also known as BIRT Reporting) is an open source, third-party tool similar to Business Objects or Crystal Reports that can be plugged in to SuccessFactors Ad Hoc reporting to provide our clients more powerful tools to manipulate the data. Visual Publisher provides abilities that Ad Hoc 2 does not support, such as relabeling columns, performing calculations and adding graphs, titles and introductory text.

The "Standard Recruiting Reports" are built in Visual Publisher. These can be enabled for a client at no cost, and the client does not have to purchase Visual Publisher to use these reports. See Sharepoint for more information and instructions.

There is a cost associated with enabling Visual Publisher. The client should expect to provide a knowledgeable fairly technical resource to work with this tool. SuccessFactors does not supply training or support on the tool; since this is an open source tool there is online training available. Some SuccessFactors partner companies choose to provide training classes at a cost.

22.4.7 YouCalc

YouCalc is a tool to build interactive graphic representations of data. It uses the data from Ad Hoc Reporting.

The Recruiting YouCalc widget appears on the top of the Requisition tab. This is the only pre-built YouCalc attribute in Recruiting today.

Clients can commission custom YouCalc dashboards to appear in the Reporting tab of the application. There is a cost associated to building custom dashboards – see Morgan Hunt's team for a quote.

22.4.8 Ad Hoc 2 versus Online Report Designer 3

Online Report Designer is a more advanced in-system reporting tool. It provides some of the same advanced features of Visual Publisher but in a more user friendly fashion and without an add-on product. ORD3 is only available to clients who have purchased either Workforce Planning or BizX Talent Insights because the technology behind ORD3 is powered by that reporting engine.

22.4.9 BizX Talent Insights / Workforce Planning & Analytics

This provides some standard pre-packaged Recruiting analytics. See the Workforce Planning team for more information.

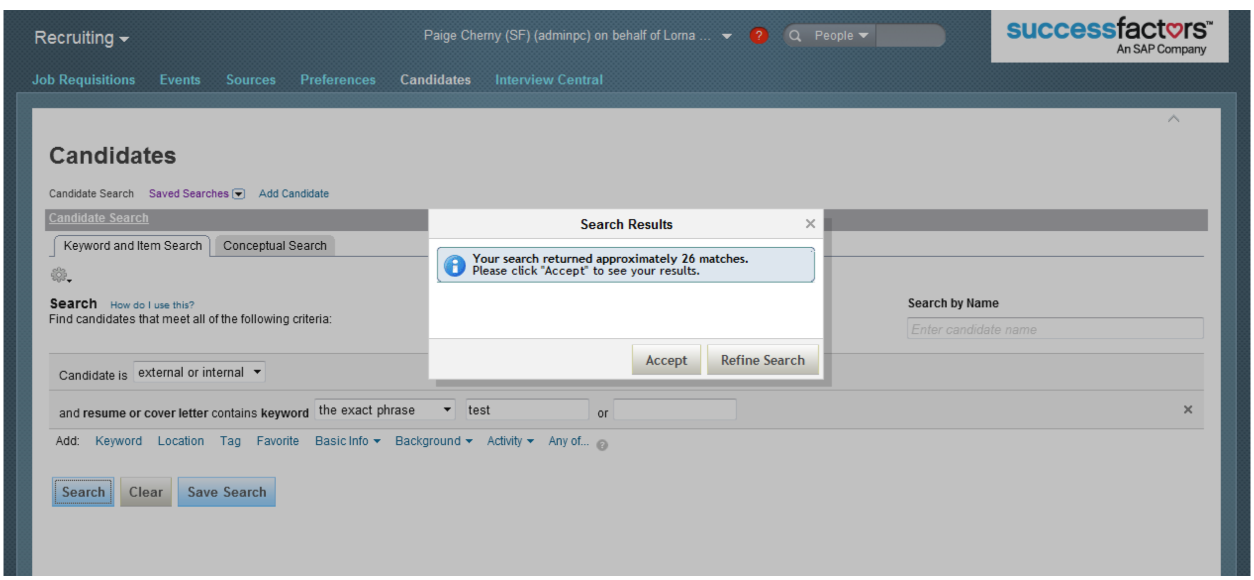
23 Governance and Compliance

23.1 OFCCP and VETS100

23.1.1 Search

Provisioning > *Company Settings* > *Enable Candidate Search OFCCP compliance warning and auditing (for US-based job reqs)*

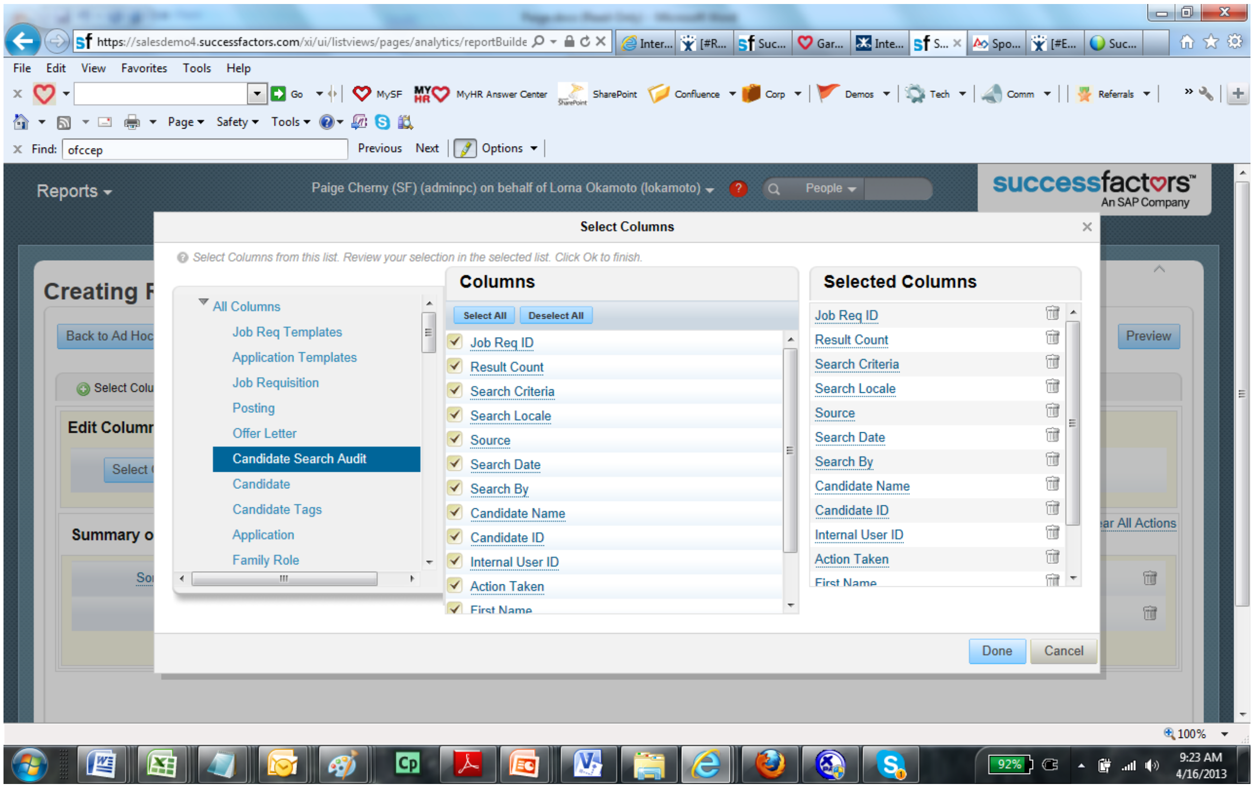
Enables pop up upon search that shows number of search results:



Search Results Pop-Up

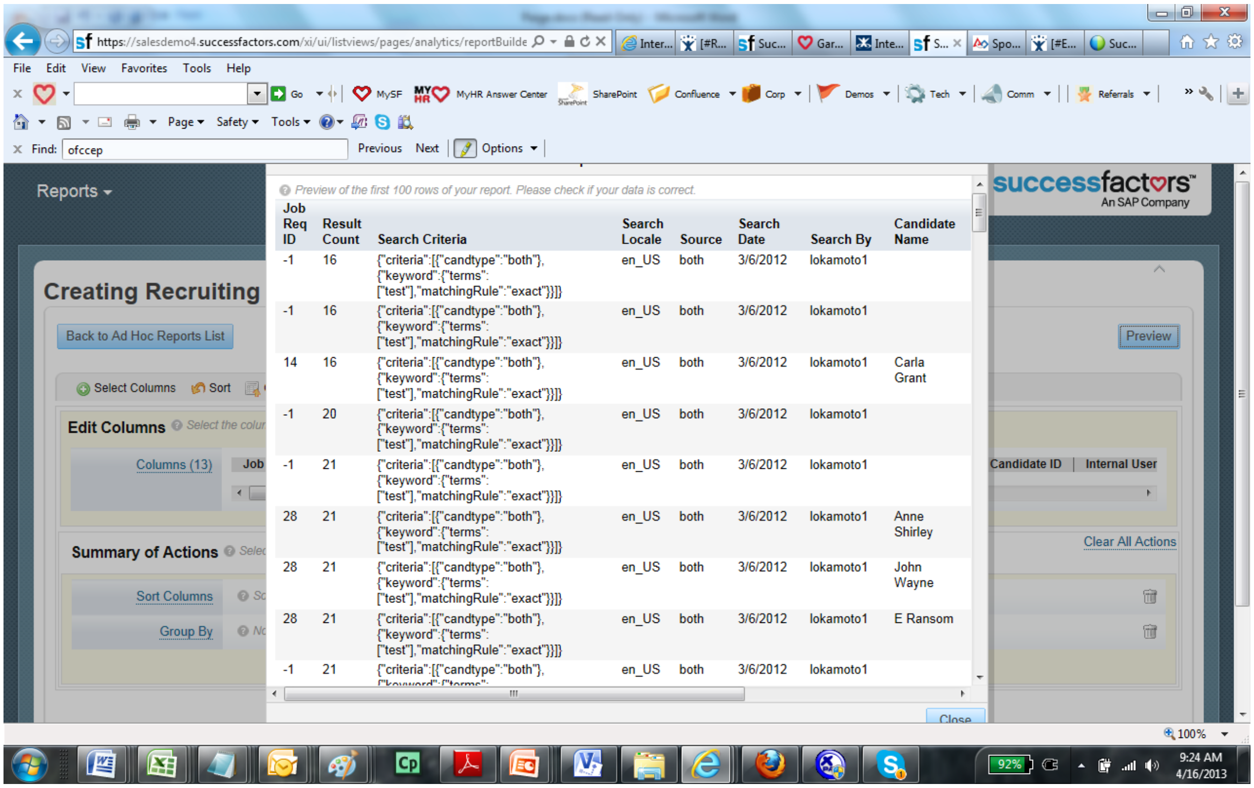
Users can accept search and see results or refine. This adheres to the Internet Applicant Rule; once search results are accepted clients should be using a process to review and disposition all results. This allows clients to contain the amount of work recruiters have to do.

Searches that are run are tracked and available in *Ad hoc Reporting* > *Candidate Search Audit*.



Candidate Search Audit

This reporting data shows the search criteria, number of results, the related requisition (if any — this is collected when the user launches their candidate search from the requisition.), the language of the search, whether the search was on internal or external candidates, the date of the search, who performed the search, every candidate returned in the search (so one search can produce multiple lines on the report), and the action taken as a result of the search (email or forward.)



Candidate Search Report

This allows clients to prove their search methodology as fair if they are audited.

23.1.2 OFCCP Candidate Profile Snapshot

A snapshot (copy) of the candidate profile is taken when an application is viewed by a recruiting user (recruiter, hiring manager, etc.) for the first time.

This information is stored with the application in the More Information and Background Elements sections, and is shown whenever the application is viewed. This ensures the candidate profile information is locked and will not change in the recruiting user's view, even if the candidate edits their candidate profile during the time that the job application is being processed.

This is an important aspect of OFCCP compliance because it ensures that all recruiting users are making hiring decisions based on a consistent understanding of the candidate's data throughout the application process. This also ensures that candidates cannot complicate any legal proceedings by changing their data to make the client seem to be practicing unfair hiring.

If the client is seeking to adhere strongly to OFCCP best practices, do not configure the EDIT_CANDIDATE_SNAPSHOT capability in the Application XML, since that allows the candidate profile snapshot data to be edited and changed.

23.1.3 EEOC Data Collection

It is up to clients to have their instance configured to EEOC specifications, according to the interpretation of the client's HR attorneys. Consultants may point the client to the EEOC website for further information:

http://www.eeoc.gov/employers/eeo1/qanda-implementation.cfm

There are standard fields recommended for use in the Application for data collection.

- Field id ethnicity should be used for the applicant to specify whether or not they identify as Hispanic or Latino. This field must be defined as a picklist and the client can specify the values they wish to provide in the drop down.
- Field id race should be used for the applicant to specify their racial identification. This field must be defined as a picklist and the client can specify the values they wish to provide in the drop down.
- Field id gender should be used for the applicant to specify their gender identification. Although gender is defined as a picklist, it will appear as radio buttons and it will not respect any picklist value changes (that is, it is not possible to add options to this field.) Since it is not possible to add a "do not wish to disclose" option this field should be left unrequired so the applicant can leave the field set as "Not Selected" if desired.

Certain clients, especially those who are federal contractors, may wish to configure additional data collection around veteran and disability status information for the Department of Labor VETS100 report.

- Field id veteranStatus can be used for the applicant to specify their veteran status. This can be configured in the client environment as a picklist, where the client can specify their desired picklist values.
- Field id disabilityStatus can be used for the applicant to specify their disability status. This can be configured in the client environment as a picklist, where the client can specify their desired picklist values.

23.1.4 OFCCP Reporting

SF also provides a pre-built file-ready OFCCP report that can be set up in a client's instance upon request (requires the client to be using the correct fields in their configuration). See the Standard Reports Guide.

10. OFCCP "Applicant Flow" Report

A report is required to be submitted annually to the Federal Government by organizations under OFCCP guidelines. The format and content is defined by the OFCCP and as such this report is intended only to provide information to assist with populating the form.

OFCCP "Applicant Flow" Report

EMPLOYMENT DATA - Count of all employees categorised by EEO Job Category, Gender and Ethnicity

Job Categories	Number of Employees (Report employees in only one category)														
	Race/Ethnicity														
	Hispanic or Latino		Not-Hispanic or Latino												Total Col A-N
			Male						Female						
	Male	Female	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or more races	White	Black or African American	Native Hawaiian or Other Pacific Islander	Asian	American Indian or Alaska Native	Two or more races	
	A	B	C	D	E	F	G	H	I	J	K	L	M	N	O
Administrative Support Workers	0	0	1	0	0	0	0	0	0	0	0	0	0	0	1
Executive/Senior Level Officials and Managers	1	1	1	1	0	0	0	0	3	0	0	0	0	0	7
First/Mid-Level Officials and Managers	0	0	0	0	1	1	0	0	0	1	0	0	0	0	3
Professionals	4	1	8	2	0	1	0	1	4	2	0	1	0	0	24
Sales Workers	0	1	7	1	0	0	0	0	6	0	0	1	0	0	16
Unknown	0	0	0	0	0	1	0	0	0	0	0	0	0	0	1
TOTAL	5	3	17	4	1	3	0	1	13	3	0	2	0	0	52

Last modified: Tuesday, December 20, 2011 SuccessFactors, Inc. Confidential / Internal Use Only Page 17 of 18

OFCCP Applicant Flow Report

23.1.5 VETS100 Reporting

SF also provides a pre-built file-ready VETS100 report that can be set up in a client's instance upon request (requires the client to be using the correct fields in their configuration). See the Standard Reports Guide.

8. Veterans Report

The Veterans report will produce information that supports the creation of the VETS100 report. There are 4 Vets-100 statuses. Of these, there are only 3 of the 4 total veteran's statuses that should be collected from an applicant. Newly Separated Veteran / Other Protected Veteran / Veteran of the Vietnam Era. The HRIS system should be the system of record of all hire information, and as such is should be the system of record for Special Disabled Veteran. Currently the SF recruiting system only captures 1 of these statuses in a standard field: Veteran of the Vietnam Era. Therefore this is the only field included in the standard report until such a time as the other fields are available.

Veterans Report Sample.pdf

Veterans Report

Department / Division / Location			Veteran of the Vietnam Era	Not Veteran of the Vietnam Era	Not specified	Grand Total
Sales	ACE Enterprises	Boston, MA	0	6	1	7
		ACE Enterprises Total	**0**	**6**	**1**	**7**
	ACE Software	Boston, MA	0	1	2	3
		Dallas, TX	0	1	2	3
		Denver, CO	0	3	0	3
		East	0	2	5	7
		Portland, OR	0	3	1	4
		San Mateo, CA	0	6	3	9
		West	0	1	2	3
		ACE Software Total	**0**	**17**	**15**	**32**
		Sales Total	**0**	**23**	**16**	**39**
Talent Management	ACE Enterprises	Central	0	0	4	4
		ACE Enterprises Total	**0**	**0**	**4**	**4**
	ACE Software	Boston, MA	0	2	2	4
		Denver, CO	1	3	3	7
		ACE Software Total	**1**	**5**	**5**	**11**
		Talent Management Total	**1**	**5**	**9**	**15**
Technology	ACE Software	Boston, MA	0	3	2	5
		Denver, CO	0	4	0	4
		ACE Software Total	**0**	**7**	**2**	**9**
		Technology Total	**0**	**7**	**2**	**9**
		Grand Total	**1**	**35**	**27**	**63**

Last modified: Tuesday, December 20, 2011 SuccessFactors, Inc. Confidential / Internal Use Only Page 13 of 18

VETS100 Report

23.2 508 / Accessibility

SuccessFactors is committed to delivering software that is accessible to individuals with disabilities. Although our applications include many accessibility features, they are currently not fully optimized for accessibility. You may need to provide client-side, third-party assistive technologies, such as the JAWS screen reader, to be used in conjunction with SuccessFactors applications. Contact Daniel Dooley, Program Manager, for any conversations about accessibility needs at 770-335-1581.

24 Recruiting Management System Notifications

Both RCM & RMK send users system notifications. In order to reduce the possibility of duplicate emails, use the following table to set up a best practice configuration for System Notifications.

Table 60:

Setting	Enabled?	Notes
Document Routing Notification	Yes	
Document Due Notification	Yes	
Document Late Notification	Yes	
External Candidate Forgot Password Notification	Yes	
Invite Candidate to Apply	Yes	
Job Alert Expired Notification	No	Job alerts not necessary when using RMK
Job Alert Invalidated Notification	No	Job alerts not necessary when using RMK
Job Alert Notification	No	Job alerts not necessary when using RMK
New Recruiting Operator Notification	Yes	
Recruiting Interviewer Notification	Yes	
Recruiting Even Interviewer Notification	Yes	
Career Site E-Mail Notification	No	Email sent when using the email verification option not supported by RCM/RMK Integration.
Recruiting Manual Candidate Notification	Yes	
Career Site Password Reset for external candidates	Yes	
Recruiting Agency	Yes	
Recruiting Imminent Candidate Purge Notification	Yes	
Share candidate search	Yes	

25 External Third Party Integrations

25.1 LinkedIn

When a candidate is applying for a job, they can either choose to apply, and enter their candidate profile data entry by hand, or use LinkedIn to populate certain data values on their candidate profile.

25.1.1 Quick Facts

- This LinkedIn integration can only be used as part of the apply process; it is not possible to use LinkedIn to populate a candidate profile if the candidate is not presently applying for a job
- Integration may only be initiated and authorized by candidates, not recruiting users. Integration may only occur on a case by case basis; the candidate’s authorization may not be used to maintain a dynamic link to the LinkedIn data
- LinkedIn only makes limited data available via integration
- Not all available LinkedIn fields need to be mapped; clients may choose to use fewer fields than LinkedIn makes available

25.1.2 Prerequisites

LinkedIn integration requires initial setup by Professional Services.

- *Provisioning* > *Company Settings* > *Enhanced Job Search UI*
- *Provisioning* > *Company Settings* > *Complete Profile before Application*

25.1.3 Configuration

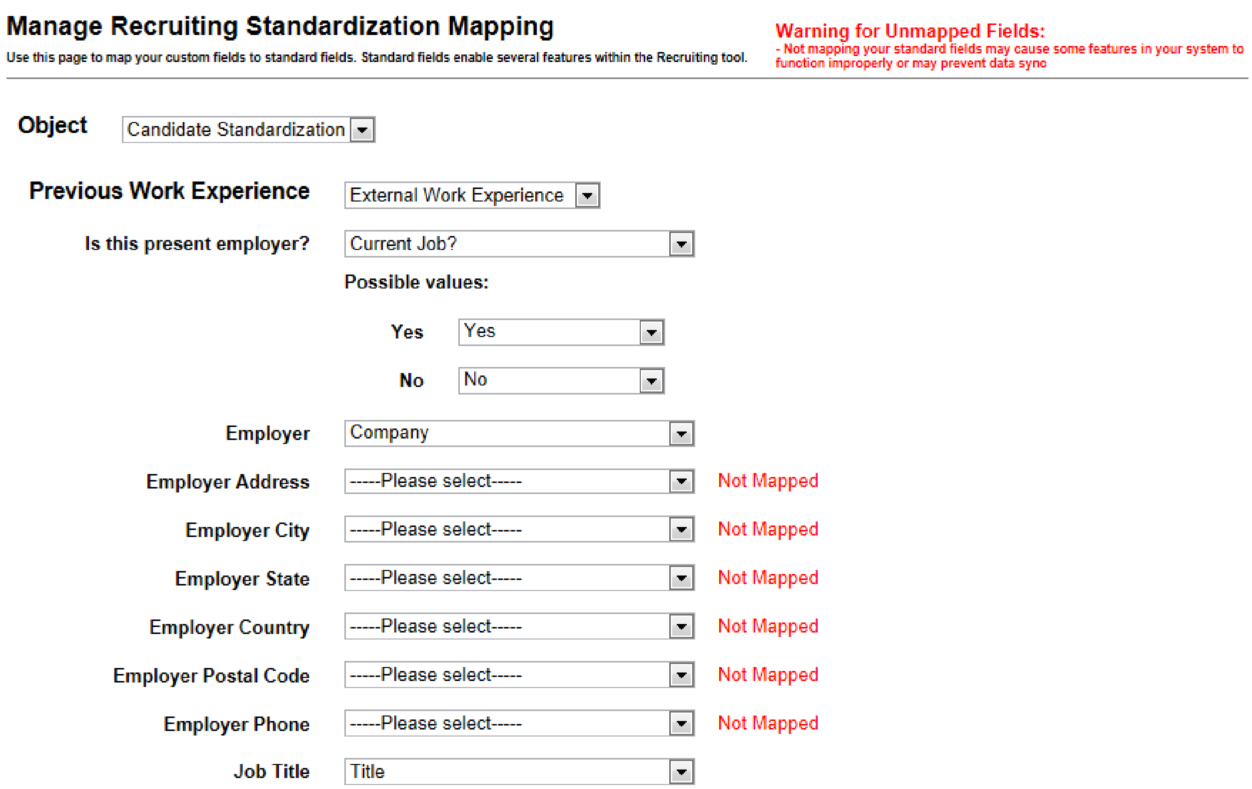
Context

Procedure

1. Enable the feature in *Provisioning* > *Company Settings* :
2. *Admin Tools* > *Configure Standardized Field Mapping*

Next Steps

Standardized field mapping is necessary to define where the values from certain LinkedIn fields should be placed in the SuccessFactors Recruiting Management candidate profile. The values on the right are the values available from LinkedIn. The fields on the left are drop downs from which you can select fields you configured in the Candidate Profile XML. Some fields are limited to match types – for instance, you cannot map a field defined as text to a value that LinkedIn will send over as a date. You cannot map any field type to a picklist field, even if it appears as an option.



Recruiting Standardization Mapping

Only certain fields are supported in the LinkedIn integration.

Basic Information

- firstName
- lastName
- address
- dateOfBirth
- cellPhone

Work Information

- currentTitle
- currentCompany
- employer
- jobTitle
- presentEmployer
- employmentStateDate
- employmentEndDate
- jobDescription

Education

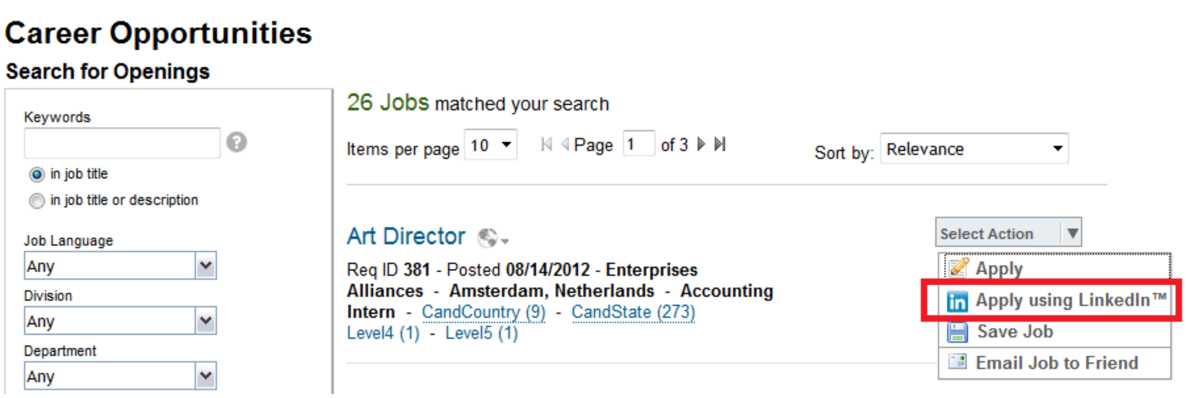
- nameofSchool
- degreeObtained
- fieldOfStudy
- startDate
- endDate

25.1.4 Working with the Apply Using LinkedIn Integration

Context

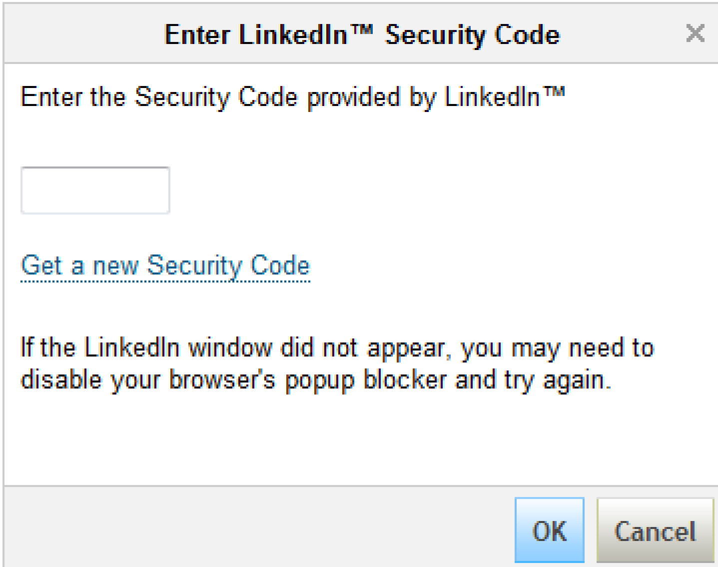
Procedure

1. Select Apply Using LinkedIn from the Action list of a job requisition or directly from a job requisition page.



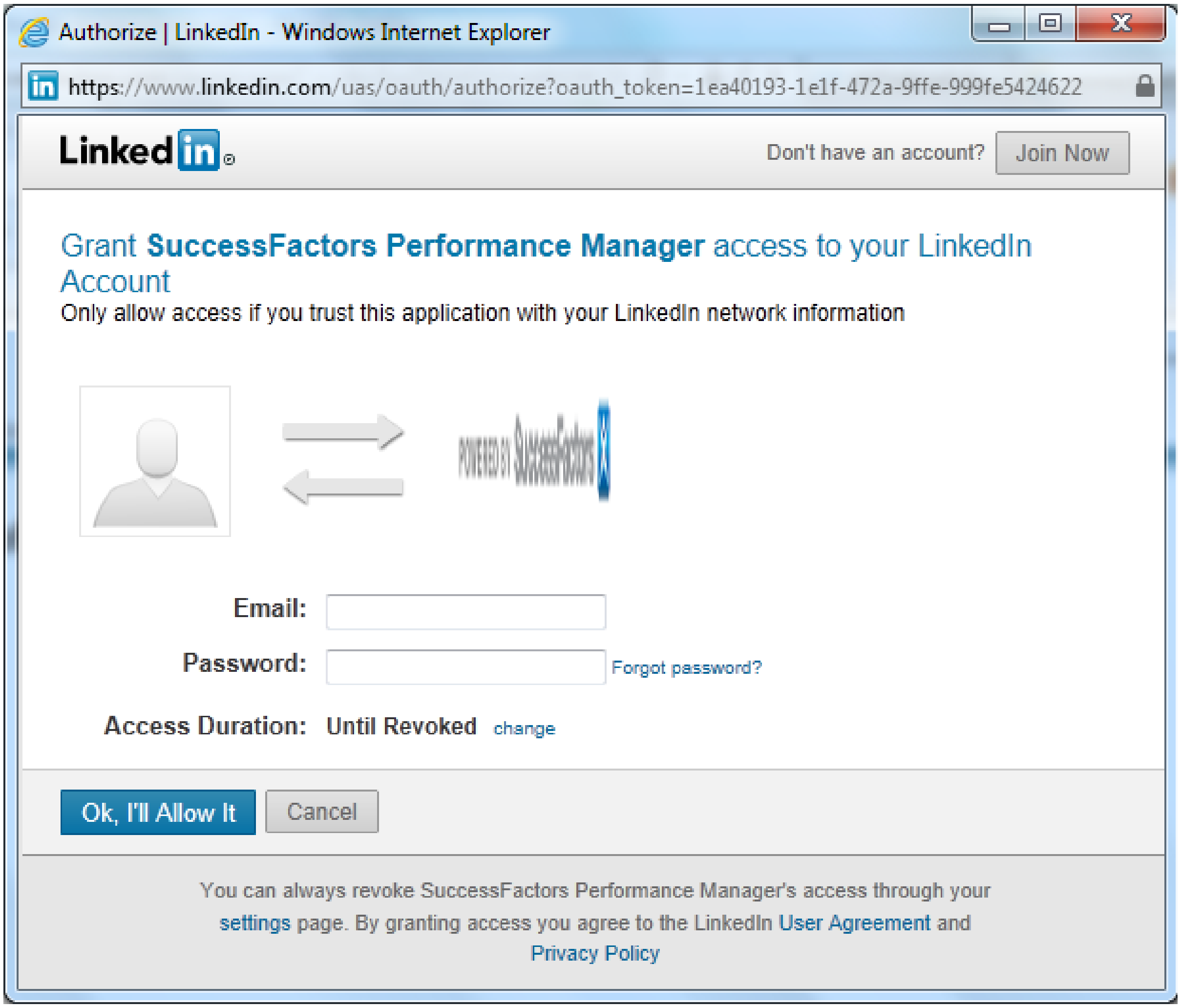
Apply using LinkedIn

2. Enter the LinkedInTM Security Code to grant access to the LinkedIn Account.



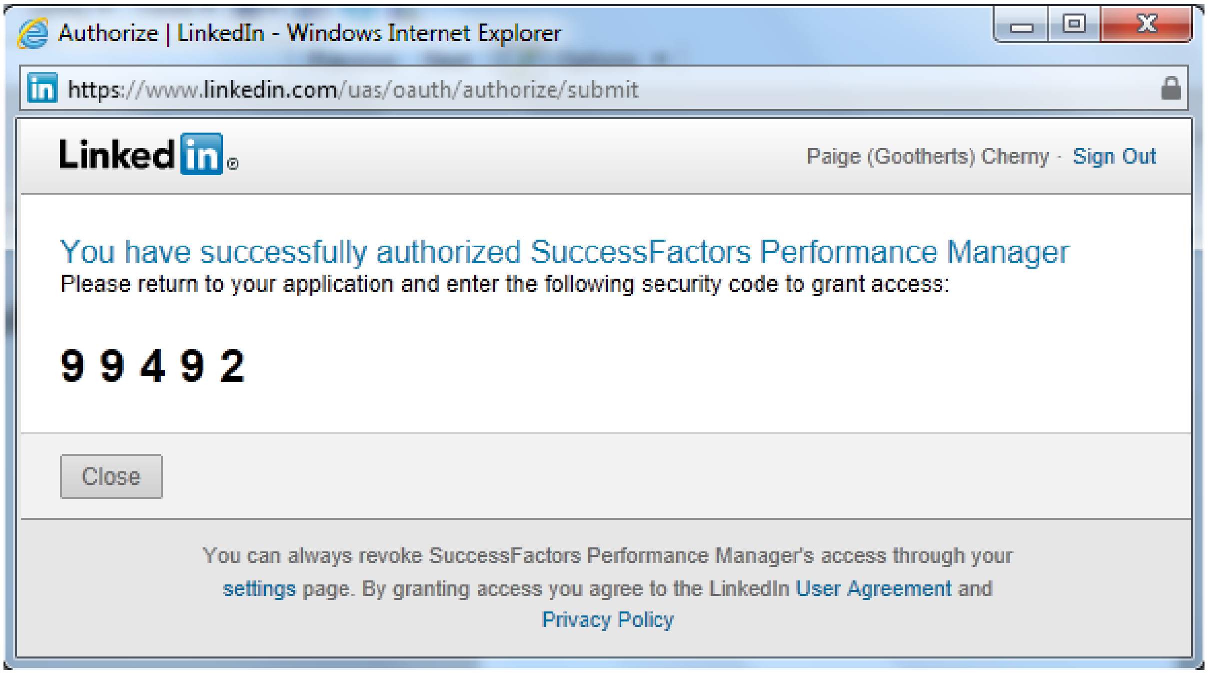
LinkedIn Security Code

3. Along with this, LinkedIn will pop up a window to provide the user account log in so they can obtain their security code. Pop-up blockers may interfere with LinkedIn's attempt to open a verification code window, and may need to be manually disabled.



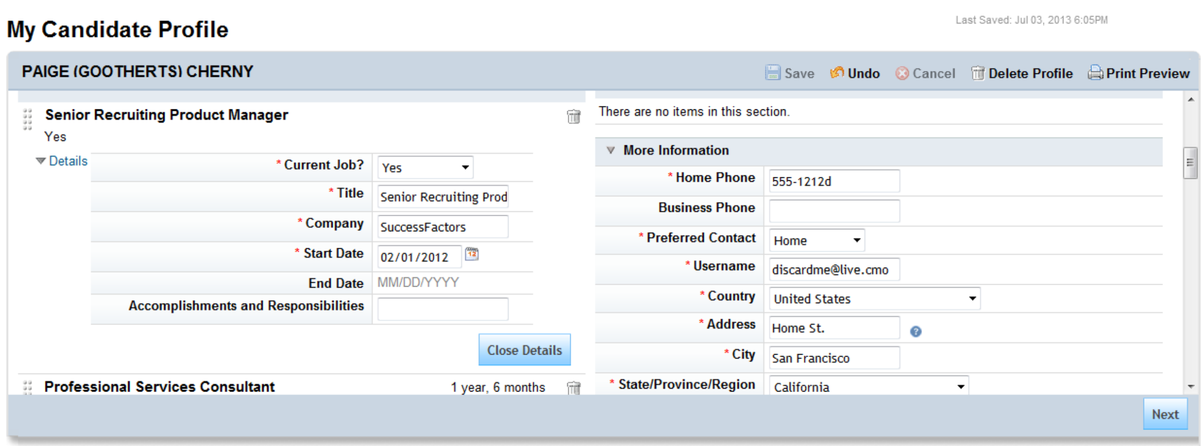
Grant the Application LinkedIn Access

4. Once the candidate authenticates into their LinkedIn account, the candidate will receive a Security Code.



LinkedIn Security Code

5. The candidate profile data will populate from LinkedIn, according to the standardized field mapping.



Candidate Profile populated with LinkedIn data

25.2 eQuest Integration

Recruiting customers can post jobs automatically to job boards and to multiple job boards simultaneously using the eQuest integration.

Users can only send a job requisition to a job board through the eQuest aggregator. Customers can work directly with eQuest to negotiate a package to purchase job postings in bulk, or via the eCommerce (a la carte) solution. Once the customer has a contract with eQuest, the receive a login and password, which are required to configure the eQuest/RCM integration.

➔ Recommendation

eQuest Advantage (an a la cart solution) is not supported.

25.2.1 eQuest Quick Facts

- The Posting Start (start) and Posting End (end) date fields do not show on the Job Requisition Detail page. The only place to access these fields is via the Job Postings page.
- You cannot permission READ access to the Intranet, Corporate, start and end dates. All users who can see the requisition can see these fields.
- Job Board Postings access is controlled solely through the Job Postings Permissions admin page Only people with rights to post jobs will have the action buttons on the table shown.

25.2.2 How to Configure eQuest

Procedure

1. Navigate to *Admin Tools* > *Managing Recruiting* > *Manage External System Accounts.* Enter `equest` in the *EXTERNAL_Partner_CODE* column.

   ➔ Recommendation

   Only one eQuest login should be configured per company to avoid duplicate postings. Multiple eQuest logins for customers who require multiple user profiles are supported. Accounts can be mapped to a single user to allow themto use the account, or they can be mapped to all users with the `*` character in the upload.

2. Navigate to *Admin Tools* > *Managing Recruting* > *Setup Company Information* to configure the information that will appear on job requisitions.
3. Navigate to *Admin Tools* > *Manage Recruiting* > *Setup Job Board Options* to configure the enum fields required by eQuest.
   a. *Industry Values Setup*: The options configured here map to the industry field in the Requisition XML. From this page, admin users can select the industries applicable to the customer's business. The fields selected appear in the dropdown list when the industry field is shown or edited on the Job Requisition XML.
   b. *Country and State/Province Values Setup*: The selections made here map to the country and stateProvince enum fields in the Requisition XML. Admin users can search from a list of countries, states and provinces to find the appropriate selections.
4. Configure the <function> field. The <function> field is a text field in the Job Requisition XML, but is restricted to a set of options. This field has a quickfind function. A user can start typing the function of the job requisition and the quickfind lists only the functions with that text in the function name.

5. Configure the Requisition XML. The following fields are required in the Job Requisition XML.
   - Classification Type (maps to classificationType)
     - Permanent
     - Contract
     - Contract to Permanent
     - Intern
   - Classification Time (maps to classificationTime)
     - Full-Time
     - Part-Time
   - Industry
   - Function
   - City (maps to city in the JRDM)
   - State/Province
   - Postal Code (maps to postalcode)
   - Country
   - Recruiter Name(maps to recruiterName)

   Classification Type, Classification Time and Country are also enum fiels with a short list of options. The short lists for these additional enums are built in to the application, so no additional configuration (other than adding them to the Requisition XML) is required.

   > **Recommendation**
   >
   > These fields should be included in every Requisition XML and made required. If they are not shown or not filled in, the recruiting user will be asked to provide ALL of this information before the job will post.

   ```
   <field-definition id="classificationType" type="enum" required="true"
   custom="false">
   <field-label><![CDATAClassification Type&linkCreation=true&fromPageId=6065099"
   class="createlink"linktype="raw" linktext="Classification Type|Classification
   Type">Classification Type]></field-label>
   <field-description><![CDATAClassification
   Type&linkCreation=true&fromPageId=6065099" class="createlink"linktype="raw"
   linktext="Classification Type|Classification
   Type">Classification Type]></field-description>
   </field-definition>
   ```

   > **Recommendation**
   >
   > These fields can be relabeled in the XML template. For example, if the customer already uses the term `Function` on the Location filter, the function field can be relabeled.

6. Configure eQuest field permissions in the Job Requisition XML. Set eQuest fields to required for the pre-approval stage to ensure values are provided, but read and edit permissions can be assigned however the client wishes.
7. Enable Job Board Posting. Navigate to *Provisioning* > *Company Settings* > *Enable Job Board Posting*.
8. Grant users the right to post jobs. Navigate to *Admin Tools* > *Manage Recruiting* > *Recruiting Permissions* > *Gran eQuest Job Posting Permissions* This permissions page allows a user or group of users to manage the External Job Boards table on the Job Postings page on a requisition Both tables on the Job Postings page

are viewable by anyone who can see the requisition, but only those individuals who have posting privileges are able to modify the External Postings table.

25.2.3 How to Post a Job to eQuest

Procedure

1. After the job poster clicks *Add Job Boards* and makes sure any required info is given, the user will be taken to eQuest. This pages shows a list of the board the user's company has pre-purchased postings from.
2. The user then clicks the board to post to and clicks *Post Job*. At this point the information will be passed through eQuest to the individual job boards, and the prepaid count will be decreased by one for each selected board.
3. After the postings are submitted, the user is then brought back to the requisition's Job Postings page. Now the lower table should be populated with the job boards selected from eQuest.

   Modifying posts updates all job boards with the current information on the Job Requisition. If any information has changed on the requisition, all of the most recent information will be sent to eQuest. Users cannot select individual boards to update. All boards are updated at the same time.

25.3 Assessment Integration (PeopleAnswers and SHL)

25.3.1 Assessment Integration

Clients can integrate with third-party vendors PeopleAnswers and SHL to perform candidate assessments.

Using this integration, customers can:

- Assign assessments to job requisitions
- Prompt applicants to fill out the corresponding assessment
- View assessment statuses and results in the assessment portlet within the application

Use of this integration requires a separate third party contract with PeopleAnswers or SHL. If the client opts-in to the assessment integration and configures it, recruiting users will see a section on the requisition that allows them to assign an assessment package to the requisition. Multiple assessment packages on one requisition are not supported.

The Recruiting integration with PeopleAnswers and SHL requires either Boomi or SAP HCI.

Related Information

Recruiting Management and PeopleAnswers/SHL Using Boomi
Recruiting Management and PeopleAnswers/SHL Using HCI

25.3.1.1 Feature Summary

Clients can integrate with third-party vendors PeopleAnswers and SHL to perform candidate assessments. Using this integration, customers can:

- Assign assessments to job requisitions
- Prompt applicants to fill out the corresponding assessment
- View assessment statuses and results in the assessment portlet within the application

Use of this integration requires a separate third party contract with PeopleAnswers or SHL. If the client opts-in to the assessment integration and configures it, recruiting users will see a section on the requisition that allows them to assign an assessment package to the requisition. Multiple assessment packages on one requisition are not supported.

25.3.1.2 Prerequisites

- Customer must have appropriate licensing to use the Assessment Integration.
- The customer's Boomi account must be provisioned for access to Integration Packs and the Atom Cloud where they will be deployed. Provisioning of the account is directly tied to the SKU used to purchase the integration.
- The customer account must have an environment created and attached to the Boomi Cloud.
- The RCM System must be configured for Assessment Integration before configuring the third party integration via Boomi.

25.3.1.3 RCM Configuration

Procedure

1. *Provisioning* > *Company Settings* > *Enable Assessment Integration*
2. Manage Vendors
    a. For recruiting users who need to upload vendor packages, the admin user can grant them Manage Assessment Vendor Permissions

1. *RBP: Admin Tools > Set User Permissions > Manage Permission Roles > Select Role > Recruiting Permissions > grant user Manage Assessment Vendors permission*
2. *Non RBP: Admin Tools > Managing Recruiting > Recruiting Permissions > grant the user Manage Assessment Vendors permission*

3. Users with Manage Assessment Vendors permissions can upload vendors by navigating to *Admin Tools > Import/Export Assessment Vendors*
4. Upload the assessment vendor in *Provisioning > Import/Export Assessment Vendor.*
5. For the first vendor import/export, export the CSV file to generate a sample CSV file with required fields. The following fields are mandatory:
   a. externalPartnerCode (SHL or PeopleAnswers)
   b. clientId (corresponds to client being implemented and comes from the assessment vendor)
   c. active (Y/N)

> **Tip**
>
> Import/Export Assessment Vendor must be completed before Import/Export Assessment Vendor Packages, or an error will occur. Sample CSV files for both imports are generated in Provisioning.

6. Manage Assessment Packages
   a. Upload the assessment vendor packages in *Provisioning > Import/Export Assessment Vendor Packages. Assessment vendor packages are provided by the third party vendor*.
   b. For the first vendor package import/export, export the CSV file to get a sample CSV file with required fields. The following fields are mandatory:
      1. vendorId: Identifies the assessment vendor the package uses. The only supported values are SHL or PA.
      2. packageCode: ID that identifies an assessment solution to use for the order. Generated by PeopleAnswers or SHL.
      3. shortName: Shortened name of the package for use on the candidate summary page. Everywhere else the complete label appears.
      4. label for each locale: The combination of the country and location code for each language the assessment will be display in. For example, en_US, fr_FR.
   c. The following columns/fields are included in the template but not used for PA or SHL. They may be left empty.
      1. Reportpackagecode
      2. ComparisongroupID
      3. The only supported values for vendorId are PA (PeopleAnswers) and SHL (SHL)

> **Tip**
>
> Import/Export Assessment Vendor must be completed before Import/Export Assessment Vendor Packages, or an error will occur. Sample CSV files for both imports are generated in Provisioning.

7. Configure Assessment Field and Permissions
   a. Configure the assessment field id in the job requisition XML. The assessment field id can be permissioned in the same way as all other job requisition fields. The field will display on the job requisition page in the

same order it is configured on the template. See the XML sample below for an example of how to declare the assessment field and grant feature permissions.

8. Configure the Alert Subscription.
9. Grant user permissions for the SFAPI dummy integration user.
   a. *RBP:* *Admin Tools* > *Set User Permissions* > *Administrator Permissions* > *Manage Integration tools* > *enable "Access to Event Notification Subscription"*
   b. *Non- RBP:* *Admin Tools* > *Manage Security* > *Administrative Privileges* > *enable "Access to Event Notification Subscription"*
10. Grant the SFAPI Assessment permissions
    - **RBP**: Navigate to *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *select Role* > *Recruiting Permissions*. Grant the *SFAPI Retrieve Assessment Order* and *SFAPI Update Assessment Report* permissions.
    - **Non RBP**: Navigate to *Admin Tools* > *Managing Recruiting* > *Recruting Permissions*. Grant the *SFAPI Retrieve Assessment Order* and*SFAPI Update Assessment Report Permission*
11. Navigate to *Admin Tools* > *Event Notification Subscription*. Click the *Subscriber* tab, and click *Edit Subscriber* to add or edit a subscriber.
    a. For each new subscriber entry, enter:
       - Subscriber ID: for RCM, the value could be either PA or SHL
       - Name: Description
       - Status: Active or Inactive
       - Client Id: corresponds to client being implemented and comes from the assessment vendor
12. In *Admin Tools* > *Event Notification Subscription*, click the *External Event* tab, then click *Add* to configure a new subscription.
    a. To add the Boomi process as a subscriber, enter the following information
       - Alert Type: rcm_assessment_alert
       - Subscriber ID: either "PA Assessment Subscriber" for PeopleAnswers or "SHL Assessment Subscriber" for SHL
       - Protocol: SOAP_OVER_HTTP_HTTPS
       - Endpoint URL: Boomi web service URL
    b. If the Boomi web service needs authentication, enter the username and password

> **Tip**
>
> Only "PA Assessment Subscriber" (PeopleAnswers) and "SHL Assessment Subscriber" are valid for the Subscriber ID field.

XML Sample

The following XML shows two configurations.

- Field declaration with permissions
- Feature permission to view "Assessment Portlet" in applicant profile. In this example, Application portlet will be visible only when the application is in "Phone Screen" status.

```
<field-definition id="assessment" type="derived" required="true" custom="false">
<field-label><![CDATA[Assessment assocication]]></field-label>
<field-description><![CDATA\[Assessmentasso]]></field-description>
```

```
    </field-definition>
    <field-permission type="write">
          <description><![CDATA[job code permissions]]></description>
            <role-name><![CDATA[R]]></role-name>
            <status><![CDATA[pre-approved]]></status>
          <field refid="assessment"/>
        </field-permission>

    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see Assessment 
detail report for the applicant when the application is in Phone Screen Status\]
\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Phone Screen\]\]></status>
    </feature-permission>
    <feature-permission type="assessmentIntegration">
        <description><\!\[CDATA\[Operators with below roles can see Assessment 
detail report for the applicant when the application is in New Application Status \]
\]></description>
        <role-name><\!\[CDATA\[S\]\]></role-name>
        <role-name><\!\[CDATA\[T\]\]></role-name>
        <role-name><\!\[CDATA\[O\]\]></role-name>
        <role-name><\!\[CDATA\[R\]\]></role-name>
        <role-name><\!\[CDATA\[G\]\]></role-name>
        <status><\!\[CDATA\[Default\]\]></status>
    </feature-permission>
```

Tip

You can edit the assessment after the job requisition is posted but this configuration is not recommended. If a recruiting user edits the assessment field after candidates have applied to the job (for example, requiring a more rigorous skills screening than was previously asked for), two sets of candidates with different assessment criteria will be created. Permissions for the assessment field are the same as any other field-lever permission.

13. Grant feature permissions for the assessment Integration feature. Feature permissions define operator access to certain special functionalities. An unlimited number of feature-permission elements can be included in the Requisition XML. For details on granting feature permissions see the Recruiting Handbook.
14. Grant user permissions for the SFAPI dummy integration user. For more information about setting up an SFAPI user and accessing the SFAPI, see the SFAPI Functional Guide .
    a. *RBP:* *Admin Tools* > *Set User Permissions* > *Manage Permission Roles* > *Select Role* > *Recruiting Permissions* > *grant the user SFAPI Retrieve Assessment Order Permission and SFAPI Update Assessment Report Permission*
    b. *Non RBP:* *Admin Tools* > *Managing Recruiting* > *Recruiting Permissions* > *grant the user SFAPI Retrieve Assessment Order Permission and SFAPI Update Assessment Report Permission*
15. The admin can also create an email template for assessments using the same procedure for all Recruiting Email Templates. For more information see the Recruiting Handbook.

25.3.1.3.1 Configure Hard Stop Field

A " hard stop" status ensure the applicant may not proceed in the application pipeline past a certain status until the results for that assessment order are returned on the applicant record.

- A hard stop status field is configured on the job requisition template as a standard field.
- On the job requisition detail page, the hard stop status drop down consists of a list of active default, in progress and on boarded statuses available in the application status set associated with the job req.
- Once configured, when the recruiter moves the applicant to a status past the hard stop status, the system checks for any assessment triggers for the applicant and if all of them are completed. If yes, the status changed is allowed, or else the candidate cannot move past the status until all assessments are complete. Template configuration

The assessment hard stop field can be configured in the job requisition template, and permissioned the same as all other job requisition fields. This field is configured as a standard pick list field, as shown below.

```
<field-definition id="hardstopStatus" type="picklist" required="false" custom="false">
 <field-label><![CDATA[Hardstop Status]]></field-label>
 <field-description><![CDATA[Hardstop status for assessments]]></field-description>
   <picklist-id>jobReqStatus</picklist-id>
 </field-definition>
```

Tip

Though this standard field is configured as a picklist and picklist id is provided, the field behaves as a derived field and displays the default, on boarded and in progress statuses of the job req, according to the application status set id associated with the requisition.

Tip

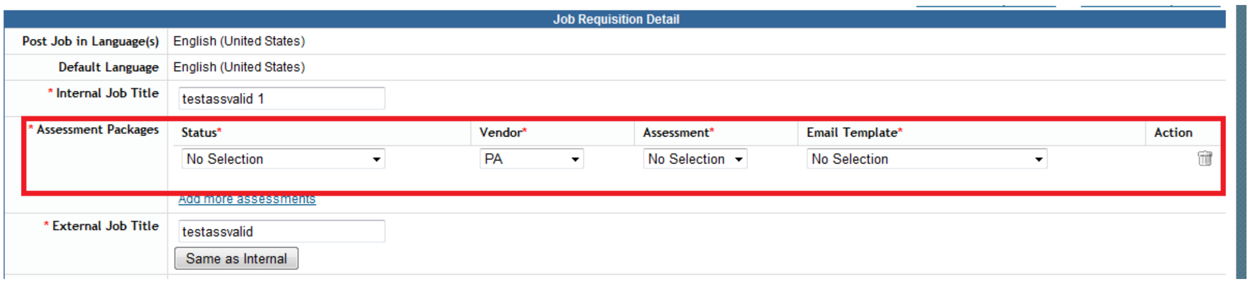
The system does not check the selection of the hard stop status against the status configured for the assessment. Users should not configure a hard stop status that would exist in the workflow before the status associated with the assessment. This would prevent the candidate from moving through the system without being sent an assessment.

25.3.2 Working with Assessment Integration

In the first phase of Assessment Integration, the applicant will be prompted to complete the assessment once they have completed the application and passed the pre-screening questions. Auto-disqualified applicants who fail the pre-screening questions will not be prompted to take an assessment.

A link to the *PeopleAnswers* assessment will appear on the screen, and the applicant will also receive an email with a link to the assessment. This process is single-sign-on and will not require additional log-in credentials.

The recruiting user can access the assessment results on the candidate summary list page or on the application page in the assessment portlet. Results on the candidate summary list page can be sorted by score, recommendation and status.



Improper Assessment/Job Requisition Configuration

Presently, the assessment integration with *People Answers* works only for the *New application* status in the status set which is associated to the requisition. You can see other statuses in the job requisition assessment field but do not select any other than the *New application* status.

25.3.3 Known Behavior

- Hard stop status: A user editing the requisition can trigger an assessment after the status configured for the hard stop. This prevents all applicants from taking the assessment and moving forward in the process. Users should pay close attention to the configuration of the assessment on the requisition to prevent this.
- Uploading and managing the vendor assessments: A user can upload the vendor assessment to RCM. Change the display name of previously loaded assessments by uploading a new list with the new display names. You cannot remove uploaded assessments, or remove them from the picklist on the requisition.
- Editing the job requisition: You can edit the assessment after the job requisition is posted but this configuration is not recommended. If a recruiting user edits the assessment field after candidates have applied to the job (for example, requiring a more rigorous skills screening than was previously asked for), two sets of candidates with different assessment criteria will be created. Permissions for the assessment field are the same as any other field-level permission.
- Adding assessments to a requisition: The assessment field on the requisition has a link that allows the user to add multiple assessments to the requisition. However, PeopleAnswers and SHL only support one assessment per requisition. Do not select more than one assessment per requisition. We recommend adding a text field to the requisition template below the assessment field instructing the user to only add 1 assessment per requisition. Optional text: "Please Note: The assessment integration only supports 1 assessment selection per requisition."
- Using multiple assessment vendors: The fields, configuration, and workflows used with this integration are only valid for PeopleAnswers and SHL. Integrating with any other vendor requires a custom integration. Any custom integration will not use the same fields, configurations, or workflows. Those custom integrations will not use the same fields, configurations and workflows used for PeopleAnswers and SHL, and the user experience will differ for applicants because of these differences.
- Candidate forwarding: If a recruiting user moves a candidate from one requisition to another requisition and into a status after the assessment trigger status, the system will not send an assessment request to that candidate. Recruiting users should move the candidate to a status before the assessment trigger status in the new requisition.
- Adding assessment score to applicant summary view: Data for PeopleAnswers and SHL is stored in different fields, and the two vendors do not share a common score field that can be permanently added to the applicant summary page. To view the score for all applicants you must add the individual vendor score field to the applicant summary view for each requisition.

- The Boomi standard integration for Assessment Integration requires that all the fields used in the integration pack are available in your data model. If you get a failure message in Boomi with the pattern *Exception=[SFAPI Domain Error!] Error Code=[INVALID_FIELD_NAME] Error Message=[Field <field name> is not defined]*, please check your data model for missing fields. For example, the gender field is used in the integration pack. A client must have this field in the data model, but it does not have to be permissioned for any user, so it never displays.

25.3.4 Assessment Integration FAQs

How many assessments can be selected on a requisition?

Select only one assessment per requisition. The system allows you to insert more than one assessment for a requisition, but this does not complete the triggers.

Does the job seeker have to log into PeopleAnswers or SHL to complete the assessment?

To complete the assessment, the job seeker must complete their profile. When the job seeker is routed to the assessment vendor from RCM, an account is automatically created with the relevant fields pre-populated. For integrations with PeopleAnswers, the job seeker must create a secure login.

How long does it take for the assessment information to be sent from the assessment vendor to SuccessFactors RCM?

The information is sent in close to real time, bu information can take a few minutes to process, send, and store in RCM.

Do PeopleAnswers or SHL send back a detailed report explaining the results for the job seeker?

No. The recruiter sees a high lever overview and overall score in RCM. Recruiters can also see detailed results by clicking a link for more information.

Does the job seeker receive an email with a link if they choose to take the assessment at a later time?

Yes, when the assessment triger is configured for the initial application, the job seeker clicks the apply button and sees a link to complete the assessment. The job seeker receives an email wtih a link to the assessment. The job seeker can also visit the *Jobs Applied* page, and use the *Action* menu to complete the assessment. If the assessment trigger is configured for any status other than the completed application, the system sends the applicant an email inviting them to complete the assessment.

Is there a time constraint when the assessment needs to be completed?

There is no technical time constraint.

Is there a way to require the job seeker to complete the assessment before they can move through the process?

Yes, by configuring a hard stop status. The hard stop status is configured, the recruiter editing the requisition's assessment information can select which status will be the hard stop.The job seeker cannot move past this status without completing the assessment.

Will the assessment open in a new window when the job seeker clicks on the link?

No, the assessment opens in the same window.

Are all assessment results translated?

The Recruiting product supports the translation of a set of standard values for assessment related fields. Other custom statuses outside this standard set are not supported for translation. Below are the accepted values for Assessment Status, Score and Recommendation.

- Assessment Status
  - Initiated
  - Error ordering assessment
  - Completed
  - Pending
- Score This is a number field and the value is numeric.

- Recommendation – This field is not displayed on the applicant profile page. The field is localized, and the localized values are displayed on the applicant profile page.
  - Recommended
  - Recommended with qualifications (PeopleAnswers only)
  - Recommended with reservations (PeopleAnswers only)
  - Not Recommended

The candidate says the assessment is complete, but I don't see the results in BizX recruiting.

Temporary outages or system maintenance can cause a delay results posting. The vendor attempted to repost the delayed results at regular intervals. For PeopleAnswers, when a results post fails for any reason, PeopleAnswers attempts to resend the results, every ten minutes for first hour, then every hour for the first day, and once daily for up to five days, until it succeeds. If after five days the results are not posted, open a JIRA ticket so the support engineers can investigate and troubleshoot. SHL attempt to resend the results a total of five times, with an extended period between each attempt.

What happens if an applicant is being asked to take an assessment they have previously completed for a similar position?

If a candidate applies for a job and takes an assessment for a company, then reapplies for another job that requires the same assessment, they do not have to complete the assessment again. When the candidate clicks the assessment link, they see a message informing them the assessment is complete. The client should work with the appropriate vendor to define the timeframe for valid assessments.

Can the Candidate Summary page be configured by default to display the Assessment Score?

It is not currently possible to have the assessment integration columns in candidate summary display by default. Unlike other display options, these are not configured in the CDM, but are available by default when an Assessment Integration is configured. The users will have to open their display options and enable the columns to be shown. Note: The available assessment fields will automatically appear for the Candidate Summary page selection when an assessment has been configured for a given requisition.

When the candidate is forwarded from one requisition to another is the assessment information included with the candidates information?

No, because of the uniqueness of assessments related to the requisition the system does not move that data with the candidate. A forwarded candidate will follow the regular workflow for the new requisition and the assessment will be triggered when the candidate is in the configured assessment status.

What happens if a requisition is closed and there are applicants who have not completed an assessment that has been triggered for them?

The applicant can take the assessment after the requisition is closed. Results from the assessment are sent to the applicants record in RCM.

What is required to setup the assessment integration?

Configuring RCM and assessment integration requires changes in Provisioning and Admin Tools, and updating files for Boomi. Clients should coordinate setup with the assessment vendor.

Do we need to use the Boomi Professional Services Team for this integration?

Yes, this is part of the setup process with Professional Services.

The SHL and PeopleAnswers Integration workflow is great but my customer uses <insert assessment vendor name here>. Can we configure Boomi or RCM to work the same with way with this vendor?

No, at this time the screens and workflows used for SHL and PeopleAnswers have been hard coded in the application to work with SHL and PeopleAnswers. The client can work with Professional Services to create a custom integration with another vendor, but it will not use the components or functionality associated with this integration.

The client has an integration with SAP that create the requisition in RCM. Can this integration populate the assessment field(s) on the requisition?

No, at this time you cannot populate the assessment fields on the requisition with an API.

How can I describe this integration in 150 words or less?

The assessment integration allows a recruiting user to set up an assessment order tied to a selected status of the requisition which automatically triggers the applicant to complete their assessment. The assessment results are tracked on the applicant's record and added to the record upon completion of the assessment. The assessment results appear as display options on the applicant list page supporting cross applicant comparisons.

Does SuccessFactors manage the assessment pricing and contract with PeopleAnswers or SHL for the Client?

No, the client is responsible for managing their relationship with PeopleAnswers and/or SHL.

I understand this integration uses Boomi. Does the client need to know we are using Boomi and is there another charge?

At this point the use of Boomi is considered part of the technology stack that is used to manage the PeopleAnswers and SHL integration. The assessment integration for SHL and PeopleAnswers is considered an iFlow. The SKU 'Boomi Integration for Recruiting' includes the use of the SHL and PeopleAnswers iFlow. This is managed by Finance and you should reference the information in BMI for final confirmation.

What does it cost a client to implement the PeopleAnswers Integration?

Greg Zanowski and Julie Fuller in Professional Services manage pricing. The approximate effort for configuring RCM, Boomi and testing is 35-40 hours. Please contact Greg and/or Julie for pricing and estimates to create the Statement of Work.

Does PeopleAnswers or SHL charge for configuring the integration?

The client should check with their PeopleAnswers or SHL representative to discuss costs associated with that vendor.

- PeopleAnswers Information Contacts
  - PeopleAnswers Partner Manager - Larry Chandler LChandler@peopleanswers.com
  - PeopleAnswers Customer Support - John DiPasquale jdipasquale@peopleanswers.com PeopleAnswers
  - Professional Services - John DiPasquale and Larry Chandler

25.4 Background Check with First Advantage

The integration between SuccessFactors and First Advantage allows joint customers to initiate and receive results of background checks and drug screens on candidates directly from the SuccessFactors Recruiting system

Recommendation

After December 2014, all new customers who need background checks should implement the First Advantage solution. Do not implement any customers with Verifications, Inc after December 2014.

25.4.1 How to Configure Background Check with First Advantage

Prerequisites

- The customer must have an existing contract with First Advantage, and should obtain the necessary URLs and credentials for the integration.

Procedure

1. Navigate to *Provisioning* > *Company Settings* > *Recruiting* > *Enable Background Check* > *First Advantage Background Check Integration*
2. Navigate to *Provisioning* > *Managing Recruiting* > *Partner Settings* > *First Advantage Integration Settings* and enter the following information. All these URLs are provided by First Advantage.
   - Background Check Request URL for DA
   - Background Check Order Status URL
   - Background Check View Report URL
   - Background Check Candidate Order Status URL
   - Background Check Get Accounts URL
   - Background Check Get Packages URL
3. Under *Provisioning* > *Company Settings* select *Enable SFAPI Webservices.*
4. Set the password login exceptions. Navigate to *Admin Tools* > *Password Policy Settings* > *Settings* > *Set API Login Exceptions* > *Add* . Enter the IP addresses the ODATA (Push) status responses are sent from, and a minimum password age of -1.
5. Share the URL pattern for OData access with First Advantage. `https://<hostname>/odata/v2/upsert`

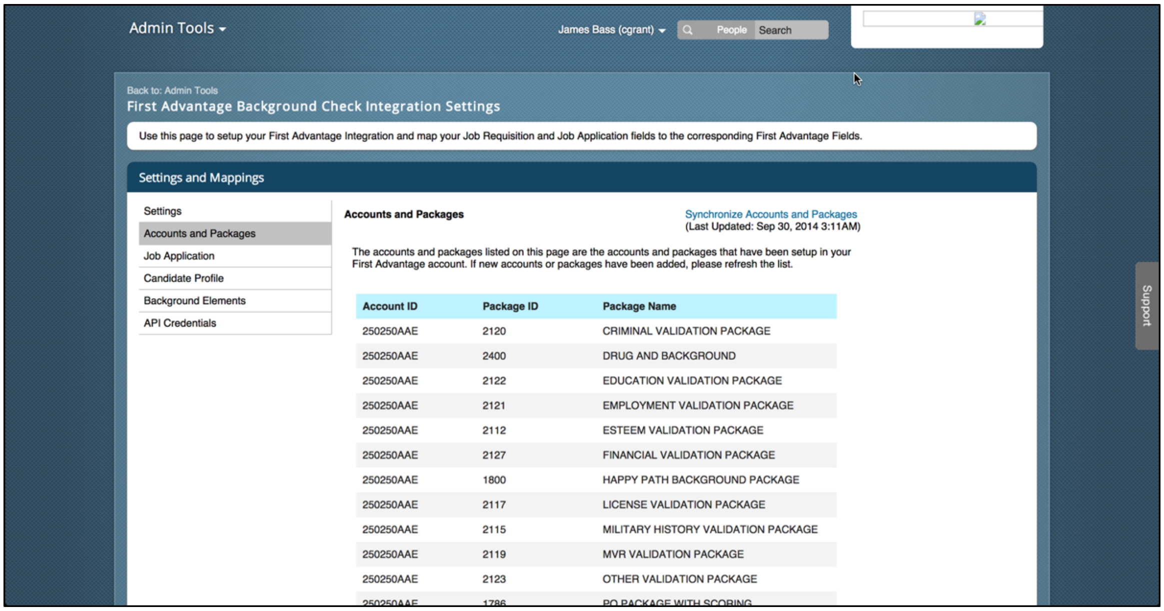
6. Add the First Advantage Account and Package field to the job requisition XML for any relevant requisition templates.

```
<field-definition id="fadvAccountPackage" type="derived" required="false"
custom="false”>
<field-label><![CDATA[Fadv Account Package]]></field-label>
<field-description><![CDATA[Fadv Account Package]]></field-description>
</field-definition>
```

7. Add/edit the backgroundCheck feature permissions to the applicable job requisition templates These permissions are the same as the Verifications, Inc. background check permissions.

```
<feature-permission type="backgroundCheck”>
<description><![CDATA[R can launch on-boarding emails during statuses with a
Hired category]]></description>
<role-name><![CDATA[R]]></role-name>
<role-name><![CDATA[G]]></role-name>
<status><![CDATA[Offer]]></status>
</feature-permission>
```

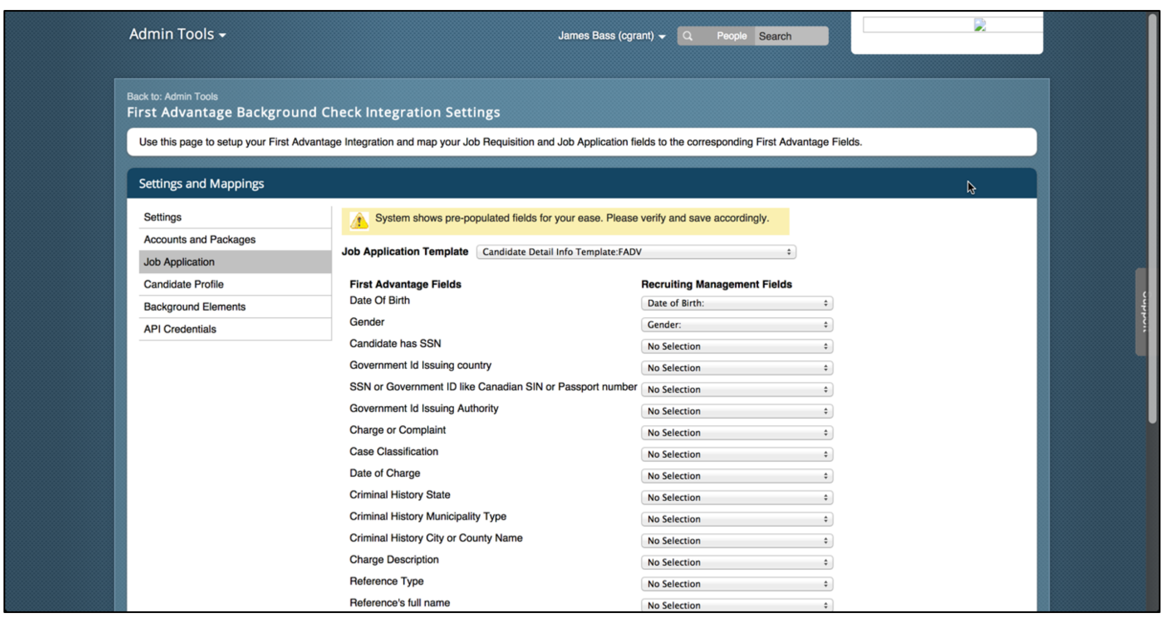
8. Grant admin users permission to the First Advantage Background Check Settings page using Admin Tools
   - **Non-RBP**: *Managing Recruiting* > *Manage Recruiting Administration* > *First Advantage Background Check Integration Settings*
   - **RBP**: *Manage Security* > *Manage Permission Roles* > *Select the Role* > *Permission* > *Administrator Permissions* > *Manage Recruiting* > *First Advantage Background Check Integration Settings*
9. Grant users permission to access the OData API
   - **Non-RBP**: Navigate to *Admin Tools* > *Manage Security* > *Administrative Privileges* and select the user or group of users you would like to permission. Click *Integration Tools* > *Admin access to OData API.*
   - **RBP:** Navigate to *Admin Tools* > *Manage Security* > *Manage Permission Roles*. Select the role that needs API access, then click *Permission settings* > *Permissions* > *Administrator Permissions* > *Manage Integration Tools* and select the *Admin access to OData API* permission.
10. Configure First Advantage Background Check Integration Settings. Navigate to *Admin Tools* > *Managing Recruiting* > *First Advantage Background Check Integration Settings*
    - **Settings:**
      - **Email applicant**: This is a two step process where SuccessFactors sends applicant data to First Advantage and First Advantage contacts the candidate to invite them to fill out the missing background check data.
      - **Allow account and packages to be selected at the application level**: Users with the appropriate permissions can add, edit, or remove account and package combinations from the job application page. All updates will be reflected on both the job requisition and job application fields.



- **Accounts and Packages**: Synchronize accounts and packages from First Advantage
- **Parent Field Selection**: Here you can select a job requisition picklist field as a parent field for the FADV account field. This refines the list of selectable accounts based on the parent field data selection.
- **Job Requisition**: Map Job Requisition fields from each Job Requisition ML templates to the corresponding First Advantage fields.

> **Note**
>
> You cannot map the user-defined fields Due Date or Post Job Language in the Job Requisition.

- **Job Application**: Map Job Application fields from each Job Application XML template to the corresponding First Advantage fields



- **Candidate Profile**: Map Candidate Profile fields from the Candidate Profile XML template to the corresponding First Advantage fields Background Elements: Map Background Element sections and fields from the Candidate Profile XML template to the corresponding First Advantage fields

- **Background Elements**: Map additional information from the Candidate Profile to FADV to send these fields to FADV when a background check or drug screen order is submitted.
- **API Credentials**: Enter First Advantage API credentials (provided by First Advantage)

11. Grant users the ability to view or initiate background checks. Navigate to *Admin Tools* > *Manage Recruiting* > *Recruiting Permissions* > *Background Check Initiate Permissions*
12. For customers who use different unique identifiers between SuccessFactors and First Advantage, map SuccessFactors employee usernames to the employee usernames entered in First Advantage in *Admin Tools* > *Managing Recruiting* > *Manage External User Accounts*
    a. Export all external accounts
    b. Update the external accounts csv file:
        - USER_NAME: SuccessFactors users' usernames who need permission to the First Advantage system
        - EXTERNAL_PARTNER_CODE: Use FADV
        - PARTNER_USERNAME: Employee's username in First Advantage
        - PARTNER_PASSWORD: Leave this blank because it is not needed

    Recommendation

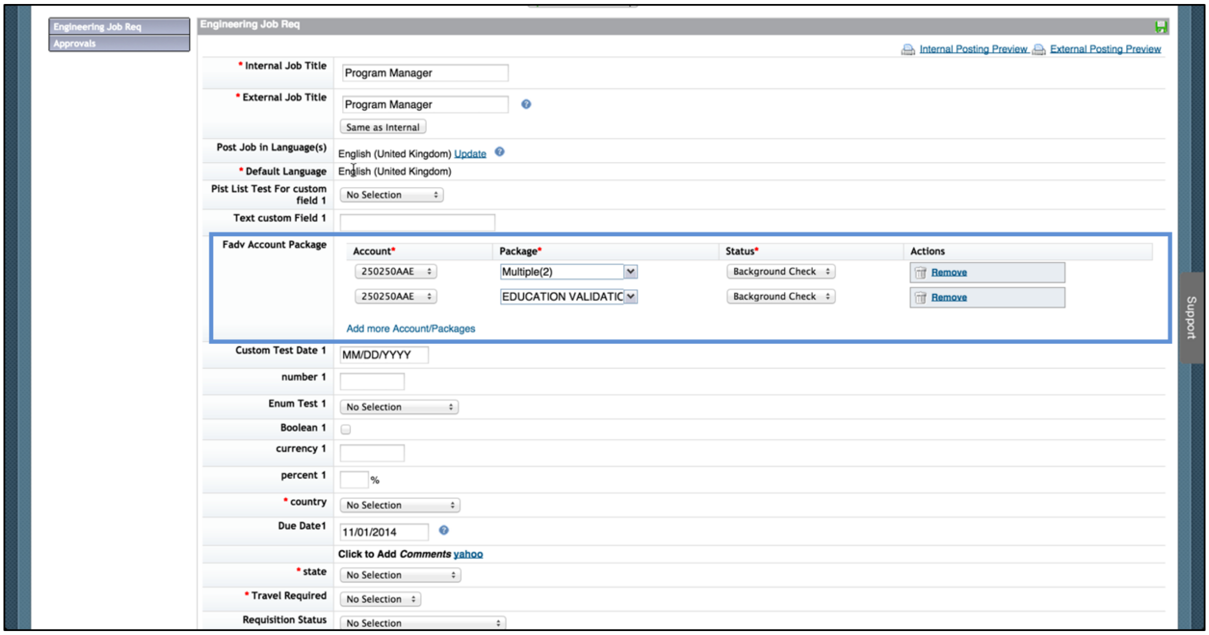
    If the customer is using another integration (eQuest or Verifications, Inc.), ensure that you have the appropriate passwords for the accounts included in the exported file. Uploading this file without passwords for the existing accounts deletes the existing passwords and prevents users from being able to use the other integrations. All new First Advantage customers should use the same unique identifiers between the two systems. Customers who follow this do not need the additional configuration step

25.4.2 Initiating a Background Check with First Advantage

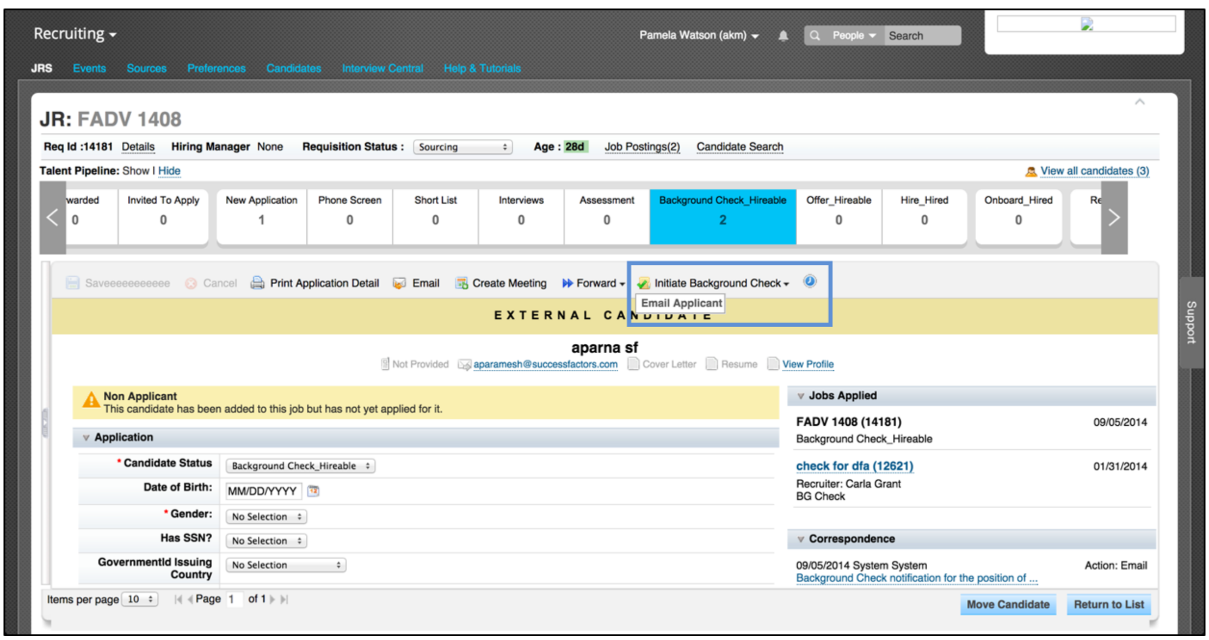
Associate background check packages with job requisitions, then initiate the background check for candidates.

Procedure

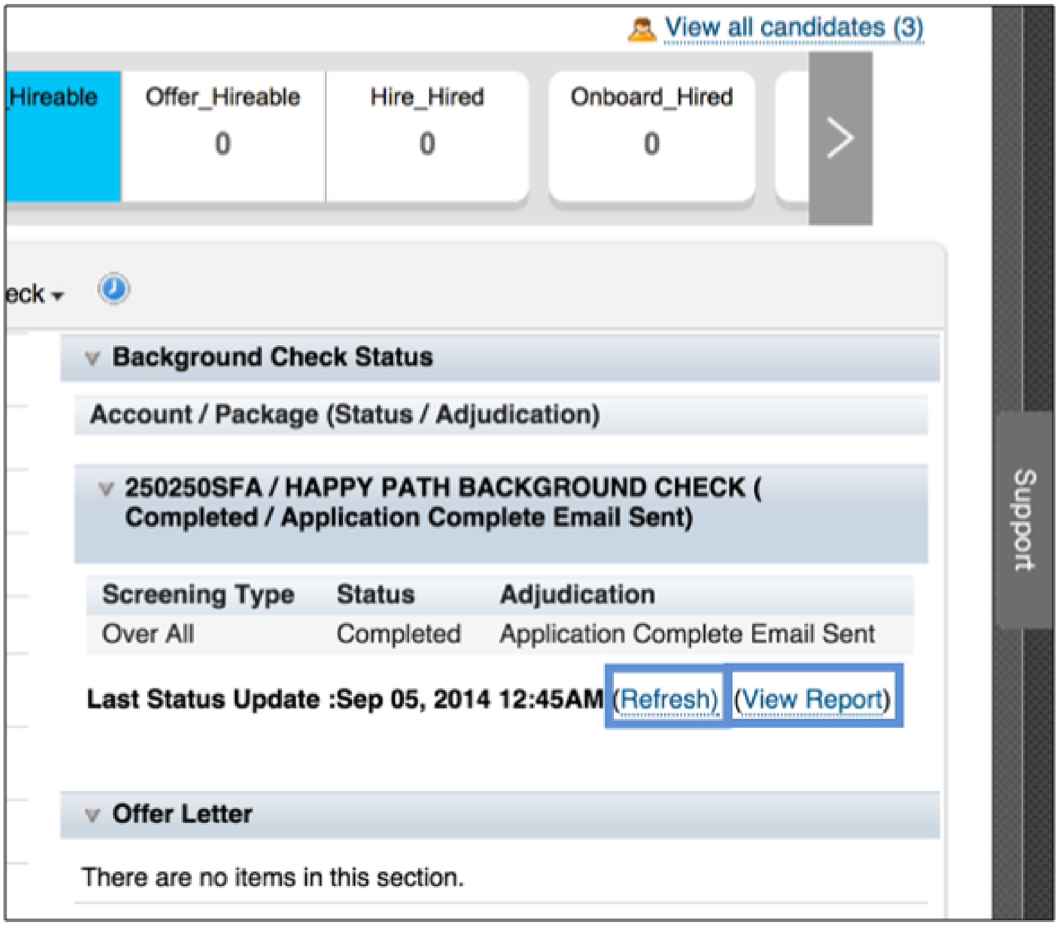
1. When you are creating a Job Requisition, select one or more account and package combinations. Configure the selectable account and package using *Admin Tools* > *Managing Recruiting* > *First Advantage Background Check Integration Settings*. During the Job Requisition creation process, configure one or more account and package combinations for the job requisition.



2. When a candidate is in a Background Check applicant status, the recruiting user sees an *Initiate Background Check* option at the top of the Application page. Click *Initiate Background Check* to select a background check order creation method.



3. After chosing a creation method, the recruiting user sees a popup of all configured accounts and packages for the job requisition. You can only select one account and package combination per requisition.
4. After the background check is initiated, recruiting users can see background check results in the *Background Check Status* portlet on the application. Click *Refresh* to update the information on the portlet. Click *View Report* to see the First Advantage report for the candidate. Users can resubmit the same package and account combination for the same candidate on the same job, but as a different order.


View all candidates (3)
Hireable
Offer_Hireable
0
Hire_Hired
0
Onboard_Hired
0
eck
Background Check Status
Account / Package (Status / Adjudication)
250250SFA / HAPPY PATH BACKGROUND CHECK (Completed / Application Complete Email Sent)
Screening Type
Status
Adjudication
Over All
Completed
Application Complete Email Sent
Last Status Update :Sep 05, 2014 12:45AM
(Refresh)
(View Report)
Offer Letter
There are no items in this section.
Support

26 Translation

When a new language pack is enabled in Provisioning > Company Settings many system labels are immediately translated with a standard set of translations. Other content, particularly configurable content, may require Professional Services work to translate.

Typically translation projects are initiated after the client signs off on iteration 3 configuration and the client's configuration choices are stabilized. Translations should be planned as part of an overall project timeline, and should have an iterative testing/configuration process planned. See the Master Translation Workbook for more information.

SuccessFactors does not provide translation services. A translation project consists of:

1. SuccessFactors providing translation workbooks wherein all configured content is listed
2. The client or a translation service hired by the client reviews the workbooks and provides all needed translations
3. SuccessFactors configures the translations per the client's direction
4. The client tests the translations and provides feedback and change requests
5. Repeat through three iterations

Translations are managed through several different methods.

1. Provisioning Field Labels
    a. Job Requisition System Field Labels
    b. Application Field Labels
    c. Internal and External Applicant Search Settings
2. XML Field Labels
    a. Requisitions
    b. Events
    c. Candidate Profile
    d. Applications
    e. Event Application
    f. Offer Approval
    g. Corporate Data Model
    h. Succession Data Model
3. Admin Translations
    a. Applicant Status
    b. Recruiting Emails
    c. System Emails
    d. Picklists
    e. Route Maps
    f. Rating Scales
    g. Career Sites
    h. Privacy Statements

   i. Header/Footer Templates
   j. Custom Help Text
   k. Competencies
   l. Questions
4. Tier-3 Standard System Translation Overrides
   - Replacement of any system-supplied translation (max: 25 per language pack)

There is no set format for the translation workbooks or test results and change requests. Sample workbooks attached (Not all translatable content may be included in the sample workbooks.) If you're good with Excel you can put together formulae such that the client's input is used to generate your XML and you can copy and paste the final translations from Excel into your XML editor and save a final draft but this is not generally expected of consultants. The alternative method is to update the XML by hand with the translations provided in the Excel file.)

A consultant's computer may not be set up to work with all the languages enabled in a client's instance, so prior to beginning a translation project it is beneficial to experiment and ensure that the appropriate language packs are correctly set up on the computer and in the programs on the computer used to manage the translated content. OpenOffice is advised over MS Word. UTF-8 Encoding should always be used on every XML, .csv and Excel file involved in a translation project. All file uploads in SuccessFactors should be done with UTF-8 encoding selected. Failure to set up the computer, files and imports in appropriate encoding can result in mangled translation output, with weird characters, question marks, and other distortions of the translated content. This is especially true when working with double-byte characters but can also occur when working with special characters from Windows, like the Windows curly apostrophes. Clients should endeavor to use standard characters rather than Windows characters .

26.1 Managing Form Template Names

Admin Tools > *Form Templates* > *Template Name*

In all languages other than the default language of the instance the form template name can be translated and changed.

26.2 Managing Provisioning Field Labels

Provisioning > *Job Requisition System Field Labels*

Provisioning > *Application Field Labels*

Standard fields and buttons on the requisition have standard supplied translations, but these fields are often re-purposed and renamed, and therefore the field labels need to be adjusted as well. Although these field ids may have translations specified in the XML, those translations are not applied in the system. These field id labels and translations are managed in Provisioning. For requisitions, this includes button permissions.

26.3 XML Field Labels

Each template with field definitions supports the declaration of a field label element; the format of the field label element may vary based on the template.

Every field should include a field label without a language declaration. This is used when the system is unable to determine the language of the viewing user.

Every field should also include one field label per language pack enabled in the instance.

Bear in mind that some fields ignore the field labels declared in the XML and instead must be managed in Provisioning.

Sample format for Req, Application, Event, Event Application, Candidate Profile field definition, Offer labels:

```
    <field-label mime-type="text-plain"><![CDATA[Default Field Label]]></field-
label>
    <field-label mime-type="text-plain" lang="en_US"><![CDATA[US English Field
Label]]></field-label>
    <field-label mime-type="text-plain" lang="es_ES"><![CDATA[Spain Spanish Field
Label]]></field-label>
```

Sample format for Candidate Profile Background Element labels and Background Element fields, corporate data model, and succession data model labels:

```
    <label>Default Label</label>
    <label xml:lang="en_US">US English Field Label</label>
    <label xml:lang="es_ES">Spain Spanish Field Label</label>
```

Be aware that exporting a succession data model may cause the underscores in the language pack references to be replaced by dashes. Importing a file with dashes in the language packs will cause the translations to break.

Requisitions can store multiple translated copies of the same field content; in this way a requisition can be posted in several languages for candidate consumption. This requires that the recruiting user populates the same content multiple times (once in English, once in French, etc.) for some field types. The candidate profile and application do not work the same way; each of those records only stores one copy of content and that content will appear as the field values no matter what the language pack of the viewing user may be. This is because the candidate is only expected to enter in their information one time, in the language of their choice, and not repeat their data entry in multiple language packs.

Application field labels, even if translated in all language packs, will only appear as translated if the requisition is posted in the language pack of the viewing candidate. That is, if the system has English, French and Spanish enabled, the requisition was only posted in English and Spanish, and the candidate is viewing the system in French and chooses to apply to that job, they will NOT see French labels on the application fields. They may instead see no labels, or the default labels for the instance.

26.4 Admin Translations

Admin Tools > *Recruiting Languages must have at least one language checked to set up translations in admin*.

1. Applicant Status

    - Translatable content includes:
    - Internal Label
    - Candidate Label
    - Next Step Text
    - Emails

    Toggle between languages and set the appropriate field labels in each language. Note that the email template selected for a recipient in language A will need to be re-selected in language B; selecting a template in one language does not select it in all languages. Set up Recruiting Email translations before applicant status translations to make this easier.
    Although status name is the value that is available in Ad Hoc Reports, this content is not presently translatable.
2. Recruiting Emails

    - Translatable content includes:
    - Template name
    - Subject
    - Body
    - Tokens will automatically populate in the appropriate language, if a translated value for that token is available.

    Toggle between languages and set the appropriate field labels in each language.
3. System Emails

    - Translatable content includes:
    - Subject
    - Body
    - Tokens will automatically populate in the appropriate language, if a translated value for that token is available.

    Toggle between languages and set the appropriate field labels in each language.
4. Picklists

    - Translatable content includes:
    - Picklist value

    All enabled languages will appear on the picklist csv file; populate the appropriate column with the appropriate language and reload the file.
    Picklist fields store the picklist optioned; the language of the viewing user determines which language pack value appears in the user interface.
    If the user is viewing a requisition, application, offer etc in a language pack that is not enabled in Recruiting, picklist fields are not editable because the system cannot figure out which picklist values to show the user.
5. Route Maps
    See platform documentation about route maps and translations
6. Rating Scales
    See platform documentation about rating scales and translations
7. Career Sites
    Translatable content includes:

    - Body

    Each microsite must have a specific language selected as the default language of the site.

When a candidate views the external site, the site will attempt to determine the candidate's preferred language based on the default language of the candidate's browser. If the candidate has manually selected a preferred language the site will display in that preferred language. If neither of the aforementioned values is available, the external site will display in the microsite's default language.

8. Privacy Statements
   Translatable content includes:
   - Body
9. Header/Footer Templates
   - Translatable content includes:
   - Template name
   - Body
   - Tokens will automatically populate in the appropriate language, if a translated value for that token is available.

   Toggle between languages and set the appropriate field labels in each language.
   End users will only see templates that are configured in their currently enabled language pack.
10. Custom Help Text
   - Translatable content includes:
   - Text in the custom help bubble

   Toggle between languages and set the appropriate help text in each language.
11. Competencies
   - See platform documentation about competencies and translations
12. Questions
   - For more information about Questions and Translations, reference the Platform documentation.

Tier-3 Standard System Translation Overrides

See platform documentation about 3-Tier

26.5 Translation Limitations

Be aware of the limitations on translation capability:

- Rating scale label as displayed in the Interview Central rating scale hover-over will display in the default language of the instance
- Text data values on Candidate Profile, Application, Offer Details, Interview Feedback Forms and any other non-Requisition object can only be entered in a single language
- Candidates who apply to a job that is not posted in the candidate's chosen language will see the field labels in the default language of the instance

27 Change History

The following table provides a historical overview of the most important changes made to this document since its initial publication.

Version	Date	Description
1.0	February 6, 2015	Major and minor features: • Recruiting Management now supports a number of general and application features with an OData API. • Recruiting users can now view First Advantage account and package combinations from the job application template to add additional accounts and packages to the job requisition. • Users can now resubmit account/package combinations for the same candidate on the same job as a new order. • Permissioned recruiting users have access to a new Historical Results tab on the job application page. You can permission Historical Background Check Results, Assessment Scores, and Pre-screening Questions and Answers to display.

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