



Talent Acquisition User Guide

Version 10.1.0.0

Published January 2013

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Publication Information

Release: 10.1.0.0

Publication date: January 28, 2013

Document Number: LTACQUG_10.1.0.0_UW_01

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Talent Acquisition Overview

1

Before you start Lawson Talent Management Suite applications are configurable. Depending on your organization's configuration settings and your own security privileges, the forms that you have access to may not include all the fields described in this guide. And you may not have access to all the actions described in this guide.

- ["Product overview" on page 12](#)
- ["Navigation " on page 17](#)

Product overview

- ["What is Talent Acquisition?" on page 12](#)
- ["Talent Acquisition roles" on page 12](#)
- ["Talent Acquisition flow" on page 15](#)
- ["How is Talent Acquisition integrated with other applications?" on page 17](#)

What is Talent Acquisition?

Talent Acquisition is a Lawson Talent Management Suite application that manages the external and internal recruitment process from the time a requisition for a position is created to the point when a candidate is hired and processed through onboarding. It includes defining, managing, and approving staffing requisitions, posting job openings to multiple job boards, matching candidates to jobs, coordinating the assessment, interviewing, and hiring processes, and onboarding new hires.

Talent Acquisition roles

The following roles are involved in the staffing and onboarding process.

Note: Organizations may combine roles.

Role	Tasks
Recruiter Administrator	Create Talent Acquisition setup data, that is setup data used specifically for recruitment, job applications, and onboarding. Can also perform the recruiter tasks.
Hiring Manager	Create and/or approve job requisitions. Review candidates submitted by recruiters. Interview candidates. Approve offers. May be assigned onboarding tasks. Note: Hiring managers are managers with HiringManager security. Hiring manager processes are documented in the <i>Lawson Talent management Manager User Guide</i>. This document is available in PDF format from the as well as on the <i>Lawson Talent Management Documentation InfoCenter</i> which is installed on your Lawson Talent Management application and is accessible from Start > Help > Application.

Role	Tasks
Recruiter	Create or complete job requisitions and post them to internal, external, and/or third-party job sites. Match candidates to open positions. Forward selected candidates to hiring managers for review. Coordinate the screening, interviewing, qualifying, and hiring of candidates. Track assessments and background checks. Send rejection notifications to candidates. Generate letters of offer and/or contracts and route for approval. Send offers to candidates. Hire or rehire external candidates. Transfer or add a work assignment to internal candidates. Move hired, rehired, or transferred candidates to the onboarding process.
Candidate	Register Create profile Apply for position Respond to queries, submit to screening and interviews. Note: External candidate processes are documented on the help for Career Space, accessible from the Help button.

Role	Tasks
Employee	Update profile Apply for positions Respond to queries, submit to screening and interviews. Note: Employee processes are documented in the <i>Lawson Talent Management Employee User Guide</i>. This document is available in PDF format from the as well as on the <i>Lawson Talent Management Documentation InfoCenter</i> which is installed on your Lawson Talent Management application and is accessible from Start > Help > Application.

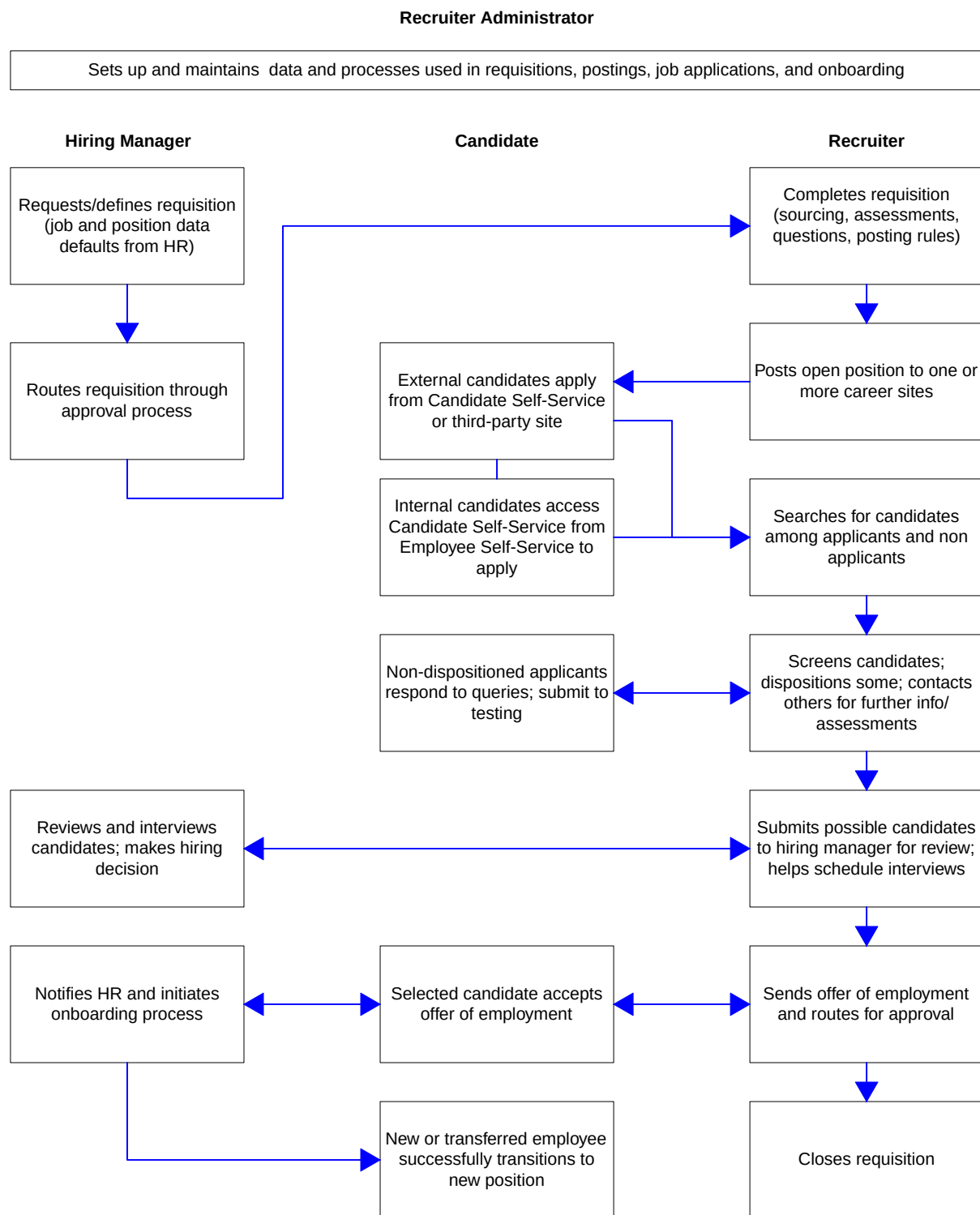
In addition, requisitions use job and position data that is defined by the HR Administrator.

Talent Acquisition flow

The following graphic illustrates how the various roles can interact within Talent Acquisition processes.

Note: Because Talent Acquisition lets you control all roles through security, the roles are only as clear cut as you want them to be. You can decide what you want each role to be able to see and do.

Figure 1. Talent Acquisition flow



How is Talent Acquisition integrated with other applications?

Talent Acquisition is fully integrated with Lawson Global HR and Lawson Compensation Management. Talent Acquisition uses the HR components defined in Global HR (organization structure, manager structure, jobs, positions, and so on) and the salary structures created in Compensation Management. Candidates hired in Talent Acquisition are automatically created as resources in Global HR. Internal Global HR resources appear as internal candidates in Talent Acquisition.

Talent Acquisition also uses Lawson Process Server to route action requests and it can also use the reporting capabilities and dashboards of Lawson Business Intelligence.

Talent Acquisition can also interface with Lawson S3 Enterprise Management applications such as Lawson Human Resources and Lawson Payroll.

Navigation

- ["Infor Rich Client navigation tips" on page 17](#)

Infor Rich Client navigation tips

Your access to applications is limited to the role or roles that you have been assigned by the administrator.

All Lawson Talent Management Suite applications, with the exception of Candidate Space are now accessible only on Infor Rich Client and have a unified user interface. For more information on Infor Rich Client, see the *Infor Rich Client User Guide*.

The following tips are not aimed at providing you with a description of the full functionality of Infor Rich Client. They are merely aimed at helping you to navigate the applications and locate the information you are interested in.

- Users have access to all their roles on the same desktop. Each role has a graphic representation (called *process board*). All users have an Employee process board. Administrators, Compensation Analysts, HR Generalists, Managers, Mentors, and Recruiters each have their own process board which can be placed wherever the users want on their desktop. Users access their process board on the desktop when they want to perform tasks related to the role. For example, managers will access Manager > Review Performance to complete performance appraisals for their direct reports, and Employee > My Reviews to access their own personal appraisals. Managers can have their Manager process board and their Employee process board opened concurrently.
- Within process boards, major groupings of processes are also represented by a graphic. Hover over a graphic to see the menu items associated with the processes. An arrow at the end of a menu item, indicates submenus. If no menu appears, click the graphic to display the form, list, or dashboard. (For example, as an employee, click My Profile to access your profile information.)

Note: For users who prefer a standard tree view, it is available under Start > Applications, or can be dragged to the desktop from Start > Library > Widgets > Navigator.

- You can use the Search box at the top of your desktop to locate a form. For example, type Compensation to view a list of all the forms that have Compensation in their title.
- All users can find the following on the drop-down list under Start:
 - My Notifications. (also accessible from an icon next to Search box at the top of the desktop.)
 - My Inbasket
 - My Print Files (all generated print files get saved to that location)
 - My Actions (both request actions and scheduled actions)
 - Set As of Date
 - Clear As Of Date
 - Proxy Management (managers and administrators)
 - Switch To Proxy
 - Help (both Environment and Application help) - use these to access the documentation infocenters.

Tip: This list is not inclusive. It includes only items that are relevant to navigation. For configuration and personalization information, see the *Infor Rich Client User Guide*.

- When you open a form or a list, you can access the actions in one of the following ways.
 - If an Actions menu item appears on the actions bar, all the possible actions for the form reside under Actions. For lists, you can also right-click an item to view the same actions.
 - If no Actions menu item appears, the most frequently used actions generally appear on the actions bar. To view the complete actions available to you, you must click the All Menu Actions icon, which looks like a vertical double arrow at the end of the actions bar. For lists, if items exist, you can also generally right-click an item to view the available actions.

Defining and maintaining Talent Acquisition data (recruiter administrator)

2

You must be an administrator to perform these tasks.

Important: The setup tasks described in this chapter are applicable only to Talent Acquisition users. However, this is not the only setup required for Talent Acquisition. Talent Acquisition is integrated with Global Human Resources and also requires Global HR setup. For more information on Global HR setup, see the *Lawson Global Human Resources User Guide*.

- ["Global HR setup" on page 20](#)
- ["Screening setup \(background checks and assessments\)" on page 27](#)
- ["Social media profile parsing setup and maintenance" on page 38](#)
- ["Talent Acquisition Organization setup" on page 41](#)
- ["Recruiter setup" on page 49](#)
- ["Talent agreement forms setup" on page 51](#)
- ["Configurable text setup" on page 54](#)
- ["Interview setup" on page 58](#)
- ["Self-identification setup" on page 61](#)
- ["Transition setup" on page 63](#)
- ["Job board setup" on page 72](#)
- ["Question setup" on page 82](#)
- ["Automatic notifications setup" on page 90](#)
- ["Miscellaneous code setup" on page 93](#)
- ["Template setup" on page 101](#)

Global HR setup

- ["Miscellaneous Global HR setup" on page 20](#)
- ["Configuring percent fit calculation and display rules for Talent Acquisition" on page 22](#)
- ["Defining sources" on page 23](#)
- ["Defining specific sources" on page 24](#)
- ["Configuring your organization to use the Talent Management shortenURL service" on page 25](#)

Miscellaneous Global HR setup

Talent Acquisition uses the core Lawson Talent Management SuiteHR functionality (organization structure, manager structure, jobs, position, resources, competency management, and so on) that other Lawson Talent Management Suite applications also use. The following HR setup tasks are applicable to Talent Acquisition. For information on the specific tasks involved, see the *Global Human Resources User Guide*.

Action reasons

All request actions provide a chance to select an action reason. Action reasons are defined under Administrator > Setup > Action Reasons.

Each action reason is associated with a subject that determines where the action reason is selectable. Talent Acquisition uses the following subjects:

- The Request New Job Requisition, Request Copy From Requisition, and Request Update To Job Requisition action requests use **HCMJobRequisitionActionRequestRequestNewJobRequisition** as the action reason subject.
- The Create Offer action request uses **HCMJobApplicationActionRequestCreateOffer** as the action reason subject
- The Rescind Offer action request uses **HCMJobApplicationRescindOffer** as the action reason subject
- The Request Hire action request uses **HCMActionRequestHire** as the action reason subject
- The Request Rehire action request uses **HCMActionRequestReHire** as the action reason subject
- The Request Transfer action request uses **HCMActionRequestTransfer** as the action reason subject
- The Add Assignment action request uses **HCMActionRequestAddWorkAssignment** as the action reason subject

Custom groups

Custom groups are used to identify a group of employees that can be processed together. For example, you can set up a group for all candidates or job applicants in a specific location. Custom groups are set up by an HR or recruiter administrator in Administrator > Setup > Custom Groups. They are also referred to as *eligibility groups*.

- Talent Acquisition uses eligibility groups to mass assign screening packages to job applications, to send screening packages to third-party vendors, and to request screening results from third-party vendors. Screening custom groups for candidates must be defined with a business class of **JobApplication** and a business subject of **HCMGroupScreening**.

Note: Screening custom groups for resources must be defined with a business class of **WorkAssignment** and a business subject of **HCMGroupScreening**.

- Talent Acquisition also uses eligibility groups to send mass emails to candidates and/or job applicants.

Note: Candidates are all the candidates that appear in the recruiter's Candidate Pool, whether or not they have applied for a position. Job applicants are a subset of candidates and include only candidates that have applied for at least one position.

- For candidates, eligibility groups must be defined with a with a business class of **Candidate** and a business subject of **CandidateMassEmail**.
- For job applicants, eligibility groups must be defined with a with a business class of **JobApplication** and a business subject of **JobApplicationMassEmail**.

Limiting candidate access to relationships to organization

An organization may have relationships to organization that they do not want internal or external candidates to access. To exclude internal candidates, external candidates, or both from a relationship to organization, the HR administrator must set the Candidate Display Indicator field to the appropriate setting on the relationship to organization record. (Access Administrator > Setup > Resource Components > Resource Relationships.)

Limiting candidate access to competencies or skills

An organization may have competencies or skills that they do not want internal or external candidates to access. To exclude internal candidates, external candidates, or both from a competency or skill , the HR administrator must set the Candidate Display Indicator field to the appropriate setting on the competency or skill record. (Access Administrator > Competency Management > Competencies or Administrator > Competency Management > Skills.)

Setting up a default HR contact

Recruiters or managers may not know who the HR contact is for their organization unit when they request a job requisition. HR administrators can assign an HR contact on each organization unit record. (Administrator > Setup > Organization Units.)

When a recruiter or manager submits a requisition request, the HR contact defined for the associated organization unit displays automatically in the HR Contact field. The requester can choose a different resource as the HR contact.

Percent fit settings for Talent Acquisition

Note: Talent Acquisition Percent fit settings used to be set on Administrator > Talent Acquisition > Primary Setup > Organization. They are now set on Administrator > Setup > Structure > Organizations. Talent Acquisition percent fit calculations do not take margins into consideration.

- If you want the system to calculate percent fit for a candidate, you can select what types of qualifications to include in the calculations and whether to include only essential qualifications or both essential and nonessential qualifications.
- You can also configure display colors for the percent fit field based on ranges of percentages. For example, you can configure a percent fit value between 0.00% and 35.00% to display in red.

Configuring percent fit calculation and display rules for Talent Acquisition

Percent fit rules determine what components are included in calculating a candidate's fitness percentage. The system compares a candidate's qualifications with the qualifications that a candidate has applied for or is being considered for and computes a percent fit based on whether the candidate has or does not have the qualifications listed for the position. Calculations only include the types of qualifications you select on this form. If Essential Only is selected, calculations only include essential qualifications.

Note: Percent fit for new job applications will be calculated automatically using the current settings. If you change the settings, you may need to recalculate the percent fit for existing job applications.

To define percent fit rules

- 1 Access Administrator > Setup > Structure > Organizations.
- 2 Select the organization for which you want to set percent fit rules.
- 3 Select the Percent Fit tab.
- 4 In the Talent Acquisition section, select your Talent Acquisition percent fit rules.

Note: Other fields on this form apply to Global HR and Succession Management. For a description of these fields see the *Global Human Resources User Guide*.

Important: You must select at least one of the following qualification types for percent fit calculations to occur. You can select all three.

Competencies And Skills	Select this option if you want the percent fit calculation to include competencies and skills.
Education	Select this option if you want the percent fit calculation to include education.
Credentials	Select this option if you want the percent fit calculation to include credentials.
Essential Only	Select this option if you want the percent fit calculation to include only the qualifications (skills, competencies, credentials, and/or education) flagged as essential for the position that the candidate is applying for (or, for percent fit modeling, the position that the candidate is potentially considered for). If you do not select this option, the percent fit calculation includes nonessential as well as essential qualifications. Users who have access to percent fit modeling can toggle this option.
Enter the Minimum and Maximum Range For Percent Fit Progress Bar	If you want to configure display colors for percent fit progress bars, enter the minimum and maximum fit percent for each color. For example, if you enter 75% to 100% for Green, the percent fit progress bars will display in green for all resources and candidates that have a percent fit within that range. Important: Selections you make in these fields will also apply to percent fit progress bars in other Lawson Talent Management applications.

- 5 Enter the effective date of the changes and click Save.

Defining sources

Sources are required on a candidate or newly hired resource record. The source indicates how the candidate or resource heard of the job opening. Use this procedure to define generic sources. You can also use sources to identify contracting companies for contracted resources.

To define a source

- 1 Access Administrator > Setup > Resource Components > Sources.
- 2 On the Sources tab, click New.
- 3 Define the source. Use the following guidelines to enter field values:

Effective Date	Required. Enter the effective date.
Source	Required. Type the source name.
Description	Type a description for the source. If you leave this field blank, the source name defaults.

Require Referring Source	Select this check box if you want to require a candidate (in Talent Acquisition) to enter a referring source when selecting this source.
Referring Source Message	If you select Require Referring Source, type a message. This message displays on a candidate's job application if a candidate has selected this source but has not entered a referring source.
Candidate Display Indicator	Use this field to indicate whether this source should not be visible to internal candidates, external candidates, or both internal and external candidates. Leave this field blank (the default) to always display this source to candidates.
Alert Me Of Candidates From This Source	Select this check box if you want this source to be a preferred source for the recruiter. Job applications associated with preferred sources will display on the recruiter's New From Preferred Sources panel on Recruiter > Requisitions.
Active	Select the Active check box to make the source active. The source is active by default. Clear the check box to inactivate it.

4 Click Save.

5 Optional. If applicable, define specific sources for the source. "[Defining specific sources](#)" on page 24

Defining specific sources

For each source that you define, you may want to define specific sources. For example, if the source is CONTRACTOR, you may want to define all the contracting vendors that your organization uses. Or if EMPLOYEE is the source you may want to create a specific source that requires a resource or candidate to enter the name of the referring employee.

To define a specific source

- 1 Access Administrator > Setup > Resource Components > Sources.
- 2 On the Sources panel, select the source that you want to define specific sources for.
- 3 On the Specific Sources panel, click New and define a specific source. Use the following guidelines to enter field values:

Effective Date	Required. Enter an effective date.
Specific Source	Required. Type the name of the specific source. For example, if your source is JOBFAIR, a specific source could be, UMINN if your organization participates in a job fair at the University of Minnesota.
Description	Type a description of the specific source. If you leave this field blank, the specific source name defaults into this field.

Require Referring Source	If your specific source is an individual, select this check box to require the name of the referring source to be entered. You might want to use this option for an EMPLOYEE source so that you can credit a specific employee for a referral and also get information on a potential candidate from that employee. Note: This field is used on candidate job applications (in Talent Acquisition).
Referring Source Message	Type the text that will appear if you want a candidate or resource to enter the name of a referring source. Note: This field is used on candidate job applications (in Talent Acquisition).
Candidate Display Indicator	Use this field if you do not want to make this specific source visible to internal candidates, external candidates, or both internal and external candidates. Leave this field blank (the default) to always display this specific source to candidates.
Active	Select the Active check box to make the source active. The source is active by default. Clear the check box to inactivate it.
Address	If the specific source has an address, you can enter an address. For example, if the source is CONTRACTOR and the specific source is a specific contracting vendor, you may want to enter the vendor's address.

4 Click Save.

Configuring your organization to use the Talent Management shortenURL service

By default, Talent Management uses the TinyUrl service to generate shortened URLs. This is a third-party URL shortening service that resides outside Talent Management.

Talent Acquisition uses shortened URLs in the context of job postings or interfacing with third-party vendors.

Because TinyUrl links have system-generated names that bear no resemblance to the long URLs that they represent, it is possible that messages containing TinyUrl links could be discarded as possibly illegitimate by security-conscious users.

The Talent Management shortenURL service is integrated with the product and generates more professional-looking shortened URLs that clearly correlate to the long URLs they are representing.

For example, where a tiny URL might be <http://www.tinyurl.com/5k3r4n6n7b3>, the Talent Management shortened URL might be <http://lawson.com/jobs/k3m2n6n>.

Important: If you do not want to configure your organization to use the Talent Management shortenURL service, you do not need to do anything. The TinyUrl service is still delivered as the default configuration.

To configure your organization to use the shortenURL service

- 1 Log in as System Administrator.
- 2 Open the Data Menu and access **la > Business Classes > Configuration Parameter**.
- 3 Click **New**.
- 4 On the Configuration Parameter form, create the three following parameters.

- a To create the ENDPOINT configuration parameter, enter the following values and click **Save and New**.

Component	config
Name	SHORTURLSERVICE.WSI.ENDPOINT
Type	URL
Length	Leave blank
Precision	Leave blank
Value	http://host:port/productline/xmlhttp

Where *host* and *port* are the server and port where the webservice resides, and *productline* is the product line name

For example, **http://ll3afa2pa-4307.corpnet.lawson.com:2055/hcm/xmlhttp**.

- b To create the WSDL configuration parameter, enter the following values and click **Save and New**.

Component	config
Name	SHORTURLSERVICE.WSI.WSDL
Type	URL
Length	Leave blank
Precision	Leave blank
Value	http://host:port/productline/xmlhttp

Where *host* and *port* are the server and port where the webservice resides, and *productline* is the product line name

For example, **http://ll3afa2pa-4307.corpnet.lawson.com:2055/hcm/xmlhttp**.

- 5 To create the TIMEOUT configuration parameter, enter the following values and click **Save**.

Component	config
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Name	SHORTURLSERVICE.WSI.TIMEOUT
Type	Numeric
Length	4

Note: This represent the length of the field. It has to accommodate the value entered in the Value field.

Precision	Leave blank
Value	100

Note: Value is the timeout value, expressed in seconds.

- 6 Restart the application server (Websphere, Jetty, and so on).

Screening setup (background checks and assessments)

- ["What is screening?" on page 27](#)
- ["How are screening requests integrated with third-party vendors?" on page 29](#)
- ["Defining screening categories" on page 30](#)
- ["Defining assessment vendors" on page 30](#)
- ["Defining assessment packages" on page 31](#)
- ["Defining assessments for assessment packages" on page 33](#)
- ["Defining background check vendors" on page 34](#)
- ["Defining background check packages" on page 35](#)
- ["Defining background checks for a background check package" on page 37](#)

What is screening?

Screening is conducted by an organization either internally or with the help of external vendors to verify resources' or candidates' qualifications, eligibility, and/or suitability for the position they occupy or aspire to occupy. There are two types of screenings: assessments and background checks.

Assessments

Assessments are usually designed to verify or ensure that a resource or candidate has the appropriate skills and competencies for a position.

Rather than assessing the resources or candidates themselves, organizations may contract vendors to do the assessment. You can define multiple vendors. Each vendor can provide multiple *assessment packages*, and each package can consist of multiple *assessments*.

For example, a vendor can provide an assessment package to test for Microsoft® Office skills. The assessment package can consist of two assessments: one for Microsoft Word and one for Microsoft Excel.

If you use assessment screening, at a minimum, you must define an assessment package. A vendor is not required.

You must set up assessment data in the following order.

- 1 If you use a vendor for an assessment, define the assessment vendor.
- 2 Define an assessment package, associated or not with the assessment vendor.
- 3 (Optional) If an assessment package includes multiple assessments, define the assessments for the assessment package.

Note: If the assessment package includes only one assessment, it is not necessary to define an assessment. you can just assign the assessment package to a candidate or resource.

Background checks

Some positions are mandated by law to require a criminal background check of candidates. For example, companies that handle drugs, such as pharmaceutical companies or hospitals, frequently require drug screenings.

Background checks can also used to verify information provided by a resource or candidate regarding to their work history, education, credit history, criminal history, and so on.

Typically, background checks are conducted by third-party vendors, although that is not a Lawson Talent Management requirement. You can define multiple vendors.

If you use background check screening, at a minimum, you must define a background check package and a background check.

You must set up background check data in the following order.

- 1 If you use a vendor for a background check, define the background check vendor.
- 2 Define an background check package, associated or not with the background check vendor.
- 3 (Required) Define at least one background check for the background check package.

Each background check is defined for a specific service type. The service types are system-defined (Abuse, Alcohol, Criminal, and so on) and correspond to the service types provided by the HR-XML standards.

Screening categories

You can assign screening categories to assessment packages and background check packages. You can also assign screening categories to positions and requisitions.

Screening categories are used to group multiple screening packages (both assessment and background check packages) so that they can be automatically or manually assigned together. Screening categories can also be used to limit the screening packages that you can assign.

For example, a screening category named BasicEligibility is assigned to a position and to assessment packages and background check packages with the Auto Assign Package rule turned on. When you assign a resource to the position, all the assessment and background check packages associated with BasicEligibility will be automatically assigned to the resource. If a job requisition is created for that position, the screening category will default on the requisition. When candidates apply for the position, all the assessment and background check packages associated with BasicEligibility will be automatically assigned to the candidates.

Note: If an assessment or background check is also defined to require a selection process, candidates will be auto assigned only when they are moved to that selection process.

The auto assign feature is configured on individual assessment and background check packages. There are system edits in place to prevent duplicate assignments.

Screening packages as well as individual assessments or background checks within screening packages can be removed after they have been assigned to a resource or candidate.

Screening categories can also be used to manually assign multiple screening packages to one or more resources or candidates. When you do a manual assignment, the screening packages included in the screening category are assigned to the selected resource(s) or candidate(s) regardless of the resource's or requisition's position.

How are screening requests integrated with third-party vendors?

Lawson Talent Management Suite uses Lawson Process Server processes to pass requests for assessments or background checks to third-party vendors.

Lawson Talent Management Suite delivers the following process templates:

AssessmentOrder	Manages assessment package requests to the vendor and the vendor's return acknowledgment that the vendor has received all necessary data to set up the assessment.
AssessmentResult	Makes a request to the assessment vendor to return assessment results.
BackgroundCheck	Manages background check package requests to the vendor and the vendor's return acknowledgment that the vendor has received all necessary data to perform the requested background check services.
BackgroundReport	Makes a request to the background vendor to return background check results.

The templates follow the HRXML standard schemas for mapping and integrating data between clients and the vendors they have contracted. These templates must be modified to meet each vendor's own requirements. You should work with Lawson Support Services to configure the processes that you will use for each client.

Defining screening categories

Screening categories are used to group assessment and background check packages so that they can be assigned and processed together.

To define a screening category

- 1 Access Administrator > Setup > Screening.
- 2 On the Screening Categories tab, click New.
- 3 On the Screening Category field, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the screening category.
Screening Category	Type the name of the screening category.
Description	Type the description of the screening category. If you leave this field blank, the screening category name defaults.
Active	The screening category is active by default. Clear the check box to make the screening category inactive. Inactive screening categories will not appear on select lists.

Defining assessment vendors

You can define multiple assessment vendors.

To define an assessment vendor

- 1 Access Administrator > Setup > Screening.
- 2 On the Assessment Vendors tab, click New.
- 3 On the Assessment Vendor form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the vendor.
Assessment Vendor	Required. Type the name of the vendor, as you want it to appear on the assessment vendor list.

Description	Type a description for the vendor. If you leave this field blank, the vendor name defaults
Active	The vendor is active by default. Clear the check box to make the vendor inactive. Inactive vendors will not appear on select lists.
Provider ID Label	Type the vendor ID Label that is appended to all communications with the vendor.
Provider ID	Type the provider ID provided to you by the vendor.
Client ID Label	Type the client label that uniquely identifies your organization to the assessment vendor. It is up to the vendor to provide the organization its label.
Client ID	Type the client ID provided to you by the vendor. This is your unique account ID.
User Name	Type the full name of the end user in the client organization who can interact with the vendor to provide missing assessment package data that may be needed.
Email Address	Type the email address of the end user in the client organization who can interact with the vendor to provide missing assessment package data that may be needed.
User ID	This is the User ID used to log in to the vendor system. This information is provided by the vendor.
User Password	This is the password used to log in to the vendor system. This information is provided by the vendor.
URL	This is the vendor URL used for integration.
Project Key	Type the project key provided to you by the vendor.

- 4 Click Save.

Defining assessment packages

Before you start If the assessment package uses a vendor, you must define the assessment vendor before you can define the assessment package.

To define an assessment package

- 1 Access Administrator > Setup > Screening.
- 2 On the Assessment Packages tab, click All Actions Menu > Create Assessment Package.
- 3 On the Assessment Package form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the assessment package.
Package	Required. Type the name of the assessment package. This is the only required field besides the effective date.
Description	Type a description for the package. If you leave this field blank, the package name defaults.
Vendor	If the assessment is provided by a vendor, select the vendor.
Active	The package is active by default. Clear the check box to make the package inactive. Assessments defined for inactive packages do not appear on select lists.
Assessment Validity Period	If the assessment results have a renewal date, type the number of days, weeks, months, or years that the assessment package results are valid. (Organizations may want employees to be tested on a regular basis).
Session Expiration	If applicable, type the number of days, weeks, months, or years that a candidate or resource has to complete the tests in the package.
Auto Assign Package	Select this check box to auto assign this package. If you select a screening category as well, this package will be automatically assigned to resources that are transferred to a position that is associated with the same screening category, as well as to candidates for requisitions that are associated with the same screening category. If you select a selection process as well, this package will be automatically assigned to candidates when they are moved to the selected selection process.
Screening Category	Select a screening category if you want to auto assign this package to resources or candidates, or if you want this package to be assigned only to resources assigned to positions that match the screening category and candidates applying for requisitions that match this screening category. Important: A screening category is required if you select Auto Assign Package.
Selection Process	If you select a selection process, this package will be assigned to candidates only when they are moved to this selection process. If you also select a screening category, the package can only be assigned to job applications where the requisition is associated with a position defined with the same screening category. If you select Auto Assign Package as well, this package will be auto assigned to job applications that are moved to the selected process and match the screening category.

Processing Type	If you select Manual, the request to the third-party vendor for this package will have to be initiated by the HR administrator, recruiter administrator, or recruiter from the employee or candidate record, or the HR administrator or recruiter administrator can submit a Send Packages action for an eligibility group and screening category or assessment package. If you select Automatic, a service call to the vendor will be initiated automatically as soon as the assessment package is assigned to a resource or job application.
Decision Point ID	This value will be provided by the vendor, if required.
Cost	The vendor cost for this assessment package.
	Note: This is informational only.
Currency	The currency in which the vendor cost is expressed.
Cost Center	The cost center to which this cost is assigned.

4 Click Save.

The Assessments tab appears.

5 If the assessment package has assessments, define the assessments. For more information, see ["Defining assessments for assessment packages"](#) on page 33.

Defining assessments for assessment packages

Before you start You must define an assessment package before you can define an assessment.

Assessments are not required. An assessment package can stand on its own.

To define an assessment

- 1 Access Administrator > Setup > Screening.
- 2 On the Assessment Packages tab, select the assessment package that you want to define an assessment for.

or

Open the assessment package and access the Assessments tab.

- 3 On the Assessments panel, click New.
- 4 On the Assessment form, use the following guidelines to enter field values.

Effective Date Required. Enter the effective date for the assessment.

Package (Read only) The selected package defaults in.

Assessment	Required. Type the assessment name. This is the only required field.
Description	Type a description for the assessment. If you leave this field blank, the assessment name defaults.
Active	The assessment is active by default. Clear the check box to make the assessment inactive.
Score Type	Optional. Select Numeric, Pass Fail, or Information Only.
Passing Score	If you indicate a score type of Numeric, type the passing score.
Assessment Validity Period	If this assessment has a renewal date, type the number of days, weeks, months, or years that the assessment results are valid. (Organizations may want employees to be tested on a regular basis).
Session Expiration	If applicable, type the number of days, weeks, months, or years that a candidate or resource has to complete the assessment

- 5 Click Save.

Defining background check vendors

An organization can have a different background check vendor for each type of check the organization may want to perform. Or a single vendor can perform multiple types of background checks.

To define background check vendors

- 1 Access Administrator > Setup > Screening.
- 2 On the Background Check Vendors form, click New.
- 3 On the Background Check Vendor form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the background check vendor.
Background Check Vendor	Type the name of the vendor, as you want it to appear on the background check vendor list.
Description	Type a description of the vendor. If you leave this field blank, the Background Check Vendor name defaults.
Active	The vendor is active by default. Clear the check box to make the vendor inactive. Inactive vendors will not appear on select lists.
Location	The location of the user making the background check request.
User Name	Type the full name of the end user in the client organization who can interact with the vendor to provide missing background package data that may be needed.

Email Address	Type the email address of the end user in the client organization who can interact with the vendor to provide missing background package data that may be needed.
User ID	This is the User ID used to log in to the vendor system. This information is provided by the vendor.
User Password	This is the password used to log in to the vendor system. This information is provided by the vendor.
Account	The group Id of the account making the request. The vendor provides this unique ID to each client as a way to identify the client making the request.
Account Password	The password for the client account. Provided by the vendor.
URL	This is the vendor URL used to access the details for the background check results..

- 4 Click Save.

Defining background check packages

Before you start If the background check package uses a vendor, you must define the background check vendor before you can define the background check package.

To define a background check package

- 1 Access Administrator > Setup > Screening.
- 2 On the Background Check Packages tab, click All Actions Menu > Create Background Check Package.
- 3 On the Background Check Package form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the background check package.
Package	Required. Type the name of the background check package. This is the only required field besides the effective date.
Description	Type a description for the package. If you leave this field blank, the package name defaults.
Vendor	If the background check is provided by a vendor, select the vendor.
Active	The package is active by default. Clear the check box to make the package inactive. Background check defined for inactive packages do not appear on select lists.

Background Check Validity Period	If the background check results have a renewal date, type the number of days, weeks, months, or years that the test results are valid. (Organizations may want employees to be tested on a regular basis).
Session Expiration	If applicable, type the number of days, weeks, months, or years that a candidate or resource has to complete the background check.
Auto Assign Package	Select this check box to auto assign this package. If you select a screening category as well, this package will be automatically assigned to resources that are transferred to a position that is associated with the same screening category, as well as to candidates for requisitions that are associated with the same screening category. If you select a selection process as well, this package will be automatically assigned to candidates when they are moved to the selected selection process.
Screening Category	Select a screening category if you want to auto assign this package to resources or candidates, or if you want this package to be assigned only to resources assigned to positions that match the screening category and candidates applying for requisitions that match this screening category. Important: A screening category is required if you select Auto Assign Package.
Selection Process	If you select a selection process, this package will be assigned to candidates only when they are moved to this selection process. If you also select a screening category, the package can only be assigned to job applications where the requisition is associated with the same screening category. If you select Auto Assign Package as well, this package will be auto assigned to job applications that are moved to the selected process and match the screening category.
Processing Type	If you select Manual, the request to the third-party vendor for this package will have to be initiated by the HR administrator, recruiter administrator, or recruiter from the employee or candidate record, or the HR administrator or recruiter administrator can submit a Send Packages action for an eligibility group and screening category or background check package. If you select Automatic, a service call to the vendor will be initiated automatically as soon as the background check package is assigned to a resource or job application.
Cost	The vendor cost for this background check package. Note: This is informational only.
Currency	The currency in which the vendor cost is expressed.

Cost Center	The cost center to which this cost is assigned.
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- 4 Click Save.

The Background Check tab appears.

- 5 Define the background checks for the background check package. For more information, see ["Defining background checks for a background check package"](#) on page 37.

Defining background checks for a background check package

Note: A background check package must have at least one background check. Background checks define the type of screening performed (criminal background, credit check, and so on).

To define a background check for a background check package

- 1 Access Administrator > Setup > Screening.
- 2 On the Background Check Packages tab, select the background check package that you want to define a background check for.

or

Open the background check package and access the Background Checks tab.

- 3 On the Background Checks panel, click New.
- 4 On the Background Check form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the background check.
Package	(Read only) The selected package defaults in.
Background Check	Required. Type the name you want to display on the background check list.
Description	Type a description for the background check. If you leave this field blank, the background check name defaults.
Active	The background check is active by default. Clear this check box to make the background check inactive. Inactive background checks do not appear on select lists.
Service Type	Select the type of background check to be performed. For example, Criminal.

Note: You should define a background check for each service type included in the background check package.

Permissible Purpose	Optional. You can indicate why the background check is requested. For example, "Required by the state for the position."
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5 Click Save.

Social media profile parsing setup and maintenance

- ["Configuring your organization to import candidates' social media profiles" on page 38](#)
- ["Defining a Talemetry user in Talent Acquisition" on page 39](#)
- ["\(Optional\) Uploading social media images" on page 40](#)
- ["Removing unprocessed Talemetry records" on page 41](#)

Configuring your organization to import candidates' social media profiles

You can configure your organization to give the option to external candidates to import their profile from a social media account when they register in Candidate Space. Currently supported social media are Facebook®, LinkedIn®, and Google+®.

Before you start Your organization must have a Talent Technology account to use EAM Services for resume parsing.

Social media setup process

- 1 In Talemetry Customer Account Manager, create a Talemetry resume processing account for social media, and create a Talemetry user for that resume processing account.

or

Get the necessary information from the person who create the accounts.
- 2 Access Administrator > Talent Acquisition > Code Setup > Define Talemetry User to define the Talemetry user for social media. Use the information provided by Talemetry. For more information, see ["Defining a Talemetry user in Talent Acquisition" on page 39](#).
- 3 Optionally, access Administrator . Talent Acquisition > Code Setup > Social Media Image Setup to replace the default social media images provided by Talent Acquisition. For more information, see ["\(Optional\) Uploading social media images" on page 40](#).

- 4 Access the Profile Parsing tab on Administrator > Talent Acquisition > Primary Setup > Organization Configuration to configure for resume parsing and social media parsing. "[Configuring Talent Acquisition organization parameters](#)" on page 43

Note: You must select a Talemetry user and at least one social media for this option to be offered to external candidates.

Candidate process

When registering, external candidates are given the option to either upload a resume or import a profile from a social media. If they select social media, they are guided through a three-step wizard.

- 1 Provide Credentials prompts candidates to sign in to their social media account. If they click OK, I'll Allow It, their profile information is copied and parsed in Talemetry Account.
- 2 Get Profile retrieves the profile information from Talemetry and creates a candidate profile in Career Space.

If candidates do not perform this task, they can still go to their profile where they will be prompted to continue the process (as long as they are still in the same session). If they leave the session without completing the process, they will have to enter their profile data manually.

Note: If candidates do not perform this task, no profile is created, and their profile information remains in limbo in Talemetry. Schedule the Remove Talemetry Records job to run periodically to remove these records. For more information, see "[Removing unprocessed Talemetry records](#)" on page 41.

- 3 Review Profile prompts candidates to access their Career Space profile and update it as needed.

Note: This is the one time action for candidates, available only during registration. If they update their social media profile, they will not be able to import the changes to their Career Space profile.

Defining a Talemetry user in Talent Acquisition

Before you start You will require information about the Talemetry resume processing account and user account that will be used specifically for social media profile parsing. If you are the one setting up the accounts in Talemetry Customer Account Manager, the Talemetry account information that you need to enter in Talent Acquisition will be e-mailed to you. If another person sets up the account, you must get the information from that person. For more information on setting up a Talemetry resume processing account and a user account, see the Talemetry Apply documentation.

To define a Talemtery user

- 1 Access Administrator > Code Setup > Talemtery User Setup.
- 2 Click New.
- 3 On Talemtery user, use the following guidelines to enter field values.

Talemtery User	The name of the user account defined for social media users.
Talemtery Password	The password of the social media user account.
Company Name	The name assigned to your company by Talent Technology.
Secret Key	The secret key generated for your company by Talent Technology.
Apply Url	The information in this field defaults in. Do not change it.
Resume Processing Account User Name	The name of the Talemtery resume processing account used for social media. It must match the resume processing account selected on the Talemtery user account.
Resume Processing Account Password	The password of the Talemtery resume processing account.

- 4 Click Save.

Follow-up task

- 1 Access Talent Acquisition > Primary Setting > Organization, and open the organization that you want to configure for social media profile parsing.
- 2 On the Profile Parsing tab, in the Talemtery User field, select the user account that you just created.

(Optional) Uploading social media images

Important: This function is available only to administrators. It is not available to recruiter administrators.

Talent Acquisition provides default images, for Facebook, LinkedIn, and Google+. You can upload your own images if you like. However, you cannot change the file name. The image file must be in **.png** format.

To upload social media images

- 1 Access Administrator . Talent Acquisition > Code Setup > Social Media Image Setup.
- 2 To view the current image for a social media, open the record.
- 3 To upload a different image:

- a Make sure the image you want to upload is in .png format and is named the same as the image you want to replace.
- b Open the social media image you want to replace and click Browse.
- c Browse to the image you want to use, and click OK.

The new image should now display.

Removing unprocessed Talemtery records

If candidates do not complete the process to import their profile from their social media account, the records remain in limbo in Talemtery. You can schedule the Remove Talemtery Records job to run periodically to clean out the records.

To remove unprocessed Talemtery records

- 1 Access Administrator > Talent Acquisition > Code Setup > Scheduled Jobs > Remove Talemtery Records.

- 2 On the Remove Talemtery records form, use the following guidelines to enter field values.

Organization	Required. Select the organization for which you want to schedule the job.
Social Media Account	Required. Select the social media account for which you want to schedule the job.
Record Removal Count	Type the maximum number of records to be removed. If you leave this field blank it will default to 100.

Note: The job does not remove records created during the last day.

- 3 Click Schedule to schedule the job to run regularly. For example, you can schedule the job to be run once a month on the last day of the month. If you provide an email, you will be notified when the job is run. You can check the action under Start > My Actions > My Scheduled Actions.

Talent Acquisition Organization setup

Primary setup data refers to Talent Acquisition data that is set for the entire organization by the recruiter administrator.

- ["Parameters defined at the Talent Acquisition organization level" on page 42](#)
- ["Configuring Talent Acquisition organization parameters " on page 43](#)

Parameters defined at the Talent Acquisition organization level

You can configure your organization to tailor processes to your needs.

Candidate configuration

- You can let the system auto-create internal candidates when a new resource is added to the system. This is used if you want your employees to apply for internal position on Employee Space.
- You can provide a URL for candidates to set up a free email account if they do not have an email. (An email is required to register on the career web site.)
- You can specify how many months candidate information and application data is retained on the career web site.
- You can allow the candidate profile and job application information to be synchronized up to the selection process that you select, at which point a job application can no longer be updated by the candidate;

or

You can prevent candidates from updating their job applications after they have been submitted.

Selection process

- You can customize the job application status descriptions that a candidate sees on the career web site

Email automation

- You can set up email automation to trigger automatic emails for any stage in the candidate selection process, as well as when a priority requisition is created. You can determine which change in selection process will trigger an automatic email, as well as choose the template to be used for each of those stages.
- You can select a document template that can be used to generate a resume from a candidate's profile when a job application is moved to Hiring Manager Review and automatic email is enabled for the Hiring Manager Review process.

Posting automation

- You can instruct the system to either remove or retain postings on the career web site if a requisition is canceled, placed on hold, or filled.

Profile parsing

Important: This functionality requires you to set up an account with Talent Technology.

- You can configure your organization to parse uploaded resumes into candidate profiles.
EAM Service is the only option that provides profile parsing. You must set up an account with Talent Technology and define your parsing rules.
Use the documentation and help provided by Talent Technology to define your parsing rules.
- If you configure your organization to use profile parsing, you can also configure your organization to allow candidates to import a candidate their profile from their LinkedIn, Facebook, or Google+ profile. To enable this functionality, you must define and select a Talemety user that will be used for social media and select each of the social media that you want to allow candidates to import their profiles from.
- If you use resume parsing, you can configure the organization to generate a log of resume parsing errors. The log will display under Talent Acquisition > Parsing Messages. You can also select an HR or recruiter administrator that will receive notifications when a log is generated.

Requisition defaults

You can select default values for the following requisition components. Any values you select will default on all requisitions at the time you create or request to create them. You can override these values on any requisition.

- Self-identification text
- Question set
- Consent agreement (external and/or internal)
- Acknowledgment (external and/or internal)

Talent Acquisition alerts

You can set up a target number of days to fill the requisition. If the requisition takes longer to fill, a message will display on the Time To Fill dashboard panel for the requisition.

You can set up a target number of days to complete an offer process. Any job application that is in Offer status longer than this number of days will be flagged with a red alert on the recruiter's Offers dashboard panel on the Today view.

Configuring Talent Acquisition organization parameters

Use this procedure to configure your Talent Acquisition organization parameters.

Important: Talent Acquisition percent fit settings are now configured on Administrator > Setup > Structure > Organizations.

This procedure requires recruiter administrator privileges

To configure organization parameters

- 1 Access Administrator > Talent Acquisition > Primary Setup > Organization Configuration.
- 2 Select the organization that you want to configure.
- 3 On the Organization form, enter the required effective date.
- 4 Use the following guidelines to enter other field values.

- Candidate Configuration tab

Auto Create Internal Candidates Select this check box if your resources apply for jobs internally (rather than through your external Career Space). This will allow internal resources to apply from their Employee space.

Tip: If you leave this check box unchecked for a period of time and new resources are created, the Create Internal Candidates button appears. Click this button to create internal candidates for these new resources. The button disappears when all resources have become internal candidates. Resources will not be able to apply internally if they are not internal candidates.

Important: You will need to perform additional security tasks for your internal candidates to be able to view job openings from their Employee space. For more information, see "[Additional setup for internal candidates](#)" on page 48

Require Job Application	Select this check box to make external candidates visible to recruiters on Candidate Pool only if they have applied for a job.
Link to Create Email	Candidates will be required to provide an email address to log in to the career web site. Enter the URL to a free email web site where a candidate who does not have an email address can acquire one. For example, you could provide the URL for GMail (http://mail.google.com).
Candidate Application History Months	Type the number of months that candidates will be able to see their job application history on the Career Space
Synchronize Profile	Select this check box if you want candidates to be able to update their job applications until they reach the selection process selected in the Lock Profile At field. If this option is selected changes made to the candidate profile will also be made automatically to any job applications that have not reached the Lock Profile At selection process. Changes made to a job application will also be made to the candidate profile and to any other job applications that have not reached the Lock Profile At selection process.
Lock Profile At	This field is visible only if you select Synchronize Profile, and it is required when it appears. Select the selection process from which candidates will no longer be able to update their job applications.

- Selection Process tab

For each stage in the selection process, type the text that appears the status field of a candidate's job application. This text appears only to candidates. You can use the same text for multiple processes. For example, you could use "In Process" for several of the selection processes.

- Email Automation tab

Email rule

For each selection process, select one of the following options:

- Select Automatic Email, if you want an automatic email to be sent to an candidate or hiring manager without any human intervention. For example, you may want to send automatic emails to all new candidates just to acknowledge the receipt of their application.
- Select No Email (the default) if you want the recruiter or hiring manager to be able to control when they send an email and which email template to use.

In addition, if you want recruiters to receive an automatic email when a candidate applies for a requisition flagged as a priority requisition, select Automatic Email in the Priority Requisition field, and select the appropriate template.

Email template

For each process that you selected for automatic email, select the email template that will be used. You can use the same email template for multiple processes. Email templates are defined in Administrator > Talent Acquisition > Template Setup > Email Templates.

Attachment template

If you select Automatic Email for the Hiring Manager Review process, you can select a profile template to be used when a recruiter changes a job application to Hiring Manager Review. The template pulls the information from the candidate application profile into a Word document that is attached to the email that is automatically sent to the manager. This can be used if candidates do not use resume parsing and enter a full profile.

Important: The template must be uploaded to the Document Templates list to be selectable (on Administrator > Talent Acquisition > Template Setup > Document Templates). The template will work only if Automatic Email is selected.

- Posting Automation tab

**Remove Postings
When Cancelling
Requisition**

Select this option if you want postings to be removed from job boards when a requisition is cancelled.

**Remove Postings
When Placing
Requisition On Hold**

Select this option if you want postings to be removed from job boards when a requisition is placed on hold

Remove Postings When Requisition is Filled	Select this option if you want postings to be removed from job boards when a requisition is filled.
---	---

- Profile Parsing tab

If you want to provide candidates with the ability to parse an uploaded resume into a profile, you must provide values in the Profile Parsing Configuration fields.

In addition, if you also want to provide candidates with the ability to either parse an uploaded resume or import an existing profile from their Facebook, LinkedIn, or Google+ account, you must also provide values in the Social Media Configuration fields.

Profile Parsing Configuration

Rex Request Type	Select the type of resume processing service that you want to use. If you choose any option other than EAM Service, your career site will have no profile parsing capability. Candidates will be able to enter a quick or full profile and to attach a resume without parsing.
-------------------------	--

Important: If you choose EAM Service, your organization must procure an account with Talent Technology, which provides the third-party software used to parse resumes, and set up your resume parsing rules.

If you choose EAM Service, you must also enter the EAM account login and password provided by Talent Technology.

EAM Login	If you choose EAM Service, type your EAM login name.
EAM Password	If you choose EAM Service, type your EAM password.
Extract Other Competency And Skill Values	If you select this check box, the resume parsing software will extract competencies and skills that are entered as "Other" because the candidate could not find a matching competency or skill in the select list.

Social Media Configuration

Talemetry User	Note: This field displays only if you have set up a Talemetry user for social media on Talent Acquisition > Code Setup > Talemetry User Setup. For more information, see "Defining a Talemetry user in Talent Acquisition" on page 39. If you want external candidates to be able to import an existing profile from their Facebook, LinkedIn, or Google+ account, select the Talemetry user that will be used to process the profiles.
-----------------------	--

LinkedIn, Facebook, Google Plus	Select the social media that you will want to enable for your organization. Candidates will be able to import a profile from any of the social media that you select.
--	---

Note: If you do not select a social media, that option will not be provided to external candidates when they register.

Logging And Notification

If you use resume parsing, you can configure your organization to generate a log of resume parsing error messages. For example, a log entry will be created if a parsed education record includes a country that does not exist in Talent Management. The education record is created, but a parsing message is issues. This allows you to identify and correct setup issues.

Log Parsing Messages Select this check box to generate a log of resume parsing errors. You can view the errors under Talent Acquisition > Parsing Messages.

For more information, see "[Viewing and correcting resume parsing errors](#)" on page 165.

Notification User	If you select Log Parsing Messages, you can also select a resource who will receive notifications when errors are generated with a link back to the log file.
--------------------------	---

Important: The selected notification user must have administrator or recruiter administrator privileges.

- Requisition Defaults tab

Select the requisition component values that you want to default on requisitions at the time that they are created.

Note: These fields are all optional. You can override these default values on any requisition.

Self Identification Default	Select a self identification configuration that will default on requisitions. Self identification configurations are defined in Administrator > Talent Acquisition > Code Setup > Self Identification > Configuration.
------------------------------------	--

Question Set Default	Select a question set that will default all the questions included in the question set on requisitions. Question sets are defined in Administrator > Talent Acquisition > Code Setup > Questions.
-----------------------------	---

Consent Agreement Default (External)	Select a talent agreement that will default on requisitions in the Consent Agreement (External) field . The text of this talent agreement will display on external candidate applications for the requisition. Consent agreements are defined in Administrator > Talent Acquisition > Primary Setup > Talent Agreements.
---	--

Consent Agreement Default (Internal)	Select a talent agreement that will default on requisitions in the Consent Agreement (Internal) field. The text of this talent agreement will display on internal candidate applications for the requisition. Consent agreements are defined in Administrator > Talent Acquisition > Primary Setup > Talent Agreements.
Acknowledgment Default (External)	Select a talent agreement that will default on requisitions in the Acknowledgment (External) field. The text of this talent agreement will display on external candidate applications for the requisition. Acknowledgments are defined in Administrator > Talent Acquisition > Primary Setup > Talent Agreements.
Acknowledgment Default (Internal)	Select a talent agreement that will default on requisitions in the Acknowledgment (Internal) field. The text of this talent agreement will display on internal candidate applications for the requisition. Acknowledgments are defined in Administrator > Talent Acquisition > Primary Setup > Talent Agreements.

- Talent Acquisition Alerts tab

Enter the number of days past which a requisition or job application will be flagged with a red alert.

Time To Fill Target If you enter a number of days in this field, the following text message will display on the Time To Fill dashboard panel for requisitions that exceed the target: "Requisition Time To Fill is over target of nn " "[The recruiter's Requisitions view](#)" on page 168

Days In Offer Target If you enter a number of days in this field, any job application that is in Offer status longer than this number of days will be flagged with a red alert, on the recruiter's Offers dashboard panel on the Today view.

5 Click Save.

Additional setup for internal candidates

These steps are needed if you want internal candidates (employees) to be able to view position openings and apply for positions from Employee > Opportunities. These steps can only be performed by administrators who have access to security tasks.

- 1 Access Data > Security > Business Classes > ActorRoles, and add the Candidate_ST role to the employee actor.
- 2 Access Data > Recruiter > Business Classes, and open the Candidate business class. Locate the candidate number and take note of it.
- 3 Access Data > Person > Business Classes > Agent, locate and right-click the employee (Name = org, emp #), and select Link To Agent.
- 4 On the pop-up form, click the Select arrow and locate the corresponding candidate.

Tip: Filter on Candidate and Name. The name format is *org, candidate #*.

5 Select the candidate.

A unique ID is added to the Agent pop-up form. Click OK.

6 Access Data > Person > Business Classes > ContextProperties.

7 Highlight the JobBoard in the upper panel. In the lower panel, select Create.

8 Type or select your actor ID, and type the name of the Job Board to which the employee will have access (for example, INTRANET).

9 Click OK.

10 Log in as the employee and access Employee > Opportunities.

If you setup was correct, the list of open requisitions posted to the job board should display.

Recruiter setup

- ["About recruiters" on page 49](#)
- ["Defining recruiters" on page 49](#)
- ["Activating or inactivating recruiters" on page 50](#)
- ["Deleting recruiters" on page 50](#)

About recruiters

Recruiters manage the recruitment process for open positions within an organization, including identifying, screening, assessing, and proposing candidates for the positions. A recruiter must be an existing resource in the organization. If the recruiter is an external recruiter, he or she must still be defined as a resource, possibly with a relationship to organization of "contractor" or "external recruiter". The recruiter administrator must define all recruiters. All requisitions are assigned to a recruiter.

Defining recruiters

A recruiter must be defined as a resource. The resource can be defined as an employee, a contractor, or another relationship to organization set up specifically for external recruiters. For more information on resources, see the *Global Human Resources User Guide*.

To define a recruiter

- 1 Access Administrator > Talent Acquisition > Primary Setup > Recruiter Setup.

A list of all the recruiters in the system appears.

- 2 Click New.

- 3 On the Recruiter form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date that the recruiter assignment takes effect.
Employee Number	Select the resource employment ID.
Active	The recruiter is active by default. Clear the Active check box to make the recruiter inactive. Inactive recruiters do not appear in lists.

- 4 Click Save.

Activating or inactivating recruiters

The only field you can modify on a recruiter is the Active status. Any changes to addresses, phone numbers, emails, and so on must be done on the resource record.

When a recruiter is inactivated, the recruiter cannot be associated with a new requisition, but existing associations with requisitions remain valid until you change them.

To activate or inactivate a recruiter

- 1 Access Administrator > Talent Acquisition > Primary Setup > Recruiter Setup.
- 2 Click the Active field for the recruiter record you want to inactivate.
- 3 Select Yes to activate or No to inactivate, and click Save
- 4 Enter the effective date and click OK.

Deleting recruiters

Important: The system will not let you delete a recruiter that has been assigned to a requisition.

To delete a recruiter

- 1 Access Administrator > Talent Acquisition > Primary Setup > Recruiter Setup.
- 2 Select the recruiter you want to delete.

- 3 Click Delete.
- 4 Click Yes to confirm.
- 5 Enter the effective date and click OK.

Talent agreement forms setup

- ["How are talent agreement forms used?" on page 51](#)
- ["Defining talent agreement forms" on page 52](#)
- ["Updating consent agreement or acknowledgment forms" on page 53](#)
- ["Deleting consent agreement or acknowledgment forms" on page 53](#)

How are talent agreement forms used?

Talent Acquisition uses the same talent agreement form to define either a consent agreement or an acknowledgment. For each requisition, the recruiter can select two of each: one to be used for external candidates, and one to be used for internal candidates.

The consent agreement form is the first page that the candidate sees when applying for a job.

The acknowledgment form is the last page the candidate sees before submitting the application. Both forms require the candidate to agree to the terms described in the form before they can proceed. The candidate must either select a check box or enter an electronic signature. If no consent agreement form or acknowledgment form is selected on the requisition for internal and/or external candidates, the job application process will bypass those steps. For example, you may want a consent agreement for external candidates to agree to a background check, but this may not be applicable to internal candidates that were already checked when they were first hired.

The system does not differentiate a consent agreement from an acknowledgment, so it is up to your organization to clarify how these forms are used. For example, a consent agreement form could be used to ask a candidate to consent to submit to the screenings that the job calls for (for example, criminal background or credit check). An acknowledgment could be used to ask candidates to attest to the accuracy of the information they provide in the application.

The recruiter administrator can define multiple consent agreement and acknowledgment forms to meet the needs of different jobs, and of internal versus external candidates. Your organization's legal department is likely to be involved in formulating the exact text of the forms.

Defining talent agreement forms

Talent agreement forms can be selected in requisitions to appear on the job application for the requisition as either a consent agreement form or an acknowledgment form.

Note: The process is the same whether you are defining a consent agreement or an acknowledgment form.



Need More Details? Check out the following concepts:

- ["How are talent agreement forms used?"](#) on page 51

To define a talent agreement form

- 1 Access Administrator > Talent Acquisition > Primary Setup > Talent Agreements.

A list of the consent agreement and acknowledgment forms in the system appears.

- 2 Click New.

- 3 On the Agreement form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the talent agreement.
Talent Agreement	Required. Type the agreement name.
Description	Type a description. This text will help recruiters select the correct forms for a requisition. The text appears only on the talent agreement primary list or select list. Tip: It might be helpful to recruiters to have the words "Consent Agreement" or "Acknowledgment" as part of the name.
Active	The talent agreement is active by default. Clear the Active check box to make the agreement inactive. Inactive agreements do not appear in lists.
Consent Type	Select Check Box, if the candidate will agree to the content by selecting a check box. Select Signature if the candidate will agree to the content by entering a signature.
Content	Type the first paragraph of the consent agreement or acknowledgment form.
Agreement Text	Type the agreement or acknowledgment part of the consent agreement or acknowledgment form. This text appears in bold on the application and is the actual text that the candidate consents to or acknowledges.

- 4 Click Save

Updating consent agreement or acknowledgment forms

Note: Updating a consent agreement or acknowledgment form automatically updates the text on new applications for requisitions that use the form. It does not affect completed applications.

To update a consent agreement or acknowledgment form

- 1 Access Administrator > Talent Acquisition > Primary Setup > Talent Agreements.
- 2 Click the consent agreement or acknowledgment you want to update.
- 3 Update the form.

Note: The only field you cannot update is Talent Agreement.

- To inactivate a consent agreement or acknowledgment, enter the effective date and clear the Active field.

Note: Inactive consent agreements and acknowledgments cannot be associated with new requisitions, but any associations with existing requisitions remain valid until they are changed.

- 4 Click Save.

Deleting consent agreement or acknowledgment forms

Important: You cannot delete a consent agreement or acknowledgment form that is associated with a requisition.

To delete a consent agreement or acknowledgment form

- 1 Access Administrator > Talent Acquisition > Primary Setup > Talent Agreements.
- 2 Select the consent agreement or acknowledgment you want to delete.
- 3 Click Delete.
- 4 Click Yes to confirm.
- 5 Enter the effective date and click OK.

Configurable text setup

You can configure text that will display when candidates register on your career site and when they apply for a job.

- ["Defining candidate wizard text" on page 54](#)
- ["Defining job application wizard text" on page 56](#)

Defining candidate wizard text

Use this procedure to define customized text that will appear on specific pages of the candidate registration wizard and on the profile wizard. When the profile is entered, the text will also appear when the candidate adds or updates information in the profile.

To define candidate wizard text

- 1 Access Administrator > Talent Acquisition > Code Setup > Configurable Text Setup > Candidate Wizard Text.
- 2 Click New.

On the Candidate Wizard Text Setup form, use the following guidelines to enter field information.

Text For	Select the section of the candidate registration wizard where you want the heading and text to appear. For more information on the field values, see "Text For values" on page 55.
-----------------	--

Note: You can define only one wizard text instance for any Text For value.

Active	The wizard text is active by default. Clear the check box to make it inactive.
---------------	--

Wizard Header	Enter a heading. The heading will appear bold on the page.
----------------------	--

Note: You can enter both a heading and text or you can enter either a heading or text.

Wizard Text	Enter text. The text will appear as normal paragraph text.
--------------------	--

Note: You can enter both a heading and text or you can enter either a heading or text.

- 3 Click Save.
- 4 Repeat for each section to which you want to add text.

Text For values

Note: The profile text you define will appear both on the candidate registration wizard and the candidate profile's addition and update pages.

Value	Description
Registration	The text will appear when a candidate is prompted to register.
Registration Confirmation	The text will appear on the registration confirmation page.
Contact Information	The text will appear on the page that prompts the candidate to enter candidate information.
Preferences	The text will appear on the profile page that prompts the candidate to enter work preferences.
Profile	The text will appear on the profile page.
Profile Employment	The text will appear on the profile page that prompts the candidate to enter employment history.
Profile Education	The text will appear on the profile page that prompts the candidate to enter education history.
Profile Skills	The text will appear on the profile page that prompts the candidate to enter skills information.
Profile Credentials	The text will appear on the profile page that prompts the candidate to enter credentials.
Profile Achievements	The text will appear on the profile page that prompts the candidate to enter achievements.
Profile Attachments	The text will appear when the candidate adds or updates an attachment on the profile.
Profile Identification Number	The text will appear on the profile page that prompts the candidate to enter identification numbers.
My Profile	The text will appear on My Profile.
Profile References	The text will appear on the profile page that prompts the candidate to enter the names and contact information of their references.

Value	Description
Attach Resume	The text will appear on the Attach Resume page of the registration wizard when a candidate chooses Quick Profile or Full Profile.
Social Media	This text will appear during the registration process when candidates select the option to upload their profile from a social media account. The text appears above the three-step procedure that guides candidates through importing their profile from a social media account.

Defining job application wizard text

Use this procedure to define customized text that will appear on specific pages of the candidate's job application wizard.

To define job application wizard text

- 1 Access Administrator > Talent Acquisition > Code Setup > Configurable Text Setup > Job Application Wizard Text.
- 2 Click New.

On the Candidate Wizard Text Setup form, use the following guidelines to enter field information.

Text For Select the section of the job application wizard where you want the heading and text to appear. For more information on the field values, see "[Text For values](#)" on page 57.

Note: You can define only one wizard text instance for any Text For value.

Wizard Header Enter a heading. The heading will appear bold on the page.

Note: You can enter both a heading and text or you can enter either a heading or text.

Wizard Text Enter text. The text will appear as normal paragraph text.

Note: You can enter both a heading and text or you can enter either a heading or text.

- 3 Click Save.

- 4 Repeat for each section to which you want to add text.

Text For values

Note: Candidates can change their profile information for a specific job application. The text you define will appear only on the pages they add or update during the course of applying for a job.

Value	Description
Consent	The text will appear on the job application wizard Consent page.
Contact Information	The text will appear when the candidate updates contact information for the job application.
Preferences	The text will appear when the candidate updates preferences for the job application.
Profile Employment	The text will appear when the candidate adds or updates employment information for the job application.
Profile Education	The text will appear when the candidate adds or updates education information for the job application.
Profile Skills	The text will appear when the candidate adds or updates skills information for the job application.
Profile Credentials	The text will appear when the candidate adds or updates credentials information for the job application.
Profile Achievements	The text will appear when the candidate adds or updates achievement information for the job application.
Profile Attachments	The text will appear when the candidate adds an attachment to the job application.
Acknowledgment	The text will appear on the job application Acknowledgment page.
Self Identification	The text will appear on the job application Self Identification page.
Summary	The text will appear on the job application summary page.
Profile References	The text will appear on the job application References page.

Value	Description
Preview	The text will appear on the job application Summary page that is presented to the candidate before submitting the job application.
Review Profile (Internal Only)	The text will appear when an internal candidate applies for a job and clicks View to view his or her existing profile.
Alter Profile (Internal Only)	The text will appear when an internal candidate applies for a job and clicks Update to update his or her existing profile.
Offer Review	This text will appear on the Offer review form that appears when an internal candidate opens a job offer notification or an external candidate clicks the Review Offer link on a job offer email and logs in to Career Space.
Application Limit	This text will appear on the candidate's job description page if candidates try to apply for a job when they have reached the maximum number of job applications. You can use variables in the text to display the candidates current number of job applications and the job application limit the candidate is subject to. Note: If you enter an Application Limit value on a job board and do not define configurable text for Application Limit, the system will display a default message whenever candidates reach their job application limit.

Interview setup

This section describes how to set up interview types, interview statuses, and interview results.

- ["Defining and maintaining interview types" on page 59](#)
- ["Defining and maintaining interview statuses" on page 59](#)
- ["Defining and maintaining interview results" on page 60](#)

Defining and maintaining interview types

Interview types refer to the medium through which an interview is conducted. For example, an interview could be by phone, on site, or online.

To define an interview type

- 1 Access Administrator > Talent Acquisition > Code Setup > Interview Setup > Types.

A list of the interview types in the system appears.

- 2 Click New.

- 3 On the Interview Type form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the interview type.
Interview Type	Required. Type the name of the interview type.
Description	Required. Type a description of the interview type.
Active	The interview type is active by default. Clear this check box to make the interview type inactive. Inactive interview types do not display in select lists.
Use for Online Interview Action	Select the this check box if this type will be used for online interviews. Important: Only one interview type can be assigned to online interviews.

- 4 Click Save.

Related tasks

- To update an interview type, access the interview type, enter the effective date of the change, update the name or description, and click Save.
- To inactivate an interview type, access the interview type, enter the effective date of the change, clear the Active field, and click Save.
- To delete an interview type, highlight the interview type, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot delete an interview type that is associated with a current interview.

Defining and maintaining interview statuses

Interview statuses refer to the stage in the interview process, such as "Scheduled" or "Completed." The recruiter or hiring manager enters and updates the status on the interview form.

To define an interview status

- 1 Access Administrator > Talent Acquisition > Code Setup > Interview Setup > Statuses.

A list of the interview statuses in the system appears.

- 2 Click New.

- 3 On the Interview Status form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the interview status.
Interview Status	Required. Type the name of the interview status.
Description	Required. Type a description of the interview status.
Active	The interview status is active by default. Clear the Active check box to make the interview status inactive. Inactive interview statuses do not appear in lists.

- 4 Click Save.

Related tasks

- To update an interview status, access the interview status, enter the effective date, update the name or description, and click Save.
- To inactivate an interview status, access the interview status, enter the effective date, clear the Active field, and click Save.
- To delete an interview status, highlight the interview status, click Delete, click Yes to confirm, enter the effective date and click OK.

Important: You cannot delete an interview status that is associated with a current interview.

Defining and maintaining interview results

Interview results refer to how the candidate performed in the interview. Each organization decides what is a meaningful interview assessment to them. Examples could be Pass/Fail, or Hire/Don't Hire, or something more graded, such as Poor/Average/Good/Excellent.

To define an interview result

- 1 Access Administrator > Talent Acquisition > Code Setup > Interview Setup > Results.

A list of the interview results in the system appears.

- 2 Click New.

- 3 On the Interview Result form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the interview results.
Interview Result	Required. Type the name of the interview result.
Description	Required. Type a description of the interview result.
Active	The interview result is active by default. Clear the Active check box to make the interview result inactive. Inactive interview results do not appear in lists.

4 Click Save.

Related tasks

- To update an interview result, access the interview result, enter the effective date, update the name or description, and click Save.
- To inactivate an interview result, access the interview result, enter the effective date, clear the Active check box, and click Save.
- To delete an interview type, highlight the interview result, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot delete an interview result that is associated with a current interview.

Self-identification setup

- ["What is self identification?" on page 61](#)
- ["Defining text for self identification components" on page 62](#)
- ["Defining self identification configurations" on page 63](#)

What is self identification?

Self identification is a set of questions related to the candidate's personal status that will appear on the candidate's job application wizard. (For example, ethnicity, gender, marital status, veteran status, and so on). The self-identification questions that are required and/or permissible vary widely from country to country. Talent Acquisition lets you create an unlimited number of self-identification configurations, each of which can include any or all of the following components:

Gender

Ethnicity

Disability Type

Nationality

Veteran Code

Religion

Marital Status

Birthdate

For each component, you can also add text that will appear in front of the question. For example, "Enter your gender below."

To associate a self identification with a job application, the requisition creator (recruiter or hiring manager) selects the self identification configuration on the requisition. All job applications for that requisition will include the applicable self identification questions.

Note: If you selected a default self-identification on Administrator > Talent Acquisition > Primary Setup > Organization Configuration, the self configuration defaults on all new requisitions. Recruiters and hiring managers can select a different self identification when they create a requisition.

The self identification information given by the candidate is visible only to recruiter administrators and HR administrators. If the candidate is hired, the information will become available to HR generalists as well. For job applications that are entered directly in Talent Acquisition, the recruiter administrator can enter the self identification information on behalf of the candidate.

Defining text for self identification components

Use this procedure to define text that will introduce a self identification component question. This is an optional procedure. You can associate a self identification component with a self identification configuration even though no introductory text is defined. You cannot define more than one component text per component.

To define text for self-identification components

- 1 Access Administrator > Talent Acquisition > Code Setup > Self Identification > Components.
- 2 Click New.
- 3 On the Self Identification Component form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the component.
Text For	Required. Select the self-identification component for which you want to define text.
Active	The component is active by default. Clear the Active check box to make the component inactive.
Component Text	Select the font and style and type the text, using the formatting tools available to you.

- 4 Click Save.

Defining self identification configurations

Use this procedure to define the self identification configurations used by your organization.

To define a self identification configuration

- 1 Access Administrator > Talent Acquisition > Code Setup > Self Identification > Configurations.
- 2 Click New.
- 3 On the Self Identification Configuration form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the configuration
Self Identification Configuration	Required. Type the name of your self-identification configuration.
Description	Type the description of your self-identification configuration.

- 4 Click Save.
The Configuration Options tab appear.
- 5 Add the components that should be included in the configuration. Repeat these steps until you have added all components.

- a On the Configuration Options tab, click New.
- b On the Configuration Setup form, use the following guidelines to enter field values.

Effective Date	Enter the effective date when the component is added.
Self Identification Component	Required. Select the self identification component to include in the configuration.
Is a Response Required?	If you select yes, the candidate will be required to respond to the question. The default is No.
Use for Internal, External, or Both	Indicate whether this question will appear on internal candidate applications only, external candidate applications only, or both. The default is both.

- c Click Save.

Transition setup

This section describes how to set up the elements required to process a newly hired or transferred resource through the onboarding (transition) steps.

- ["Transition setup overview" on page 64](#)
- ["Transition setup order" on page 65](#)
- ["Defining transition task groups" on page 65](#)
- ["Updating transition task groups" on page 66](#)
- ["Deleting transition task groups" on page 67](#)
- ["Defining and maintaining transition tasks" on page 67](#)
- ["Defining transition task sets" on page 68](#)
- ["Adding tasks to transition task sets" on page 69](#)
- ["Updating transition task sets" on page 71](#)
- ["Deleting transition task sets" on page 71](#)

Transition setup overview

Onboarding is the process of transitioning newly hired or transferred resources to their new position. Onboarding is one of the transitions that occur within Lawson Talent Management Suite.

When an internal candidate is hired or an internal resource is transferred to a new job, an organization typically has standard processes that apply to all resources.

For example, the resource will be assigned an office, a telephone number, an email address, and a computer, will be introduced to other employees, go through new hire training, and so on.

A different person or group of persons will be assigned to perform specific tasks. IS would be responsible for computers, facilities for security access, office space, and telephone; HR for providing a new ID number, orienting the new person to benefits and having the person complete the required ethics training, and so on. Some tasks must be performed in a specific order. A different set of tasks may be needed depending on whether the resource is a new hire or a transferred resource, permanent or temporary, unionized or not, and so on.

Transition task groups

A transition (onboarding) task group is a group in the organization that will be responsible for carrying out transition tasks. For example, the IS task group would be responsible for providing the user with computer equipment and access, FACILITIES would be responsible for assigning an office and a telephone connection, HR would be responsible for setting up the employee number and setting up the employee compensation and benefits package and so on.

Transition task groups are associated with specific employees. Any of the employees in the transition task group can perform a transition task that is assigned to the group.

Transition tasks

Transition (onboarding) tasks are the actual activities that must be performed as part of the onboarding process. For example, providing a laptop for the new resource is one of the IS onboarding tasks. A task may itself include a number of subtasks and approval workflows, but those are not tracked in Talent Acquisition. For example, a new laptop would probably involve a procurement request, determining the laptop load, loading the laptop, and setting up security.

A transition task can be associated with a prerequisite task. For example, before you can procure a laptop for an employee, the employee must have an employee ID. So, setting up an employee ID would be a prerequisite to almost any other onboarding task.

If a task has a prerequisite, it will not be actionable until the prerequisite task has been completed.

Transition task sets

Transition tasks can be grouped in transition task sets that apply to different types of resources. For example, a new employee is subject to a different transition process from a transferring employee. So you could set up a new employee task set and a transfer task set. Some of the tasks can be shared, but some may be applicable to one set and not the other.

Transition task sets are not required; however, they provide a way to assign multiple transition tasks at a time to a new hire or transfer, rather than having to add tasks one at a time.

Transition setup order

Use the following order to set up transitions

- 1 Define transition task groups. Associate them with actual resources.
- 2 Define transition tasks, including associating them with a task group and optional prerequisite task.
- 3 Define transition task sets and add tasks to the task sets.

Note: Each task added is pulled in with its associates task group. If a task is defined with a prerequisite task, the prerequisite task is automatically added to the set.

Defining transition task groups

Define transition task groups before you define transition tasks.

To define a transition task group

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Groups.
- 2 In the Transition Task Groups region, click New.

- 3** On the Transition Task Groups form, use the following guidelines to enter field values

Effective Date	Required. Enter the effective date for the transition task group.
Transition Task Group	Required. Type the transition task group name
Description	Type a description of the transition task group. If you leave this field blank, the transition task group name defaults when you save the set.
Active	The transition group is active by default. Clear the Active check box to make the transition group inactive. Inactive transition groups do not appear in lists.

- 4** Click Save. The Transition Task Group Assignments panel appears.

- 5** Add resources to the group.

- a** On the Transition Task Group Assignments panel, click New.
- b** On the Transition Task Group Assignment form, enter an effective date and select a resource.

Tip: If you do not see a resource on the list, use the Search fields to locate the resource.

- c** If you want to save this assignment and enter a new one, click Save and New and continue entering assignments.

or

If this is the only or last assignment you want to make, click Save.

Updating transition task groups

Note: You can update the task group description, you can also add or remove resource assignments.

To update a transition task group

- 1** Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Groups.
- 2** Access the transition group you want to update.
- 3** Update the transition task group.
 - To update the description, enter the effective date, type your changes in the Description field, and click Save.
 - To add a resource assignment, click New on the Transition Task Group Assignments panel, enter an effective date, select a resource and click Save.
 - To remove a resource assignment, select the resource on the Transition Task Group Assignments panel, click Delete, click Yes to confirm, enter the effective date, and click OK.

Deleting transition task groups

Important: You cannot delete a transition task group that is associated with a task.

To delete a transition task group

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Groups.
- 2 Select the transition task group you want to delete.
- 3 Click Delete.
- 4 Click Yes to confirm.
- 5 Enter the effective date and click OK.

Defining and maintaining transition tasks

Before you start Define transition task groups before you define transition tasks.

To define a transition task

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Tasks.
- 2 Click New.
- 3 On the Transition Task form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the transition task.
Transition Task	Required. Type the name of the transition task.
Description	Type a description of the transition task. If you leave this field blank, the transition task name defaults when you save the task.
Prerequisite Task	If another task must be performed before this task, select the prerequisite task.
Transition Task Group	Select the transition task group responsible for performing the task.
Instructions	Describe what the task entails.
Use Process Flow, Flow Selection	If the task triggers a process flow, select the Use Process Flow check box and type the name of the flow.
Days, Weeks, Months, Years	Type how many days, weeks, months, or years the task is expected to take. If these fields are blank, the task is due as soon as it is assigned.

Send Email	If you want an email to be sent when the task is picked up or when the task is complete, select the appropriate option and enter the email information. Enter the email information in the same manner as for an email template, using variables (right-click > Variables) so that the email will go to a role rather than a specific person. For example, the email can be addressed to {HiringManager}. The system will convert to the hiring manager for the resource that is being onboarded. For more information, see "Defining email templates" on page 104.
Preferred Email Language	If your organization uses Dynamic Embedded Translation (DET), you can specify what language will be used for the email recipients. If you leave this field blank, the organization base language will be used.
File	If you want to attach a file to this task, click the Browse button, and browse to the file you want to attach.
Title	If you attach a file, you can type a title for the attachment. If you do not, the file name defaults into this field.

Related topics

- To update a transition task, open the task, update any of the fields (except for the name), and save. The Effective Date field is required.
- To delete a transition task, select the task, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot delete a task that is associated with a transition task set.

Defining transition task sets

Before you start Define tasks before you define task sets.

To define a transition task set

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Sets.
A list of all the transition task sets in the system appear. Select a transition task set to view the transition tasks associated with the task set.
- 2 On the Transition Task Set panel, click New.
- 3 On the Transition Task Set form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the transition task set.
Transition Task Set	Type the name of the transition task set.
Description	Type a description of the transition task set. If you leave this field blank, the transition task set name defaults when you save the set.
Active	The task set is active by default. Clear the check box to make the task set inactive. Inactive task sets do not appear on select lists.

- 4 Click Save. The Transition Tasks tab appears.
- 5 Add tasks to the transition task set. For more information, see ["Adding tasks to transition task sets"](#) on page 69.

Adding tasks to transition task sets

Before you start You must define transition tasks before you can add transition tasks to a transition task set.

You can add tasks in a flat structure or in a tree structure.

To add a task to a transition task set in a flat structure

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Sets.
- 2 Select the transition task set that you want to add tasks to.
- 3 To add a task, on the lower panel, click New.

Note: Alternatively, open the task set, and click New on the Transition Tasks tab.

- 4 On the Transition Set Task form, use the following guidelines to enter field values.

Transition Task Set	This value defaults from the transition task set and cannot be changed.
Transition Set Task	The system will assign a number to the transition set task when you save the form.
Transition Task	Required. Select the transition set task that you want to add to the set.

Prerequisite Task	If a prerequisite task is already defined for the transition set task you selected, it will be entered in this field when you save the task, and it will be added to the task list in the set if it is not already there. You can select a different prerequisite task or remove the prerequisite task. These changes will be valid only for the task set and will not affect the original task. Important: If you want to select a different prerequisite task, it must exist in the task set.
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Transition Task Group	This value defaults from the transition task and cannot be changed. It will be assigned when you save the form.
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- 5 Click Save and New to save the task and enter another task.
- 6 Repeat steps 3 through 5 until you have added all the tasks.
- 7 After adding the last task, click Save.
- 8 Optional. To view the tasks in a tree format that shows the dependencies, highlight the transition task set, open the transition task set on the Transition Task Set panel, and click the Transition Task Tree tab.

To add a dependent task to a transition task set in the tree structure

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Sets.
- 2 Open the transition task set that you want to add tasks to or click Actions > Update.
- 3 Click the Transition Task Tree tab.
- 4 Locate the transition task under which you want to add a dependent task.

Tip: Click the arrow next to a transition task to view any existing dependent tasks.

- 5 To add a dependent transition task, select the task that is a prerequisite to the task you want to add, and click New > Create Within.
- 6 On the Transition Set Task form, use the following guidelines to enter field values.

Transition Task Set	This value defaults from the transition task set and cannot be changed.
Transition Set Task	The system will assign a number to the transition set task when you save the form.
Transition Task	Required. Select the transition set task that you want to add to the set.
Prerequisite Task	This value defaults from the selected transition task set and cannot be changed.
Transition Task Group	This value defaults from the transition task and cannot be changed. It will be assigned when you save the form.

- 7 Click Save.
- 8 Repeat steps 4 through 7 until you have added all the dependent tasks.
All the tasks also appear in a flat structure on the Transition Tasks tab.

Updating transition task sets

Note: You can change the description of a task set. You can add or remove tasks from the task set. You cannot update a task.

To update a transition task set

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Task Sets.
- 2 On the Transition Task Set panel, open the task set you want to update or click Actions > Update.
- 3 Make your changes as follows.
 - To change the transition task set description or Active status, enter the effective date, enter your changes, and click Save.
 - To add a task, on the Transition Tasks tab, click New, select the task in the Transition Task field, and save. The task and any prerequisite tasks associated with it will be added to the task set.

If the task does not have a prerequisite task, you can add a prerequisite task just for the task set. Or you can select a different prerequisite task. Any prerequisite task you select must already be in the task set.
 - To remove a task, select the task, click Delete, and click Yes to confirm.

Important: You can remove a task that has a prerequisite task, but you cannot remove a task that is required by another task in the set. For example, you can remove ASSIGN PARKING even if it has a prerequisite task of ASSIGN USER NAME, but you cannot remove ASSIGN USER NAME because it is a prerequisite to several of the tasks in the task set. You must delete all the tasks that have ASSIGN USER NAME as a prerequisite before you can delete ASSIGN USER NAME.

Deleting transition task sets

Important: You cannot delete a task set that is associated with an ongoing onboarding process. Before you can remove a transition task set, you must delete any tasks associated with the task set.

To delete a transition task set

- 1 Access Administrator > Talent Acquisition > Code Setup > Transition Setup > Tasks.
- 2 Select or open the transition task set you want to delete.
- 3 If any tasks exist for the transition task set, delete the tasks.

Important: You can remove a task that has a prerequisite task, but you cannot remove a task that is required by another task in the set. For example, you can remove ASSIGN PARKING even if it has a prerequisite task of ASSIGN USER NAME, but you cannot remove ASSIGN USER NAME because it is a prerequisite to several of the tasks in the task set. You must delete all the tasks that have ASSIGN USER NAME as a prerequisite before you can delete ASSIGN USER NAME.

- 4 When all the tasks are deleted from the transition task set, click Delete on the Transition Task Set panel.
- 5 Click Yes to confirm.
- 6 Enter the effective date and click OK.

Job board setup

Job board data determines where, when, and for how long a job can be posted. The recruiter administrator must define job board data before a requisition can be posted.

- ["Job boards and job posting rules" on page 73](#)
- ["How can you limit the number of job applications that a candidate can submit?" on page 74](#)
- ["Defining and maintaining job boards \(non Talemetry\)" on page 75](#)
- ["Defining a Talemetry™ job board" on page 78](#)
- ["Defining job posting rules" on page 79](#)
- ["Adding job boards to a job posting rule" on page 80](#)
- ["Updating job posting rules" on page 81](#)
- ["Deleting job posting rules" on page 82](#)

Job boards and job posting rules

Job boards

Job boards are internet job postings. Talent Acquisition lets the recruiter administrator define the job boards where a requisition will be posted. Each job board defines a job board location. A job board can be internal (such as an intranet reserved for employees only) , external (such as an organization's career site), a third-party job board with which your organization has a contract, or a Talemetry job board, which allows you to use the Talent Technology Talemetry functionality to post a requisition to multiple third-party job boards simultaneously.

A requisition can be posted to multiple job boards. The recruiter can add job boards to a requisition individually, or through a job posting rule. Job boards pull information from the requisition, so recruiter should define a requisition fully before assigning job boards to it.

Third-party job boards

Third-party job boards are created in the same manner as internal or external job boards. The only difference in the setup is that there is usually a per-posting fee associated with a third-party job board.

Talent Acquisition uses the HR-XML standard to interface with third-party job board providers such as Monster or Career Builder. This means that your organization could post to any provider that is compatible with the HR-XML standards.

When posting to a third-party job board, Talent Acquisition creates an HR-XML file in the appropriate format and saves it in the HRXMLOutput > PositionOpening directory, under the appropriate job board name (for example, Monster). Your IT organization then interfaces with the third-party career site to post the job. A customizable link is provided from the job posting on the career site to your career site and you can also provide contact information for candidates to email or mail resumes to recruiters.

Talemetry job board

Talent Acquisition provides integration with the ©Talent Technology Corporation Talemetry solution. You can purchase a contract with Talent Technology Corporation that lets you post, update, track costs, and measure the effectiveness of job postings across multiple job boards, all from Talent Acquisition.

To use this functionality, you create a single job board of type Talemetry in Talent Acquisition, using the parameters provided to you by Talent Technology. To post an open requisition to any or all of the job boards that are included in your Talent Technology contract, you create a posting for the Talemetry job board on the requisition. The Post action then takes you to a wizard that guides you through the two-step posting process.

Note: You cannot use job posting rules for a Talemetry job board.

Job posting rules

A job posting rule associates one or more job boards with time constraints (such as delay before posting, specific day of the week for the posting, and time that the posting remains on the job board). For

example, the recruiter administrator can define a job rule to post a requisition immediately on the internal job site and then after two weeks on the external job site.

The recruiter administrator can define any number of posting rules. When a recruiter assigns a posting rule to a requisition, all the job boards included in the job posting rule are automatically added to the requisition. When the recruiter posts the requisition, the system will apply any delays dictated by the posting rules.

How can you limit the number of job applications that a candidate can submit?

Your organization may want to limit the number of applications that a single candidate can submit within the organization.

To set this up:

- 1 Type the number of applications on the job boards for which you want to limit the number of job applications.
- 2 Optional. Define Job application configurable text for Application Limit.

Note: If you do not define configurable text, default text will appear. Configurable text allows you to incorporate variables in the body of the text, making it more useful to the user.

- 3 Optional. You can override the Application Limit value on any candidate, and you can assign a date by which the override value will expire.

Note: The Application Limit field appears on the candidate record only if the job board with which the candidate is associated has a defined application limit.

How are application limits implemented?

- The application limits apply to all active job applications submitted by a candidate across job boards. Dispositioned or withdrawn job applications are excluded from the limit.
- Within a job board, a candidate can only submit up to the number of applications allowed for the job board, minus the number of applications already submitted in other job boards. Blank job boards allow an unlimited number of job applications.

Example:

Job board TEACHERS has no application limit.

Job board CONSULTANTS has an application limit of 6.

Job board ADMINISTRATORS has an application limit of 5.

If candidate Noelle applies for 5 positions on the ADMINISTRATORS job board, she will only be allowed to apply for one position on the CONSULTANTS job board. If she applies for 5 positions

on the CONSULTANTS job board, she will not be able to apply for any position on the ADMINISTRATORS job board.

However, Noelle can apply for as many positions as she likes on the TEACHERS job board, even if she has already applied for the maximum number of positions on the other job boards.

- If a recruiter enters a different application limit on the candidate record (At A Glance tab), this value supercedes the Application Limit value on the job board. If there is an expiration date for the override value, the Application Limit value for this candidate returns to the job board value after the expiration date.
- Candidates can make room to apply for more positions by withdrawing from job applications they have already submitted.
- A dispositioned job application automatically makes room for the dispositioned candidate to apply for a new position.
- Recruiters are not held to the Application Limit numbers. They can attach any candidates to as many job applications as they like and mark them as applied or email candidates to submit the job application.

Defining and maintaining job boards (non Telemetry)

Job boards are areas on a career web site where jobs are posted.

To define a job board

- 1 Access Administrator > Talent Acquisition > Code Setup > Job Boards.
- 2 Click New.
- 3 On the Job Board form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date the job board becomes effective.
Job Board	Required. Type the job board name. For example, INTERNALJOBS. Note: Do not use blanks in the name as it might cause trouble creating a URL.
Description	Type the job board description. For example, Internal Career Site. If you leave this field blank, the job board name defaults.
Board Type	Required. Select the board type: Internal, External, or Third-Party. Note: To define a Telemetry job board, see " Defining a Telemetry™ job board " on page 78.

Auto Create Job Posting URL	(External job boards only) Select this check box if you want to the job board to store a short URL for a job posting when a requisition is posted to the job board. Recruiters can use the short URL in an email to send a link to the posting to a prospective candidate without creating a candidate. The candidate would still have to register and log in to Career Space to apply. If you do not check this check box, you can manually generate a short URL for a specific job posting on the requisition's Postings tab. (Highlight a posting and select Actions > Generate Job Posting URL.) Note: By default, Lawson Talent Management uses TinyUrl as a URL shortening service. You can also configure Lawson Talent Management to use the Lawson shortenURL service.
Active	The job board is active by default. Clear this check box to make the job board inactive. Inactive job boards do not appear on select lists.
Default Source	This is the source that will be used on the job application if the candidate does not provide a source. Important: A default source is required on internal job boards.
Default Specific Source	This is the specific source that will be used on the job application, if the candidate does not provide a specific source.
Cost Per Posting	Third-party job boards usually have a cost associated with them. Type the cost per posting in this field.
Expense Category	If you entered a cost, you must also select the expense category that the cost will be assigned to. Tip: To define a new expense category, click F6 in the field. On Requisition Cost Reason, enter an effective date, a requisition cost reason and description, and save.
Recent Job Days	(Internal and external job boards only) Type the number of days included in the Recent Jobs posting. For example, if you enter 14, the Recent Jobs panel on the job board will include all the requisitions posted within the last 14 days.
Send To Friend Template	Select the email template that will be used when a candidate sends a job on this job board to a friend.
Job Notification Email Template	Select the email template that will be used when a candidate is notified that a job meeting the criteria included in the candidate's job notification has been posted.

Self Identification Text	(Internal and external job boards only) Type any text (such as required legal verbiage) that you want to appear on job applications above the self identification questions.
Show Location If No Openings	If you select this check box, all locations will display on the job board, whether or not openings exist for the location. If you do not select this check box, only the locations for which there are openings will display.
Show Category If No Openings	If you select this check box, all categories will display on the job board, whether or not openings exist for the category. If you do not select this check box, only the categories for which there are openings will display.
Show Relationship to Organization If No Openings	If you select this check box, all relationships to organization (for example, Employee or Contractor) will display on the job board, whether or not openings exist for the relationship to organization. If you do not select this check box, only the relationships to organization for which there are openings will display.
Configurable UI File	(External job boards only) If you want to use a customized home page for this job board, attach the home page zip file that you want to use. You can have a different file for each external job board. If you do not attach a file, the default home page is used.

Note: For information on creating customized home pages for Candidate Space, see the *Talent Management Suite Configuration Guide*.

Custom Candidate UI Leave this field blank.

- 4 (Third Party job boards only) On the Application Process tab, enter information on the various ways that a candidate can apply.

By default, the third-party posting will include a link to your career site. You can also enter a mailing address, an email address, and a telephone number.

- 5 Click Save.

For external job board types, the Limit Application field displays next to the Board Type field.

- 6 (External job boards only) If you want to limit the total number of job applications that a candidate can submit on the job board, type the number in the Limit Application field. Recruiters can override this number for specific candidates.

Related topics

- ["How can you limit the number of job applications that a candidate can submit?"](#) on page 74
- ["Configuring your organization to use the Talent Management shortenURL service"](#) on page 25

Related tasks

- To update a job board , access the job board, enter your changes, including the required effective date, and save.

- To delete a job board, highlight the job board, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot delete a job board that is attached to a job requisition.

Defining a Talemetry™ job board

Before you start You must have a current Talent Technology contract that lets you post requisitions to third-part job boards using the Talemetry Broadcast functionality. You will need the parameters provided you by Talent Technology to define the job board.

You can define only one Talemetry job board per organization.

To define a Talemetry job board

- 1 Access Administrator > Talent Acquisition > Code Setup > Job Boards.
- 2 On Job Boards, click New.
- 3 On the Job Board form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date that the job board becomes effective.
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Job Board	Required, type the job board name.
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Note: We recommend using Talemetry as part of the job board name. This will help you know which job board to select when you want to post a requisition to the job boards included in your contract with Talent Technology.

Description	Type a description for the job board. If you leave this field blank, the job board name defaults.
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Board Type	Select Talemetry. The form immediately changes to display the fields you need to enter.
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- 4 On the General Information tab, use the following guidelines to enter field values.

Active	The job board is active by default. If the job board is inactive, you will not be able to use the Talemetry Broadcast functionality.
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Default Source	Required. This is the source that will be used on the job application if the candidate does not provide a source.
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Default Specific Source	This is the specific source that will be used on the job application, if the default source has specific sources and the candidate does not enter a default source.
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Expense Category	Required. Select the expense category that the job board costs will be assigned to. Tip: To define a new expense category, click F6 in the field. On Requisition Cost Reason, enter an effective date, a requisition cost reason and description, and save.
Custom Candidate UI	Leave this field blank.

Note: The Administrator Report and Transaction Report buttons let you access the Talemetry report functionality. These buttons are relevant only after you post requisitions to Talemetry job boards.

- 5 On the Talemetry Configuration tab, enter the Talemetry Configuration parameters.
All fields, except for Contact ID must be provided to you by Talent Technology. All fields are required.
For Contact ID, select the resource to be contacted for billing.
- 6 When all field values are entered, click Save.
The system generates the Authentication Token and the Talemetry Destinations tab appears.
The Talemetry Destinations tab displays all the job boards defined on the Talemetry site. For each job board, the Broadcast Destination # of days, indicated the number of days that a posting will remain on the job board.

Other available actions

- To update the list of Talemetry Destinations, select Actions > Get Broadcast Destinations.
- To generate a new authentication token (assuming the current token has expired), select Actions > Grant Access.
- To activate the reports buttons (after jobs have been posted), select Actions > Get Report URL. Click the Administrative Report button or the Transaction Report button on the General Information tab to access the Talemetry reports.

Defining job posting rules



Need More Details? Check out the following concepts:

- ["Job boards and job posting rules"](#) on page 73

Before you start Define the job boards that you are going to associate with the job posting rule before you define the job posting rule.

To define a job posting rule

1 Access Administrator > Talent Acquisition > Code Setup > Job Posting Rules.

2 Click New.

3 On the Job Posting Rule form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the job posting rule.
Job Posting Rule	Required. Type the name of the rule. For example EXT1WEEK for a rule to post the job on the external web site after 1 week on the intranet.
Description	Type a meaningful description that will help the recruiter select the right rule.
Active	The job rule is active by default. Clear this check box to make the job rule inactive. Inactive job rules do not appear on select lists.

4 Click Save. The Job Boards tab appears.

5 Add job boards with rules to the job posting rule. For more information, see "[Adding job boards to a job posting rule](#)" on page 80.

Adding job boards to a job posting rule

Before you start Define the job boards before you define job posting rules.

To add a job board to a job posting rule

1 Access Administrator > Talent Acquisition > Code Setup > Job Posting Rules.

2 Select or open the job posting rule you want to add a job board to.

3 On the Job Boards panel, click New.

4 On the Job Posting Rule Detail form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date when the job is added.
Job Board	Select the job board to associate with the job posting rule.
Delay Before Posting	If applicable, indicate how many days, months, weeks, or years to wait before the requisition gets posted on this job board. If these fields are blank, the requisition is posted immediately.

Weekday, Weekday Priority	You can also specify a specific day of the week for the posting. • If you specify no delay, the job is posted on the first occurrence of the weekday. • If you specify a delay and a day of the week and the option Find Weekday First, the system will first find the first occurrence of the weekday then apply the delay to it. For example, you post on 16 November 2011 to a job board with a delay of one month and the options Friday and Find Weekday First. The first occurrence of a Friday is 18 November 2011. With the delay of 1 month, the job is posted on 18 December 2011. • If you select Find Weekday Last, the application will first apply any time indicated in the Delay Before Posting fields and then post on the first occurrence of the weekday. For example, you post on 16 November 2011 to a job board with a delay of 1 month and the options Friday and Find Weekday Last. The delay of 1 month produces a date of 16 November 2011, which is a Friday, so the posting date is 16 November 2011.
Length of Posting	If applicable, indicate the number of days, months, weeks, or years that you want the posting to requisition to remain posted on the job board.

5 Click Save

6 Repeat steps 3 through 5 for each job board you want to add to the job posting rule.

Updating job posting rules

Note: You can update only the job posting rule description and the time parameters (Delay Before Posting and Length of Posting) on the job boards.

To update a job posting rule

- 1 Access Administrator > Talent Acquisition > Code Setup > Job Posting Rules.
- 2 Open the job posting rule you want to update.
- 3 To update the job posting rule description (the only field that you can update), enter the required effective date, enter your updates and click Save.
- 4 To update any of the job boards, open the job board you want to update, enter the required effective date, update any of the modifiable fields, and click Save.
- 5 To remove a job board from the job rule, select the job board, click Delete, click Yes to confirm, enter the effective date, and click OK.

Deleting job posting rules

Important: The system will not let you delete a job posting rule that is associated with a requisition.

To delete a job posting rule

- 1 Access Administrator > Talent Acquisition > Code Setup > Job Posting Rules.
- 2 Select the job posting rule you want to delete.
- 3 Click Delete.
- 4 Click Yes to confirm.
- 5 Enter the effective date and click OK.

Question setup

You can define requisition questions that can be asked of a candidate during a job application or as part of an online interview.

You can also define profile questions that are not specific to any particular position and must be answered by all candidates.

- ["About recruiting questions" on page 82](#)
- ["Defining and maintaining recruiting question categories" on page 84](#)
- ["Defining and maintaining recruiting questions" on page 84](#)
- ["Defining and maintaining recruiting question sets and recruiting set questions" on page 86](#)
- ["Adding questions to a recruiting question set" on page 87](#)
- ["Defining profile questions" on page 90](#)

About recruiting questions

You can define questions that will be used when screening or interviewing candidates.

- Questions defined on Administrator > Talent Acquisition > Code Setup > Questions > Question Catalog are meant to be attached to job requisitions. Different job requisitions will have different sets of questions.

Note: Questions can also be entered directly on a requisition. In this case, they do not appear on the question catalog.

- Questions defined on Administrator > Talent Acquisition > Code Setup > Questions > Profile Questions are common to all external candidates, reside on the candidate profile, and appear on all job applications. Typically, these questions relate to work eligibility, criminal history, and so on.

Requisition questions

You can attach individual questions or question sets to requisitions.

A question set includes multiple questions. There are two ways to add questions to a question set. You can use a combination of both.

- You can group questions into question categories, then add the categories to the question set. All the questions in the category are added to the question set.
- You can add individual questions directly to a question set.

The advantage of using question categories is that you can add questions quickly to question sets, and that a question category can be used by multiple questions sets. For example, if there are a set of requirements common to all nurses, a hospital might have a CORENURSING question category that they attach to all the questions sets they create for different nursing jobs.

Note: Once a question has been added to a question set by way of a question category, the question set questions are no longer functionally tied to the category questions. You can add or remove a question in a question category and the change will not be reflected in the question set; It will only be reflected in future question sets. Conversely, you can change or remove any of the category questions in the question set without affecting the original question categories.

Profile questions

Profile questions are stand-alone questions. The same question types are available as for question catalog questions, as well as the Required and Screen Out options. However, they are not used in online interview questions, and they always appear on the online application.

Note: It is assumed that internal candidates would already have answered these questions when they were hired, or during the course of their employment. Therefore profile questions are asked only of external candidates.

Question options

Question types can be Short Text, Long Text, Yes No, Yes No with Text, or List.

Questions can be required, in which case the candidate must provide an answer in order to complete the job application.

Yes No, Yes No Text, and List questions can be Screen Out question. Screen Out question also require you to enter the preferred answer. If a candidate gives the wrong answer, the candidate is disqualified.

Requisition questions can be flagged to be Included In Online Application. Such questions are part of the online job application and must be answered on the application.

Note: Profile questions appear on all online job applications.

Requisition questions that are not flagged as Included In Online Application can be used in subsequent online interviews.

Defining and maintaining recruiting question categories

Question categories are just a label to group like questions. Define your question categories before you define questions.

To define a recruiting question category

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions > Question Catalog.
- 2 On the Recruiting Question Categories tab, click New.
- 3 On the Recruiting Question Category form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the question category.
Question Catalog	Required. Select the recruiting catalog. This field may already be filled for you.
Question Category	Type the name of the question category. For example, GENERAL.
Description	Type a description for the category. If you leave this field blank, the question category name defaults when you save the form.

Related tasks

- To update a question category, open the question category, enter the effective date, change the description, and save.
- To delete a question category, select the question category, click Delete, click Yes to confirm, enter the effective date, and click OK.

Note: You cannot delete a question category that is associated with a question.

Defining and maintaining recruiting questions

When you define a recruiting question on this page, you must associate it with a recruiting question category.

To define a recruiting question

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions > Question Catalog.
- 2 Click the Questions tab.
- 3 Click New.
- 4 On the Recruiting Catalog Question form, use the following guidelines to enter field values.

Question Catalog	Read Only. The Question Catalog is always Recruiting.
Effective Date	Required. Enter the effective date for the recruiting question.
Question	Required. Type the text of the question.
Response Type	Select the type of response expected.
Important: Only the following question types can be used for recruiting questions: Short Text, Long Text, Yes No, Yes No Text, and List.	
Is A Response Required?	Select Yes if you want to require the candidates to respond to the question. Candidates will not be allowed to complete the application until they answer all required questions.
Use For Internal, External, Or Both	Select Internal if you want only internal candidates to see the question. Select External if you want only external candidates to see the question. Select Both if you want both internal and external candidates to see the question.
Include In Online Application?	If you select Yes, candidates will see the question when they apply. If you select No, the question will be stored on the job application for later interviews.
Is This A Screen Out Question?	If the question will be used to screen out candidates, select Yes. If such is the case, you must enter a preferred answer.
Note: Only Yes No, Yes No Text, and List questions can be used to screen out candidates.	
Active	The question is active by default. Clear the Active check box to make the recruiting question inactive. Inactive recruiting questions do not appear in select lists.
Question Category	Required. Select the category that the question belongs to.
Select The Preferred Answer	If the question will be used to screen out candidate and the question type is Yes No, select the preferred answer (Yes or No)
Require Follow Up Text If Answer Is	If the question will be used to screen out candidate and the question type is Yes No Text, indicate whether you want the candidate to enter follow-up text, and for what response. For example, if you select No, it means that you want the candidate to add follow-up text to a No answer.

5 Click Save.

- If the response type is not List, you are done.
- If the response type is List, the List Answer tab appears. You must add the answer list. Go to step 6.

6 To define list answers:

- a** On the List Answers tab, click New.
- b** In the List Value field, type the text of the first response.
- c** If the answer is the preferred answer, select the check box for This Is the Preferred Answer.

Important: If this is a screen out question, you must select one of the answers as the preferred answer. You cannot have more than one preferred answers in the list.

- d** Click Save and New.
- e** Repeat steps 6-a through 6-d until you have entered all the responses.
- f** When you have entered the last response, click Save.

Related topics

- To update a recruiting question, access the question, make your changes, and click Save.
Note: You can change any field except for the organization and question catalog.
- To delete a question, highlight the question, click Delete, and click Yes to confirm.

Defining and maintaining recruiting question sets and recruiting set questions

Recruiting question sets can contain a mix of standalone questions associated with question categories.

To define a recruiting question set

- 1** Access Administrator > Talent Acquisition > Code Setup > Questions > Question Catalog.
- 2** Click the Question Sets tab.
- 3** Click New.
- 4** On the Recruiting Question Set form, use the following guidelines to enter field values.

Effective Date Required. Enter the effective date for the question set.

Question Catalog	Required. Select the recruiting catalog. This field may already be filled for you.
Question Set	Type the name of the question set. For example, MANAGER. You can also type a description or let the category name default as the description.

- 5 Click Save. The Recruiting Set Questions tab appears.
- 6 Attach questions to the question set. For more information, see "[Adding questions to a recruiting question set](#)" on page 87.

Related topics

- To update a recruiting question set, access the recruiting question set, enter the effective date, make your changes, and click Save.

Note: You can only change the question set description. However, you can also add or remove standalone questions.

- To update a question within a question set, access the question, enter the effective date, make your changes, and save.

Important: The changes you make to a question within a question set apply only to the question set and do not affect the original question.

- To delete a question set, select the question set, click Delete, click Yes to confirm, enter the effective date, and click OK.

Note: You cannot delete a question set that is attached to a job requisition.

- To delete a question within a question set, select the question, click Delete, and click Yes to confirm.

Note: You cannot delete a question that has been attached to a job requisition.

Adding questions to a recruiting question set

There are two ways to add questions to a recruiting questions set.

- You can define a standalone question for the question set, not tied to a question category.
- You can attach a question category and all its associated questions to the question set.

To add standalone questions to a recruiting question set

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions > Question Catalog.
- 2 Click the Recruiting Question Sets tab and open the recruiting question set to which you want to add standalone questions.
- 3 On the Attached Questions tab, click New.
- 4 On the Recruiting Set Question form, use the following guidelines to enter field values.

Note: The fields are the same as for the recruiting questions on the Recruiting Questions tab. However, the question is unique to the set and does not get added to the recruiting question list.

Question Catalog	Defaults from the Recruiting Question Set.
Question Set	Defaults from the Recruiting Question Set.
Effective Date	Required. Enter the effective date for the recruiting set question.
Question	Required. Type the text of the question.
Response Type	Select the type of response expected.
	Important: Only the following question types can be used for recruiting questions: Short Text, Long Text, Yes No, Yes No Text, and List.
Use For Internal, External, Or Both	Select Internal if you want only internal candidates to see the question. Select External if you want only external candidates to see the question. Select Both if you want both internal and external candidates to see the question.
Include In Online Application?	If you select Yes, candidates will see the question when they apply. If you select No, the question will be stored on the application for later interviews.
Is A Response Required?	Select Yes if you want the candidates to respond to the question. Candidates will not be allowed to complete the questionnaire until they answer all required questions.
Is This A Screen Out Question?	If the question will be used to screen out candidates, select Yes. If such is the case, you must enter a preferred answer.
	Note: Only Yes No, Yes No Text, and List questions can be used to screen out candidates.
Question Category	Required. Select the category that the question belongs to.
Active	Select the Active check box to make the recruiting question active. Inactive recruiting questions do not appear in lists.
Preferred Answer	If the question will be used to screen out candidate and the question type is Yes No or Yes No Text, select the preferred answer (Yes or No)

Require Follow Up Text If Answer Is	If the question will be used to screen out candidate and the question type is Yes No Text, indicate whether you want the candidate to enter follow-up text.
--	---

- 5 Click Save.

To add all the recruiting questions that belong to a question category to a question set

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions.
- 2 Click the Recruiting Questions Categories tab
- 3 Highlight the question category (or question categories) that contain the questions you want to attach to the question set.
- 4 Click Actions > Attach Category Questions to Question Set.
- 5 Select the question set.
- 6 Enter the effective date
- 7 Click OK.

When you open the question set, you can see that all the questions included in the selected question categories have been added to the set.

or

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions.
- 2 Click the Recruiting Question Sets tab and open the recruiting question set to which you want to add standalone questions.
- 3 On the Attached Questions panel, click the Helper List icon.
- 4 Select the question category (or categories) that you want to attach to the question set.
- 5 Click Attach Category Questions To Question Set.
- 6 Enter the effective date and click OK.

Related tasks

- To update a question within a question set, open the question, enter the effective date, make your changes, and click Save.

Important: The changes you make to a category question added to a question set apply only to the question set and do not affect the original question.

- To remove a question from a question set, select the question, click the Delete button, click Yes to confirm, enter the effective date, and click OK.

Note: You cannot remove a question that has been attached to a job requisition.

Defining profile questions

Use this procedure to define questions that are common to all external candidates in your organization.

- 1 Access Administrator > Talent Acquisition > Code Setup > Questions > Profile Questions.
- 2 To define individual questions, click New and select the type of question you want to define Yes No Question, Yes No Text Question, Long Text Question, Short Text Question, or List Question.
- 3 On the Questions form, use the following guidelines to enter field values.

Enter The Question	Required. Type the text of the question.
Is a Response Required?	If Yes, the candidate will have to respond to the question to be allowed to complete any job application.
Is this a Screen Out Question	This field appears only for Yes No, Yes No Text, and List questions. Select Yes if the wrong answer to this question will automatically disqualify a candidate. Otherwise, select No. If you select Yes you must also select a preferred answer.
Select The Preferred Answer	This field is used only by Yes No, Yes No Text questions. If the question is screen out, select the preferred answer (Yes or No). If the screen out question is a List question, you will select the preferred answer on the List Answer tab.

- 4 Click Save.
- 5 If the question is a List question, define the multiple responses on the List Answers tab.
 - Click New, type the answer and click Save and New. Repeat for each answer. Click Save after the last answer.

If it is a screen out question, select one of the list items as the preferred answer.

Automatic notifications setup

- ["What are automatic user notifications?" on page 90](#)
- ["Configuring Talent Acquisition automatic notifications" on page 91](#)

What are automatic user notifications?

Recruiters and hiring managers automatically receive a user notification for every approval step in any Talent Acquisition process that is run for their requisitions. For example, if a requisition is submitted for approval, each time one of the approvers approves the requisition, a user notification will be sent to the recruiter and hiring manager on the requisition.

In addition, you can configure user notifications, email notifications, or both for the following other events:

Draft Requisition Approval Requested
Online Interview Completed
Define Offer Approved
Offer Accepted
Offer Declined
Hire Completed
Rehire Completed
Transfer Completed
Add Assignment Completed

Email notifications are sent by email to each recipient's work email on the selected notification email template.

User notifications appear under the Unread Notifications icon at the top of each recipient's desktop (or under Start > My Notifications).

You can use the same notification email template to send both an email and a user notification. Email notification templates are defined under Administrator > Talent Acquisition > Template Setup > Email Templates.

In addition, user notifications are sent to the recruiter and hiring manager at each step in the approval process for requisitions.

Configuring Talent Acquisition automatic notifications

You can configure your organization to automatically send email notifications, user notifications, or both email and user notifications when specific Talent Acquisition events occur.

Note: Email notifications are sent by email to each recipient's work email. User notifications appear under the Unread Notifications icon at the top of each recipient's desktop (or under Start > My Notifications). You can use the same template to send both an email and a user notification.

To configure automatic notifications

- 1 Access Administrator > Talent Acquisition > Code Setup > Notification Configuration.

- 2 For each of the event that you want to configure a notification for, select a notification rule and an email template.

Notification Rule	Select No Notification (the default) if you do not want any notification or email sent. Select Email Notification to send only an email to the recipient(s) defined in the email notification template. Select User Notification to send only a user notification to the recipient(s) defined in the email notification template. Select Email and User Notification to send both an email and a user notification to the recipient(s) defined in the email notification template.
Notification Email Template	For each event for which you selected a notification rule other than No Notification, you must select the email notification template that will be used to determine the recipients and the contents of the message.

- 3 Click Save.

Events for which you can configure notifications

Event	Description
Draft Requisition Approval Requested	If configured, a notification is triggered when a hiring manager requests approval for a Draft requisition.
Online Interview Completed	If configured, a notification is triggered when a candidate completes an online interview.
Define Offer Approved	If configured, a notification is triggered when the last approver approves a job offer defined for a candidate.
Offer Accepted	If configured, a notification is triggered when a candidate accepts a job offer.
Offer Declined	If configured, a notification is triggered when a candidate declines a job offer.
Hire Completed	If configured, a notification is triggered when a candidate is hired (as a result of a completed Hire action).
Rehire Completed	If configured, a notification is triggered when a candidate is rehired (as a result of a completed Rehire action).
Transfer Completed	If configured, a notification is triggered when a candidate is transferred (as a result of a completed Transfer action).
Add Assignment Completed	If configured, a notification is triggered when a new work assignment is added to an employee (as a result of a completed Add Work Assignment action).

Miscellaneous code setup

- ["How are attachment types used in Talent Acquisition?" on page 93](#)
- ["Locations and locations of jobs" on page 93](#)
- ["About disposition reasons" on page 94](#)
- ["How are candidate tags used?" on page 94](#)
- ["Defining and maintaining attachment types" on page 94](#)
- ["Defining and maintaining candidate disposition reasons" on page 95](#)
- ["Defining Do Not Hire action reasons" on page 96](#)
- ["Defining locations of jobs" on page 97](#)
- ["Maintaining locations of jobs" on page 98](#)
- ["Defining and maintaining job application ranks" on page 98](#)
- ["Defining and maintaining reasons for opening a requisition" on page 99](#)
- ["Defining reference statuses." on page 100](#)
- ["Defining candidate tags" on page 100](#)

How are attachment types used in Talent Acquisition?

Candidates can attach documents to their job applications. Recruiters and hiring managers can attach documents to requisitions. Document types provide a way to categorize documents. A document type can be valid for candidates, for requisitions, or for both candidates and requisitions. If a document type is valid only for candidates (for example, "Cover Letter"), it can be selected only on the career web site on the candidate's profile. If a document type is valid only for requisitions (for example, "Justification for Requisition"), it can be used only by recruiters and hiring managers in the context of a requisition. If a document type is valid for both, (for example "Other"), it can be selected by candidates on their profile or by recruiters or hiring managers on a requisition.

Locations and locations of jobs

Locations of jobs are used solely on job boards to let candidates search by a location that makes sense for job seekers. Locations (also called HR locations) provide specific addresses for an organization. A location can be associated with a location of job. Location is a non-required field on positions.

The two types of locations serve two different purposes. The location provides a mailing address for business transactions within the organization. The location of job merely provides a sorting mechanism

for job boards and a way to identify the location of a job opening independent of the location that is associated with the position.

By default, the system automatically creates locations of jobs out of locations by pulling the country, state, and city from the location address. Recruiters can define other locations of jobs and can use them on job boards to override the location of job defaulted from the position (if it exists), or to assign a location of job to a requisition when the position does not have a location.

On the job postings sites, the location of job appears on job lists. Candidates can search for position by location of jobs.

About disposition reasons

In Talent Acquisition, When a candidate is rejected, the recruiter or hiring manager moves the candidate to the Disposition selection process. The recruiter or hiring manager is required to provide a reason for the candidate not being hired.

In addition, candidates can withdraw their application on their own. A disposition code must be defined that will be automatically assigned to job applications that have been withdrawn. Only one such disposition code can exist for any organization.

How are candidate tags used?

Candidate tags are labels defined by administrators or recruiter administrators to categorize candidates. Your organization can make tags anything you want them to be. For example, you could define tags for job types and tags indicating a recruiter's general assessment of a candidate. For example, A-LIST, B-LIST, HEALTH ADMIN, CLERICAL, and so on.

Recruiters can assign tags to candidates as they are adding them into the system or after they have been added. A candidate can have multiple tags. For example, A-LIST and HEALTH ADMIN.

On Candidate Search, recruiters can use the Keyword field to locate candidates with a specific tag. This gives them a shortcut if they receive a requisition. For example, suppose you receive a requisition for a top executive position in administration. You (or other recruiters) may already have tagged some candidates as "A-LIST" (to indicate that they are high-caliber candidates) and you know that the candidates must have an MBA. On Candidate Search, you can enter A-LIST in the Keyword field and MBA in the Education field to generate a list of candidates that have the required education and have already been assessed as top candidates.

Defining and maintaining attachment types

Attachment types are used when candidates attach documents to their profile or when recruiters attach documents to requisitions or applications.

To define an attachment type

- 1 Access Administrator > Talent Acquisition > Code Setup > Attachment Types.

A list of the document types in the system appears.

- 2 Click New.

- 3 Define and save the document type.

Effective Date	Required. Enter the date when the attachment type becomes effective.
Attachment Type	Required. Type a name for the document type. If you leave this field blank, the Attachment Type value defaults
Description	Type a description for the document type.
Active	The document type is active by default. Clear this check box to make the attachment type inactive. Inactive attachment types do not appear in select lists.
Cover Letter, Resume/ CV, Valid For Candidates, Valid For Requisitions	At the minimum, you must indicate whether the document type is valid for candidates or valid for requisitions. A type can be valid for both candidates and requisitions. For example, you could have an "Other" type to catch any type not specifically defined in the type list. Typically, you will have at least one cover letter type and one resume type valid for candidates. To define a cover letter type, select the Cover Letter check box and the Valid For Candidates check box. To define a resume type, select the Resume check box and the valid for Candidates check box. For any other type, do not select the Cover Letter and Resume check boxes.

- 4 Click Save.

Related tasks

- To update an attachment type, open the attachment type you want to update, enter the effective date, make your changes, and click Save.
- To delete an attachment type, select the document type, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: The system will not let you delete an attachment type that is currently associated with a candidate or requisition record.

Defining and maintaining candidate disposition reasons

Recruiters use candidate disposition reasons to explain why a candidate was not hired.

To define a candidate disposition reason

- 1 Access Administrator > Talent Acquisition > Code Setup> Disposition Reasons.
- 2 Click New.
- 3 On the Disposition Reason form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the disposition reason.
Candidate Disposition reason	Required. Type a name for the candidate disposition reason. For example, "Does not meet minimal requirements."
Description	Required. Type a description of the candidate disposition reason.
Active	The disposition reason is active by default. Clear the Active check box to make the disposition reason inactive. Inactive disposition reasons do not appear in select lists.
Use This Disposition Code When a Candidate Withdraws From Consideration	Select this check box if you want this disposition reason to be used when a candidate withdraws. Important: Because the disposition reason will be assigned to a candidate automatically if the candidate withdraws, only one disposition code per organization should be defined for use when a candidate withdraws.

Related tasks

- To update a disposition reason, open the disposition reason, enter the effective date, make your changes and save.
- To inactivate a disposition reason, open the disposition reason, enter the effective date, clear the Active field, and click Save.
- To delete a disposition reason, select the disposition reason, click Delete, click Yes to confirm, enter the effective date, and click OK.

Note: You cannot delete a disposition reason that is associated with an application.

Defining Do Not Hire action reasons

A recruiter can tag any candidate with a Do Not Hire label. This is to provide a warning to other recruiters. Recruiters who flag a candidate as Do Not Hire are required to provide a reason. Use this procedure to define the reasons why a candidate should not be hired.

To define a Do Not Hire reason

- 1 Access Administrator > Talent Acquisition > Code Setup > Do Not Hire Reasons.
- 2 Click New.
- 3 On the Do Not Hire Reasons form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date when the Do Not Hire reason becomes effective.
Candidate Do Not Hire Reason	Required. Type the Do Not Hire Reason code. This is a unique code that cannot be changed. This is also the code that displays when a recruiter hovers over the red alert that displays next to flagged candidates.
Description	Type a long description of the Do Not Hire reason.
Active	The Do Not Hire reason is active by default. To inactivate it, clear the check box. Inactive Do not Hire reasons do not appear on select lists.

- 4 Click Save.

Defining locations of jobs

Locations of jobs let candidates to search for jobs by location.



Need More Details? Check out the following concepts:

- ["Locations and locations of jobs"](#) on page 93

To define a location of job

- 1 Access Administrator > Talent Acquisition > Code Setup > Location Of Job.
- 2 Click New.
- 3 On the Location Of Job form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the location of job.
Location Of Job	Required. Type the location of job name in the field. or If you want to create a multilevel location name such as US-MN, type up to four levels under "Specify Up To Four Levels Of The Location." When you save the form, the multilevel location appears in the Location Of Job field.
Description	Optional. Type the description of the location of job. If you leave this field blank, the location of job name defaults in this field.

Active	Select the Active check box to make the location of job active. Inactive locations of job do not appear in lists.
Candidate Display Indicator	If you leave this field blank, the location of job is visible to all. You can exclude internal candidate, external candidates, or both from seeing this location of job.

4 Click Save.

Maintaining locations of jobs

Note: You can update only the location of job description and the Active status. If you inactivate a location of job, it can no longer be selected for an HR location or for a job board. You cannot delete a location of job that is assigned to an HR location or job board.

To maintain a location of job

- 1 Access Administrator > Talent Acquisition > Code Setup > Location Of Job.
- 2 Access the location of job you want to delete or update.
 - To delete the location of job, select the location of job, click Delete, click Yes to confirm, enter the effective date, and click OK.
 - To update the location of job, open the location of job, enter the effective date, update the description or Active status, and click Save.

Defining and maintaining job application ranks

You can define ranks that you can apply to job applications. This is one more piece of information to help the recruiter or the hiring manager to make decisions on a candidate.

To define a rank

- 1 Access Administrator > Talent Acquisition > Code Setup > Rank.
- 2 Click New.
- 3 On the Rank form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the rank.
Job Application Rank	Required. Enter the unique name for the rank.

Description	Enter a description for the rank. If you do not enter a description, the rank name defaults.
Active	The rank is active by default. Clear the check box to inactivate it. Inactive ranks do not appear on select lists.

- 4 Click Save.

Follow-up tasks

- To update a rank, open the record, enter the effective date, update the description, and click Save.
- To inactivate a rank, open the record, enter the effective date, clear the Active check box, and click Save.
- To delete a rank, open the record, enter the effective date, click Delete, and click Yes to confirm.

Defining and maintaining reasons for opening a requisition

Reasons for opening a requisition are used by hiring managers or recruiters to justify hiring new resources.

To define a reason for opening

- 1 Access Administrator > Talent Acquisition > Code Setup > Reason For Opening.
- 2 Click New.
- 3 On the Reason For Opening form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the reason for opening.
Reason For Opening	Required. Type the name for the reason that a requisition is needed, for example, STAFF ADDITION or STAFF REPLACEMENT.
Description	Type a description for the reason.
Active	The reason for opening is active by default. Clear the check box to inactivate it. Inactive reasons for opening do not appear on select lists.

- 4 Click Save.

Related tasks

Important: You cannot delete a reason for opening that is assigned to a requisition.

- To update a reason for opening, open the reason for opening, enter the effective date, update the description, and click Save.

- To delete a reason for opening, select the reason for opening, click Delete, click Yes to confirm, enter the effective date, and click OK.

Defining reference statuses.

Reference statuses are entered on references by recruiters or hiring managers to indicate whether the reference has been verified and whether the verification was satisfactory.

To define a reference status

- 1 Access Administrator > Talent Acquisition > Code Setup > Reference Statuses.
- 2 Click New.
- 3 On the Reference Status form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date when the reference status becomes effective.
Reference Status	Required. Type the name of the reference status.
Description	Type the description of the reference status.
Active	The reference status is active by default. To inactivate the status, clear the check box. Inactive statuses do not appear on select lists.

- 4 Click Save.

Defining candidate tags

Candidate tags are selected on candidate records by recruiters or recruiter administrators. Candidates can have multiple tags.

To define a candidate tag

- 1 Access Administrator > Talent Acquisition > Code Setup > Candidate Tags.
- 2 Click New.
- 3 On the Candidate Tag form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date when the candidate tag becomes effective.
Candidate Tag	Required. Type the name of the candidate tag. This is a unique code that cannot be changed.
Short Description	Type the short description of candidate tag. This is the name that appears on lists.

Description	Type a long description of the candidate tag. This is visible only to administrators or recruiter administrators.
Active	The candidate tag is active by default. To inactivate the candidate tag, clear the check box. Inactive candidate tags do not appear on select lists.

4 Click Save.

Template setup

This section describes how to define email and job posting templates and how to upload document templates.

- ["How are email templates used in Talent Acquisition?" on page 101](#)
- ["What are job posting templates?" on page 102](#)
- ["How are document templates used in Talent Acquisition?" on page 103](#)
- ["Defining email templates" on page 104](#)
- ["Updating email templates" on page 106](#)
- ["Deleting email templates" on page 107](#)
- ["Uploading document templates for Talent Acquisition" on page 107](#)
- ["Defining and maintaining job posting templates" on page 108](#)
- ["Defining a "Send To A Friend" email template" on page 110](#)

How are email templates used in Talent Acquisition?

Email templates let a recruiter or hiring manager generate standard emails at certain stages in the application process. The "To", "CC", "BCC", and "From" sections of the template are variables representing roles to be replaced by the email address of the person who holds the role in the context of the application. The subject and body of the email can also contain variable text such as {OrganizationName} or {PositionTitle} that will be replaced with the appropriate organization and position title in the context of the application being processed.

The recruiter administrator configures which processes will generate an automatic or interactive email, and what template the system will use to generate the emails. For more information, see ["Configuring Talent Acquisition organization parameters"](#) on page 43.

In addition to defining email templates for automated and interactive emails, the recruiter administrator can define email templates for any other purpose. A recruiter or hiring manager can select which

template to use when they want to send an email. The person sending the email will be able to make changes to the generated email before sending it.

Most templates are defined with a Default email template type that provides access to all the email variables in Talent Acquisition. There are two other email templates types (Link To Candidate Job Board and Link To Candidate Profile) that can be used to define templates for emails that are sent to candidates when they are added in the system by a recruiter who wants them to log in and download a resume or enter a profile. These two templates provide access to a limited subset of variables and let you specify the job board that the candidate will access. Email templates for these types must contain a {link} variable positioned where you want the linkback to Candidate Space to appear.

What are interactive emails

Interactive emails are sent by the recruiter to request an action from the candidate. Interactive emails are sent to request online interviews, to request references, or to request an offer review. In all cases, the system provides a linkback to Candidate Space to allow the candidate to provide information online.

- External candidate get the link inside the email. You must create email templates for these emails that conclude a {link} variable.
- Internal candidates get the link from a notification. However, they also receive an email prompting them to check their notifications. The same email template is used to produce both the email and the notification. The subject of the email becomes the subject of the notification. You must create email templates for internal candidates that do not include the {lin} variable.

What are job posting templates?

Job posting templates are used to define the job description that will appear on job postings. They use variable text that can pull information from a job or position, or from both a job and position.

When a recruiter selects a template on a requisition, the requisition description pulls its information from the job and/or position that the requisition is associated with. The template controls which information is pulled and from where.

A job posting template can consist of a combination of typed-in text and variable text.

A template can use variable text to pull very detailed information from the job and/or position associated with the requisition. For example:

- The Summary text, the Responsibilities text, and/or the Other information text.
- The location, location of job, working schedule, shift, Exempt From Overtime status.
- The Detailed Responsibilities.
- A list of qualifications associated with the job and position and whether they are essential to the job being posted.
- A list of competencies and skills associated with the job and position and whether they are essential to the job being posted.

Note: The template can also be defined to include only essential qualifications.

Recruiters can modify the text of the requisition description after the description generated from the template appears on the requisition.

When recruiters add job boards to the requisition, the requisition description defaults to each job board. Recruiters can also modify the description on each job board. It is the job board description that appears on the job posting. However, if a requisition description is updated after job boards are created, the updates will not appear on the requisition's existing job boards.

How are document templates used in Talent Acquisition?

You can keep a library of offer, profile, hire paperwork or other document templates. You create the document templates on your machine in RTF format, using the Microsoft Word merge fields capability. Then you upload the templates to Talent Acquisition. For more information, see "[Uploading document templates for Talent Acquisition](#)" on page 107

Note: This guide does not describe how to create the document templates. Lawson provides one basic offer template and one basic profile template. Creating a template requires an understanding of the Microsoft Word merge fields feature and a knowledge of the Lawson Pattern Language (LPL) database structure and field names required to create the template.

- When recruiters create an offer letter, they must first define the offer components on the Request To Define An Offer form, including an offer template. When the offer has been routed and approved, recruiters can generate the offer letter, which uses the offer template selected on the offer form. The merge fields in the template are replaced with specific offer information pulled from the offer component fields and the requisition fields. For example, the offer letter is likely to contain the candidate name and address, the position name, the amount of the offer, and so on.

When an offer is extended to a candidate via email (external candidate) or notification (internal candidate), the email or notification received by the candidate includes a link to the offer letter.

In addition, Talent Acquisition can generate an employment contract document along with the offer document, by selecting an employment contract template on the offer form. Employment contract templates and their associated document templates are defined in Global HR. Contract document templates are also RTF documents using the Microsoft Word merge fields capability. For information on defining employment contracts, see the *Global Human Resources User Guide*.

If an offer contains both an offer template and an employment contract template, the Create Offer and Contract Document action creates both documents as separate attachments that can then be emailed.

- If your organization configures the Hiring Manager Process to use automatic email and selects a profile template for this process, a profile document is automatically created and attached to the automatic email sent to the hiring manager when the job application status changes to Hiring Manager Review. The template uses the candidate's profile information to generate a Word document in a resume-like format.

- Administrators and recruiter administrators can upload document templates that can be used to generate any type of standardized documents your organization might use.

Administrators, recruiters and recruiter administrators can use the Create Document action at any time during a job application cycle to create a document based on a selected document template (for example, hire paperwork) that will be attached to the candidate's profile. If the candidate is hired, the resource record will keep the attachment.

Defining email templates



Need More Details? Check out the following concepts:

- ["How are email templates used in Talent Acquisition?"](#) on page 101

To define an email template

- Access Administrator > Talent Acquisition > Template Setup > Email Templates.
- Click New.
- On the Email Template form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the email template.
Recruiting Email Template	Required. Type the template name. Make it meaningful to help recruiters or hiring managers in their email template selection.

Template Type	Select the template type to be used. Default provides you access to all the email variables in Talent Acquisition. Select Link To Candidate Job Board to define a template that can be used when a recruiter adds a candidate in the system and sends an email to the candidate with instructions to log in to the system and either download a resume or enter a profile. The email automatically generates a login and a link to the job board that you select on this form. The login will take the candidate to the job listing page. Select Link To Candidate Profile to define a template that can be used when a recruiter adds a candidate in the system and sends an email to the candidate with instructions to log in to the system and either download a resume or enter a profile. The email automatically generates a login and a link to the job board that you select on this form. The login will take the candidate to candidate's profile. Note: The variables that can be used in a Link To Candidate Job Board or Link To Candidate Profile email template are a small subset of the variables accessible for a Default email template. The variables also include {Link} which you should position where you want the link to the job board or profile to appear in the body of the email.
Description	Type a description for the email template.
Active	The template is active by default. Clear this check box to make the template inactive. Inactive templates do not appear on select lists.
Preferred Email Language	If your organization uses Dynamic Embedded Translation (DET), you can select the language to be used for recipients. If you do not select a preferred language, the company base language is used.
To	Select the variable or variables representing the person or persons to whom the email will be sent. To select a variable, right-click within the field, then click Variables to display the variables you can select. The variable you select will display within curly braces. For example, {Candidate}. Separate multiple variables with commas.
CC, BCC	Select the variable or variables representing the person or persons to whom the email will be copied. To select a variable, right-click within the field, then click Variables to display the variables you can select. The variable you select will display within curly braces. For example, {HiringManager}. Separate multiple variables with commas.
From	Select the variable representing the email address of the person sending the email. To select a variable, right-click within the field then click Variables to display the variables you can select. The variable you select will display within curly braces. For example, {Recruiter}.

Subject	Type the subject of the email. Use variable for any text you want substituted. Tip: To select variable text, right-click on the line then click Variables on the menu. For example: Thank you for your interest in {OrganizationName}
Body	Type the text of the email. Use variable text for any text you want substituted. For example: Tip: To select variable text, click the {A} icon on the Body toolbar to display the variables you can select. The variable you select will display within curly braces. Thank you for your recent expression of interest in the {PositionTitle} position in our organization. Important: For emails that will contain a linkback to Candidate Space, make sure to include a {link} variable where you want the link to display.
Job Board	If you selected Link To Candidate Job Board or Link To Candidate Profile, select the job board that you want the candidate to access when receiving an email based on the template.

- 4 Click Save.

Updating email templates

Note: The only field that you cannot update is the template name. Updates affect only emails created after the updates.

To update an email template

- 1 Access Administrator > Talent Acquisition > Template Setup > Email Templates.
- 2 Open the email template you want to update.
- 3 Update the template. The Effective Date is required.
- 4 Click Save.

Deleting email templates

Important: You cannot delete a template that is assigned to a selection process on the Recruiter Setup page. For more information, see "[Configuring Talent Acquisition organization parameters](#)" on page 43.

To delete an email template

- 1 Access Administrator > Talent Acquisition > Template Setup > Email Templates.
- 2 Select the email template you want to delete.
- 3 Click Delete.
- 4 Click Yes to confirm.
- 5 Enter the effective date and click OK.

Uploading document templates for Talent Acquisition

Before you start You must create and save the document template in RTF format on your machine or on a shared server before you can attach the template to Talent Acquisition.

This procedure merely uploads the document templates and make them available to recruiters when they are creating an offer, submitting a candidate to managers for consideration, hire paperwork, or any other use.

Note: Contract document templates are not uploaded to Talent Acquisition. They are uploaded to Administrator > Setup > Contract Components > Templates. For more information, see the *Global Human Resources User Guide*.



Need More Details? Check out the following concepts:

- "[How are document templates used in Talent Acquisition?](#)" on page 103

To upload a document template

- 1 Access Administrator > Talent Acquisition > Template Setup > Document Templates.
- 2 Click New.
- 3 On the Document Template form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the document template.
-----------------------	---

Document Template	Required. Type the name of the template. For example, JOBOFFER
--------------------------	--

Description	Optional. You can type a description of the template. If you leave this field blank, the document template name defaults in this field. .
Preferred Document Language	If your organization uses Dynamic Embedded Translation (DET), you can select whether the document should be translated to the candidate's language or to the hiring manager's language. If you do not select a preferred language, the company base language is used.
Active	The template is active by default. Clear this check box to make the template inactive. Inactive templates do not appear on select lists.
Template File	Click Browse, browse to the template file you want to attach, and double-click the file.
Mime Type	When you attach the file, the file type displays in this field. For RTF files, the type is application/rtf.

4 Click Save.

Related tasks

- To update a template attachment description, open the attachment, enter the effective date, change the description, and click Save.
- To replace the currently attached template file with a different file or a new version of the attached file, open the attachment, click Browse, browse to the template file you want to attach, and double-click the file.
- To delete a template attachment, select the template on the templates list, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot remove a file attachment that is in use in a current offer.

Defining and maintaining job posting templates



Need More Details? Check out the following concepts:

- ["What are job posting templates?"](#) on page 102

To define a job posting template

- 1 Access Administrator > Talent Acquisition > Template Setup > Job Posting Templates.
- 2 Click New.
- 3 On the Job Posting Template form, use the following guidelines to enter field values.

Effective Date	Required. Enter the effective date for the job posting template.
Job Posting Template	Required. Type the name of the job posting template.
Active	The template is active by default. Clear this check box to make the template inactive. Inactive templates do not appear on select lists.
Include Job Components	Select this check box if you want to include only job components.
Include Position Components	Select this check box if you want to include only position components. Note: It is probably a good idea to select both job and position since the template can be used by any position and you have no way of knowing whether the job description has been defined at the job level or at the position level. If text has been defined in both places, the template will concatenate both sets of descriptions. For example, you could have summary text at the job level and responsibilities text at the position level. Competencies and skills will include both job competencies and skills and any additional position competencies and skills.
Include Essential Only	If the job template includes qualifications, select this check box to include only essential qualifications. If you do not select this check box, both essential and non-essential qualifications will be included.
Posting text	Type a combination of actual text and variables that will make up the body of the posting text. A typical posting would include an introductory statement about the company, a summary of the position, a description of the responsibilities, a list of required qualifications, and some closing text. This is an RTF field. You can format the text, using the tool in the toolbar. To see what variable text is available to you and to select a variable, click the {A} icon on the tool bar. Variable text appears between curly braces in the text. For example, {CompetenciesAndSkills}.

4 Click Save.

Related tasks

- To update a template, open the template, enter the effective date, make your changes and click Save.

Note: You can update any fields except for the template name. Updating the template will update the requisition description. However, if job boards have already been added to the requisition, their text is not updated unless you remove the job boards and add them again.

- To delete a template, select the template, click Delete, click Yes to confirm, enter the effective date, and click OK.

Important: You cannot delete a template that is attached to a job requisition.

Defining a "Send To A Friend" email template

You can define a template that will be attached to a job board. When a job opening is posted to the job board, the email template is used for all "Send To A Friend" emails for that job opening. The email will contain a link back to the Career Space, allowing the recipient to view the job details, register, and apply for the job.

To define a "Send To A Friend" email template

- 1 Access Administrator > Talent Acquisition > Template Setup > Send To a Friend Email Template.
- 2 Click New.
- 3 On the Send To A Friend Email Template form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date on which the template takes effect.
Candidate Email Template	Required. Type the template name.
Active	The template is active by default. Clear the check box to inactivate it.
Subject	Type the text that will appear on the subject line of the email. To insert a variable, right-click inside the field, select Variables and choose the variable you want to insert.
Body	Type the text that will appear on the message, including any job variables. To insert a variable, click the {A} icon on the text box tool bar and select the variable that you want to insert, or type the variables, exactly as shown below. Possible variables are {JobID} {OrganizationName} {PositionTitle} {PositionDescription} Note: Due to some current limitations, you must type the {PositionTitle} and {PositionDescription} variables manually.

- 4 Click Save.

Follow-up procedure

- Associate the email template with the appropriate job board.

Defining and approving requisitions

3

This chapter describes how to request, define and approve job requisitions. A job requisition starts the recruitment process for a job opening.

- ["Requisition overview" on page 112](#)
- ["Requisition creation" on page 118](#)
- ["Requisition processing" on page 139](#)

Requisition overview

- ["Requisition process overview" on page 112](#)
- ["Defaulting values for requisitions and job applications" on page 117](#)

Requisition process overview

Requisitions drive the Talent Acquisition process from the point when a staffing need is identified to the point where a candidate is hired or a resource is transferred to fill the position.

A requisition is always tied to a position, which is in turn tied to a job. Jobs and positions are defined in Administrator > Setup. Before you can create a requisition, the administrator must perform the appropriate Global HR setup and Talent Acquisition setup. For more information on Global HR setup, see the *Lawson Global Human Resources User Guide*. Talent Acquisition setup is described in this guide.

The following steps are typical.

Step	Description	Role	References
1	Create a Draft requisition (from scratch or by copying an existing requisition). The requisition may or may not include a list of approvers.	Hiring Manager	<i>Lawson Talent Management Manager Guide</i>
		Recruiter	" Creating requisitions " on page 120 " Creating a requisition from a copy (recruiter) " on page 126
2	Request approval for own Draft requisition (hiring manager) or Approve own Draft requisition manually (recruiter, recruiter administrator)	Hiring Manager	<i>Lawson Talent Management Manager Guide</i>
		Recruiter	" Approving a requisition manually or requesting approval (recruiter) " on page 127

Step	Description	Role	References
3	Approve requisition in inbasket (Start > My Inbasket). Approvers receive a notification that lets them access the requisition in the inbasket or approvers access their inbasket directly. Approvers can review and approve or return the requisition. The requisition remains in Approval Requested status until the final approver approves. The requisition status then changes to Pending. Note: Requesters can monitor the routing status of their request by opening the requisition and clicking the Approval Tracking link.	If request comes from hiring manager for him/herself, any designated approvers in the order they are listed, then the recruiter. If request comes from hiring manager for another hiring manager, the hiring manager, any designated approvers in the order they are listed, then the recruiter. If request comes from recruiter, the hiring manager then any designated approvers in the order they are listed. Note: By default, recruiters and recruiter administrators approve their own requisitions manually. However, their security can be modified to use the Request Approval action.	"Processing requisitions for approval" on page 128

Step	Description	Role	References
4	Add a description and questions to requisition.	Recruiter	"Adding a description and questions to job requisitions (recruiter)" on page 132
5	Add job boards. Note: Talent Acquisition supports internal, external, and third-party job boards.	Recruiter	"Adding job boards to a requisition (recruiter)" on page 134
6	Post requisition to job boards (requisition status changes to Open)	Recruiter	"Posting requisitions to internal, external, or third-party job boards (recruiter)" on page 140
7	Collect and triage applications for the requisition from all job boards. Screen out and disposition unsuitable candidates; possibly add external candidates to Talent Acquisition or submit applications on behalf of internal candidates.	Recruiter	"Selection process overview" on page 173 "Searching for candidates with the search tool" on page 170 "Reviewing or updating job applications" on page 177 "Applying for a job on behalf of a candidate" on page 155 "Screening candidates" on page 188
8	Move suitable candidate to Hiring Manager Review process.	Recruiter	"Moving job applications through the selection processes" on page 187

Step	Description	Role	References
9	Review candidates; disposition unsuitable candidates and move others to Qualify process.	Hiring manager	<i>Manager User Guide</i>
10	Perform qualifying tasks (references, interviews, background checks, assessments, and so on). Note: Some of these activities may span the next steps. For example, an offer can be extended subject to the candidate passing a background check or completing an assessment package.	Recruiter Hiring Manager (interviews)	"Interviewing candidates" on page 190 "Qualifying candidates (recruiter)" on page 188
11	Create an offer and optionally an employment contract and route for approval; send approved offer/employment contract to candidate	Recruiter (with input from Hiring manager and reviewers)	"Defining and routing an offer with or without an employment contract" on page 213
12	If external candidate accepts, hire. If former employee accepts, rehire. If internal candidate accepts, transfer or add work assignment. Note: Requesters can monitor the routing status of their request by opening the requisition and clicking the Approval Tracking link.	Recruiter	"Hiring external candidates (recruiter)" on page 230 "Requesting a rehire in Talent Acquisition (recruiter)" on page 238 "Transferring internal candidates (recruiter or manager)" on page 245 "Adding work assignments for an internal candidate (recruiter)" on page 251
13	Kick off on-boarding tasks.	Recruiter	"Transitioning new or transferred resources" on page 224

Step	Description	Role	References
14	When all positions for the requisition have been filled, close the requisition.	Recruiter	"Changing the status of a requisition" on page 139

Defaulting values for requisitions and job applications

A requisition must be associated with a position. A position is always associated with a job.

Job and positions have default rules set for specific fields at the organization level. These default rules determine how these job and position fields default to requisitions. For these fields, the following rules apply:

- If the default rule on a job or position field is set to "Default No Override" that field is set and cannot be overridden on the requisition, the job application, the job offer, or any of the hire/rehire/transfer/add work assignments actions. If the field has a value, the value is kept. If the field does not have a value, it cannot be assigned a value.
- If the default rule on a job or position field is set to "No Default" or "Default With Override" and there is no value in the field, the field can be assigned a value on the job requisition, which will default to the job application where it can be changed on the offer and possibly on the hire, rehire transfer, or add work assignment actions (although, they would normally match the offer).
- If the default rule on a job or position field is set to "Default With Override" and there is a value in the field, that value defaults on the job requisition, where it can be changed. The requisition value then defaults on the job application record where it can be changed on the offer and possibly on the hire, rehire transfer, or add work assignment actions (although, they would normally match the offer).
- If the default rule on a job or position field is set to "No Default" but a value exists for the field in the organization unit's work assignment defaults, that value defaults on the job requisition, where it can be changed. The requisition value then defaults on the job application record where it can be changed on the offer and possibly on the hire, rehire transfer, or add work assignment actions (although, they would normally match the offer).

For fields that do not have default job or position rules:

- If the field exists on the job requisition and has a value, the value defaults on the job application where it can be changed. Any change made on the job application (including the offer) defaults on the hire, rehire transfer, or add work assignment action, where it could be changed (although, it would normally match the approved offer).
- If the field does not exist on the requisition, the most recent value entered on the job application (including the offer) defaults on the hire, rehire transfer, or add work assignment action, where it could be changed (although, it would normally match the approved offer).

- If an employment contract is defined and approved as part of the offer process, the employment contract data defaults on the hire, rehire, transfer, or add work assignment actions, but it cannot be changed.

Other defaulting consideration

- For the job description that appears on the requisition, the job posting template selected for the requisition determines whether the description text is pulled from the job, from the position, or from both. For more information, see "[What are job posting templates?](#)" on page 102.
- The recruiter administrator can configure an assessment vendor package, a self identification, a question set, an external consent agreement, an internal consent agreement, an external acknowledgment, and/or an internal acknowledgment to default on all new requisitions. Recruiters and hiring managers can change those values when they create a requisition.

Requisition creation

Typically, a hiring manager will create a Draft job requisition (either new or copied from an existing requisition) and request approval. The request will be routed to approvers on the requisition, then to the recruiter. Once the requisition is approved, the recruiter will complete the requisition and post it to the appropriate job boards. Recruiters and recruiter administrators can also create Draft job requisitions. Recruiters and recruiter administrators manually approve their own Draft requisitions.

Note: Your organization may not require hiring managers to request approval. This entails a customization of the hiring manager security role which must be configured through Landmark security. The security can also be modified to require recruiters to request approval.

- "[Searching for requisitions](#)" on page 119
- "[Creating requisitions](#)" on page 120
- "[Creating a requisition from a copy \(recruiter\)](#)" on page 126
- "[Approving a requisition manually or requesting approval \(recruiter \)](#)" on page 127
- "[Processing requisitions for approval](#)" on page 128
- "[Requesting updates to a job requisition \(recruiter\)](#)" on page 128
- "[Adding a description and questions to job requisitions \(recruiter\)](#)" on page 132
- "[Adding job boards to a requisition \(recruiter\)](#)" on page 134
- "[Adding notes to requisitions](#)" on page 136
- "[Adding document attachments to requisitions](#)" on page 137
- "[Adding expenses to requisitions](#)" on page 138

Searching for requisitions

You can locate requisitions by using the search tool. The search feature lets you locate requisitions that contain a combination of keywords and field values.

To search for requisitions

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, use the following guidelines to enter your search criteria:

Keyword	In the Search field, type one or more keywords. • To locate the requisitions that contain any one of the keywords, separate the keywords with OR (full caps not required). • To locate the requisitions that contain all the keywords, separate the keywords with AND (full caps not required). • Keyword can be portions of words. For example, if you are looking for a requisition that is related to banking but are not sure of the exact position name, you can type "bank" The tool will show not only the requisitions with a name that contains "bank", but also the requisitions that have "bank" in their description. • You can also use the Keyword field to search for a position, a position description, a relationship to organization, an organization unit, a location, a location of job, a location of job description, and a sub category.
Job ID	Enter a job ID to locate a specific requisition by its unique ID.
Status	Select a status to view only the requisitions in that status. (For example, select Draft to view only your Draft requisitions.)
Recruiter	(Administrator) Select a recruiter to display all the requisitions that the recruiter is assigned to as a recruiter. (Recruiter) Select yourself if you want to see only the requisitions that you are assigned to as a recruiter. If you select another recruiter, you will see only the selected recruiter's requisitions for which you are the alternate recruiter. Note: By default, recruiters see all requisitions that they are assigned to as recruiter or alternate recruiter. Recruiter administrators see all requisitions for all recruiters.
Hiring Manager	Select a hiring manager in this field to view all the requisitions for that hiring manager.

- 3 Click Search to display the results of your search.
- 4 Click Clear to clear the search.

Creating requisitions

Before you start Before you can create a job requisition, the job and position, must exist in the system.

Use this procedure to create a Draft requisition. You can update or delete a Draft requisition. It is visible only to you or to an administrator.

Note: For information on hiring manager processes, see the *Lawson Talent Management Manager User Guide*.

To create a Draft requisition

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, select All Actions Menu > Create Requisition.
- 3 On the requisition header, use the following guidelines to enter field values.

Note: Some of the fields are configurable and may not appear on your form.

Status	(Read only) When you save the requisition, the system assigns a status of Draft.
Date Needed	Enter the date by which the requisition must be filled.
Open Date, Total Days Open	(Read only) The system will populate the open date at the time that the requisition is posted, and keep track of the number of days that the requisition is open.
Confidential Requisition	If the requisition is confidential, select this check box. Important: Security customization will be needed if your organization wants to restrict access to confidential requisitions.
Priority Requisition	If the requisition is urgent, select the Priority Requisition check box. All priority requisitions appear in red on the requisition list. In addition, if the administrator also defined an automatic email and template on the organization setup, recruiters (and any other recipients identified in the email template) will automatically receive an email when a job application is submitted for the requisition.

Note: Priority requisitions appear in the Hot Jobs section of the internal and external job boards.

- 4 On the Requisition tab, use the following guidelines to enter or update field values.

Note: You do not need to fill all the fields. The most important fields for a potential candidate will be the title, the location, the category (to help with the job search), the job description, and the salary range.

- Position Information section

Position Code	Required. Select the position code. Fields that were defined at the job or position level are immediately populated on the requisition if the position defaulting rules for the organization allow it. If an HR contact exists on the organization unit record, the HR contact defaults in the HR contact field (Contacts section). If a position is defined as key or critical, these values will display as well.
Organization Unit	Select the organization unit for which the position is required. If you do not select an organization unit, the top organization unit for the organization is assumed.
Cost Center	If applicable, you can select the cost center to which expenses associated with the requisition will be assigned.
Project	If applicable, you can select the project to which expenses associated with the requisition will be assigned.
Location	Select the location for which the position is required. If the location is associated with a position location, it will default on the job boards.
Category	If the position has a category associated with it, it displays here. If it does not, you can add one. Categories are used to locate jobs on job boards.
Relationship to Organization	The relationship to organization (for example, employee, consultant, intern, apprentice, and so on)
Sub Category	If the position has a subcategory, it displays in this field. The subcategory does not show on job postings.
Work Type	The work type (full time, part time).
Professional Category	Select the professional category that the position belongs to. Professional categories can be used to assign a unique hourly pay rate to resources belonging to the same professional category for the purpose of estimating costs.
Work Schedule	Select the work schedule (for example weekdays 9 a.m. to 5 p.m).
Shift	If the position involves a shift, type the shift name or number.
Standard Hours	Type the standard number of hours per week.
Bargaining Unit	If the position is unionized, this field contains the bargaining unit.
Union	If the position is unionized, the field contains the union name.
Exempt from Overtime	Select this checkbox if the position is an exempt position (salaried with no overtime).
Employment Contract Type	If the position is subject to an employment contract, select the employment contract type (for example, TEMPORARY).

Begin Date	If the position is subject to an employment contract, enter the employment contract begin date.
Duration	If the position is subject to an employment contract with a set duration, enter the contract duration in these fields (for example, 6 Months).
End Date	If applicable, enter the employment contract end date.
• Compensation section	
Pay Rate	If a pay rate exists, it defaults in this field. The currency displays next to it. If no compensation defaults, you can enter a pay rate and currency.
Step And Grade Schedule, Grade, Step	If a position is compensated on a step and grade schedule, the step and grade information defaults in these fields and the currency displays in the Currency field next to the Pay Rate field.
Pay Rate Type	If a pay rate type exists, the pay rate type displays in this field (Annual, Monthly, Weekly, and so on).
Number Of Months	If the pay rate type is Monthly, specify the number of months. The default is 12. If the number of months exists it displays in this field.
FTE	Enter the full time equivalent for the position. For example, 1, 0.75, or 0.5).
Salary Structure, Geographical Differential, Grade	If the position is associated with a salary structure, the salary structure information displays in these fields. Note: If a pay rate exists, it must be within the range of the grade assigned to the position.
Pay Frequency	If a pay frequency is defined for the position, it may default on this field, depending on the position defaulting rules.
Bonus	Use this field to describe bonus information, if applicable.
Payment Schedule	If a payment schedule is defined for the position, it may default on this field, depending on the position defaulting rules.
Other Compensation Info	This field is used to describe other compensation information not already provided.
• Opening Information section	
# of Openings	A requisition can apply to multiple openings. Type the number of openings. By default the number of openings is 1.
Reason For Opening	Select the reason for requesting a requisition.
Travel Required	Indicate whether the position includes traveling. This is an alphanumeric field, so you can enter Yes, No, or a percentage.
# Filled	The recruiter increments this field by 1 any time a position is filled.

Detailed Reason For Opening	Type additional detail if needed.
# Remaining	The system automatically computes this number by subtracting the # Filled from the # of Openings. For example if you have 3 openings and 1 is filled, the number remaining is 2.
Budgeted	If this is a budgeted position, select this check box.
Relocation Provided	If relocation costs are reimbursed, enter the information (for example, the plan under which this is allowed).

- **Contacts section**

At the minimum, select the Hiring Manager and the Recruiter associated with the requisition. If as a manager you do not know who the recruiter will be, you could have a process whereby requisitions are sent to a recruiting gatekeeper who then changes to the appropriate recruiter.

Direct Manager, HR Contact, and Alternate Recruiter fields are optional, but may be required by your organization.

Direct Manager	Select the prospective position's direct manager.
Hiring Manager	Select the prospective position's hiring manager.
HR Contact	Select the HR contact for any HR questions.
	Note: If it exists, the organization unit HR contact defaults in this field. You can select a different HR contact.
Recruiter	Select the recruiter for the position.
Alternate Recruiter	Select the alternate recruiter for the position.

Approver 1, Approver 2, Approver 3 You can select up to three approvers, in the order in which you want them to approve. The approval process will be triggered when you select the Request Approval action.

Note: If you are a recruiter or recruiter administrator, these fields are meaningful only if your security has been modified to request approval. By default, you will approve your own requisitions manually. However, you can, use these fields if you request an update to the requisition when it is in Pending or Open state.

If one or more approvers are entered:

- Requests submitted by a hiring manager will be routed to each approver in turn, then to the recruiter.
- Requests submitted by a recruiter will first go to the hiring manager for approval, then they will be routed to each approver in turn.

If no approvers are entered:

- Requests submitted by a hiring manager will be routed to the recruiter.
- Requests submitted by a recruiter will be routed to the hiring manager.

When all approvals have been processed, the requisition status changes to Pending.

- Other Information section

Assessment Package If you require all candidates for this position to submit to assessment tests, select the assessment package that includes the tests the candidates will have to submit to. If you want only a few candidates to submit to the assessment, you can add an assessment package on individual job applications.

Note: If a default assessment package is defined at the organization level, it appears in this field. You can select a different assessment package or none at all.

Self Identification Configuration If you want self-identification questions to appear on the job application, select the appropriate self-identification configuration.

Note: If a default self identification configuration is defined at the organization level, it appears in this field. You can select a different self identification configuration or none at all.

Question Set	You can select a question set. When the requisition is approved (in Pending status), all the questions in the question set will appear on the requisition's Questions tab. Note: If a default question set is defined at the organization level, it appears in this field. You can select a different question set or none at all.
Consent Agreement (External)	Select the consent agreement text (if any) that you want to appear at the beginning of the job application for external candidates. Note: If a default external consent agreement is defined at the organization level, it appears in this field. You can select a different consent agreement or none at all.
Consent Agreement (Internal)	Select the consent agreement text (if any) that you want to appear at the beginning of the job application for internal candidates. Note: If a default internal consent agreement is defined at the organization level, it appears in this field. You can select a different consent agreement or none at all.
Acknowledgment (External)	Select the acknowledgment text (if any) that you want to appear at the end of the job application for external candidates. Note: If a default external acknowledgment is defined at the organization level, it appears in this field. You can select a different acknowledgment or none at all.
Acknowledgment (Internal)	Select the acknowledgment text (if any) that you want to appear at the end of the job application for internal candidates. Note: If a default internal acknowledgment is defined at the organization level, it appears in this field. You can select a different acknowledgment or none at all.

5 Click Save.

The requisition is created with a Draft status and the next requisition number available in the system. You can use the Search feature to locate the new requisition. Search on the Draft status to view all your Draft requisitions.

You can update any field in the requisition until you request approval or approve the requisition. In addition, use the Notes, Attachments, and Expense link that appear in the requisition header, to add notes, attach files, and/or add expenses.

6 If responsibilities are defined for the position, access the Responsibilities tab to view them.

- 7 Click Save and continue with "[Approving a requisition manually or requesting approval \(recruiter \)](#)" on page 127.

Follow-up task

- Approve the requisition manually or request approval. For more information, see "[Approving a requisition manually or requesting approval \(recruiter \)](#)" on page 127.

Creating a requisition from a copy (recruiter)

If you need to create multiple requisitions for the same position but the requisitions differ in certain aspects (for example location, hiring manager, or recruiter), you can copy an existing requisition that is close to the one you need to create and make the necessary changes.

Note: For information on hiring manager processes, see the *Lawson Talent Management Manager User Guide*.

To copy a requisition

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, select All Actions Menu > Create Requisition From Copy.
- 3 In the From Job Requisition field, select the job requisition number, and click OK.

A new requisition that is an exact copy of the copied requisition is immediately created in Draft status with the next requisition number available in the system. You can use the Search feature to locate the new requisition. Search on the Draft status to view all your Draft requisitions.

- 4 Open the requisition and update it as needed for the new requisition.

You can update any field in the requisition until you request approval or approve the requisition. In addition, use the Notes, Attachments, and Expense link that appear in the requisition header, to add notes, attach files, and/or add expenses. For information on the fields you can update, see "[Creating requisitions](#)" on page 120.

Follow-up task

- Approve the requisition manually or request approval. For more information, see "[Approving a requisition manually or requesting approval \(recruiter \)](#)" on page 127.

Approving a requisition manually or requesting approval (recruiter)

By default, approval is required for hiring managers. If no approvers exist, the requisition will be approved automatically when approval is requested.

Recruiters and recruiter administrators approve their own Draft requisitions manually. However, your organization can modify security so that hiring managers can approve their own Draft requisitions or recruiters and recruiter administrators can be required to request approval for their Draft requisitions.

Note: For information on manager processes, see the *Lawson Talent Management Manager User Guide*.

To approve a requisition manually

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, locate and select the Draft requisition and select All Actions Menu > Manual Approve.

or

Open the requisition and select Actions > Manual Approve.

The requisition status changes to Pending. You can then add a description, questions, and postings.

To request approval for a Draft requisition

Note: This would assume a security modification for recruiters or recruiter administrators.

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, select the Draft requisition and select All Actions Menu > Request Approval.

or

Open the requisition and select Actions > Request Approval.

The requisition status changes to Approval Requested. The requisition is routed first to the hiring manager, then to any approvers on the list, in the order that they are listed.

Note: To track the status of the request, open the requisition and click the Approval Tracking link.

When the last approver approves, the requisition acquires a Pending status, and you can add a description, questions, and postings.

Follow-up task

- Add a description, and optional questions. For more information, see "[Adding a description and questions to job requisitions \(recruiter\)](#)" on page 132.

Processing requisitions for approval

The Request Approval action triggers a process flow that routes the form to the people supposed to review, edit, and/or approve the request. Recipients will likely receive an email informing them that have a pending action in their inbasket.

A requisition will remain in Approval Requested status until the last approver approves the requisition. After the final approval, the requisition will be in Pending status.

To process a received requisition

- 1 Access your process flow inbasket (Start > My Inbasket) or access your notifications.
- 2 Open the requisition.
- 3 Edit the requisition if applicable. For information on field values, see "[Creating requisitions](#)" on page 120
- 4 Take one of the following actions.

Approve	Sends the requisition request to the next person on the route, or, if you are the final approver, creates the requisition in Pending state.
Return	Returns the request to the sender. The sender can modify the request and request approval again.

Follow-up task

- After a requisition is approved, the recruiter must complete the requisition and post it to the appropriate job boards. For more information, see "[Adding a description and questions to job requisitions \(recruiter\)](#)" on page 132.

Requesting updates to a job requisition (recruiter)

Recruiters and recruiting administrators can update a requisition directly. However, organization processes may require you to request approval when you want to update a requisition, especially if it is already posted. Hiring managers must always request approval.

Note: For information on hiring manager processes, see the *Lawson Talent Management Manager User Guide*.

To request updates to a job requisition

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions Dashboard panel, select the requisition you want to update and select All Actions Menu > Request Update To Job Requisition..

or

Open the requisition you want to update and select Actions > Request Update To Job Requisition.

- 3 On the Request Update form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date on which you want the update request to become effective.
Reason	Select a reason code for this action. Action reasons are defined Administrator > Setup.
Position Code	If you want to assign a different position to the job requisition, select a new position code. The position values will default when the update request is approved. Note: If you select a new position code, the job requisition will keep its original ID but will be for a different position.
Date Needed	Enter or update the date when the position needs to be filled.
Priority Requisition	If the requisition is urgent, select the Priority Requisition check box. All priority requisitions appear in red on the requisition list. In addition, if the administrator also defined an automatic email and template on the organization setup, recruiters (and any other recipients identified in the email template) will automatically receive an email when a job application is submitted for the requisition.
Position Information	Note: Modify any of the fields as applicable
HR Organization Unit	Select the organization unit for which the position is required.
Cost Center	If the organization unit is associated with a cost center, it defaults in this field. Select a cost center, if applicable.
Project	If the organization unit is associated with a project, it defaults in this field. Select a project, if applicable.
Category	Select the position category. Candidates can search for jobs by job category.

Sub Category	If subcategories exist for the category, you can select a subcategory.
Location	Select the location for which the position is required.
Standard Hours	Type the standard number of hours per week.
Relationship to Organization	Select the relationship to organization (for example, employee, consultant, intern, apprentice, and so on)
Work Type	Select the work type (full time, part time)
Work Schedule	If a specific work schedule is desired, you can select the work schedule.
FTE	Enter the full time equivalent for the position. (for example 1, 0.75, or 0.5).
Shift	If the position involves a shift, type the shift name or number.
Exempt from Overtime	If the position is exempt from overtime pay, select yes.
Professional Category	If applicable, select the position's professional category.
Bargaining Unit	If the position is unionized, you can select the bargaining unit.
Union	If the position is unionized, you can select the union.
Employment Contract Type	If an employment contract is required for this position, select the contract type (for example, FIXED TERM).
Begin Date	The employment contract's begin date
Duration	If an employment contract is required for this position, enter the contract duration (for example, 2 Years).
End Date	The employment contract's end date
# of Openings	A requisition can apply to multiple openings. Type the number of openings.
Travel Required	If travel is required, indicate the percentage.
Budgeted	If this is a budgeted position, select this check box.
Relocation Provided	Indicate whether relocation costs will be offered as part of the offer.
Reason For Opening	Select the reason for requesting a requisition.
Detailed Reason For Opening	Type additional detail if needed.
Direct Manager	Select the prospective position's direct manager.
Hiring Manager	Select the prospective position's hiring manager.
HR Contact	If an HR contact is defined for the organization unit, it defaults in this field. Select the HR contact for any HR questions.
Recruiter	Select the recruiter for the position.
Alternate Recruiter	Select the alternate recruiter for the position.

Approver 1, Approver 2, Approver 3	You can select up to three approvers, in the order in which you want them to approve. The approval process will be triggered when you select Submit. If one or more approvers are entered: - Requests submitted by a hiring manager will be routed to each approver in turn, then to the recruiter. - Requests submitted by a recruiter will first go to the hiring manager for approval, then they will be routed to each approver in turn. If no approvers are entered: - Requests submitted by a hiring manager will be routed to the recruiter. - Requests submitted by a recruiter will be routed to the hiring manager. When all approvals have been processed, the requisition changes appear on the requisition.
Assessment Package	If the position requires candidates to be formally assessed, select the appropriate assessment package.
Self Identification Configuration	If you want self-identification questions to appear on the job application, select the appropriate self-identification configuration.
Question Set	You can select a different question set. When the requisition update is approved, all the questions in the question set will appear on the requisition's Questions tab.
Job Posting Template	You can select a different job posting template. When the update is approved, the new description will appear on the Position Description tab.
Consent Agreement (External)	Select the consent agreement text (if any) that you want to appear at the beginning of the job application for external candidates.
Consent Agreement (Internal)	Select the consent agreement text (if any) that you want to appear at the beginning of the job application for internal candidates.
Acknowledgment (External)	Select the acknowledgment text (if any) that you want to appear at the end of the job application for external candidates.
Acknowledgment (Internal)	Select the acknowledgment text (if any) that you want to appear at the end of the job application for internal candidates.
Confidential Requisition	If the requisition is confidential, select this check box. This means that only a few authorized people (defined by the organization) will have access to this requisition.
Comments	Add any comments relevant to the request.

4 Click Submit to start the approval process.

Follow-up tasks

- Any approver on the approval route defined for the update requisition request action must take action. The requisition changes will appear on the requisition after the approval process is completed.

If you assigned a new position to the job requisition, the job requisition will keep its original ID but refer to a different position.

- Requesters can monitor the routing status of their request by opening the requisition and clicking the Approval Tracking link.
- If the changes affect the postings, the recruiter must either update any existing postings manually, or remove the postings and re-apply them so that the changes can show.

Adding a description and questions to job requisitions (recruiter)

Only recruiters can make modifications directly to a requisition after it is in Pending status. If you are updating a newly approved requisition, you must add the Description, questions (if applicable), and eventually, the job postings.

Important: Updates will not appear on the job boards unless the job boards are added *after* the updates are made. To update an unposted job board, you must open the job boards on the Postings tab and update manually (or remove the job board and add it back). To update a posted job board, you must first remove the posting, make your changes manually, then repost the job board.

To update a requisition

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition you want to update.

Note: Use the Search features to locate the requisition.

- 3 Review and update the Requisition tab information as needed. For field descriptions, see "[Creating requisitions](#)" on page 120
- 4 To add or modify the job description, access the Description tab.

Job Posting Template If you select another job posting template and save it, a new description will appear.

Description	The description is created from the job posting template. You can modify the description here or on the individual job boards. You can also type a description directly in the text box.
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- 5 To view or attach questions, access the Questions tab.

An organization can select a default question set that will default to all requisitions. You can substitute a different question set (or remove it entirely) when you create the requisition. You can also attach a question set directly on the Questions tab.

If a question set is attached to the requisition, all the questions in the question set appear on the Questions tab. You can also add questions that are not part of the catalog.

Note: Questions that are included in the online application appear with the candidate answers on the completed job application's Screening Questionnaire Form. Questions that are not included in the online application appear on the completed application's Interview Response Form and can be used in subsequent interviews.

- a To attach a question set, on the Questions tab, click the Helper's List icon, select the question set and click Attach Questionnaire To Job Requisition.
- b To define individual questions, On the Questions tab, under Actions, click the type of question you want to define.
- c On the Questions form, use the following guidelines to enter field values.

Enter The Question	Required. Type the text of the question.
Is a Response Required?	If Yes, the candidate will have to respond to the question to be allowed to continue with the application.
Use For Internal, External, or Both?	If you select Internal, only internal candidates will see this question. If you select External, only external candidates will see this question. If you select both, all candidates will see this question.
Include in Online Application?	If you want the question to be part of the application questions, select Yes.
Is this a Screen Out Question	This field appears only for Yes No, Yes No Text, and List questions. Select Yes if the wrong answer to this question will automatically disqualify a candidate. Otherwise, select No. If you select Yes you must also select a preferred answer.
Select The Preferred Answer	This field is used only by Yes No and Yes No Text questions. If the question is screen out, select the preferred answer (Yes or No). If the screen out question is a List question, you will select the preferred answer on the List Answer tab.

- d Click Save.
- e If the question is a List question, define the multiple responses on the List Answers tab.
 - Click New, type the answer and click Save and New. Repeat for each answer. Click Save after the last answer.

If it is a screen out question, select one of the list items as the preferred answer.

Follow-up task

- When the requisition is complete and needs no more changes, add job boards to the requisition. For more information, see "[Adding job boards to a requisition \(recruiter\)](#)" on page 134.

Important: The reason you may want to wait until a requisition is approved and completely defined before you add job boards is that changes you make to a requisition after job boards are added are not reflected on the job boards. You would need to either update the job boards manually or remove the job boards and add them back to include the updates.

Adding job boards to a requisition (recruiter)

Before you start Your requisition should be complete and ready to post before you add job boards.

Talent Acquisition provides two methods to add job boards.

- You can add multiple job boards at a time by applying a job rule to the requisition.

Note: Assigning a job rule will automatically add any job boards associated with the job posting rule, as well as impose time constraints on the postings. For more information, see "[Job boards and job posting rules](#)" on page 73.

- You can add job boards one by one.

The job boards are added with a status of NonPosted. When the requisition is fully approved and given a status of Open, the recruiter can post the job to the job boards.

To apply a job rule to a requisition

Note: This option is not available for a Talemetry job board.

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition you want to add job boards to.
- 3 Access the Postings tab.
- 4 On the Requisition header, click Actions > Create Job Postings.
- 5 Select the job posting rule and click OK.

Any job boards associated with the job rule are added to the Job Board Posting region in Not Posted status.

- 6 Open each job board to make changes as needed. Use the following guidelines to enter or modify fields values.

Note: The Job Posting URL field is not an enterable field. If the job board was defined with the Auto Create Job Posting URL, the short URL to the job posting will display in this field when you save the job posting. If the job board does not include this option, you can generate a short URL manually specifically for this job posting.

Posting Begin and End Date	Because you added the job board through a posting list you probably want to leave these fields blank to let any time constraints defined for the posting rule apply.
Location, Category, Subcategory	If these values exist for the position, they default on the job board. If they do not exist, you should enter them so that the position can be searched by category and location on job postings.
Minimum, Maximum Salary	Enter this information if you want it to appear on the job posting. If you leave these fields blank, the word "Negotiable" will appear on the posting.
Details	When you save the posting, the job description defaults from the requisition description. You can customize it for the job board.

7 To view what the job posting will look like on the career site, click the View Posting tab.

8 If you made changes to the job posting, click Save.

To add job boards one at a time

1 On the Job Board Posting panel, click New.

2 On the Edit Posting form, use the following guidelines to enter field values.

Note: The Job Posting URL field is not an enterable field. If the job board was defined with the Auto Create Job Posting URL, the short URL to the job posting will display in this field when you save the job posting. If the job board does not have this option, you can generate a short URL manually specifically for this job posting.

Job Board	Required. Select the job board you want to add.
Posting Begin and End Date	You can specify dates for the posting to start and end. Note: If you selected a Talemetry job board, this field is not available. You will specify posting dates at posting times.
Location, Category, Sub Category	If these values exist for the position, they default on the job board. If they do not exist, you should enter them so that the position can be searched by category and location on job postings. Note: If you selected a Talemetry job board, these fields are not available. At posting time, you will be able to provide equivalent information for each of the job boards that you select.
Minimum, Maximum Salary	Enter this information if you want it to appear on the job board. If you leave these fields blank, the word "Negotiable" will appear on the posting.
Details	When you save the posting, the job description defaults from the requisition description. You can customize it for the job board.

3 Click Save.

The job posting is created in Not Posted status.

- 4 (Non Talemtery postings) To view what the job posting will look like on the career site, click the View Posting tab.

Note: Talemtery postings do not have a View Posting tab. Instead, they have a Posting Locations tab that will display posting locations after the posting process is completed.

Follow-up tasks

- To edit a job posting, open the posting, make your changes and save.
- To delete a job posting, select the posting, click the Delete icon and click Yes to confirm.
- (External job boards only) To manually generate a short URL for the job posting, select the posting and select Actions > Generate Job Posting URL. The URL is stored on the job posting in the Job Posting URL field.

Recruiters can use the short URL in an email to send a link to the posting to a prospective candidate without creating a candidate. The candidate would still have to register and log in to Career Space to apply.

Note: By default, Lawson Talent Management uses TinyUrl as a URL shortening service. You can also configure Lawson Talent Management to use the Lawson shortenURL service. "[Configuring your organization to use the Talent Management shortenURL service](#)" on page 25

- To post the job posting to the job board (so that candidates can apply, see "[Posting requisitions to internal, external, or third-party job boards \(recruiter\)](#)" on page 140 (for non Talemtery job boards) or
See "[Posting a Talemtery job board](#)" on page 141.

Adding notes to requisitions

Notes are free-form comments that can accompany a requisition.

Note: Hiring managers can add notes only to requisitions they have created and only when they are still in Draft status. You can modify a hiring manager's security to allow it.

To add a note to a requisition

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition that you want to add a note to.
- 3 Click the Notes link.

- 4 On the Notes list, click New.
- 5 On the Note form, type the note description and text.
- 6 Click Save and return to the requisition form.

A number appears next to the Notes button. The number is incremented each time a new note is added.

- 7 To view or update a note:
 - a Click the Notes button.
 - b Open the note you want to view.
 - c If you want to make changes, update the note and click Save.

Adding document attachments to requisitions

Documents can be any document in support of the requisition (for example a budget).

Note: Hiring managers can add attachments only to requisitions they have created and only when they are still in Draft status. You can modify a hiring manager's security to allow it.

To add a document attachment to a requisition

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition that you want to attach a document to.
- 3 Click the Attachments link.
- 4 On the Attachments list, click New.
- 5 On the Attachment form, use the following guidelines to enter field values.

Job Requisition	The requisition number defaults in this field and cannot be changed.
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Type Of Attachment	Select the type of attachment, for example "Requisition Justification".
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Note: The recruiter administrator defines the types of attachment.

Description Of Attachment	The file name defaults in field when you save the attachment.
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File	Click the attachment icon and browse to the attachment that you want to add.
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Tip: Click Browse, navigate to the file you want to attach and double-click the file..

6 Click Save and return to the requisition form.

A number appears next to the Attachments link. The number is incremented each time a new attachment is added.

7 To view or update an attached document.

- a** Click the Attachments link
- b** On the attachments list, open the attachment record.
- c** To view the attachment, click the arrow next to the Browse button, and select Open.
- d** To update an attached document, change the document on your machine, then reattach it.

Adding expenses to requisitions

Expenses describe the various expenses that might be associated with the requisition (for example, advertising costs). The list of expenses is built throughout the life of the requisition. For example, a requisition may start with generic costs such as advertising. As specific candidates are considered, expenses may be added. For example, a candidate may have to be flown in for an interview.

Note: Hiring managers can add expenses only to requisitions they have created and only when they are still in Draft status. You can modify a hiring manager's security to allow it.

To add expenses to a requisition

- 1** Access Recruiter > Requisitions.
- 2** Open the requisition that you want to add an expense to.
- 3** Click the Expenses link
- 4** On the Requisition Expenses list, click New.
- 5** On the Requisition Expenses form, use the following guidelines to enter field values.

Requisition	The current requisition defaults in this field and cannot be changed.
Cost Name	Select the requisition cost reason for the expense.
Description	Type a description for the expense.
Amount	Type the expense amount.
Date Incurred	If you do not enter a date, the system will use today's date as the date the expense was incurred.

6 Click Save and return to the requisition form.

The total expense amount appears next to the Expenses link. The total amount is updated each time a new expense is added, removed, or an existing amount is changed.

- 7 To view or update an expense:
 - a Click the Expenses link.
 - b Open the expense you want to view.
 - c If you want to make changes, enter your changes and click Save.

Requisition processing

- ["Changing the status of a requisition" on page 139](#)
- ["Deleting a requisition \(recruiter\)" on page 140](#)
- ["Posting requisitions to internal, external, or third-party job boards \(recruiter\)" on page 140](#)
- ["Posting a Talemetry job board" on page 141](#)
- ["Updating a Talemetry posting" on page 143](#)
- ["Removing a posting \(recruiter\)" on page 145](#)
- ["Removing a Talemetry posting from a requisition" on page 145](#)

Changing the status of a requisition

When a requisition is created, it has the status of Draft. When the requisition is approved, it is in Pending status. Before you post the requisition and make it available for candidates to apply you must change the status to Open. Other statuses are Hold, Cancel, and Close.

To change the status of a non-Draft requisition

- 1 Access Recruiter > Requisitions.
- 2 Select the requisition that you want to change the status of.
- 3 Change the status by choosing on of the following options:
 - To approve a draft requisition and make it Pending, select All Actions Menu > Manual Approve.
 - To make a pending requisition available for posting, select All Actions Menu > Open.
 - To put a pending or open requisition on hold, select All Actions Menu > Hold.

Note: To open an On Hold requisition, select All Actions Menu > Open

- To cancel an open requisition before it is filled, select All Actions Menu > Cancel. You are prompted to confirm the cancellation.
- To close a filled requisition, select All Actions Menu > Close.

Deleting a requisition (recruiter)

Important: You cannot delete a requisition that has an application attached to it. However, you can put it on hold or cancel it.

To delete a requisition

- 1 Access Recruiter > Requisitions.
- 2 Locate and select the requisition you want to delete.
- 3 Select All Actions Menu > Delete.
- 4 Click Yes to confirm.

Posting requisitions to internal, external, or third-party job boards (recruiter)

You can post a requisition to one job board at a time or to all job boards at once. For example, you could first post to an internal job board, and after a few weeks post to an external job board and to an agency.

Important: If you added the job boards through a job rule, you can post all the job boards at the same time. They will go live as determined by the job rule. For more information, see "[Job boards and job posting rules](#)" on page 73.

To post a requisition

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition you want to post.
- 3 If the requisition status is not Open, change it to Open
 - Click Actions > Open.
- 4 To post all job postings at once, on the requisition's header, click Actions > Post All.

5 To post a single job posting perform these steps:

- a** Access the Postings tab.
- b** Select the job posting you want to post.
- c** In the Job Posting Region, click Actions > Post
 - If the posting is to an internal or external job board, the job is posted immediately. The status changes to Posting Live.
 - If the posting is to a third-party job board, an HR-XML file is created in the appropriate format and saved in the HRXMLOutput > PositionOpening directory, under the appropriate job board name (for example, Monster). Your IT organization then will interface with the third-party career site to post the job. Your organization's IT must develop a process outside of Talent Management to submit the file to the appropriate job board.

Note: The posting status will remain as Not Posted unless the IT process includes a call to the database to change the status.

Important: You can no longer delete a posted job. However, you can remove the posting and re-post it at a later date.

Posting a Talemetry job board

Before you start The following are required before you get to this stage:

This procedure lets you post a requisition to all the third-party job boards that are included in your contract with Talent Technology. .

- Your organization must have a contract with Talent Technology that lets you post to specified third-party job boards using their Talemetry functionality.
- A Talemetry job board must be defined for the organization under Administrator > Talent Acquisition > Code Setup > Job Boards.
- The Talemetry job board must be attached to the requisition you want to post.

To post a Talemetry job board

- 1** Access Recruiter > Requisitions.
- 2** Open the requisition you want to post and access the Postings tab.
- 3** Select the Talemetry Job board and select Actions > Post.

The Edit Posting panel of the Post To Talemetry form appears.

- 4 On the Edit Posting panel, use the following guidelines to enter field values:

Posting Begin Date Required. Enter the date that the job will be posted to the job board.



Warning: If you do not enter a posting begin date, the posting process will fail.

Posting End Date	You can enter a posting end date. If you leave this field blank, the posting end date is determined for each selected job board by the number of days that the job board keeps postings.
-------------------------	--

Minimum Salary, Maximum Salary, Location	If you entered values in these fields when you added the job board to the requisition, they will default here. You can modify these values.
---	---

Details	This is the description as it will appear on each selected job board. You cannot modify it on this form. If you need to modify the description, return the TALEMETRY job board posting to Not Posted status.
----------------	--

- 5 Click Next.

The Process panel appears. Both step 1 and step 2 are required.

Note: On the job requisition's posting tab, the Talemetry posting appears with a status of Posting submitted.

- 6 Click Step 1 - Process Posting.

A Talemetry web form opens.

Note: If you wait too long to click the Step 1 - Process Posting button, the link to Talemetry may time out. You'll have to start the posting process over.

- 7 Select the job boards that you want to post, and click Continue.

The Job Position Details form appears.

Note: Only the job boards that are included in your contract with Talent Technology display. The cost of each job board displays as well.

- 8 On the Job Position Details form enter the required Position Information, and (if applicable) job board information, and click Continue.

A summary form appears.

- 9 Review the information and click Continue to complete the posting. The Post Summary Page appears.
or

Click Cancel to cancel the posting.

- 10 On the Post Summary Page, click Post Job.

A confirmation message appears. You can close the web window.

Note: On the job requisition's posting tab, the Talemetry posting still appears with a status of Posting submitted.

- 11** Return to the Post To Talemetry Process panel and click Step 2 - Get Status.

A summary appears displaying a Posting live Posting status. You can close the form.

Note: If you close the Process panel before performing the Get Status action, you can perform the Get Status action from the requisition's Postings tab.

- 12** On the requisition's Posting tab, verify that the Talemetry job board now displays a Posting live status.

Tip: If the status still appears as Posting submitted, refresh the page.

- 13** Open the Talemetry job board. On the Posting Locations tab, verify that all the job boards that you selected are displayed with a status of Posted. This tab also displays each job board posting end date. It also displays any costs incurred.

Note: Costs are also added to the requisition's expenses.

Updating a Talemetry posting

Use this procedure to update your Talemetry job posting. You can perform the following actions:

- Modify the posting details.
- Add job boards.
- Remove postings from job boards

To update a Talemetry posting

- 1** Access Recruiter > Requisitions.
- 2** Open the requisition you want to post and access the Postings tab.
- 3** Select the Talemetry Job board and select Actions > Talemetry Update.
The Edit Posting panel of the Post To Talemetry form appears.
- 4** On the Edit Posting panel, make applicable changes, and click Next .
The Process panel appears. Both step 1 and step 2 are required.

Note: On the job requisition's posting tab, the Talemetry posting appears with a status of Posting submitted.

5 Click Step 1 - Process Posting.

A Talemetry web form opens.

Note: If you wait too long to click the Step 1 - Process Posting button, the link to Talemetry may time out. You'll have to start the posting process over.

6 Select the type of update you want to perform:

- Select Modify This posting to modify the contents of the posting.
- Select Add Additional Job Boards To The Posting to post the requisition to additional job boards.
- Select Remove Posting From Job Board to remove the posting from a job board.

7 Complete the Talemetry process for the type of update you selected, until you get to the Job Position Details summary page, which lists the job postings that have been processed.

8 Review the information and click Continue to complete the posting. The Post Summary Page appears.

9 On the Post Summary Page, click Post Job.

A confirmation message appears. You can close the web window.

Note: On the job requisition's posting tab, the Talemetry posting still appears with a status of Posting submitted.

10 Return to the Post To Talemetry Process panel and click Step 2 - Get Status.

Note: If you close the Process panel before performing the Get Status action, you can perform the Get Status action from the requisition's Postings tab.

A summary appears displaying a Posting live Posting status. You can close the form.

11 On the requisition's Posting tab, verify that the Talemetry job board now displays a Posting live status.

Tip: If the status still appears as Posting submitted, refresh the page.

12 Open the Talemetry job board. On the Posting Locations tab, verify that all the job boards that you selected are displayed with a status of Posted. This tab also displays each job board posting end date. It also displays any costs incurred.

Note: Costs are also added to the requisition's expenses.

Other results

- If any new job boards that you posted to incurred a cost, the costs is added to the requisition's current expenses.
- Job boards that were removed appear with a status of Not Posted and a posting end date equal to today's date.
- If you removed a posting from job boards that incurred expenses, the expenses remain attached to the requisition. If you post to the job board again , new expenses will be added.

Note: If you receive a refund from Talent Technology, you will have to make a manual adjustment to the requisition expenses.

Removing a posting (recruiter)

After a posting is removed, you can modify it, then post it again.

To remove a posting

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition and access the Postings tab.
- 3 On the Job Board posting panel, select the posting.
- 4 Click Actions > Remove Posting. The status changes to Not Posted.
- 5 Optional. To post the requisition again:
 - a Open your requisition and access the Postings tab.
 - b On the Job Board posting panel, select the posting.
 - c Click Actions > Re Post.

Removing a Talemetry posting from a requisition

You can remove a Talemetry posting at any time.

To remove a Talemetry posting

- 1 Access Recruiter > Requisitions.
- 2 Open the requisition you want to post and access the Postings tab.
- 3 Select the Talemetry Job board and select Actions > Remove Posting.

Results

- The status of the Talemetry posting changes to Not Posted.
- If you open the posting, the job boards appear with a status of Not Posted and a posting end date equal to today's date.
- Expenses remain unchanged.

Employees apply for positions internally in a similar manner to external candidates. Recruiters and recruiter administrators can create external candidates and apply for jobs on behalf of an internal or external candidate.

- ["Creating external candidates manually" on page 147](#)
- ["Creating a job application on behalf of a candidate" on page 155](#)
- ["Creating candidates with the Talemetry Add-in" on page 155](#)
- ["Monitoring resume parsing errors \(administrator or recruiter administrator only\)" on page 165](#)

Creating external candidates manually

- ["Reasons for creating a candidate and job application internally" on page 147](#)
- ["Adding an external candidate" on page 148](#)
- ["Viewing or updating candidate information \(recruiter\)" on page 152](#)

Reasons for creating a candidate and job application internally

Recruiters typically do not rely solely on their organization's career site to find potential candidates. They may receive candidate information from multiple sources (mail, fax, third-party career site, and so on). In order to have all their candidate information centralized in one place, recruiters will want to bring in the candidates they are interested in into the system. They may want to enter those candidates in the system and upload the profile information themselves rather than ask the candidates to do it.

In addition, an organization is not likely to require a high-profile candidate (such as a CFO or CEO) to register at a career web site and apply. Requisitions for such positions will probably be marked as "confidential" and the search itself will be confidential. However, at some point, the organization will want to have one or more targeted candidates brought into the system. The selected candidate will need to be brought in so he or she can be processed for onboarding.

Adding an external candidate

External candidates are created automatically in Talent Acquisition when a candidate registers on organization's career web site. Internal candidates are created automatically if the organization is configured to auto create candidates and the internal candidates are given the appropriate security.

In addition, recruiters can create external candidates manually. For example, they might have a high-profile position for which they do not want to require the candidate to apply online, or they may have electronic resumes that they want to enter in the system so they can compare the candidates with other candidates already in the system. Or they may meet a candidate that they like, and send them a login to register in the career site and download their resume.

Once they create candidates, recruiters can email them to invite them to visit the career web site and enter their profile. The email contains a system-generated login that the new candidate can use to log in.

Note: If the recruiter enters only the candidate's name and email during the "Add A Candidate" process, then exits the form, the candidate will be taken to the Registration page, where a resume parsing option will be available (assuming the organization uses resume parsing).

Recruiters can also attach a candidate to a job and email the candidate to check the position on the career web site. Again, the email contains a system-generated login that the new candidate can use. Or recruiters can attach a candidate to a job and, if they have the candidate's agreement, mark the candidate as having applied.

To add an external candidate

- 1 Access Recruiter > Add A Candidate.

or

Access Recruiter > Candidate Pool, and select All Actions Menu > Enter New Candidate.

- 2 On Enter A New Candidate, type the candidate first name, last name, email address and optional phone number and click Next.
- 3 On Additional Candidate Details, click one of the following options.

- **Create From Resume/CV**

If you have a resume in electronic format, and your organization supports resume parsing, click Create From Resume/CV. The system will parse the resume into a profile that you can then edit for the portions that did not get parsed properly.

- a On Additional Candidate Details, click Create From Resume/CV.
- b On Select Resume/CV, click the Browse button, navigate to the resume file, and double-click the file.
- c Click OK to start the uploading process.
- d On the Registration Confirmation form, click View Profile to access the candidate's profile.
- e Update the profile as needed.

f Click Finish.

g Select one of the following options or click Exit.

- Email Candidate.

Select this option to send the candidate a link to the external candidate space. Every field is required.

When the candidate receives it, the email will contain a link to the external candidate space as well as a login. The candidate can then apply for jobs.

- Attach Candidate.

Select this option if you want to apply for a job on the candidate's behalf. The Job Requisition, Job Posting, and Source fields are required. You can also email the position to the candidate.

If you email the position to the candidate, the email will contain a link to the external candidate space as well as a login so the candidate can apply.

If you do not email the candidate or do not expect the candidate to apply in person, you can complete the job application by opening it on Candidate Pool and selecting Mark As Applied.

- Exit

If you select Exit, it closes the candidate creation wizard. You can view and update the candidate's profile on Candidate Pool and attach the candidate to a position at a later date.

- **Quick Profile**

If you do not have an electronic resume or your organization does not use resume parsing, click Quick Profile to enter the candidate's contact and preferences information. You can later add more information.

a On Additional Candidates Details, click Quick Profile.

b On Create Resume/CV - Contact Information, use the following guidelines to enter field values and click Next.

Note: You do not have to provide information in every field. Just enter the information that a recruiter or hiring manager will need to contact the person.

Contact Information The given name, family name and preferred contact methods are required.

Primary Contact Information The email address is automatically filled from the previous page. If the candidate's Preferred Contact Method is Mail, type the mailing address.

Note: If you type an address, the country is required.

Primary Phone Number	You can enter a home phone, a work phone, or a mobile phone, and select one of these three numbers or the secondary phone number as the number where the candidate would prefer to be called. You can also enter a fax number. If the preferred contact method is Telephone or Fax, make sure the appropriate information is entered.
Secondary Contact Information	These fields are optional, but if the Preferred Mailing Address is Secondary, you should enter a secondary address.
Secondary Phone Number	You can enter a secondary phone number and select it as the preferred phone number.

Tip: You can select only one phone number on this page as a preferred phone number.

- c** On Create Resume - Preferences, enter the candidate's preferences.

Preferences include the type of job the candidate is looking for, the candidate's salary expectations, when the candidate would be available to start, and whether the candidate would be willing to travel or relocate. This is basic information a recruiter would use to include the candidate in a search for potential candidates for a specific position.

- d** Click Finish.

To send an email to the candidate, click Email Candidate.

To attach the candidate to a position and send an email containing the link to the position, click Attach Candidate.

- e** On the Registration Confirmation form, click View Profile to access the candidate's profile.

- f** Update the profile as needed.

- g** Click Finish.

- h** Select one of the following options or click Exit.

- Email Candidate.

Select this option to send the candidate a link to the external candidate space. Every field is required.

When the candidate receives it, the email will contain a link to the external candidate space as well as a login. The candidate can then apply for jobs.

- Attach Candidate.

Select this option if you want to apply for a job on the candidate's behalf. The Job Requisition, Job Posting, and Source fields are required. You can also email the position to the candidate.

If you email the position to the candidate, the email will contain a link to the external candidate space as well as a login so the candidate can apply.

If you do not email the candidate or do not expect the candidate to apply in person, you can complete the job application by opening it on Candidate Pool and selecting Mark As Applied.

- Exit

If you select Exit, it closes the candidate creation wizard. You can view and update the candidate's record on Candidate Pool and attach the candidate to a position at a later date.

- **Click Next to continue**

Click Next if you do not want to provide profile information at this time, and select one of the following options:

- Email Candidate.

Select this option to send the candidate a link to the external candidate space. Every field on the email form is required .

When the candidate receives the email, the it will contain a link to the external candidate space as well as a login. The candidate can then enter a profile (through a resume download or manual entry) and eventually apply for a job.

Important: The candidate will only be offered the option to download and parse a resume if you entered only the first page of the Add Candidate wizard. If you entered even partial profile information, the candidate will be able only to enter a profile manually and attach a resume that will not be parsed.

- Attach Candidate.

Select this option if you want to apply for a job on the candidate's behalf. The Job Requisition, Job Posting, and Source fields are required. You can also email the position to the candidate.

If you email the position to the candidate, the email will contain a link to the external candidate space as well as a login so the candidate can apply.

If you do not email the candidate or do not expect the candidate to apply in person, you can complete the job application by opening it on Candidate Pool and selecting Mark As Applied.

- Exit

If you select Exit, it closes the candidate creation wizard. You can view and update the candidate's record on Candidate Pool and attach the candidate to a position at a later date.

Related topics

- ["Viewing or updating candidate information \(recruiter\)"](#) on page 152
- ["Applying for a job on behalf of a candidate"](#) on page 155

Viewing or updating candidate information (recruiter)

You can view and update the profile that you entered for a candidate.

To view or update candidate information

- 1 Access Recruiter > Candidate Pool.
- 2 Open the candidate record you want to view or update.
- 3 View or update the profile information.
 - To review or update the candidate's preferences, access At A Glance. Enter or update the preferences and click Save.

Note: Use the Point Of Origin field to indicate where a candidate that is going to travel would be starting from. This field is different from the Location field. It is defined under Administrator > Setup > Resource Components > Personal Information > Point of Origin.

- In the Profile Question Results section, you can indicate whether you have reviewed the answers to the profile questions that you can read on the Profile Questions tab. If you indicate that you have reviewed the questions, you must enter the date that you reviewed them.

Profile questions are required of all external candidates. External candidates can provide the answers either on their candidate profile (My Questions tab) or any job application. The answers are always kept in sync.

Important: The Profile Question Results Reviewed field will become unchecked if the candidate changes any of the answers on any job application or on My Questions (external candidates only) after you have reviewed them.

- In the Other Information section, use the following guidelines to enter field values.

Application Limit	This field is visible only if the job board on which the candidate is registered is defined with an Application Limit value that limits the number of job applications candidate can submit. As a recruiter you can override this number for a specific candidate.
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Important: This number applies only to the number of applications a candidate can personally submit from the job board. Recruiters can apply for jobs on behalf of candidates or request candidates to submit applications even if candidates have reached their limits.

Limit Expiration	If you want the application limit value that you entered to expire, select the expiration date in this field. If you select an expiration date, the application limit for this candidate will return to the job board application limit on the expiration date.
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Do not Hire	Select this check box if you want to flag this candidate as someone who should not be hired. If you select this candidate, you will be required to select a reason in the Reason field. If you select this check box, a red alarm will appear next to this candidate on the Candidate Search list as well as on lists for any process in the Requisitions process board. Hovering over the alert will display the reason code.
Reason	If you select the Do Not Hire check box, you must select a reason. Do not hire reasons are defined in Administrator > Code Setup > Do Not Hire Reasons.

- To view, select, or deselect tags that are appropriate for the candidate, access Tags and click the tag check boxes that are appropriate.

Note: You can search candidates by tag name by entering the tag name in the Keyword field of the Candidate Search form.

- To review or update a candidate's qualifications, access the Talent Profile tab.

Note: For internal candidates, you cannot modify the talent profile. You can just view it.

- (Internal candidates only) The Assignments panel displays the employee's work assignments. Open a work assignment to see the details. Click View History to view the history of the work assignment.
- The Employment History panel displays the candidate's employment history. Click All Actions Menu > Create to add a new employment record. Open an employment record to view the details. Click Edit Employment Details to modify or validate the information.
- The Education History panel displays a candidate's educational attainments. Click All Actions Menu > Create to add a new education record. Open an education record to view the details. Click Edit Education Details to modify or validate the information.
- The Competencies And Skills History panel displays a candidate's competencies and skills. Click All Actions Menu > Create to add a new competency or skill. Open a competency or skill to view the details and modify or validate the information.
- The Credentials panel displays a candidate's credentials. Click All Actions Menu > Create to add a new credential. Open a credential record to view the details. Click Edit Credential to modify or validate the information.
- The Achievement History panel displays a candidate's individual achievements. Click All Actions Menu > Create to add a new achievement. Open an achievement to view the details and modify the information.
- To model a candidate's percent fit for a position, access the Fit Analysis tab. Click the Model Percent Fit button, select the position for which you want to calculate a percent fit, select or clear the Essential Only check box, and click OK. For more information, see "[Modeling a percent fit for a candidate](#)" on page 172.

- To view a candidate's answers to profile questions, access the Profile Questions tab.
Indicate that you have reviewed the questions on the At A Glance tab of the job application or on the At A Glance tab of the candidate's profile. A checkmark indicates that the questions have been reviewed and the date of the review. If the candidate has changed any answers since the last review date, the check box is automatically deselected.
- To view or add references, access the References tab. Click Actions Menu > Create to add a new reference. Open a reference record to view or modify the details or to enter a reference status.
- To view and update a candidate's contact information, access the Contact Info tab.
- To view the emails, attachments, and notes associated with the candidate, access the Correspondence tab.
 - To send an email, on the Correspondence panel, click Create Email. Select an email template and proceed as described in "[Sending emails](#)" on page 183.
 - To enter a record of correspondence related to the candidate outside the system, on the Correspondence panel, click Track Correspondence . Select the correspondence type, type a note, and save.
 - To add an attachment, on the Attachments panel, click All Actions Menu > Create. Select a document type, browse to the document, double-click the document, and click OK.
To view an attachment, on the Attachments tab, open the attachment. Click the arrow next to the Browse button, and click Open.
 - To add a note, on the Notes panel, click All Actions Menu > Create. Enter a description and note text, and click Save.
- To view or add identification numbers and/or travel documents for a candidate, access the Personal Information tab.
 - The Identification Number panel displays the candidate's identification number information. Click Create to add an identification number. Open an identification number to view or update the details.
Note: You will see this panel only if your organization is configured to use identification numbers.
 - The Travel Documents panel displays the candidate's travel document information. Click Create to add a travel document. Open a travel document to view or update the details.
Note: You will see this panel only if your organization is configured to use travel documents. Some fields are country-specific and may not be meaningful to you.

Creating a job application on behalf of a candidate

- ["Applying for a job on behalf of a candidate" on page 155](#)

Applying for a job on behalf of a candidate

A recruiter can attach a candidate to a requisition, thereby creating an automatic application for the candidate. The candidate can be registered on the external career site or entered by the recruiter.

To create a job application on behalf of a candidate

- 1 Access Recruiter > Candidate Pool.
- 2 Select the candidate you want to attach to a job opening.
- 3 Right-click the candidate (or select All Actions Menu), and select Attach Candidate.
- 4 On Attach Candidate, select the job opening you want the candidate to apply for, the job board that you want to associate the job application with, and the source where the candidate heard about the job. All three fields are required.
- 5 If you want to email the job description to the candidate, type a To and From email address and type a message.
- 6 Click OK to associate the candidate with the job requisition.

The job application is created.

If you selected to send an email, the candidate will receive an email with a link to the position. The candidate can then apply.

If you did not send an email or want to be applying on behalf of the candidate, you can complete the job application manually:

- a Access Recruiter > Candidate Pool.
- b Select the candidate that you just attached a job to.
- c Double-click the number in the Applications column.
- d Select the job application and select Actions > Mark As Applied.

Creating candidates with the Talemetry Add-in

- ["What is the Talemetry Add-in?" on page 156](#)
- ["Configuring your organization to use the Talemetry Add-in" on page 157](#)

- ["Configuring your machine to use the Talemtery Add-in" on page 159](#)
- ["Submitting an external resume to Talemtery for parsing" on page 160](#)
- ["Retrieving Add In resumes" on page 162](#)
- ["Creating candidates from pending candidates" on page 163](#)

What is the Talemtery Add-in?

If your organization is configured to use Talent Technology EAM Services for resume parsing, you can also download the Talemtery Add-in. This add-in lets any user configured to use the Talemtery Add-in submit resumes to Talemtery for parsing without logging in to Lawson Talent Management.

The Talemtery Add-in lets you submit the following types of resumes for parsing:

- From Microsoft Outlook you can submit resumes in any format (Word, RTF, PDF, HTML) attached to a Microsoft Outlook email as well as a resume embedded in a Microsoft Outlook email.
- From Microsoft Word, you can submit a resume in Word, RTF, or text format
- From Internet Explorer, you can submit a resume in HTM or HTML format.

Recruiters and recruiter administrators can then retrieve the resumes submitted by anyone for parsing on Recruiter > Candidate Pool and create candidates from the resumes returned by Talemtery.

The Talemtery Add-in download file is accessible on the Talent Technology support site and is accessible to the primary user set up for your company by Talent Technology. The primary user can disseminate the download file to any one in the organization.

Using the Talemtery Add-in requires some configuration in Talemtery as well as on each user's machine.

- The organization for which you want to use this add-in must be configured to use Talent Technology resume parsing on Administrator > Talent Acquisition > Primary Setup > Organization Configuration.
- The primary account user set up by Talent Technology must import or add recruiter IDs and names for organization to the Talemtery Customer Account Manager.
- The primary account user must upload the default configuration file delivered by Lawson to the Talemtery Customer Account Manager. This file is a customization that lets you specify a recruiter name when you submit a resume for parsing to Talemtery.
- The primary account user must create at least one user group.
- The primary account user must set up a user accounts on the Talemtery Customer Account Manager for each user of the Talemtery Add-in.
- All users who want to use this feature must install the Talemtery Add-in on their machine and configure Microsoft Outlook, Microsoft Word, and Internet Explorer to use the Talemtery Add-in.

Configuring your organization to use the Talemetry Add-in

Talent Technology creates at least one primary account user in Talemetry Customer Account Manager. That user can do all the configuration that is required in Talemetry Customer Account Manager and add the users that will use the Talemetry Add-in.

Important: These configuration steps may need to be repeated for each organization. Please refer to the Talent Technology documentation for more information.

To configure the Talemetry Add-in for your organization

1 Add the recruiters to the Talemetry Customer Account Manager in one of two ways:

- Import a CSV file. that contains the recruiter data.
 - a** Create a CSV file with two columns: Recruiter employment ID and Recruiter name.

Note: The column headers are required as part of the CSV file.

For example:

Id	Description
700401	Tyler, Mary
700405	Harrison, Dean

- b** Name the file **LTM_Recruiters.csv**.
 - c** Log in to Talemetry Customer Account Manager (on <https://cam.resumemirror.com>).
 - d** Access Add-In > Customer Data Table List.
 - e** Click Import Customer Data Table.
 - f** Browse to the LTM_Recruiter.csv file, enter a description, and click Import.

Note: Leave Parent List Name blank.

- Add each recruiter one by one.
 - a** Log in to Talemetry Customer Account Manager (on <https://cam.resumemirror.com>).
 - b** Access Add-In > Customer Data Table List.
 - c** Click Add Customer Data Table.
 - d** Enter LTM_Recruiters in the Name field and enter a description.

Note: Leave Parent List Name and Use Workflow blank.

- e Click Add Row.
- f Enter the recruiter employment ID and Name next to the Add Row button and click Update.
- g Repeat steps e and f for each recruiter.
- h Click Save.

2 Upload the configuration file.

- a Download the **DefaultConfig.xml** file delivered by Lawson to your machine.
- b Log in to Talemetry Customer Account Manager.
- c Access Add-In > Configuration List.
- d Filter on the Resume Processing Account you use for resume parsing.
- e Click Add Configuration.
- f Browse to the **DefaultConfig.xml** file delivered by Lawson.
- g Click Import.

3 Create an Add-in Group.

Note: When you add account users for Talemetry Add-in, you will associate each user with this group.

- a Log in to Talemetry Customer Account Manager.
- b Access Add-In > Group List.
- c Filter on the Resume Processing Account you use for resume parsing.
- d Click Add Group.
- e Enter a group name, group description and the maximum number of users that can be associated with this group. Make sure the Active Configuration field is set to the configuration you just imported.
- f Click Save.

4 Create user accounts for the users that will submit resumes for parsing using the Talemetry Add-In feature.

- a Log in to Talemetry Customer Account Manager.
- b Access Company > User List.
- c Click Add User.
- d Use the following guidelines to enter field values.

User Name	Type the user name
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Group	Enter the group name of the group that you just defined.
User Type	Select the type of access you want to user to have. At the minimum Talemtery Add-in users must have Resume Processing and Retrieval access.
Contact name	Type the contact name
Contact Email	Type the email to which a temporary password will be sent. The first time the user logs in, a prompt will appear to enter a new password.

- 5 Click Save.
- 6 Download the Talemtery Add-in from the Talent Technology support site and make it available to all users that will use the functionality.

Note: You do not have to be in a particular role to submit a resume to Talemtery for parsing. However, only recruiters or recruiter administrators will be able to retrieve the resumes in Lawson Talent Management and create candidates from these resumes.

Configuring your machine to use the Talemtery Add-in

To use the resume parsing functionality provided by the Talemtery Add-in, you must install the Add-in on your machine, then configure your Microsoft Outlook, Microsoft Word, and Internet Explorer Browser with your Talemtery log-in information.

To configure your machine to use the Talemtery Add-in

Before you start When a Talemtery customer account was created for you, you should have received an email with the login information, as well as a link to change your password.

- 1 Install the Talemtery Add-in executable, using all default settings.
- 2 Configure your Outlook mail.
 - a Open your Outlook mail.

If this is the first time you open Outlook since you installed the Talemtery Add-in, the Talemtery log-in dialog should pop up automatically.
 - b If the Talemtery log-in dialog does not pop up as you open Outlook, access Talemtery Apply > Configure Talemtery Apply Add-in.
 - c On the Talemtery Apply Add-in Configuration form, enter your Talemtery login company name, user ID and password.

Microsoft Word is configured to submit Word resumes for parsing.

Note: You only need to perform these steps once, unless your log-in information changes or you want to change your password.

3 Configure Microsoft Word.

a Access Microsoft Word.

If this is the first time you open Microsoft Word since you installed the Talemetry Add-in, the Talemetry log-in dialog should pop up automatically.

b If the Talemetry log-in dialog does not pop up as you open Word, click the Talemetry menu and select Configure.

c On the Talemetry Apply Add-in Configuration form, enter your Talemetry login company name, user ID and password.

Your Outlook mail is configured to submit resumes for parsing.

Note: You only need to perform these steps once, unless your log-in information changes or you want to change your password.

4 Configure Microsoft Internet Explorer.

a Access Microsoft Internet Explorer.

If this is the first time you open Microsoft Internet Explorer since you installed the Talemetry Add-in, the Talemetry log-in dialog should pop up automatically.

b If the Talemetry log-in dialog does not pop up as you open Internet Explorer, click the Tools menu and select Configure Talemetry Add-ins.

c On the Talemetry Apply Add-in Configuration form, enter your Talemetry login company name, user ID and password.

Internet Explorer is configured to submit HTM or HTML resumes for parsing.

Note: You only need to perform these steps once, unless your log-in information changes or you want to change your password.

Submitting an external resume to Talemetry for parsing

Before you start The Talemetry Add-in must be installed and configured on your machine.

To submit a resume from Microsoft Outlook

Note: Talemetry can process multiple attachments at time. It always looks for attachments first. It will only try to parse the text of the email itself if there are no attachments. The only way to parse a PDF resume is as an attachment.

- 1 Open the email where the resume is attached or integrated.
- 2 Select Talemetry Apply > Send To Talemetry Apply.

The Resume Review form opens.

Note: If there are multiple attachments, the first resume attachment will display. After you accept or reject the attachment, the next attachment will display.

- 3 (Required) Select a recruiter.
- 4 Review and (if applicable) modify the information that appears. For example, if the resume is embedded in the body of the email, you may want to remove extraneous information, such as introductory text or signature text.
- 5 Click Confirm to submit the resume, then click OK.

The resume can now be retrieved in Lawson Talent Management.

Note: If you select Reject, the resume is not processed.

To submit a resume from Microsoft Word

- 1 Open the resume in Microsoft Word.
 - 2 Select Talemetry > Send To Talemetry Apply.
- The Resume Review form opens.
- 3 (Required) Select a recruiter.
 - 4 Review and (if applicable) modify the information that appears.
 - 5 Click Confirm to submit the resume, then click OK.

The resume can now be retrieved in Lawson Talent Management.

Note: If you select Reject, the resume is not processed.

To submit a resume from Internet Explorer

- 1 Open the resume in Internet Explorer.
- 2 On the Command Bar click the Send To Talemetry Apply icon.

Note: You may need to click the overflow icon to see the command.

The Resume Review form opens.

- 3 (Required) Select a recruiter.
- 4 Review and (if applicable) modify the information that appears.
- 5 Click Confirm to submit the resume, then click OK.

The resume can now be retrieved in Lawson Talent Management.

Note: If you select Reject, the resume is not processed.

Retrieving Add In resumes

Important: Recruiters retrieve and view only the resumes they are associated with. Recruiter administrators retrieve all resumes. No other role can retrieve the resumes.

To retrieve Add In resumes

- 1 Access Recruiter Candidate Pool.
- 2 On the Candidate tab, click the All Actions Menu and select Retrieve Add In Resumes.
The resumes should appear on the Pending Candidates tab.
- 3 If the latest submitted resumes do not appear on the Pending Candidates tab, click Refresh to view the latest resumes.

Follow-up tasks

You cannot modify any of the information on the Pending Candidates tab. However you can view the resumes and remove resumes that you do not want to make into candidates. For example, a resume might have been submitted in duplicate accidentally.

- To view a resume, click the resume link.
- To remove a resume from the list and from the Talemetry database, right-click the resume and select Remove Resume.
- To create a candidate for one or all resumes, select Actions > Create Candidates. For more information, see "[Creating candidates from pending candidates](#)" on page 163.

Creating candidates from pending candidates

You can create a candidate for one resume or for all the resumes that you can see on the Resumes From Talemtery tab. You can also attach the candidate (or candidates) to the requisition at the same time.

To create candidates from Talemtery resumes

- 1 Access Recruiter Candidate Pool.
- 2 On the Pending Candidates tab, select Actions > Create Candidates.
- 3 On the Create Candidates form, use the following guidelines to enter field values.

Candidate Either select a candidate in this field to create a single candidate, or select the Create All Candidates check box to create candidates for all the resumes that you see on the Resumes From Talemtery tab.

Note: Recruiters can see only the resumes for which they were selected as recruiters.

Create All Candidates Either select a candidate in the Candidate field to create a single candidate, or select this check box to create candidates for all the resumes that you see on the Resumes From Talemtery tab.

Attach A Candidate To A Requisition Select this check box if you want to attach the candidates to a job requisition. If you select this check box, more fields appear.

Note: If you select this check box and the Create All Candidates check box, all candidates will be attached to the same requisition.

Job Requisition (Required if you selected Attach A Candidate To A Requisition). Select the requisition that you want to attach to the selected candidate (or candidates).

Job Posting (Required if you selected Attach A Candidate To A Requisition) Select the job board where the candidate can view the posting.

Source (Required if you selected Attach A Candidate To A Requisition) Select the source. For example, an agency might have sent you multiple resumes.

Specific Source If the select source has specific sources, you must select a specific source.

Referring Source If a specific person or agency referred the candidate, you can type in the name.

Would You Like To Email The Candidate About This Position	Select this option to email the candidate about the position. When the candidate receives the email, the email will contain a link to the job board as well as a login. The candidate can then apply for the job. If you do not email the candidate or do not expect the candidate to apply in person, you can complete the job application by opening it on Candidate Pool and selecting Mark As Applied.
From, Subject, Message	If you select Would You Like To Email The Candidate About This Position, these fields are required.

- 4 Click OK to process the candidates immediately.

or

If you selected Create All Candidates and have many candidates to process, click Schedule and specify the time at which you want the candidates to be processed.

Results

- All processed candidates disappear from the Resumes From Pending Candidates tab and appear on the Candidate tab as External candidates with an Entry type of Add In.
- If you attached the candidate(s) to a job requisition, the number 1 appears in the Applications column for the candidate. You can click on the number to see the job application. The job application appears in Screen status on Recruiter > Requisitions > By Selection Process. However it cannot be processed until the candidate actually applies for the job or the recruiter marks the job as applied (Mark As Applied).
 - If you did not send an email or want to be applying on behalf of the candidate, you can complete the job application manually:
 - 1 Access Recruiter > Candidate Pool.
 - 2 Select the candidate that you just attached a job to.
 - 3 Double-click the number in the Applications column.
 - 4 Select the job application and select Actions > Mark As Applied.
- If you emailed the candidate, the candidate is provided with a link and a login to apply for the job.

Monitoring resume parsing errors (administrator or recruiter administrator only)

Note: This topic is applicable only if your organization is configured to parse resumes and log resume parsing errors.

- ["Viewing and correcting resume parsing errors" on page 165](#)

Viewing and correcting resume parsing errors

You can configure your organization to display the parsing error log. All administrators and recruiter administrators have access to that log. You can also select an administrator or recruiter administrator that will receive a notification any time a new error is logged.

A log entry will be created any time there is a parsing error. The most frequent error is a country code that does not exist in the system (for example on an education or employment history entry).

Note: The parsing error does not prevent an entry from being created; it creates an incomplete entry and notifies you of the error.

To access the parsing error log

- 1 Access Administrator > Talent Acquisition > Parsing Messages.

or

If you received a notification, click the notification text to access the parsing message.

- 2 Open the log entry to view the cause of the error.

To correct a parsing error

Note: You cannot correct the error from the error log.

- 1 To correct the parsing error, access the applicable candidate's profile and correct the error (or ask the candidate or recruiter to do so).
- 2 If an error was due to the country not existing in the system, add the country to the system (Administrator > Setup > Prerequisites > Countries) so other resumes with that country will parse correctly.

The application processing steps are the same whether a candidate has applied externally through the career site or internally as an employee, or whether the candidate has been entered and associated to a requisition by a recruiter.

- ["Monitoring your workload" on page 166](#)
- ["Searching for candidates" on page 170](#)
- ["Selecting candidates" on page 173](#)
- ["Setting up and processing interviews" on page 189](#)
- ["Sending mass emails to candidates or job applicants" on page 192](#)

Monitoring your workload

- ["The recruiter's Today view" on page 166](#)
- ["The recruiter's Requisitions view" on page 168](#)

The recruiter's Today view

Access Recruiter > Today to view current and new information related to the requisitions that you are assigned to.

Recruiter administrators can see all the information for all the recruiters. Recruiters can see only the information related to the requisitions that are assigned to them as recruiters. If recruiters select another recruiter, they can view the other recruiter's requisition information only if they are assigned to the requisition as an alternate recruiter.

Note: You can customize your views with the Configuration Console. For more information, see the *Landmark User Setup and Security Guide*.

Dashboard 1

- Requisition Summary

The Requisition Summary panel displays the status of the requisitions that the selected recruiter is assigned to and the number of requisitions in each status.

- Notes

The Notes panel displays all notes entered within 24 hours by the selected recruiter.

If the panel cannot display the complete list, select View All to see the complete list.

Click the + (plus) sign to add a note.

Note: Administrators can view all the notes, but cannot add notes on behalf of a recruiter. Recruiters can view only their own notes.

- Interviews Today

The Interviews Today panel displays any interviews scheduled for today's date for requisitions that the selected recruiter is assigned to.

Select View All to see all current and upcoming interviews scheduled for requisitions that the selected recruiter is assigned to.

- Offers

The Offers panel displays all job applications in the Offer selection process for requisitions that the selected recruiter is assigned to.

If the panel cannot display the complete list, select View All to see the complete list.

Note: If your organization is configured to display an alert when a job application remains in Offer status past a specified number of days, any offer that is not accepted within the specified number of days displays in red.

Dashboard 2

- Pending Requisitions

The Pending Requisitions panel displays the pending requisitions that the selected recruiter is assigned to as a recruiter.

A red alert displays next to the Job Requisition ID if the requisition is a priority requisition.

Select View Alternate Recruiter to view the requisitions that the selected recruiter is assigned to as an alternate recruiter.

- Newly Registered Candidates

The Newly Registered Candidates panel displays newly registered candidates over the past 24 hours.

If the panel cannot display the complete list, select View All to see the complete list.

Click the + (plus) sign to add an external candidate.

Note: You can also add an external candidate from Recruiter > Add A Candidate or from Recruiter > Candidate Pool. "[Adding an external candidate](#)" on page 148

The recruiter's Requisitions view

The Requisitions view provides a single point of entry for all the actions recruiters may need to take on requisitions and job applications. It also provides up-to-date analysis that recruiters may want to check when accessing their desktop everyday.

Requisitions panel

The Requisitions panel displays all the requisitions that the recruiter is assigned to as a recruiter or alternate recruiter. The recruiter administrator will see all the requisitions for all recruiters.

- Click the All Actions Menu icon on the Requisitions panel to create a new requisition or copy a requisition.
- Select or open a requisition to take action on the requisition. From the requisitions list, you can approve Draft requisitions and change the status of requisitions. Use the Search dialog to locate a requisition. For more information, see "[Searching for requisitions](#)" on page 119.
- Select a requisition on the Requisitions panel to display information related to the requisition on the various tabs.

Overview tab

This tab displays preferred source, source, and time to fill analysis on the selection requisition. In addition, it displays the personal notes that the user has entered about the requisition and associated job applications, and the interviews that are scheduled for the day.

New From Preferred Source panel

This panel displays job applications that came in for the selected requisition within the last 24 hours from the organization's preferred sources.

If the list does not fit on the panel, click View All to view the complete list of job applications received for the selected requisition within the last 24 hours from the organization's preferred sources (New From Preferred Sources tab. Click the All New Applications tab to view all new applications from all sources.

Requisition Notes panel

This panel displays all notes entered (by anyone) for the requisition.

Click the + sign to add a new note to the requisition.

Source panel

This panel displays a source analysis of all job applications submitted for the selected requisition. Hover over a source to see the number of requisitions submitted for that source.

Note: To view the job applications, access the By Selection Process tab and select the requisition. The All tab displays all job applications for the requisition, with the source for each job application.

Interviews Today panel

This panel displays interviews scheduled today for the selected requisition.

Click View All to view all the interviews for the selected requisition.

Time To Fill panel (Dashboard panel 2)

This panel displays an analysis of the number of days that the selected requisition has been open .

Click View Analysis to display the Analyze Time To Fill report for the requisition.

This reports includes the average days to fill the requisition (for all job applications associated with the requisition), the target days to fill (if configured for the organization), and the average number of days in each selection process. If a requisition is put on hold temporarily, the number of days on hold are deducted from the time to fill calculations.

Cost Analysis (Dashboard panel 2)

For requisitions that have costs, this panel displays a pie chart, with each slice representing a cost type.

Hover over a slice of pie to see the cost amount for that cost type.

Job application tabs

Use these tabs to view and process all the job applications for the selected requisition.

All tab

The All tab displays the total number of job applications for the selected requisition and lists each job application, with the percent fit, rank, application date, the selection process they are in, the candidate type (Internal, External), the source, and a link to the resume (if applicable). The number displayed on the All tab is the sum of the numbers displayed on all the selection process tabs.

Selection process tabs

Each selection process has its own tab that displays the number of job applications in the selection process. For example, Screen: 3 indicates that the requisition has three job applications in the Screen selection process.

For information on selection processes, see "[Selection process overview](#)" on page 173
To view the actions available for a job application, select the job application (on the All tab or on the appropriate selection process tab), and click the All Actions Menu.

or

Right-click the job application (on the All tab or on the appropriate selection process tab).

To view or update a job application, open the job application record.

Searching for candidates

This section describes the search tools at your disposal to search for candidates.

- ["The Candidate Pool" on page 170](#)
- ["Searching for candidates with the search tool" on page 170](#)
- ["Modeling a percent fit for a candidate" on page 172](#)

The Candidate Pool

The Candidate Pool view displays:

- (Candidate tab) All the candidates who have registered on the career site, whether they have actually applied for a job or not.
- (Candidate tab) All internal candidates (employees), whether they have applied for a job or not.
- (Candidate tab) Any candidates entered directly into Talent Acquisition by a recruiter.
- (Pending Candidates tab) For Talemetry Add-in users only, the list of resumes returned by Talemetry.

Note: Recruiters can create candidates and job applications from the Pending Candidates tab as well as from the Candidates tab

Clicking the name of a candidate provides access to the candidate's record. Clicking the number of applications (if it exists) provides access to the job applications currently submitted or in process for the candidate.

Use the Search dialog box to locate the candidates you are interested in.

Searching for candidates with the search tool

The search feature lets you locate candidate records that contain a combination of keywords and field values.

Note: The search includes all the records on the candidate profile. In addition, if resume parsing was used, the system automatically created a text version of the parsed resume that is included in the search. The search does not include attached resumes that were not parsed, or any other type of attachment.

1 Access Recruiter > Candidate Pool.

2 In the Search box, use the following guidelines to enter your search criteria:

Keyword	In the Search field, type one or more keywords. - To locate the candidates that contain any one of the keywords, separate the keywords with OR (full caps not required). - To locate the candidates that contain all the keywords, separate the keywords with AND (full caps not required). - Use the Keyword field to search for any information that is not covered by the other fields. The search tool searches the entire candidate record for occurrences of the keywords that you enter.
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Family Name (Last)	Type a family name to locate any candidate with that last name.
City	Type a city to locate all candidates whose address includes the city. You can search for multiple cities (for example, St Paul or Minneapolis).
State	Type a state to locate all candidates whose address includes the city. You can search for multiple states (for example, MN or NY).
Postal Code	Type a state to locate all candidates whose address includes the postal code).
Competency And Skill	Type a skill or competency in this field to locate any candidate record that contains this skill or competency. You can search for multiple skills and competencies (for example, leadership and management). You can also use partial words (for example, manage for management).
Education	Type an educational achievement in this field to locate any candidate record that contains this education. You can search for multiple diplomas (for example, Bachelor of Arts or Bachelor of Sciences).
Credential	Type a credential in this field to locate any candidate record that contains this credential. You can search for multiple credentials (for example, JAVA or COBOL).
Has An Application	If you want to display only candidates that have applied for jobs, select Yes. If you want to display only candidates that have not applied for jobs, select No. Leave blank to display all candidates whether or not they have applied.
Type	If you want to display only internal candidates, select Internal. If you want to display only external candidates, select External. Leave blank to display both internal and external candidates.

3 Click Search to display the results of your search.

- 4 To view a candidate's detailed information, open the candidate record. For more information, see ["Viewing or updating candidate information \(recruiter\)"](#) on page 152.

Modeling a percent fit for a candidate

If you are considering a candidate for a position, you can compare the candidate's qualifications with the position's qualifications using the Model Percent Fit action.

Before you start Model Percent Fit settings must be set in Administrator Space > Setup > Organizations. For more information, see ["Configuring percent fit calculation and display rules for Talent Acquisition"](#) on page 22.

To perform gap analysis

- 1 Access Recruiter > Candidate Pool.
- 2 Locate the candidate that you want to analyze and open the candidate's record.
- 3 On the Candidate Details page, access the Fit Analysis tab.
- 4 Click the Model Percent Fit button.
- 5 On the Model Percent Fit Form, enter the following field values.

Compare Position	Required. Select the position that you want to compare the candidate to.
Essential Only	If you want the comparison to include only essential qualification, select this check box. If you do not select this check box, the comparison will include all the qualifications defined for the position, whether essential or not.

Note: The Essential Only setting on the organization's Percent Fit Organization tab defaults on this form. You can change it.

- 6 Click OK.
The system refreshes the page.
- 7 The fit percent displays at the top of the page, followed by a spider graph comparing the position's skills and competencies' requirements with the candidate's qualification. Click Graph to view the same information as a bar or pie graph. Scroll down to view a list of the position's essential or essential and non-essential qualifications included in the percent fit calculation. For each included qualification, the system displays a red alert with the comment "No Match" or a green alert with the comment "Match". The percent fit is derived by dividing the number of qualifications that match by the total number of qualifications included in the calculations.

Note: The settings on the HR organization's Percent Fit Organization tab determine the qualification types that are included in the calculations.

Selecting candidates

- ["Selection process overview" on page 173](#)
- ["Reviewing or updating job applications" on page 177](#)
- ["Assigning a rank to a job application" on page 183](#)
- ["Sending emails" on page 183](#)
- ["Adding notes to job applications" on page 185](#)
- ["Adding document attachments to job applications" on page 185](#)
- ["Mass recalculating percent fit for all job applications" on page 186](#)
- ["Moving job applications through the selection processes" on page 187](#)
- ["Screening candidates" on page 188](#)
- ["Qualifying candidates \(recruiter\)" on page 188](#)
- ["Dispositioning candidates" on page 189](#)

Selection process overview

A candidate is routed from one stage to the other by a recruiter. However, the majority of the tasks involved in processing an application are performed outside the system. For example, the recruiter will send information to background check companies and update the status of the candidate after they receive feedback from the company. If assessment tests are required, the recruiter will communicate with the candidate and assessment company outside the system. After the candidate passes or fails the tests, the recruiter will enter the results on the application and update the status accordingly.

The various stages involved in the selection process do not have to be performed in a rigid order and not all stages have to be used. For example your organization may want the recruiter to perform formal screening such as background and credit checks before asking the hiring manager to review only applications that have been screened. On the other hand, screening that is carried out by outside vendors entails costs. So the organization might want the hiring manager to first review a number of possible candidates, narrow down the list to the few the manager is interested in and then have the recruiter do the screening. Or the organization might want to perform screening only on candidates that will be offered a position. Some positions may not require any screening.

The selection process can include the following processes.

Process	Description
New	All new applications that are not automatically screened out start with a status of New. The recruiter administrator can configure the system to send an automatic email informing the candidate that the application has been received. Note: Applications attached to a candidate by a recruiter start with a status of Screen.
Screen Out Online	If an application contains questions that are flagged as screen out questions and the response to the question is wrong, the candidate is automatically screened out. The recruiter administrator can configure the system to send an automatic email to screened out candidates informing them that they will not be considered for the job. The recruiter then moves the candidate to the Disposition status. For example, a job may require US citizenship. Any candidates who respond No to a question asking them if they are US citizens would be automatically screened out.
Screen	The recruiter is responsible for processing the screening tasks. These can include sending candidate information to a background check vendor if required for the position. It can also include verifying the basic information such as employment history. If the results of the screening are disqualifying, the candidate is moved to the Disposition status. Successful candidates are moved to the next process

Process	Description
Hiring Manager Review	After performing a preliminary screening of potential candidates, the recruiter sends a number of applications for the hiring manager to review. When the recruiter selects this stage, the application becomes visible to the hiring manager. The recruiter may have Notes attached to the application. The system can also be configured to automatically generate a configurable email to be sent to the hiring manager. If not, the recruiter can still send an email manually to the hiring manager. While the application is in review, the hiring manager can disposition unsuitable applicants, select a few applications for interviews, schedule an interview or send an email to the recruiter to set up the interviews. The recruiter or hiring manager can enter the results of the interviews. The hiring manager or recruiter can also move applicants to the Qualify process where more in-depth checking will be performed.
Qualify	The recruiter is responsible for verifying a candidate's qualifications. This can include requesting a candidate to take tests and coordinating this activity with the assessment vendor. It can also include verifying the degrees and certifications on the candidate's profile. The recruiter enters the verification dates or successful test dates on the application. Note: Like Screen, the activities in this stage can be performed at various points in the application process. If the results of the qualifying activities are disqualifying, the recruiter or hiring manager can disposition the candidate. Successful candidates are moved to the next stage.

Process	Description
Offer	After a hiring manager selects a candidate, the recruiter moves the application to the offer stage. This stage includes the recruiter putting together a letter of offer and/or employment contract, having the documents approved by the key players, and submitting the offer to the candidate. If the candidate accepts, the recruiter changes the offer status to accepted and moves the candidate to the On Board stage. If the candidate refuses, the recruiter moves the candidate to Disposition. An offer can be withdrawn for various reasons. If this happens, the recruiter disposes the candidate. Depending on the reason for the withdrawal, the recruiter may close the requisition. When an offer is accepted, Filled Openings on the requisition is incremented by one. If the number of Filled Openings gets incremented to match the number of initial openings for the requisition, then the status of the Requisition is changed to Filled.
On Board	If the organization uses the on boarding process, after an offer is accepted, the recruiter moves the candidate to the On Board process. The recruiter assigns a transition task set to the candidate and initiates the process flow that moves the resource through the various tasks. Resources responsible for the tasks access them on Employee > To Do. The On Board process can last through the resource's first performance assessment. After the process is started, the recruiter moves the candidate to the Hire process.
Hire	The recruiter can create hiring paperwork, hire an external candidate, rehire a former employee, and transfer or add a work assignment to an existing employee. The request is routed for approval. After final approval, external candidates become employees in the system; transferred resources appear in their new position (or location); new work assignments appear on the resource's record.

Process	Description
Disposition	A candidate can be dispositioned at any stage until the candidate is hired. A candidate disposition requires a reason code. The recruiter administrator defines the disposition reason codes. Reasons could be Withdrawn by Candidate, Not Qualified, Screened out - Criminal, Screened Out - credit, Screened out - references, and so on.

At any stage in the process, recruiters can send emails, and attach notes, documents, or expenses to the application.

Reviewing or updating job applications

Candidate preference and profile information defaults on the job application. When internal or external candidates apply for a job, they can make changes to their preferences and talent profile. These changes are valid only for the job application and do not update the original candidate preferences and talent profile. When the job application is submitted, recruiters can make changes to the talent attributes, which again apply only to the job application.

Once a job application is submitted, all activities related to the job application are tracked on the job application record.

Note: For hiring manager processes related to job applications, see the *Talent Management Manager Guide*.

To review or update a job application

- 1 Access > Recruiter > Requisitions.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
The Selection Process column displays each application's status. Each application also appears on the tab for the selection process they are in.
- 3 Open the application you want to review.
- 4 On the job application form, access the tab for the information you want to review.

Tip: If you do not see the At A Glance or Personal Information tabs, click the Show Tabs icon (vertical double arrow) below the list of tabs, and select the tab that you want to see.

Tab	Description
At A Glance	Access this tab to view a summary of the candidate job application. To recalculate the percent fit, select Actions > Calculate Fit. To indicate that you have reviewed screening questions select the Reviewed check box under Screening and enter the date of the review, or let today's date default. To indicate that you have reviewed the profile questions, select the Reviewed check box under Profile and enter the date of the review. Note: If the candidate changes any responses for the profile questions after they were last checked as reviewed, the Reviewed check box is automatically deselected, prompting recruiters to review the profile question results again.

Tab	Description
Talent Profile	Access this tab to review and/or update a candidate's qualifications. • (Internal candidates only) The Assignments panel displays the employee's work assignments. Open a work assignment to see the details. Click View History to view the history of the work assignment. • The Employment History panel displays the candidate's employment history. Click All Actions Menu > Create to add a new employment record. Open an employment record to view the details. Click Edit Employment Details to modify or validate the information. • The Education History panel displays a candidate's educational attainments. Click All Actions Menu > Create to add a new education record. Open an education record to view the details. Click Edit Education Details to modify or validate the information. • The Competencies And Skills History panel displays a candidate's competencies and skills. Click All Actions Menu > Create to add a new competency or skill. Open a competency or skill to view the details and modify or validate the information. • The Credentials panel displays a candidate's credentials. Click All Actions Menu > Create to add a new credential. Open a credential record to view the details. Click Edit Credential to modify or validate the information. • The Achievement History panel displays a candidate's individual achievements. Click All Actions Menu > Create to add a new achievement. Open an achievement to view the details and modify the information.
Preferences	Access this tab to view and/or update the candidate's work preferences.

Tab	Description
Fit Analysis	Access this tab to view the candidate's fit analysis and/or recalculate the candidate's percent fit for the position that the candidate applied for. The system automatically calculates the percent fit when the job application is created. The percent fit displays on top right corner of the job application form. If you make changes to the talent attributes, you can recalculate the percent fit. a Click > Recalculate Fit. The system refreshes the page. The fit percent displays at the top of the page, followed by a spider graph comparing the position's skills and competencies' requirements with the candidate's qualification. Click Graph to view the same information as a bar or pie graph. b Scroll down to view the list of the position's essential or essential and non-essential qualifications included in the percent fit calculation. For each included qualification, the system displays a red alert with the comment "No Match" or a green alert with the comment "Match". The percent fit is derived by dividing the number of qualifications that match by the total number of qualifications included in the calculations. Note: The settings on the organization's Percent Fit Organization tab determine whether only essential or both essential and nonessential qualifications are included in the qualifications as well as which qualification types are included in the calculations.
Screening Question Results	Access this tab to view the candidate's responses to any questions that were asked in the online job application process. Indicate that you have reviewed the questions on the At A Glance tab.

Tab	Description
Profile Question Results	Access this tab to view the candidate's profile question responses. These questions are part of the external candidate's profile and are the same for all job applications. Note: Because profile questions are applicable to all candidates, it is assumed that internal candidates would have already satisfied these questions, and therefore the questions do not appear on their job applications. Indicate that you have reviewed the questions on the At A Glance tab of the job application or on the At A Glance tab of the candidate's profile. A checkmark indicated that the questions have been reviewed and the date of the review. If the candidate has changed any answers since the last review date, the check box is automatically deselected.
Interviews	Access this tab to track interviews and access the results of online interviews. For more information, see "Interviewing candidates" on page 190. Note: You can also track and add interviews by clicking the Interviews link at the top of the form.
Screenings	Access this tab to view, update, add, and process screening packages (background checks and assessments). For more information, see "The screening process" on page 197. Note: You can also add and process screenings by clicking the Screenings link at the top of the form.
Offer And Contract	Note: If your organization is not configured for employment contracts, this tab is "Offer". Access this tab to view offer and (if applicable) contract information. For more information, see "Defining and routing an offer with or without an employment contract" on page 213. Tip: You can view the offer letter and contract documents on the Attachments panel of the Correspondence tab.
On Board	Access this tab to trigger the onboarding process and track the progress of a candidate through the onboarding process. For more information, see "Transitioning new or transferred resources" on page 224.

Tab	Description
References	Access this tab to track reference information. For more information, see " Tracking references " on page 195..
Contact Information	Access this tab to view and update a candidate's contact information (email addresses, primary and secondary phone numbers, mailing and residential addresses) Note: The format is different for internal candidates who are already in the Lawson Talent Management HR database, and external candidates who at this point need only provide basic contact information.
Self Identification	Access this tab To view the candidate's self-identification information. You cannot update this information.
Other Applications	Access this tab to view the other jobs that the candidate has applied for.
Personal information	Access this tab to view or update the candidate's identification number, travel document, or dependent information. Note: Identification Numbers and Travel Documents are configurable features for the organization and the panels will display only if they are selected. Candidate Dependents is a country-configurable feature, and the Dependents panel will display on job applications only if the country where the job is located is configured to display it. • The Identification Number panel displays the candidate's identification number information. Click Create to add an identification number. Open an identification number to view or update the details. • The Travel Documents panel displays the candidate's travel document information. Click Create to add a travel document. Open a travel document to view or update the details. • The Dependents panel displays the candidate's dependent information. Click Create to add a new dependent. If Identification Numbers and/or Travel documents are configured for your organization, you can also add the dependent's identification number and/or travel document information.

Assigning a rank to a job application

Before you start Ranks must be defined by the recruiter administrator.

To help in the decision-making, you can assign a rank to a job application. This can be useful when multiple job applications exist for the same requisition.

To assign a rank to a job application

- 1 Access Recruiter > Requisitions > By Selection Process tab.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
- 3 In the Rank column, select the rank for each candidate you want to rank directly on the list. When you are done, click Save.

or

Open a job application, add or update a rank on the At A Glance tab, and click Save.

When a job application is assigned a rank, the rank appears on the upper-right corner of the job application header.

Sending emails

Recruiters and hiring managers can send emails during any process. Sending an email requires the use of an email template. Recruiter administrators must define email templates for all possible occasions. Depending on the organization setup, a recruiter or a hiring manager can be prompted to send an email during certain processes, or they can send emails as needed.

Important: Recruiters and hiring managers can always use their work email for correspondence, but the only way to have an audit log of the correspondence in Talent Acquisition is to send emails from Talent Acquisition.

To send an email

- 1 Access Recruiter > Requisitions > By Selection Process tab.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
- 3 Open the candidate's job application record.
- 4 Click the email link under the candidate's name.

or

Access the Correspondence tab, and select Create Email on the Correspondence panel.

or

Click the Correspondence link and select Create Email.

- 5 Select the appropriate mail template and click Next.

The email appears with pre-entered information.

- 6 Modify the text of the email as necessary.

- To modify the email addresses or the text of the message, simply type your changes. This will not affect the original template.
- To attach a file that is not already attached to the candidate, click the Browse button, navigate to the file and double-click the file.

Note: To attach a file that is already attached to the application and is not on your machine, send the email from the attachment itself. For more information, see "[Sending an email from an attachment](#)" on page 184.

- 7 Click Next

- 8 Review the email and click Send to send the email immediately, or Finish to create the email in Created status, so it can be reviewed and modified before being sent.

or

To modify the email, click Previous, make your changes, then resume the process.

- 9 To send a Created email, access the Correspondence tab, right-click the email on the Correspondence panel, and click Send. The status changes to Sent.

Sending an email from an attachment

If you specifically want to send someone an email that includes a document already attached to a job application, the easiest way is to send the email from the attachment itself.

- 1 Open the candidate's job application record.
- 2 Access the Correspondence tab.
- 3 On the Attachments panel, click the Send Email button next to the attachment you want to forward.
- 4 Select a template and click OK.

Note: The attachment is automatically attached to the email.

- 5 Make any modifications you want to the email and click Next.
- 6 Review the email and click Send to send the email immediately, or Finish to create the email in Created status, so it can be reviewed and modified before being sent.

or

To modify the email, click Previous, make your changes, then resume the process.

- 7 To send a Created email, right-click the email on the Correspondence panel, and click Send. The status changes to Sent.

Adding notes to job applications

Only recruiters can add notes to job applications. Hiring managers can only view the notes.

To add a note to a job application

- 1 Access Recruiter > Requisitions > By Selection Process tab.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
- 3 Open the candidate's job application record.
- 4 Click the Notes link.
or
Access the Notes panel on the Correspondence tab.
- 5 On the Notes panel, click All Actions Menu > Create
- 6 Type the note description and notes text.
- 7 Click Save.
- 8 To view or update a note:

Note: Hiring managers can view notes but they cannot update them.

- a Open the note you want to view.
- b If you want to make changes, enter your changes.
- c Click Save.

Adding document attachments to job applications

Any documents a candidate attached to his or her profile or to a job application appear in the list of attachments for the job application. Parsed resumes, offer letters, and contracts also appear as attachments on the candidate's job application. In addition recruiters can add miscellaneous attachments.

Note: Hiring managers cannot add or update attachments, they can only view them.

To add a document attachment to a job application

- 1 Access Recruiter > Requisitions > By Selection Process tab.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
- 3 Open the candidate's application record.
- 4 Click the Attachments link.
or
Access the Attachments panel on the Correspondence tab.
- 5 On the Attachments panel, click All Actions Menu > Create.
- 6 On the Manage Attachment form, Use the following guidelines to enter field values.
Type Of Attachment Select the type of attachment, for example "reference".

Note: The recruiter administrator defines the types of attachment.

Browse	Click the Browse button to navigate to the file you want to attach.
---------------	---

- 7 To create the attachment, double-click the file, and click Save.
- 8 Close the form to return to attachments list.
- 9 To view or update an attached document.
 - a Open the attachment you want to view or update.
 - b To view the document, click the arrow next to the Browse button, and select Open.
 - c To change an attached document, change the document on your machine, then reattach it, or select another document to attach.
- 10 To email an attachment, click the Send Email button next to the attachment. "[Sending emails](#)" on page 183

Mass recalculating percent fit for all job applications

Use this procedure to recalculate the percent fit for all job applicants associated with a requisition.

Note: Percent fits are automatically calculated when a candidate is attached to a job application, and recruiters can always recalculate percent fits for candidates whose profile has changed. This action is needed only if a position has changed in a way that would require recalculating percent fits (for example, if a new skill has been added).

To mass recalculate fit analyses

- 1 Access Recruiter > Requisitions.
- 2 Locate the requisition for which you want to mass recalculate fit percents.
- 3 Right-click the requisition and select Mass Calculate Percent Fit.

The fit percents for all existing applicants are updated.

Note: Candidates that apply for the position after this action will have their percent fit calculated according to the changed position parameters.

Moving job applications through the selection processes

Much of the application process involves work outside the Talent Acquisition application, such as phone calls, calls to references, and so on. Talent Acquisition provides a tracking tool for interviews, emails, and where a candidate is in the process.



Need More Details? Check out the following concepts:

- "[Selection process overview](#)" on page 173

To move a job application through the selection process

- 1 Access Recruiter > Requisitions > By Selection Process tab.
- 2 On the Requisition Dashboard panel, locate and select the requisition.
All the applications for the selected requisition appear on the All tab.
- 3 Select the job application you want to move.

Note: You can select multiple job applications (using **Ctrl-Click** or **Shift-Click**) and move them together.

- 4 On the Candidates panel, right-click the selected job application or click the All Actions Menu, and select the selection process that you want to move the job application to.
 - If you choose Disposition, select a disposition reason and click OK. The job application is moved to the Disposition process and the number of candidates in that process is incremented by one.
 - If you choose any other selection process, the selected job application is moved to that process and the number of candidates in that process is incremented by one.

Alternatively, if you want to first review a candidate or enter information before moving the job application, open the job application record. When you are ready, click Actions and select the selection process that you want to move the job application to.

Screening candidates

Screening and qualifying involve similar tasks. Screening tasks typically occur before a hiring manager review; qualifying tasks typically occur after a hiring manager's selection of serious candidates. Your organization will determine how much and what type of checking to do in each stage. It may also vary from job to job.

Typically screening would involve a preliminary check on candidates that meet or exceed the position requirements and a selection of the best candidates to send to the hiring manager for review. Verification of job history and qualifications, as well as testing if required would be more likely to occur in the qualifying stage. But there is no hard and fast rule.

To screen candidates

- 1 Move the candidate to the Screen process.
- 2 Open the candidate record and review the candidate information. "[Reviewing or updating job applications](#)" on page 177
- 3 If you verified the information provided by the candidate at this point, (such as work history and education), on the Application Details tab, click the item you verified, enter the verification date, and save.
- 4 If you want the candidate to be reviewed by the hiring manager, move the candidate to Hiring Manager Review.

Note: You may also want to send an email to the hiring manager and/or add notes to the applications to provide more information for the manager.

- 5 If the preliminary screen disqualifies the candidate, move the candidate to Disposition, and provide a reason for the disposition.

Qualifying candidates (recruiter)

Qualifying candidates means checking their credentials, making sure they pass any background checks, and any assessment tests, checking references, and so on. Much of the work is done outside Talent Acquisition, but the results are entered in Talent Acquisition.

To qualify a candidate

- 1 Move the candidate to the Qualify process.
- 2 Open the candidate record.
- 3 Correspond with the candidate as needed to obtain information.
- 4 Request and verify references. For more information, see "[Tracking references](#)" on page 195.

- 5 If applicable, review and update screening packages (background check packages and/or assessment packages). If no screening packages are assigned you can assign one or more packages to the candidate. If third-party vendors are used, you can send the packages to the vendors.

For more information, see "[The screening process](#)" on page 197.

- 6 If applicable, request screening results from screening vendors.
- 7 Enter the results of the various verifications you made personally on the job application record (employment, education, and so on).
 - If you verified the information provided by the candidate at this point, (such as work history and education), on the Talent Profile tab, open the item you verified, enter the verification date, and save.
 - If your organization performed screenings without the help of third-party screening vendors, enter the screening results manually on the Screenings tab. For more information, see "[Entering screening results manually](#)" on page 210.
- 8 If the candidate failed the required background checks or assessments, disposition the candidate.
- 9 If the candidate passed all qualifying tests, and the hiring manager is ready to make an offer, move the candidate to the Offer process.

Dispositioning candidates

You can disposition a candidate at any time during the candidate selection process. If the candidate withdraws voluntarily, the candidate is moved automatically to the Disposition process with the disposition reason the recruiter administrator defined for withdrawal. Hiring managers can disposition candidates who are in the Hiring Manager Review or Qualify process.

To disposition a candidate

- 1 Access the job application
- 2 Click Actions > Disposition Candidate.
- 3 Choose a disposition reason and click OK.

The candidate is moved to the Disposition process.

Setting up and processing interviews

- "[Interviewing candidates](#)" on page 190
- "[Setting up an interview](#)" on page 190

- ["Requesting and processing online interviews \(recruiter only\)" on page 191](#)
- ["Updating interview statuses" on page 192](#)

Interviewing candidates

Typically, a recruiter will send candidates for the hiring manager to review. The hiring manager will then ask the recruiter to set up an interview. The recruiter will then arrange the interview date and time outside of Talent Acquisition, then enter the interview in the system and send a confirmation email to the candidate. After the interview, either the hiring manager or the recruiter can enter the results and the candidate can be moved to the next process.

Online interviews occur entirely online and therefore follow a different process.

- ["Setting up an interview" on page 190](#)
- ["Requesting and processing online interviews \(recruiter only\)" on page 191](#)
- ["Updating interview statuses" on page 192](#)

Setting up an interview

Important: Do not use this procedure for online interviews.

Typically, the recruiter would be asked to set up an interview; however the hiring manager can do so as well.

To set up an interview

- 1 Outside Talent Acquisition, contact the candidate to arrange the interview type, date, and time.
- 2 Open the candidate's application.
- 3 Access the Interviews tab and click All Actions Menu > Create.
- 4 On the Create Interview form, use the following guidelines to enter field values.

Type	Select the interview type to be conducted, for example, by telephone, online, onsite, and so on.
-------------	--

The recruiter administrator defines the interview types.

Interview Date	Enter the date of the interview.
-----------------------	----------------------------------

Interview Time	Enter the time of the interview.
-----------------------	----------------------------------

Interviewer	Select the interviewer.
--------------------	-------------------------

Location	If applicable, select the interview location
Status	You can select an interview status such as Scheduled. Statuses are defined by the recruiter administrator.
Result	This field will be filled after the interview is completed.
Comments	Type optional comments on the interview.

- 5 From the Correspondence tab, send a confirmation email to the candidate and other interested parties.

For more information, see "[Sending emails](#)" on page 183.

Requesting and processing online interviews (recruiter only)

Online interviews are processed in different manner from other types of interviews. The process is also slightly different for internal and external candidates.

Before you start Before you initiate an online interview, verify that the requisition that you are interviewing for contains online interview questions, that is questions that are not defined for the online job application. Questions that are defined for the online job application will not appear on the online interview. For more information, see "[Adding a description and questions to job requisitions \(recruiter\)](#)" on page 132.

To request and process an online interview

- 1 Open the job application of the candidate that you want to send an online interview to.
- 2 Click the candidate's email address in the job application header.
- 3 On Send Email, select the template to be used and the Online Interview check box, and click Next.
The text of the email appears.
- 4 Review and modify the email as needed.

Note: For internal candidates, the subject of the email will be the text of the notification.

- 5 Click Send.

The following documents are created:

- A Sent correspondence record on the Correspondence tab.
- For external candidates, an email that contains a link to a page on the Career Space (login required), where the candidate can respond to the questions.

or

For internal candidates, an email (without a link), and a notification. The notification title is the subject you entered on the email, and the notification provides a link to the Talent Acquisition form where the candidate can respond to the questions.

- An online interview record on the job application's Interviews tab, with a link to the interview questions.

Results

When the candidate's completes the online interview and submits it, his or her responses are immediately available to the recruiter and hiring manager on the Interviews tab.

Updating interview statuses

Either the hiring manager or the recruiter can change the status of an interview and enter the results.

To update the status of the interview

- 1 Open the interview record on the Interviews tab.
- 2 Change the status and/or the results.
 - Statuses are defined by the recruiter administrator. There is probably a status for canceling the interview, changing the interview, and completing the interview.
You may also want to explain the status change in the Comments text box.
 - If the interview is complete, you may want to add the results of the interview. The recruiter administrator defines the interview results. For example Pass or Fail. Recommended for Hire or Not Recommended for Hire.
- 3 Click Save.
- 4 If you want to inform the candidate of an interview change or cancellation, or if you want to notify a manager or recruiter of the results of an interview, send an email from the Correspondence tab.

For more information, see "[Sending emails](#)" on page 183.

Sending mass emails to candidates or job applicants

Recruiters and recruiter administrators can send mass emails to candidates or job applicants that are members of an eligibility group.

Note: Mass emails use templates that the sender will not be able to modify, so email templates must be defined very precisely for the circumstances that require a mass email.

- ["Sending mass emails to candidates" on page 193](#)
- ["Sending mass emails to job applicants" on page 194](#)

Sending mass emails to candidates

Recruiters and recruiter administrators can send mass emails to groups of candidates. For example, you may want to inform candidates know about an upcoming job fair.

Before you start Mass emailing requires recruiter administrators to define email templates that precisely address the specific subject of the email.

To send a mass email to candidates

- 1 Access Recruiter > Candidate Pool.
- 2 On the All Actions Menu, click Send Mass Email.
- 3 In the Send Mass Email form, use the following guidelines to enter field values.

Email Template	Required. Select the email template that specifically addresses the email you want to send.
-----------------------	---



Caution: Be sure that you select the right template. You will have no chance to review or edit the email before sending it.

Eligibility Group	Required. Select the group of candidates that will receive the email. Mass email eligibility groups must be defined by a recruiter administrator under Administrator > Setup > Custom Groups.
--------------------------	---

Note: Custom groups defined to be used in mass emails to candidates (who may or may not be also job applicants) must have **Candidate** as their Business Class and **HCMCandidateMassEmail** as their Subject.

- 4 Click OK.
The email is immediately sent to all applicants.
- 5 To check that the email has been sent, open the Correspondence record of any candidate that belongs to the eligibility group.

Sending mass emails to job applicants

Recruiters and recruiter administrators can send a mass email to a groups applicants for a specific requisition. For example, you may want to reassure job applicants in Qualify status that their job applications are still being processed.

Before you start Mass emailing requires recruiter administrators to define email templates that precisely address the specific subject of the email.

To send a mass email to candidates

- 1 Access Recruiter > Requisitions.
- 2 Right-click the requisition for which you want to send a mass email and select Send Mass Email.
- 3 In the Send Mass Email form, use the following guidelines to enter field values.

Email Template	Required. Select the email template that specifically addresses the email you want to send.
-----------------------	---



Caution: Be sure that you select the right template. You will have no chance to review or edit the email before sending it.

Eligibility Group	Required. Select the group of job applicants that will receive the email. Mass email eligibility groups must be defined by a recruiter administrator under Administrator > Setup > Custom Groups.
--------------------------	---

Note: Custom groups defined to be used in mass emails to job applicants must have **JobApplication** as their Business Class and **HCMJobApplicationMassEmail** as their Subject.

- 4 Click OK.
The email is immediately sent to all job applicants that meet the criteria in the eligibility group.
- 5 To check that the email has been sent, open the Correspondence record of any job applicant that belongs to the eligibility group.

- ["Checking references" on page 195](#)
- ["Assigning and processing screening packages \(assessment and background checks\)" on page 197](#)

Checking references

- ["Tracking references" on page 195](#)

Tracking references

Candidates can enter references' names and contact information on their profile as well as on their job applications. Recruiters can view the references, enter references on behalf of a candidate, and enter references status after they have checked them. Recruiters can request references by email to external candidates that will provide the candidates with a link back to a page where they can enter their reference information. Internal candidates will receive a notification from which they can enter references.

Talent Acquisition tracks only references' names and contact information, and the result of any verification (which happens outside Talent Acquisition).

Note: Default security does not allow managers to view references.

To request references

- 1 Open a candidate's job application.
- 2 Click the candidate's email address in the job application header.
- 3 On Send Email, select the template to be used and the Request For References check box, and click Next.

The text of the email appears.

4 Review and modify the email as needed.

Note: For internal candidates, the subject of the email will be the text of the notification.

5 Click Send.

The following documents are created:

- A Sent correspondence record on the Correspondence tab.
- For external candidates, an email that contains a link to a page on the Career Space (login required), where the candidate can enter references.

or

For internal candidates, an email (without a link), and a notification. The notification title is the subject you entered on the email, and the notification provides a link to the Talent Acquisition form where the candidate can enter references.

When the candidate saves a reference, it appears immediately on the References tab of the candidate's job application.

To view or add reference information

- 1** Open a candidate's job application.
- 2** Access the References tab.
- 3** To view the detail of an existing reference, open the reference.
- 4** To add a reference, Select All Actions Menu > Create, enter the reference information, and click Save.

To track a reference's verification process

Note: It is assumed that the verification process itself occurs outside of Talent Acquisition. If you want to document the process, you can enter any correspondence on the Correspondence tab and/or attach relevant documents.

- 1** Open the reference record.
- 2** Select a reference status in the Reference Status field and click Save.

Reference statuses are defined by the recruiter administrator.

Assigning and processing screening packages (assessment and background checks)

- ["The screening process" on page 197](#)
- ["Auto assigning resources or candidates to screening packages" on page 200](#)
- ["Mass Assigning resources or candidates to screening packages" on page 201](#)
- ["Assigning screening packages to individual resources or candidates" on page 203](#)
- ["Mass sending screening packages to resources or candidates" on page 204](#)
- ["Sending screening packages to vendors for individual resources or candidates" on page 207](#)
- ["Mass requesting screening results" on page 208](#)
- ["Requesting individual screening results for resources or candidates" on page 209](#)
- ["Entering screening results manually" on page 210](#)

The screening process

Before you start If you are using third-party vendors, you should configure the process templates delivered by Lawson Talent Management and test your integration with your third-party vendors.

Step	Step description	Who?	Where?	Notes
1.	Set up screening codes	HR administrator or recruiter administrator	Administrator > Setup > Screening	
2.	Set up screening eligibility groups	HR administrator or recruiter administrator	Administrator > Setup > Custom Groups	For resources, business class WorkAssignment, subject HCMGroupScreening. For candidates, business class JobApplication, subject HCMGroupScreening.
3.	If packages are not auto assigned, assign packages manually	(Mass assign - resources) HR administrator	Administrator > Resources > Screening Packages > Assign Packages	The assigned packages have a status of Proposed

Step	Step description	Who?	Where?	Notes
4.	If third-party vendors are involved, send screening packages to third-party vendors	(Mass assign - candidates) Recruiter administrator	Administrator > Talent Acquisition > Screening Packages > Assign Packages	The third-party vendor will return an acknowledgment that all necessary data has been received and the packages are moved to the In Progress status
		(Single assign - resource) HR Generalist	Administrator > Resource > Resources > Assign Screening Packages action on resource	
		(Single assign - candidate) Recruiter	Recruiter > Requisitions > By Selection Process tab > Assign Screening Packages action on job application	
		(Mass send - resources) HR administrator	Administrator > Resources > Screening Packages > Send Packages	
		(Mass send - candidates) Recruiter administrator	Administrator > Talent Acquisition > Screening Packages > Send Packages	
		(Single send - resource) HR administrator	Administrator > Resources > Screening Packages > Screening Packages > Send Screening Package action	
		(Single send - candidate) Recruiter administrator	Administrator > Talent Acquisition > Screening Packages > Screening Packages > Send Screening Package action	

Step	Step description	Who?	Where?	Notes
5.	If third-party vendors are involved, request screening results from third-party vendors	(Single send - resource) HR Generalist	Administrator > Resource > Resources > Open resource > Open Screenings tab > Send Screening Package action	Note: If no third-party vendors are involved, simply enter results on the assessment or background check form. When results are returned by third-party vendor, the packages are moved to Completed status.
		(Single send - candidate) Recruiter	Recruiter > Requisitions > By Selection Process tab > Open job application > Open Screenings tab > Send Screening Package action	
		(Mass request results resources) HR administrator	Administrator > Resources > Screening Packages > Request Results	
		(Mass request - candidates) Recruiter administrator	Administrator > Talent Acquisition > Screening Packages > Request Results	
		(Single request - resource) HR administrator	Administrator > Resources > Screening Packages > Screening Packages > Request Results action (In Progress tab)	
		(Single request - candidate) Recruiter administrator	Administrator > Talent Acquisition > Screening Packages > Screening Packages > Request Results action (In Progress tab)	

Sep	Step description	Who?	Where?	Notes
		(Single request - resource) HR Generalist	Administrator > Resource > Resources > Open resource > Open Screenings tab > Request Results action	
		(Single request - candidate) Recruiter	Recruiter > Requisitions > By Selection Process tab > Open job application > Open Screenings tab > Request Results action	

Auto assigning resources or candidates to screening packages

Before you start Screening packages must be defined with the Auto Assign Package option to be automatically assigned.

To auto assign screening packages to resources (HR administrator, HR generalist)

- 1 Access Administrator > Setup > Positions.
- 2 Open the position for which you want to auto assign screening packages.
- 3 In the Screening Category field, select the screening category you want to associate with the position.
- 4 Save the position.

To auto assign screening packages to candidates (recruiter administrator, recruiter)

- 1 Access Recruiter > Requisitions.
- 2 On the Requisitions tab, open the requisition for which you want to auto assign screening packages.
If a screening category is associated with the requisition's position, it defaults on the requisition.
- 3 Accept the defaulted screening category (if applicable) or select another screening category.
- 4 Save the requisition

Results

- When a resource is assigned to a position that is associated with a screening category, all the screening packages defined with the Auto Assign Package option that are associated with the screening category are assigned to the resource.
- When a candidate submits a job application for a requisition that is associated with a screening category, all the screening packages defined with the Auto Assign Package option that are associated with the screening category are assigned to the resource.

Note: If an auto assigned screening package is also defined for a selection process, the screening package is auto assigned when the candidate is moved to the selection process.

Mass Assigning resources or candidates to screening packages

Before you start You must define screening eligibility groups in Administrator > Setup > Custom Groups.

To mass assign resources to screening packages

- 1 Access Resources > Screening Packages > Assign Packages.
- 2 Use the following guidelines to enter field values.

Eligibility Group	Select the eligibility group to which you want to assign the screening packages.
--------------------------	--

Note: The screening eligibility group must be defined with a business class of **WorkAssignment** and a business subject of **HCMGroupScreening**.

Screening Category	Select a screening category to assign all the screening packages associated with the screening category to the eligible resources. or Select a screening package in the Screening Package field to assign the screening package to the resources that belong to the selected eligibility group.
---------------------------	---

Screening Package	Select a screening package in the Screening Package fields to assign the screening package to the eligible resources. or Select a screening category in the Screening Category field to assign all the screening packages associated with the screening category to the eligible resources.
--------------------------	---

Note: If a screening category is selected, only screening packages associated with the screening category can be assigned to the selected resources.

- 3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

To mass assign candidates to screening packages

- 1 Access Administrator > Talent Acquisition > Screening Packages > Assign Packages.

- 2 Use the following guidelines to enter field values.

Eligibility Group	Select the eligibility group to which you want to assign the screening packages.
--------------------------	--

Note: The screening eligibility group must be defined with a business class of **JobApplication** and a business subject of **HCMGroupScreening**.

Screening Category	Select a screening category to assign all the screening packages associated with the screening category to the eligible candidates. or Select a screening package in the screening package field to assign the screening package to the candidates that belong to the selected eligibility group.
---------------------------	---

Screening Package	Select a screening package to assign the screening package to the eligible candidates or Select a screening category in the Screening Category field to assign all the screening packages associated with the screening category to the eligible resources.
--------------------------	---

Note: If a screening category is selected, only screening packages associated with the screening category can be assigned to the selected candidates.

- 3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

Assigning screening packages to individual resources or candidates

HR generalists, HR administrators, recruiters, and recruiter administrators can assign screening packages to individual resources or candidates.

To assign screening packages to individual resources

- 1 Access Resources > Resources.
- 2 Select or open the resource.
- 3 Select the Assign Screening Packages action.
- 4 Use the following guidelines to enter field values.

Screening Category	Select a screening category to assign all the screening packages associated with the screening category to the resource. or Select a screening package in the screening package field to assign the screening package to the resource.
Screening Package	Select a screening package to assign the screening package to the resources that belong to the selected eligibility group. or Select a screening category in the Screening Category field to assign all the screening packages associated with the screening category to the resources that belong to the selected eligibility group.

Note: If a screening category is selected, only screening packages associated with the screening category can be assigned to the selected resource.

- 5 Click OK.

To assign individual candidates to screening packages

- 1 Access Recruiter > Requisitions.
- 2 On the By Section Process tab, select the requisition, and select or open the candidate's job application.
- 3 Select the Assign Screening Packages action.

4 Use the following guidelines to enter field values

Screening Category	Select a screening category to assign all the screening packages associated with the screening category to the candidate. or Select a screening package in the screening package field to assign the screening package to the candidate.
Screening Package	Select a screening package to assign the screening package to the resources that belong to the selected eligibility group. or Select a screening category in the Screening Category field to assign all the screening packages associated with the screening category to the resources that belong to the selected eligibility group.

Note: If a screening category is selected, only screening packages associated with the screening category can be assigned to the selected candidate.

5 Click OK.

Mass sending screening packages to resources or candidates

These steps apply only to screening packages that use third-party vendors. Screening packages that do not use vendors can be updated manually.

Before you start You must define screening eligibility groups in Administrator > Setup > Custom Groups. The Send action applies only to screening packages that have been assigned to resources or candidates (that are in Proposed status). You must also have established and tested your connections to and from the third-party vendors.

To mass send resources to screening packages

- 1 Access Resources > Screening Packages > Send Packages.
- 2 Use the following guidelines to enter field values

Eligibility Group Select the eligibility group to which you want to send the screening packages. If you do not define a screening category or screening package, all the screening packages assigned to the eligible resources will be sent to the screening vendors.

Note: The screening eligibility group must be defined with a business class of **WorkAssignment** and a business subject of **HCMGroupScreening**.

Screening Category Select a screening category to send all the screening packages that are associated with the screening category to the screening vendors for all the resources that have been assigned the packages.

Note: If you also select an eligibility group, only screening packages for eligible resources will be sent; if you do not send an eligibility group, eligible screening packages for all resources will be sent.

or

Select a screening package in the Screening Package field to send the screening package to the screening vendor for all resources that have been assigned to it.

Screening Package Select a screening package in the Screening Package field to send the screening package to the screening vendor for all resources that have been assigned to it.

Note: If you also select an eligibility group, only screening packages for eligible resources will be sent; if you do not send an eligibility group, the screening package will be sent for all resources that have been assigned to it.

or

Select a screening category in the Screening Category field to send all the screening packages that are associated with the screening category to the screening vendors for all the resources that have been assigned the packages.

3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

To mass send candidates to screening packages

- 1** Access Administrator > Talent Acquisition > Screening Packages > Send Packages.
- 2** Use the following guidelines to enter field values.

Eligibility Group

Select the eligibility group to which you want to send the screening packages. If you do not define a screening category or screening package, all the screening packages assigned to the eligible candidates will be sent to the screening vendors.

Note: The screening eligibility group must be defined with a business class of **JobApplication** and a business subject of **HCMGroupScreening**.

Screening Category

Select a screening category to send all the screening packages that are associated with the screening category to the screening vendors for all the candidates that have been assigned the packages.

Note: If you also select an eligibility group, only screening packages for eligible candidates will be sent; if you do not send an eligibility group, eligible screening packages for all candidates will be sent.

or

Select a screening package in the Screening Package field to send the screening package to the screening vendor for all candidates that have been assigned to it.

Screening Package

Select a screening package in the Screening Package field to send the screening package to the screening vendor for all candidates that have been assigned to it.

Note: If you also select an eligibility group, only screening packages for eligible candidates will be sent; if you do not send an eligibility group, the screening package will be sent for all candidates that have been assigned to it.

or

Select a screening category in the Screening Category field to send all the screening packages that are associated with the screening category to the screening vendors for all the candidates that have been assigned the packages.

3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

Results

When the vendors acknowledge having received the screening package, the packages are moved to In Progress status.

Sending screening packages to vendors for individual resources or candidates

HR generalists, HR administrators, recruiters, and recruiter administrators can send screening packages to individual resources or candidates.

Note: These steps apply only to screening packages that use third-party vendors. Screening packages that do not use vendors can be updated manually.

To send screening packages to individual resources (HR generalist)

- 1 Access Resources > Resources.
- 2 Open the resource's record.
- 3 Access the Screenings tab or Screenings link.
- 4 Select the screening package you want to send.
- 5 Select the Send Screening Package action.

To send screening packages to individual resources (HR administrator)

- 1 Access Resources > Screening Packages > Screening Packages.
- 2 On the Proposed tab, select the package you want to send.
- 3 Select the Send Screening Package action.

To send screening packages to individual resources (recruiter)

- 1 Access Recruiter > Requisitions.
- 2 On the By Section Process tab, select the requisition, and open the candidate's job application.
- 3 Access the Screenings tab or Screenings link.
- 4 Select the screening package you want to send.
- 5 Select the Send Screening Package action.

To send screening packages to individual resources (HR administrator)

- 1 Access Administrator > Talent Acquisition > Screening Packages > Screening Packages.
- 2 On the Proposed tab, select the package you want to send.
- 3 Select the Send Screening Package action.

Results

When the vendor acknowledges having received the screening package, the package is moved to In Progress status.

Mass requesting screening results

These steps apply only to screening packages that use third-party vendors. Screening packages that do not use vendors can be updated manually.

Before you start You must define screening eligibility groups in Administrator > Setup > Custom Groups. The Request Results action applies only to screening packages that have been sent to vendors.

To mass request screening results for resources

- 1 Access Resources > Screening Packages > Request Results.
- 2 Use the following guidelines to enter field values.

Eligibility Group	Select the eligibility group to which you want to request results. If you do not select an eligibility group, the request will include all screening packages in In Progress status
--------------------------	---

Note: The screening eligibility group must be defined with a business class of **WorkAssignment** and a business subject of **HCMGroupScreening**.

- 3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

To mass request screening results for candidates

- 1 Access Administrator > Talent Acquisition > Screening Packages > Request Results.
- 2 Use the following guidelines to enter field values.

Eligibility Group	Select the eligibility group to which you want to request results. If you do not select an eligibility group, the request will include all screening packages in In Progress status
--------------------------	---

Note: The screening eligibility group must be defined with a business class of **JobApplication** and a business subject of **HCMGroupScreening**.

3 Click OK to submit the action immediately.

or

Click Schedule to schedule the action to be run at a later time.

Results

The returned results are on the Completed tab. Open the screening package to view the results.

Requesting individual screening results for resources or candidates

HR generalists, HR administrators, recruiters, and recruiter administrators can request screening package results from vendors.

Note: These steps apply only to screening packages that use third-party vendors. Screening packages that do not use vendors can be updated manually.

To request screening package results from vendors (HR generalist)

- 1** Access Resources > Resources.
- 2** Open the resource's record.
- 3** Access the Screenings tab or Screenings link.
- 4** Select the screening package you want to send.
- 5** Select the Request Results action.

The results display on the resource's Screenings tab.

To request screening package results from vendors (HR administrator)

- 1** Access Resources > Screening Packages > Screening Packages.
- 2** On the In Progress tab, select the package you want to send.
- 3** Select the Request Results action.

The results display on the Completed tab.

To request screening package results from vendors (recruiter)

- 1** Access Recruiter > Requisitions.
- 2** On the By Section Process tab, select the requisition, and open the candidate's job application.
- 3** Access the Screenings tab or Screenings link.

4 Select the screening package you want to send.

5 Select the Request Results action.

The results display on the candidate's Screenings tab.

To request screening package results from vendors (HR administrator)

1 Access Administrator > Talent Acquisition > Screening Packages > Screening Packages.

2 On the In Progress tab, select the package you want to send.

3 Select the Request Results action.

The results display on the Completed tab.

Entering screening results manually

If a screening package does not use a third-party vendor, you can enter the results of your organization's internal screening manually.

To enter screening results

1 Access the Screenings tab on the resource's profile or on the candidate's job application.

2 Open the assessment package or backgroundcheck package for which you want to enter results.

3 For assessment packages, if assessments exist, open each assessment on the Screenings tab, and enter the results on the assessments. Else you can enter the results on the assessment package itself.

- For background check packages, open each background check on the Screenings tab, enter the results, and save.
- If assessments exist, open the assessment, enter the results, and save.

Hiring and transitioning new hires and transfers

7

This chapter describes the processes associated with hiring or transferring resources and transitioning them into their new position.

- ["Processing offers to candidates" on page 211](#)
- ["Transitioning new hires or transfers" on page 223](#)
- ["Hiring candidates" on page 228](#)

Processing offers to candidates

- ["Overview of the offer process" on page 211](#)
- ["Defining and routing an offer with or without an employment contract" on page 213](#)
- ["Creating offer and contract documents" on page 220](#)
- ["Extending an offer to an internal or external candidate" on page 221](#)
- ["Emailing an offer or contract document" on page 222](#)
- ["Rescinding, accepting, or declining an offer" on page 223](#)

Overview of the offer process

Note: You can rescind a job offer at any time after you have sent it to a candidate.

- 1 The recruiter or recruiter administrator defines the offer and submits it for approval. The offer status is Pending.
- 2 Each approver reviews and possibly updates (if allowed) the offer and/or employment contract. When the final approver approved, the offer status is Approved.

- 3 The recruiter or recruiter administrator generates the offer letter and (if applicable) contract documents.

The offer status (on the job application's Offer and Contract tab) changes to Created.

Note: The documents appear as attachments on the job application record. They are in .rtf format and can be edited, printed, and emailed.

- 4 When the documents are finalized, the recruiter or recruiter administrator requests an offer review.

Note: This is the process you can use if you want to allow candidates to review and accept an offer online. If you need to use a more formal process (for example a process that requires a candidate to sign an offer document or employment contract, use the alternate process instead. "[Alternate offer process](#)" on page 212

- For internal candidates, this action opens a notification.
- For external candidate, this action opens an email.

When the email or notification is sent, the offer status changes to Extended.

- 5 The candidate receives a notification (internal candidate) or email (external candidate) with a link to an offer review form that lets them access the offer document and accept or decline the offer.

Note: Only the offer document is included. Contract documents are not part of this process.

Candidates can access the offer review form repeatedly from the notification or email while they are considering the offer.

- 6 The candidate accepts or declines the offer directly on the offer review form.
- 7 The job application status automatically changes to Accepted or Declined.

Alternate offer process

Your organization may want not use the Request Offer Review process to extend an offer. For example, your organization may want to send an offer by regular mail or email that the candidate will have to sign. Or, if your organization uses employment contracts, the employment contract may be the job offer.

If such is the case, you can use a more manual process:

- 1 Define the offer and create the offer documents, as described above.
- 2 Send a copy of the job offer and/or employment contract to the candidate by email or regular mail.
- 3 Mark the offer as Extended.
- 4 When the candidate provides a response (by whatever means you requested), mark the offer as Accepted or Declined.

Related topics

- ["Defining and routing an offer with or without an employment contract"](#) on page 213
- ["Creating offer and contract documents"](#) on page 220
- ["Extending an offer to an internal or external candidate"](#) on page 221
- ["Emailing an offer or contract document"](#) on page 222
- ["Rescinding, accepting, or declining an offer"](#) on page 223

Defining and routing an offer with or without an employment contract

Important: Employment contract fields appear only if your organization is configured to use employment contracts.

After you define the offer, it is routed for approval. As the offer is routed for approval, approvers who have update privileges can make changes both to the offer and to the employment contract data.

If the offer includes an offer and/or an employment template, after the offer is fully approved, you can generate offer and/or contract documents that reflect the offer as approved. When the candidate is hired, rehired, or transferred, the contract document and contract information remain associated with the new resource and work assignment record.

To define an offer and/or employment contract

- 1 Open the job application.
- 2 Move the job application to the Offer process.
- 3 Define the offer and/or employment contract.
 - a Click Actions > Define Offer.
 - b On Request To Define An Offer, use the following guidelines to enter field values.

Note: Most of the fields are optional. As the request is routed, the recipients can fill the fields that they are responsible for. In addition many of the fields default in from the position or requisition. For more information, see ["Defaulting values for requisitions and job applications"](#) on page 117

Header:

Effective Date	Required. Enter the date as of which the offer exists in Talent Acquisition.
Reason	Optional. You can select a reason for the offer. Action reasons are defined by the HR administrator.

Candidate Name	The name is automatically filled from the job application.
Offer Status	The status is Pending until the offer is approved. When approved, the offer is Defined. When the documents are created, the status is Extended. The offer can also be declined by the candidate or rescinded by the organization.
Offer Letter Template	If you want to generate an offer letter, select the template for the document.

Important: To appear on the template list, the document template must have been uploaded to the application by the recruiter administrator (Administrator > Talent Acquisition Management > Template Setup > Document Templates).

Title	The name position title is automatically filled from the requisition.
Recruiter	The recruiter name is automatically filled from the requisition.
Reports to	Select the resource's direct manager.
Organization Unit	select the organization unit that the resource will be assigned to.
Location	Select the location that the resource will be assigned to.
Work Type	Select the work type (for example, Full time, Part Time or Temporary).
Professional Category	(Country Specific) If the resource will be associated with a professional category, select the professional category.
Assignment Type	If the resource will be associated with a assignment type, select the assignment type.
Legal Establishment	(Country-specific) If you select a legal entity, you can also select a legal establishment.
Resource Being Replaced	If the contract is to replace an existing resource (for example, a temporary replacement of a resource on maternity leave), select the resource being replaced.

Dates:

Offer Date	Enter the date when the offer will be officially made.
Offer Deadline Date	Enter the date by which the candidate must accept the offer.
Employment Start Date	Enter the date when employment will officially start.
Date Of First Pay	Enter the date when the resource will receive the first payment.

Contract:

Note: These fields appear only if your organization is configured to use employment contracts.

If the position is subject to an employment contract, you can create an employment contract at the same time as you define an offer by entering information in the contract fields. If you do not define contract information on the offer, it can be added on the Hire, Rehire, or Transfer action, or on the resource record after it is created in Global HR.

Resource Being Replaced	If the contract is to replace an existing resource (for example, a temporary replacement of a resource on maternity leave), select the resource being replaced.
Reason For Contract	Select the reason for which the employment contract is being issued. For example, new hire or transfer. Note: Reasons for contracts are user-defined in the Administrator Space under Employment Contract Components > Reasons.
Contract Type	Select the contract type.
Contract Template	Select the contract template. When the offer is approved, the contract template brings over all the sections attached to the template and stores the template contract document. Note: A document template must be attached to the contract template in order to generate a contract document.
Contract Number	If available, type the contract number.
Begin Date	Select the contract begin date.
Duration	Enter the contract duration with the unit of duration.
End Date	If you entered a begin date and duration, the system calculates the end date. However, you can override this value. Note: This field is required for fixed-term contracts.
Contracted Time	Enter the contracted work time, that is the number of hours/weeks/months per day/month/year that the resource is committed to work and the employer is committed to provide.
Contractual FTE	Type the contractual full time equivalent. For example, if full time in your organization is 2080 hours and the contracted time is 1040 hours, the contractual full time equivalent is 0.5.
Renewal Notification Date	If the contract is subject to renewal, enter the date that you want the renewal notification to be sent. Note: No notifications are currently sent by the system.
Renewal Date	If the contract is subject to renewal, enter the renewal date.

Assignment Type	If assignment types are used by your organization, select the assignment type.
------------------------	--

Salary:

Salary	Type the salary amount being offered, the currency in which the salary of the currency code that you select, and for the salary type that you select.
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For example, if the salary is annual and in dollars, enter the annual amount, USD as the currency, and Annual as the salary type.

Note: Do not enter this information if the compensation is based on a step and grade schedule.

Currency Code	Select the currency code in which the salary amount is expressed.
----------------------	---

Frequency	Select the payment frequency (for example, Biweekly, Semimonthly, or Monthly)
------------------	---

Salary Type	Select the salary type.
--------------------	-------------------------

Number of Months	If the salary type is Monthly Salary, type the number of months. The salary amount will be multiplied by the number of months to produce the annualized salary. The number of months is 12 by default.
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Bonus, Currency Code, Frequency	If the offer includes a bonus, type the bonus amount, expressed in the currency of the currency code that you select, and for the frequency that you select.
--	--

Monthly Incentive Bonus Annualized, Currency Code	If the offer includes an annualized bonus paid in monthly installments, type the annual bonus amount, expressed in the currency of the currency code that you select.
--	---

Step And Grade Schedule, Grade, Step	If the compensation is based on a step and grade schedule, select the step and grade schedule, grade, and step assigned to the candidate.
---	---

Note: Do not enter a salary in the Salary field if the compensation is based on a step and grade schedule.

Notional Salary	(Country-specific) If applicable, type the employee's notional salary. This field is used to track the salary that international assignees would receive in their own country. This salary may be used to determine benefits, merit increases, and so on.
------------------------	---

If you enter a notional salary, select the currency in which the salary is expressed.

Collective Agreement:

Note: These fields appear only if your organization is configured to use collective agreements.

Collective Agreement If the position is regulated by a collective agreement, enter the collective agreement ID, the population category, and the position or level. For more information on collective agreements, see the *Lawson Compensation User Guide*.

Allowances:

You can include up to ten allowances in the offer. For each allowance, enter the following information, and click Submit.

Type	Select the allowance type. Allowance types are user-defined. For example, child care allowance, housing allowance, parking allowance. If applicable, the allowance's begin and end dates The pay code to be used for the allowance How often the allowance should be paid Whether to include the allowance in the total pay rate Whether this allowance is for information only Whether this allowance should appear in the employment contract
Amount, Currency	Type the allowance's flat amount and currency in this field or Type the percent of pay rate in the Percent field.
Percent	Type the percent of pay rate in this field. or Type the allowance's flat amount and currency in the Amount and Currency fields
Begin Date, End Date	If the allowance is valid only for a date range, enter the begin and end dates.
Pay Code	If you want to associate the allowance with a pay code that will be interfaced to a payroll system, type the pay code.
Pay Frequency	Select how often the allowance is paid. For example, a resource could be paid bimonthly but receive the allowance only once a month.
Include In Total Pay Rate	If you select this check box, the allowance will be added to the base pay rate as part of the total pay rate.
Information Only	Select this check box if you want this allowance to be used only for information purposes.

Display In Contract Select this check box if you want this allowance to display on the resource's contract.

In addition, in order to display on a contract document, the variable "Allowances" must be included in a compensation type contract section of the contract template.

Other Pay:

You can select up to 5 other pay values in the offer. For each other pay, enter the following information and click Submit.

Type Select the Other Pay type. Types are user-defined. For example, you could have a learning pay rate which is different from the base pay rate.

Category Select the Other Pay category.

If you select Alternate Rate, the rate will be paid in place of the normal pay rate.

If you select Add On Rate, the rate will be paid on top of the normal pay rate.

If you select Add On Percent Of Pay Rate, the rate will be calculated as a percent of the normal pay rate and added to the pay rate.

If you select Billing Rate, the rate will be billed to customers.

Pay Rate, Currency If you selected a category of Alternate Rate, Add On Rate, or Billing Rate, type the rate and the currency.

Percent If you selected a category of Add On Percent Of Pay Rate, type the percent value.

Begin Date, End Date If the other pay is valid only for a date range, enter the begin and end dates.

Display In Contract Select this check box if you want this other pay to display on the resource's contract.

In addition, in order to display on a contract document, the variable "OtherPay" must be included in a compensation type contract section of the contract template.

Trial And Notice Periods:

Trial Period Select a trial period to calculate the trial period end automatically.

Note: If you select a trial period, you cannot select a trial period end date override.

Trial Period End Date Override	Select a trial period end override to specify a trial period end date that is not calculated by the system.
---------------------------------------	---

Note: If you select a trial period, you cannot select a trial period end date override.

Notice Period During Trial Period	(Country-specific) If you want to give the resource advanced notice in case of termination during the trial period, select the notice period. If you
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Notice Period After Trial Period	(Country-specific) Select the notice period that the resource is entitled to after completing the trial period
---	--

Attachments:

You can attach up to three documents. They will appear as attachments to the job application.

Attachment	To attach a document to the offer, select the attachment type, click the Browse icon, navigate to the file, and double-click the file.
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Comments	Enter any additional comments in support of the offer.
-----------------	--

4 Click Submit

The offer is routed for approval.

After the offer is approved, you can view the content on the offer on the job application's Offer And Contract tab, (or Offer tab if your organization is not configured to use employment contracts).

Approver task: review and approve offer

Approvers process offers in their inbasket.

To process the offer for approval (any approver)

- 1** If you are an approver, access Your Inbasket (start > My Inbasket).
- 2** Open the offer.
- 3** To edit the offer (assuming you are authorized to do so), make changes and click OK.

Note: If a contract template is attached to the offer, you can preview the contract section by clicking the Preview Contract Sections link. You can also access and edit the contract sections by clicking the Contract Sections link.

4 To route the offer, you have three options.

- If you are satisfied with the offer, click the Approve button. The offer is routed to the next approver.
- If you want the initiator of the offer to make changes, click the Return button. The offer is returned to the initiator who can make changes and resubmit it.

- If you want to reject the offer altogether, click the Reject button. The offer will be stopped. To issue another offer, the recruiter would have to start over with the offer process.

When the final approver approves the offer, the recruiter can generate an offer letter and/or a contract document.

Creating offer and contract documents

The offer must be defined with an offer template and/or a contract template and be fully approved before you can generate the offer a letter and/or contract document.



Need More Details? Check out the following concepts:

- ["How are document templates used in Talent Acquisition?"](#) on page 103

To generate an offer letter and/or a contract document (recruiter)

- 1 Open the job application and click Actions > Create Offer Letter And Contract (or Create Offer Letter if your organization does not use employment contracts).
- 2 Click OK.

On the Offer And Contact tab, the job offer status changes to Created.

- If you attached an offer template to the offer, an offer letter is generated and added to the job application as an attachment .
- If you attached an employment contract template to the offer, an employment contract document is generated and added to the job application as an attachment.

- 3 To view either document, click the Attachments link, open the attachment, click the arrow next to the Browse button, and select Open.

You should verify that all the variables in the template have resolved properly. You can edit the document and save it. For example, if the contract document contains a section that is not applicable to the candidate, you can remove this section, save the document to your machine, and upload the updated document to the same attachment.

Note: If you are going to use the Request Offer Review process to submit an offer and you make changes to the offer document, you must save the file to your machine under the same file name (**offer letter.rtf**) and upload it back to the same attachment as the original offer document, so that the correct version of the document can be attached to the offer.

If your process involves mailing printed documents for the candidate to sign, you can print the documents. You can also email the document by clicking the Email button next to the attachment.

Follow-up tasks

- To extend an offer that the candidate can accept online, see "[Extending an offer to an internal or external candidate](#)" on page 221.
- To email an offer letter or employment contract with instructions on how to accept or decline the offer (manual process), see "[Emailing an offer or contract document](#)" on page 222.
- To mark an offer that was extended by email or regular mail as Extended, select Actions > Mark As Extended, enter the date that offer was extended, and click OK.
- To rescind, accept, or decline an offer manually, see "[Rescinding, accepting, or declining an offer](#)" on page 223.

Extending an offer to an internal or external candidate

Before you start You must create the offer document before you extend the offer.

To extend an offer

- 1 Open the job application of the candidate that you want to send an online interview to.
- 2 Click the candidate's email address in the job application header.
- 3 On Send Email, select the template to be used and the Request Offer Review check box, and click Next.

The text of the email appears.

- 4 Review and modify the email as needed.

Note: For internal candidates, the subject of the email will be the text of the notification.

- 5 Click Send.

The status of the offer changes to Extended.

The following documents are created:

- A Sent correspondence record on the Correspondence tab.
- For external candidates, an email that contains a link to a page on the Career Space (login required), where the candidate can access the offer.

or

For internal candidates, an email (without a link), and a notification. The notification title is the subject you entered on the email, and the notification provides a link to the Talent Acquisition form where the candidate can access the offer.

Offer review cycle

- 1 The candidate receives the email or notification with a Review offer link.
 - An internal candidate must log in to Talent Management to access the notification. The notification has a link to the offer review.
 - When an external candidate clicks the link on the email, a Career Space login dialog box appears. The candidate must log in to Career Space to access the Offer review.
- 2 To view and/or print the offer, the candidate clicks the View Offer Letter link.

Note: The document is in Microsoft Word format.

- 3 To accept or decline the offer, the candidates accesses the Offer review form again from the email, selects "I Accept The Offer" or "I Decline The Offer" then clicks OK.
- 4 The job offer status is automatically updated as Accepted or Declined on the Requisition Dashboard.

Emailing an offer or contract document

If you do not use the Request Offer Review process, you may want to submit a job offer to a candidate by emailing the job offer document or employment contract to the candidate with instructions on how to accept or decline the offer. You may also want to email these documents to other people in your organization before actually extending an offer.

Note: If you use the employment contract as the job offer document, you cannot use the Request Offer Review action to extend an offer to a candidate. The Request Offer Review action attaches only the job offer document to the offer review.

To email an offer or a contract document

- 1 Access the Attachments panel of the Correspondence tab, click the Send Email button next to the offer or contract attachment.
- 2 Select the appropriate email template (for example, Email Offer, or Contract Offer). The document is automatically attached to the email.
- 3 Complete the email and send.

Follow-up task

- If you sent the email is an official job offer, select Actions > Mark Offer As Extended, enter the date that the email was sent, and click OK.
The status of the offer changes to Extended.

Rescinding, accepting, or declining an offer

You can rescind an offer at any time. In addition, if you did not use the automated Request Offer Review process to extend an offer to a candidate, you can accept or decline an offer manually when you receive a response from a candidate.

Note: If you used the Request Offer Review action, the status of the offer will be automatically updated when the candidate accepts or declines the offer online.

To rescind, accept, or declining an offer

- 1 Open the job application.
- 2 Change the offer status.
 - To rescind the offer, click Actions > Rescind Offer, enter a reason, date and optional comments, and click OK. The status changes to Rescinded.
 - To accept the offer on behalf of the candidate, click Actions > Accept Offer enter the date the offer was accepted, and click OK. The status changes to Accepted.
 - To decline the offer on behalf of the candidate, click Actions > Decline Offer, enter the date the offer was declined, and click OK. The status changes to Declined.
- 3 Send an appropriate email to the parties involved. For more information, see "[Sending emails](#)" on page 183.

Transitioning new hires or transfers

- "[Transitioning \(onboarding\) overview](#)" on page 223
- "[Transitioning new or transferred resources](#)" on page 224
- "[Accepting and completing transition tasks](#) " on page 225
- "[Monitoring the progress on the transitioning process](#)" on page 227

Transitioning (onboarding) overview

If your organization uses Transition Management, when the decision is made to hire, rehire, or transfer a resource, the recruiter moves the transitioning resource to the On Board process. The recruiter then selects the transition task set or transition tasks that apply to the resource and initiates the onboarding process.

Important: This must take place before the actual hiring process is under way.

Each task is associated with a transition task group that is responsible for completing the task. Multiple resources can be assigned to a transition task group. Any of the resources assigned to a transition task group can accept and complete the task.

When a transition task becomes due, the task appears in the Transition Management queued tasks list of all the resources that are assigned to the transition task group for the task (Employee > To Do > Transition Management). Any of the resources in the task group can accept the task. When the task is complete, the resource who accepted the task flags it as complete. The next task then automatically appears in the Transition Management task list of the resources assigned to the transition task group responsible for that task, and so on.

Some tasks can be concurrent and be processed in parallel. Some tasks may not be completed until the resource is fully transitioned. For example, if the transitioning process ends at the resource's first-year anniversary, the final task (presumably, some type of performance appraisal) will not be completed until that anniversary.

When all the tasks in the task set are complete, the resource is considered successfully transitioned to his or her new position.

Transitioning new or transferred resources

When a resource is newly hired or transferred to a new organizational unit, recruiters can associate them with transition tasks or transition task sets that must be performed by various groups to facilitate their integration into their new position and organization unit.

To transition a resource to a new job

- 1 Open the job application of the resource you want to transition.
- 2 Move the job application to the On Board process. Click Actions > On Board.
- 3 Access the On Board tab.
- 4 On the On Board tab, click the candidate's name to access Resource Transition.
- 5 On Candidate Transition add the tasks or task sets that are part of the onboarding process for this candidate.
 - To add an individual task, click New, select a task in the Transition Task field, and save.
 - To add all the tasks associated with a transition task set, click the Helpers List icon, select the transition task set and click Assign Tasks.

Note: If you add a combination of stand-alone tasks and transition task set, the system will not let you add a duplicate task.

6 Modify the tasks as needed.

- a** Open any of the tasks.
- b** Modify any of the editable fields and save.

Many of the fields default from the transition task you chose, which was defined by an administrator. You can modify the following fields:

Due Date	You can assign a due date to a task.
Assigned To	By default, a task automatically goes to all resources attached to the transition task group that is responsible for the task and any of the resources can accept and complete the task. If you assign the task to a specific resource, only this resource can access the task and complete it.
Prerequisite Task	If the transition task is associated with a prerequisite, the prerequisite task displays in this field. You can select another prerequisite task (or add one if none displays). Any prerequisite task that you select must already be part of your task list.
Details	Add supplementary details if needed.
Notes	Add supplementary notes if needed.

7 When you are ready to start the onboarding process, on the job application header, select Actions > Begin On Board.

- All unassigned tasks with no prerequisites appear in the Transition Management Queued Tasks list of the resources that belong to the transition task groups responsible for the tasks.
- All assigned tasks with no prerequisites appear in the Transition Management Assigned Tasks list of the resources that belong to the transition task groups responsible for the tasks.
- Tasks that have prerequisites will appear in the Queued Tasks or Assigned Tasks lists only after their prerequisite tasks have been completed.

Follow-up tasks (assigned resources)

- To complete a transition task that you have been assigned to as a resource, see "[Accepting and completing transition tasks](#)" on page 225

Accepting and completing transition tasks

A transition task can be associated with an email template that will automatically notify affected employees that a task for which their group is responsible is pending in their Transition Management queued tasks. Any of the employees can accept a task. Once you accept a task, you are solely responsible for completing it.

To accept and complete a transition task

- 1 In your Employee space, access To Do > Transition Management.
- 2 On the Assigned Tasks tab, view your assigned and queued tasks.

Note: A task will appear on your Transition Management task lists if you are assigned to the task's task group *and* if a transition management process including that task has been started for any resource.

- All unassigned tasks with no prerequisites appear on the Queued Tasks panel.
- All assigned tasks with no prerequisites appear on the Assigned Tasks panel.
- Tasks that have prerequisites will appear in the Queued Tasks or Assigned Tasks lists only after their prerequisite tasks have been completed. However, they appear on the All Tasks tab as soon as the transition management process is triggered.

- 3 To assign an unassigned task to yourself, select the task on the Queued Tasks panel and click Actions > Accept.

The task disappears from the Queued Tasks list and appears on the Assigned Tasks list.

Important: Once you assign yourself to a task, the task is no longer visible to the other employees. You are therefore committed to completing the task.

- 4 To view any instructions associated with the task you want to complete, click the task.
- 5 Outside of the application, perform the tasks that are involved in the transition task.
For example, if the task is to procure a computer for a new hire, perform all the tasks involved from ordering a computer to loading any required software.
- 6 When you consider the task complete, return to My Activities > Transition Management and change the status of the task to Complete.
 - a On the Assigned Tasks tab, open or select the task you want to complete.
 - b To add some notes or details, open the task, type your notes or details, and save.

Note: If you completed the task before today's date you can enter the actual date on the task before completing it.

- c To complete the task click Actions > Complete.

The task now disappears from the Accepted Tasks list and appears on the Completed Tasks tab with a completion date of today's date.

Results

- When a task is completed, the task status immediately shows as Complete on the On Board tab of the resource's job application record.

- If a completed task is a prerequisite for other tasks, the other tasks immediately appear on the queued tasks or assigned tasks lists of the resources responsible for the tasks.

Note: To view all tasks of any status that you are associated with, including tasks that are not queued yet because they are awaiting completion of a prerequisite task, click the All Tasks tab.

Monitoring the progress on the transitioning process

Hiring managers can monitor the progress of the transitioning process for candidates for which they are hiring managers. Recruiter administrators or HR administrators can monitor the transition tasks for all resources. Recruiters have access to the transition tasks for the candidates they have processed.

To monitor the progress

- 1 Access the candidate for whom you want to monitor transition tasks.
 - (Manager) Access Manager > To Do > Transition Tasks
 - (Administrator) Access Administrator > To Do > Resource Transitions.
 - (Recruiter, recruiter administrator) Locate the candidate on Candidate Pool, click the number in the Applications column, open the application, and access the Job Board tab.
- 2 To view the tasks associate with the candidate, select the candidate (hiring manager) or open the candidate on the On Board tab.

The tasks involved in the transition appear with their completion status.

Status	Description
Complete	This status is assigned to completed tasks. The information includes the date of completion, and the resource who completed the task.
Unassigned	This status is assigned to tasks that are sitting in the Queued Tasks list of the resources assigned to the task and that have not been accepted by any resource.
Assigned	This status is assigned to tasks that are sitting in the Assigned Tasks list of the resource who accepted the task or was assigned to it and that are awaiting completion. The information also includes the date of assignment.

Status	Description
Waiting On Dependency	This status is assigned to tasks that have prerequisite tasks that are not yet completed. These tasks are not visible to any resources and cannot be acted on until their prerequisite task is completed.

Other information

- If tasks have been assigned a due date, the system keeps track of overdue tasks.
- The status of the transition process is In Progress until the last task is completed. The status then changes to Complete.
- The transition process for candidates who have been moved to Onboard but for whom the On Board process has not been triggered is Pending.

Hiring candidates

- ["Rehire, hire, transfer, and add assignment request actions" on page 228](#)
- ["Generating documents from a Talent Acquisition document template" on page 229](#)
- ["Hiring external candidates \(recruiter\)" on page 230](#)
- ["Requesting a rehire in Talent Acquisition \(recruiter\)" on page 238](#)
- ["Transferring internal candidates \(recruiter or manager\)" on page 245](#)
- ["Adding work assignments for an internal candidate \(recruiter\)" on page 251](#)

Rehire, hire, transfer, and add assignment request actions

An HR administrator or HR generalist can rehire a resource whether or not the resource has been terminated. For example, you might want to do a rehire for an employee returning from a leave of absence or for an employee who was on a fixed-term contract and whom you want to hire on an indefinite term contract. The system does not place any restrictions on which resources you can rehire.

Rehiring a resource lets you add a resource's contract, and update or add a work assignment. The Rehire action does not update the employee's addresses, contacts or identification numbers.

The difference between a rehire and a transfer request action in Global HR is that the transfer applies only to a resource's current work assignment and affects only the resource's direct manager, the resource's position, and/or the resource's salary, whereas the rehire can affect all fields except for the resource's address and contact information.

In Talent Acquisition, the difference between the hire, rehire transfer, and add assignment request actions is much more precise. Recruiters can use transfer and add assignment actions only for internal candidates (that is candidates that are currently employed in the organization). If an external candidate is a former employee, the recruiter or recruiter administrator uses the rehire request action. If an external candidate is not a former employee, the recruiter or recruiter administrator uses the hire request action.

The transfer request action updates the resource's current primary work assignment. The add assignment request action adds a new work assignment for the resource.

With an add assignment request action, the resource's current work assignments remain unchanged. If no work assignments exist, the new work assignment will be created as the primary assignment. If work assignments already exist, the work assignment will not be the primary assignment.

All four actions let you add a new employment contract, if it is not already defined on the offer.

If an employment contract is defined and approved on the offer, it cannot be changed on the hire, rehire, transfer, or add assignment action. The contract document generated during the offer becomes an active contract on the resource's record as soon as the hire, rehire, transfer, or add assignment action is completed. It can only be changed through an employment contract amendment.

If the employment contract is defined on a hire, rehire, transfer, or add assignment action, the contract document is created in Draft status as soon as the hire, rehire, transfer, or add assignment action is completed. It can still be changed if necessary by an HR administrator when the action has completed.

Generating documents from a Talent Acquisition document template

You can generate a document at any time on an existing job application. For example, you may want to attach hire paperwork to a candidate that has accepted an offer.

Before you start This functionality requires an RTF document template defined in the format that your organization requires for the type of document, with merge fields that will pull the variable data required by your organization when the paperwork is generated. This template must be uploaded to the Document Templates page under Administrator > Talent Acquisition > Template Setup > Document Templates.



Need More Details? Check out the following concepts:

- ["How are document templates used in Talent Acquisition?"](#) on page 103

To generate a document

- 1 Open the candidate job application for which you want to generate the document.
- 2 Click Actions > Create Document.

- 3 Select the document template to be used, and click OK.

This creates an attachment that you can view on the Attachments panel of the Correspondence tab and that you can email.

When the candidate is hired, rehired, or transferred, the document is automatically transferred to the resource record and is available as an attachment on the resource's profile (under Personal Information).

Hiring external candidates (recruiter)

Note: Hiring a resource is a recruiter-initiated action request that can be routed to multiple people who each fill the information at their disposal. You need fill only the required fields and fields relevant to you. When the action is completed, a new resource record is created in Global HR. The HR administrator can always update the information when the hire action is completed.

For internal candidates, use the Transfer or Add Assignment actions. For rehired resources, choose the Rehire action.

Before you start Initiate this process after an offer has been accepted and a start date set. If your organization uses the onboarding selection process, make sure onboarding tasks are initiated before you perform this action.

To hire a candidate

- 1 Open the candidate's job application.
- 2 Select Actions > Move to Hire.
- 3 Select Actions > Hire.
- 4 On the Hire form, use the following guidelines to enter field values.

Note: Most of the fields are optional. As the request is routed, the recipients can fill the fields that they are responsible for. Some of the fields do not apply to all countries. In addition many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Header information:

Effective Date	Required. Enter the date that this action request becomes effective. This is used for audit logs.
Reason	You can select a reason for the hire.
Employment ID	This field appears only if the organization does not use auto-numbering. The employment ID will likely be filled by an HR resource. However, if you already know it, you can type it.

Name:

The new hire's given name (first name) and family name default from the offer. You can add a title (Mr., Mrs., Ms, and so on), a middle name (if it exists), a preferred name (if it exists), a suffix, and a professional designation.

General:

Home Country	If the resource's home country is different from the employment country, you can select a home country.
Birth City, Birth Country	These fields are country configurable and may not appear.
Relationship To Organization	Select the new hire's relationship with the organization (employee, intern, etc).
Relationship Status	Select the relationship status the employee will have once hired. It probably will be Active.
Work Type	Select the work type (FT, PT, and so on)
Working Remotely	Select this check box if the employee will be working remotely.

Hire Source:

The source and specific source (if applicable) entered on the job application defaults in this field. You can also type the name of a referring source. For example, if the source is an employee, the referring source would be the name of the employee. If the source is an agency, the referring source could be the name of the referring agent.

Personal Information:

Identification Number	If visible, you can enter the candidate's identification information, which includes the country that provides the ID and the identification number.
Gender	The employee's gender
Hispanic Or Latino Origin	This field refers to the ethnicity of the candidate (which, for EEO purposes is different from the race). Select this checkbox to indicate that the candidate's ethnicity is Hispanic or Latino.
Race	Select the check box that best describes the candidate's race. (Preferably, the candidate should have self-identified).
Disability Type	If the candidate is disabled, select the disability type.
Nationality, Nationality Country	Select the nationality and country of nationality.
Veteran Code	If the candidate is a veteran, select the veteran code.
Religion	This field is country configurable.
Marital Status	Select the candidate's marital status.
Birthdate	Enter the candidate's birthdate.

Point Of Origin	For candidates who will travel for the organization, you can select a point of origin (which is different from the location). It would indicate where a candidate's traveling would originate. Points of origins are defined in Administrator > Setup > Resource Components > Personal Information > Point Of Origin.
------------------------	---

Dates:

Most the dates will probably be entered by an HR administrator. The start date is a required date for the final approver.

Work Assignment:

Note: Many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Assignment Type	If your organization uses assignment types, you can select the assignment type applicable to the resource.
Position	The resource's new position.
Job	The resource's new job.
Professional Category	(Country-specific) If the resource belongs to a professional category, select the professional category.
Organization Unit	The organization unit that will employ the resource. Depending on your organization's settings, you may be able to override this value. If this field is not populated, you will be prompted to enter it.
Legal Entity	If your organization uses legal entities, you can associate the candidate with a legal entity.
Legal Establishment	(Country-specific) If you select a legal entity, you can also select a legal establishment.
Cost Center	The cost center to be used when interfacing the resource's salary to a payroll system.
Project	The project to be used when interfacing the resource's salary to a payroll system.
Location	The location that the resource will be assigned to.
Preferred Job Title	If you do not want to use the position as a title, you can type a preferred job title.
Work Schedule	The work schedule (for example, Weekdays 9 a.m. to 5 p.m.)
Shift	if applicable, the shift that the resource will work.
Union	(Country-specific) If the position is unionized, select the union.
Bargaining Unit	(Country-specific) For unionized positions, you can select a bargaining unit.

Grant Management:

Note: This section appears only if the organization is configured to interface with the Lawson HRM Grant Management application. This section will likely be filled by an HR specialist. This section will just pass information that will be interfaced to the Grant Management application. The organization must also be configured to use the Chart of Accounts feature.

Labor Distribution	Select this check box if this work assignment is subject to labor distribution.
Salary Encumbrance	Select this check box if this work assignment is subject to salary incumbrance
Encumbrance Fringe Rate	Type the encumbrance fringe rate.
Fringe Encumbrance Account Category	Select the account category that the fringe encumbrance amounts will be posted to.
Company	Select the GL company to which the Grant Management transactions will be posted
Fringe Encumbrance Account	Select the GL account to which fringe encumbrance amounts will be posted.
Effort Reporting	Select this check box if the employee is subject to effort reporting.
Effort Currency	If you selected Effort Reporting, select the reporting currency.
Primary Certifier	Select the primary certifier for effort reporting.
Secondary Certifier	Select the secondary certifier for effort reporting.
Manager Information:	
Direct Manager	The resource's direct manager.
Dotted Line Manager	If applicable, select the resource's dotted line manager.
Assignment Is Manager	If the position is a managerial position, select the manager role it is associated with.

Trial And Notice Periods:

Trial Period	Select a trial period to calculate the trial period end automatically.
	Note: If you select a trial period, you cannot select a trial period end date override.
Trial Period End Date Override	Select a trial period end override to specify a trial period end date that is not calculated by the system.
	Note: If you select a trial period, you cannot select a trial period end date override.

Notice Period During Trial Period	(Country-specific) If you want to give the resource advanced notice in case of termination during the trial period, select the notice period. If you
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Notice Period After Trial Period	(Country-specific) Select the notice period that the resource is entitled to after completing the trial period
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Pay Information:

Pay Rate	The pay rate should match the pay rate on the offer. If you define the pay rate, you must also define the pay rate currency.
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Important: If a pay rate was already approved in a contract, you should not override it.

Pay Rate Currency	Select the currency in which the pay rate is expressed.
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Step And Grade Schedule	Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.
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Grade	If you selected a step and grade schedule, select the resource's pay grade.
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Step	If you selected a step and grade schedule, select the resource's pay step.
-------------	--

Pay Rate Type	The pay rate type (Hourly, Annual Salary, or Monthly Salary).
----------------------	---

Important: If an approved contract already exists, the pay rate type should match the contract's pay rate type.

Number Of Months	If the pay rate type is Monthly Salary, type the number of months. The default is 12.
-------------------------	---

Pay Frequency	Select the pay frequency, for example, Monthly
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Payment Schedule	Select the payment schedule, for example the last day of each month.
-------------------------	--

Full Time Equivalent	Type the full time equivalent factor associated with the resource. This is the percentage of standard full time hours the resource works.
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Full Time Annual Hours	Type the number of full-time annual hours for the resource's assignment. For example, 2080 if the standard full time week is 40 hours, or 1820, if the standard full time week is 35 hours.
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Exempt From Overtime	(US resources only) Select this check box if this is an exempt position.
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Collective Agreement:

Note: These fields display only if the collective agreement feature is configured for your organization.

Collective Agreement, Population Category, Position/Level	If the position is regulated by a collective agreement, select the collective agreement name, the collective agreement population category, and the collective agreement position/level. For more information on collective agreements see the <i>Lawson Compensation User Guide</i> .
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Compensation Analysis:

Salary Structure	If the compensation is based on a salary structure, select either a salary structure and salary structure grade.
Geographic Differential Code	If a geographic salary differential applies, select the appropriate geographic differential code.
Salary Structure Grade	If you selected a salary structure, select a salary structure grade.
Notional Salary	(Country-specific) If applicable, type the employee's notional salary. This field is used to track the salary an international assignee would have received in their home country. This salary may continue to be used to determine benefits, merit increases, and so on. If you enter a notional salary, select the currency in which the notional salary is expressed.

Other Pay:

You can define up to five other pay values for the resource. Click the icon next to each field to define an other pay.

Type	Select the Other Pay type. Types are user-defined. For example, you could have a learning pay rate which is different from the base pay rate.
Category	Select the Other Pay category. If you select Alternate Rate, the rate will be paid in place of the normal pay rate. If you select Add On Rate, the rate will be paid on top of the normal pay rate. If you select Add On Percent Of Pay Rate, the rate will be calculated as a percent of the normal pay rate and added to the pay rate. If you select Billing Rate, the rate will be billed to customers.
Pay Rate, Currency	If you selected a category of Alternate Rate, Add On Rate, or Billing Rate, type the rate and the currency.
Percent	If you selected a category of Add On Percent Of Pay Rate, type the percent value.
Begin Date, End Date	If the other pay is valid only for a date range, enter the begin and end dates.
Display In Contract	Select this check box if you want this other pay to display on the resource's contract. In addition, in order to display on a contract document, the variable "OtherPay" must be included in a compensation type contract section of the contract template.

Allowances:

You can define up to ten allowances for the resource. Click the icon next to each field to define an allowance.

Type	Select the allowance type. Allowance types are user-defined. For example, child care allowance, housing allowance, parking allowance. If applicable, the allowance's begin and end dates The pay code to be used for the allowance How often the allowance should be paid Whether to include the allowance in the total pay rate Whether this allowance is for information only Whether this allowance should appear in the employment contract
Amount, Currency	Type the allowance's flat amount and currency in this field or Type the percent of pay rate in the Percent field.
Percent	Type the percent of pay rate in this field. or Type the allowance's flat amount and currency in the Amount and Currency fields
Begin Date, End Date	If the allowance is valid only for a date range, enter the begin and end dates.
Pay Code	If you want to associate the allowance with a pay code that will be interfaced to a payroll system, type the pay code.
Pay Frequency	Select how often the allowance is paid. For example, a resource could be paid bimonthly but receive the allowance only once a month.
Include In Total Pay Rate	If you select this check box, the allowance will be added to the base pay rate as part as the total pay rate.
Information Only	Select this check box if you want this allowance to be used only for information purposes.
Display In Contract	Select this check box if you want this allowance to display on the resource's contract. In addition, in order to display on a contract document, the variable "Allowances" must be included in a compensation type contract section of the contract template.
Other Amounts:	
Other Amounts	If other amounts are used for compensation purposes, enter the amounts with their corresponding currency code.

Contracts:

Note: This section will not appear if your organization is not configured to use employment contracts.

If a work contract is applicable to this resource, define or review the contract information.

- If an approved contract was created with the offer, this information is read-only. The Hire action will create the approved contract record and document in Global HR with a status of Active. If changes are needed, a contract amendment can be created in Global HR.
- If an approved contract does not exist, you can enter the contract information. The Hire action will create the contract record and the contract document in Global HR with a status of Draft. It can be modified and approved in Global HR.

Reason For Contract	Select the reason for the contract
Contract Type	Select the contract type (for example, fixed-length or indeterminate)
Contract Template	Select the contract template. The contract template contains all the paragraphs to be included in the contract.
Contract Number	You can type the contract number, if known at this stage.
Begin Date	Select the date that the contract takes effect.
Duration	Select the contract duration, for example 1 Year.
End Date	The system can calculate the contract end date from the duration. However, you can override the end date if, for example, the end date falls on a weekend. Note: This field is required for fixed-term contracts.
Contracted Time	Select the contracted work time, for example, 40 hours per week, or 11 months per year.
Contractual FTE	Type the percentage of standard full time hours the resource should work according to the contract.
Renewal Notification Date	Enter the date when a notification will be sent for renewing the contract. Note: No notifications are currently sent by the system.
Renewal Date	Enter the date by which the contract must be renewed.

Address:

This information should default from the job application.

Contact Information:

If more than one email address exists, select which should be the preferred email contact and which should be used as a work email address.

Attachments:

You can attach up to three attachments. When the action is completed, these attachments will appear on the resource's record.

For each attachment, select the document type and click Browse to navigate and select the document.

Comments:

Type additional information as needed.

The comments appear in the audit log.

5 Click Submit

The hire request is routed for approval. When the final approver approves the request, a new resource is created with a primary assignment corresponding to the work assignment information, and a contract, if applicable in Active or Draft status.

Note: While the request is being routed, you can monitor its status by clicking the Approval Tracking link on the job application.

Requesting a rehire in Talent Acquisition (recruiter)

If an external candidate is also a former employee, you must use the rehire action request to hire the candidate.

Rehiring a resource is a recruiter-initiated action request that can be routed to multiple people who each fill the information at their disposal. You need fill only the required fields and fields relevant to you. The HR administrator can always update the information when the rehire action is completed.

Before you start Initiate this process after an offer has been accepted and a start date set. If your organization uses the onboarding selection process, make sure onboarding tasks are initiated before you perform this action.

To request a rehire

- 1 Open the job application for the candidate that you want to rehire.
- 2 Select Actions > Move To Hire.
- 3 Select Actions > Rehire.
- 4 On the Request To Rehire form, use the following guidelines to enter field values.

Note: Most of the fields are optional. As the request is routed, the recipients can fill the fields that they are responsible for. Some of the fields do not apply to all countries. In addition many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Header information:

Effective Date	Required. Enter the date that this action request becomes effective. This is used for audit logs.
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Reason	Select the reason for the rehire action request.
Employment ID	The employment ID of the resource being rehired.
Work Assignment Option	Choose Update First Work Assignment to update the resource's first work assignment with the assignment you choose in the Work Assignment section. If this is not the primary work assignment, it will be set to Primary when the rehire action is completed. Choose Create New Work Assignment to add an assignment to the resource's current assignments. This new assignment is automatically added as the resource's primary assignment.

Name:

The resource's name information defaults from the existing name information. Update the fields as needed.

Note: If you do not enter a resource's preferred given name or preferred family name, the given name and family name are used as preferred names.

General:

Home Country	If the resource's home country is different from the employment country, you can select a home country.
Birth City, Birth Country	These fields are country configurable and may not appear.
Relationship To Organization	Select the new hire's relationship with the organization (employee, intern, etc).
Relationship Status	Select the relationship status the employee will have once hired. It probably will be Active.
Work Type	Select the work type (FT, PT, and so on)
Working Remotely	Select this check box if the employee will be working remotely.

Hire Source:

If applicable, select the source from which the resource learned about the position or which contractor referred them to the position. If specific sources exist for the source, select the specific source. Optionally, you can type the name of a referring source as well.

Personal Information:

Gender	Select the candidate's gender.
Hispanic Or Latino Origin	This field refers to the ethnicity of the candidate (which, for EEO purposes is different from the race). Select this checkbox to indicate that the candidate's ethnicity is Hispanic or Latino.
Race	Select the check box that best describes the candidate's race. (Preferably, the candidate should have self-identified).
Disability Type	If the candidate is disabled, select the disability type.

Nationality, Nationality Country	Select the nationality and country of nationality.
Veteran Code	If the candidate is a veteran, select the veteran code.
Religion	This field is country configurable.
Marital Status	Select the candidate's marital status.
Birthdate	Enter the candidate's birthdate.
Point Of Origin	For candidates who will travel for the organization, you can select a point of origin (which is different from the location). It would indicate where a candidate's traveling would originate. Points of origins are defined in Administrator > Setup > Resource Components > Personal Information > Point Of Origin.

Dates:

The resource's original dates default in these fields. Adjust the dates as needed. Your personnel policies will guide what dates are entered when a resource is rehired. If a start date is included in the offer, it will default here.

Separation Information:

If the resource was terminated, the termination date, last date work and last date paid that you entered at the time of termination default in these fields.

Work Assignment:

Note: Many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Assignment Type	If your organization uses assignment types, you can select the assignment type applicable to the resource.
Position	The resource's new position.
Job	The resource's new job.
Professional Category	(Country-specific) If the resource belongs to a professional category, select the professional category.
Organization Unit	The organization unit that the resource will be assigned to.
Legal Entity	If your organization uses legal entities, you can associate the candidate with a legal entity.
Legal Establishment	(Country-specific) If you select a legal entity, you can also select a legal establishment.
Cost Center	The cost center to be used when interfacing the resource's salary to a payroll system.
Project	The project to be used when interfacing the resource's salary to a payroll system.
Location	The location that the resource will be assigned to.

Preferred Job Title	If do not want to use the position as a title, you can type a preferred job title.
Work Schedule	The work schedule (for example, Weekdays 9 a.m. to 5 p.m.)
Shift	if applicable, the shift that the resource will work.
Union	(Country-specific) If the position is unionized, select the union.
Bargaining Unit	(Country-specific) For unionized positions, you can select a bargaining unit.

Grant Management:

Note: This section appears only if the organization is configured to interface with the Lawson HRM Grant Management application. This section will likely be filled by an HR specialist. This section will just pass information that will be interfaced to the Grant Management application. The organization must also be configured to use the Chart of Accounts feature.

Labor Distribution	Select this check box if this work assignment is subject to labor distribution.
Salary Encumbrance	Select this check box if this work assignment is subject to salary incumbrance
Encumbrance Fringe Rate	Type the encumbrance fringe rate.
Fringe Encumbrance Account Category	Select the account category that the fringe encumbrance amounts will be posted to.
Company	Select the GL company to which the Grant Management transactions will be posted
Fringe Encumbrance Account	Select the GL account to which fringe encumbrance amounts will be posted.
Effort Reporting	Select this check box if the employee is subject to effort reporting.
Effort Currency	If you selected Effort Reporting, select the reporting currency.
Primary Certifier	Select the primary certifier for effort reporting.

Secondary Certifier

Select the secondary certifier for effort reporting.

Manager Information:

Direct Manager	The resource's direct manager.
Dotted Line Manager	The resource's indirect dotted line manager, if applicable.
Assignment Is Manager	If the position is a managerial position, select the manager role it is associated with.

Trial And Notice Periods:

Trial Period	Select a trial period to calculate the trial period end automatically. Note: If you select a trial period, you cannot select a trial period end date override.
Trial Period End Date Override	Select a trial period end override to specify a trial period end date that is not calculated by the system. Note: If you select a trial period, you cannot select a trial period end date override.
Notice Period During Trial Period	(Country-specific) If you want to give the resource advanced notice in case of termination during the trial period, select the notice period. If you
Notice Period After Trial Period	(Country-specific) Select the notice period that the resource is entitled to after completing the trial period
Pay Information:	
Pay Rate	The pay rate should match the pay rate on the offer. If you define the pay rate, you must also define the pay rate currency. Important: If a pay rate was already approved in a contract, you should not override it.
Pay Rate Currency	Select the currency in which the pay rate is expressed.
Step And Grade Schedule	Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.
Grade	If you selected a step and grade schedule, select the resource's pay grade.
Step	If you selected a step and grade schedule, select the resource's pay step.
Pay Rate Type	The pay rate type (Hourly, Annual Salary, or Monthly Salary). Important: If an approved contract already exists, the pay rate type should match the contract's pay rate type.
Number Of Months	If the pay rate type is Monthly Salary, type the number of months. The default is 12.
Pay Frequency	Select the pay frequency, for example, Monthly
Payment Schedule	Select the payment schedule, for example the last day of each month.
Full Time Equivalent	Type the full time equivalent factor associated with the resource. This is the percentage of standard full time hours the resource works.
Full Time Annual Hours	Type the number of full-time annual hours for the resource's assignment. For example, 2080 if the standard full time week is 40 hours, or 1820, if the standard full time week is 35 hours.

Exempt From Overtime (US resources only) Select this check box if this is an exempt position.

Collective Agreement:

Note: These fields display only if the collective agreement feature is configured for your organization.

Collective Agreement, Population Category, Position/Level If the position is regulated by a collective agreement, select the collective agreement name, the collective agreement population category, and the collective agreement position/level. For more information on collective agreements see the *Lawson Compensation User Guide*.

Compensation Analysis:

Salary Structure Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.

Geographic Differential If the new hire will be working outside his or her home country and a geographic salary differential applies, select the appropriate geographic differential code.

Salary Structure Grade If you selected a salary structure, select a salary structure grade.

Notional Salary (Country-specific) If applicable, type the employee's notional salary. This field is used to track the salary an international assignee would have received in their home country. This salary may continue to be used to determine benefits, merit increases, and so on.

If you enter a notional salary, select the currency in which the notional salary is expressed.

Other Amounts:

If other amounts are used for compensation purposes, enter the amounts with their corresponding currency code.

Contracts:

Note: This section will not appear if your organization is not configured to use employment contracts.

If a work contract is applicable to this resource, define or review the contract information.

- If an approved contract was created with the offer, this information is read-only. The Rehire action will create the approved contract record and document in Global HR with a status of Active. If changes are needed, a contract amendment can be created in Global HR.
- If an approved contract does not exist, you can enter the contract information. The Rehire action will create the contract record and the contract document in Global HR with a status of Draft. It can be modified and approved in Global HR.

Reason For Contract Select the reason for the contract

Contract Type Select the contract type (for example, fixed-length or indeterminate)

Contract Template Select the contract template. The contract template contains all the paragraphs to be included in the contract.

Contract Number	You can type the contract number, if known at this stage.
Begin Date	Select the date that the contract takes effect.
Duration	Select the contract duration, for example 1 Year.
End Date	The system can calculate the contract end date from the duration. However, you can override the end date if, for example, the end date falls on a weekend. Note: This field is required for fixed-term contracts.
Contracted Time	Select the contracted work time, for example, 40 hours per week, or 11 months per year.
Contractual FTE	Type the percentage of standard full time hours the resource should work according to the contract.
Renewal Notification Date	Enter the date when a notification will be sent for renewing the contract. Note: No notifications are currently sent by the system.
Renewal Date	Enter the date by which the contract must be renewed.

Attachments:

You can attach up to three attachments. When the action is completed, these attachments will appear on the resource's record.

Comments:

Type additional information as needed.

5 Click Submit

The request is routed to the next approver. After the rehire is finally approved, the resource's record is updated as follows:

- If you chose the Update First Work Assignment option, the resource's first work assignment information is updated with the work assignment you just defined. If it was not a primary assignment before the action, it is made primary.
- If you chose the Create New Work Assignment option, the work assignment you just defined is added as a new work assignment and is made primary.

Note: While the request is being routed, you can monitor its status by clicking the Approval Tracking link on the job application.

Transferring internal candidates (recruiter or manager)

Transferring an internal candidate is a recruiter-initiated action request that can be routed to multiple people who each fill the information at their disposal. You need fill only the required fields and fields relevant to you. The HR administrator can always update the information when the transfer action is completed.

Transferring a candidate will result in the existing primary work assignment being modified. If you want to add a work assignment to the resource's record, use the Add Assignment action instead.

Before you start Initiate this process after an offer has been accepted and a start date set. If your organization uses the onboarding selection process, make sure onboarding tasks are initiated before you perform this action.

To transfer an internal candidate

- 1 Open the job application for the candidate that you want to transfer.
- 2 Select Actions > Move To Hire.
- 3 Select Actions > Transfer.
- 4 On the Transfer form, use the following guidelines to enter field values.

Note: Most of the fields are optional. As the request is routed, the recipients can fill the fields that they are responsible for. Some of the fields do not apply to all countries. In addition many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Header Information:

Effective Date	Required. Enter the date that this action request becomes effective. This is used for audit logs.
Reason	You can select a reason for the transfer.
Employment ID	The employment ID of the resource being transferred.
General:	
Home Country	If the resource's home country is different from the employment country, you can select a home country.
Birth City, Birth Country	These fields are country configurable and may not appear.
Relationship To Organization	Select the new hire's relationship with the organization (employee, intern, etc).
Relationship Status	Select the relationship status the employee will have once hired. It probably will be Active.
Work Type	Select the work type (FT, PT, and so on)

Working Remotely Select this check box if the employee will be working remotely.

Hire Source:

If applicable, select the source from which the resource learned about the position or which contractor referred them to the position. If specific sources exist for the source, select the specific source. Optionally, you can type the name of a referring source as well.

Personal Information:

Gender Select the candidate's gender.

Hispanic Or Latino Origin This field refers to the ethnicity of the candidate (which, for EEO purposes is different from the race). Select this checkbox to indicate that the candidate's ethnicity is Hispanic or Latino.

Race Select the check box that best describes the candidate's race. (Preferably, the candidate should have self-identified).

Disability Type If the candidate is disabled, select the disability type.

Nationality, Nationality Country Select the nationality and country of nationality.

Veteran Code If the candidate is a veteran, select the veteran code.

Religion This field is country configurable.

Marital Status Select the candidate's marital status.

Birthdate Enter the candidate's birthdate.

Point Of Origin For candidates who will travel for the organization, you can select a point of origin (which is different from the location). It would indicate where a candidate's traveling would originate. Points of origins are defined in Administrator > Setup > Resource Components > Personal Information > Point Of Origin.

Dates:

The resource's original dates default in these fields. Adjust the dates as needed. Your personnel policies will guide what dates are entered when a resource is rehired. If a start date is included in the offer, it will default here.

Work Assignment:

Note: Many of the fields default in from the position, requisition, and/or offer. For more information, see "[Defaulting values for requisitions and job applications](#)" on page 117

Assignment Type If your organization uses assignment types, you can select the assignment type applicable to the resource.

Position The resource's new position.

Job The resource's new job.

Professional Category (Country-specific) If the resource belongs to a professional category, select the professional category.

Organization Unit	The organization unit that will the resource will be assigned to.
Legal Entity	If your organization uses legal entities, you can associate the candidate with a legal entity.
Legal Establishment	(Country-specific) If you select a legal entity, you can also select a legal establishment.
Cost Center	The cost center to be used when interfacing the resource's salary to a payroll system.
Project	The project to be used when interfacing the resource's salary to a payroll system.
Location	The location that the resource will be assigned to.
Preferred Job Title	If do not want to use the position as a title, you can type a preferred job title.
Work Schedule	The work schedule (for example, Weekdays 9 a.m. to 5 p.m.)
Shift	if applicable, the shift that the resource will work.
Union	(Country-specific) If the position is unionized, select the union.
Bargaining Unit	(Country-specific) For unionized positions, you can select a bargaining unit.

Grant Management:

Note: This section appears only if the organization is configured to interface with the Lawson HRM Grant Management application. This section will likely be filled by an HR specialist. This section will just pass information that will be interfaced to the Grant Management application. The organization must also be configured to use the Chart of Accounts feature.

Labor Distribution	Select this check box if this work assignment is subject to labor distribution.
Salary Encumbrance	Select this check box if this work assignment is subject to salary incumbrance
Encumbrance Fringe Rate	Type the encumbrance fringe rate.
Fringe Encumbrance Account Category	Select the account category that the fringe encumbrance amounts will be posted to.
Company	Select the GL company to which the Grant Management transactions will be posted
Fringe Encumbrance Account	Select the GL account to which fringe encumbrance amounts will be posted.
Effort Reporting	Select this check box if the employee is subject to effort reporting.
Effort Currency	If you selected Effort Reporting, select the reporting currency.
Primary Certifier	Select the primary certifier for effort reporting.

Secondary Certifier

Select the secondary certifier for effort reporting.

Manager Information:

Direct Manager The resource's direct manager.

Dotted Line Manager If applicable, the resource's dotted line manager.

Assignment Is Manager If the position is a managerial position, select the manager role it is associated with.

Trial and Notice Periods:

Trial Period Select a trial period to calculate the trial period end automatically.

Note: If you select a trial period, you cannot select a trial period end date override.

Trial Period End Date Override Select a trial period end override to specify a trial period end date that is not calculated by the system.

Note: If you select a trial period, you cannot select a trial period end date override.

Notice Period During Trial Period (Country-specific) If you want to give the resource advanced notice in case of termination during the trial period, select the notice period. If you

Notice Period After Trial Period (Country-specific) Select the notice period that the resource is entitled to after completing the trial period

Pay Information:

Pay Rate The pay rate should match the pay rate on the offer. If you define the pay rate, you must also define the pay rate currency.

Important: If a pay rate was already approved in a contract, you should not override it.

Pay Rate Currency Select the currency in which the pay rate is expressed.

Step And Grade Schedule Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.

Grade If you selected a step and grade schedule, select the resource's pay grade.

Step If you selected a step and grade schedule, select the resource's pay step.

Payment Schedule Select the payment schedule, for example the last day of each month.

Pay Rate Type	The pay rate type (Hourly, Annual Salary, or Monthly Salary).
	Important: If an approved contract already exists, the pay rate type should match the contract's pay rate type.
Pay Frequency	Select the pay frequency, for example, Monthly.
Number Of Months	If the pay rate type is Monthly Salary, type the number of months. The default is 12.
Full Time Equivalent	Type the full time equivalent factor associated with the resource. This is the percentage of standard full time hours the resource works.
Full Time Annual Hours	Type the number of full-time annual hours for the resource's assignment. For example, 2080 if the standard full time week is 40 hours, or 1820, if the standard full time week is 35 hours.
Exempt From Overtime	(US resources only) Select this check box if this is an exempt position.

Collective Agreement:

Note: These fields display only if the collective agreement feature is configured for your organization.

Collective Agreement, Population Category, Position/Level If the position is regulated by a collective agreement, select the collective agreement name, the collective agreement population category, and the collective agreement position/level. For more information on collective agreements see the *Lawson Compensation User Guide*.

Compensation Analysis

Salary Structure	Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.
Geographic Differential Code	If the new hire will be working outside his or her home country and a geographic salary differential applies, select the appropriate geographic differential code.
Salary Structure Grade	If you selected a salary structure, select a salary structure grade.
Notional Salary	(Country-specific) If applicable, type the employee's notional salary. This field is used to track the salary an international assignee would have received in their home country. This salary may continue to be used to determine benefits, merit increases, and so on. If you enter a notional salary, select the currency in which the notional salary is expressed.

Contract:

Note: This section will not appear if your organization is not configured to use employment contracts.

If a work contract is applicable to this resource, define or review the contract information.

- If an approved contract was created with the offer, this information is read-only. The Transfer action will create the approved contract record and document in Global HR with a status of Active. If changes are needed, a contract amendment can be created in Global HR.
- If an approved contract does not exist, you can enter the contract information. The Transfer action will create the contract record and the contract document in Global HR with a status of Draft. It can be modified and approved in Global HR.

Reason For Contract	Select the reason for the contract
Contract Type	Select the contract type (for example, fixed-length or indeterminate)
Contract Template	Select the contract template. The contract template contains all the paragraphs to be included in the contract.
Contract Number	You can type the contract number, if known at this stage.
Begin Date	Select the date that the contract takes effect.
Duration	Select the contract duration, for example 1 Year.
End Date	The system can calculate the contract end date from the duration. However, you can override the end date if, for example, the end date falls on a weekend. Note: This field is required for fixed-term contracts.
Contracted Time	Select the contracted work time, for example, 40 hours per week, or 11 months per year.
Contractual FTE	Type the percentage of standard full time hours the resource should work according to the contract.
Renewal Notification Date	Enter the date when a notification will be sent for renewing the contract. Note: No notifications are currently sent by the system.
Renewal Date	Enter the date by which the contract must be renewed.

Attachments:

You can attach up to three attachments. When the action is completed, these attachments will appear on the resource's record.

Comments

Type additional information as needed.

5 Click Submit

The transfer request is routed for approval.

When the final approver approves this request, the resource's primary work assignment is updated with the changes.

Note: While the request is being routed, you can monitor its status by clicking the Approval Tracking link on the job application.

Adding work assignments for an internal candidate (recruiter)

Adding a work assignment is a recruiter-initiated action request for internal candidates only that can be routed to multiple people who each fill the information at their disposal. You need fill only the required fields and fields relevant to you. Some fields are country-specific and may not apply to your organization. The HR administrator can always update the information when the transfer action is completed.

Note: Adding a work assignment will result in adding a new work assignment for a resource. If you want to modify an existing assignment, use the Transfer action instead.

Before you start Initiate this process after an offer has been accepted and a start date set. If your organization uses the onboarding selection process, make sure onboarding tasks are initiated before you perform this action.

To add a work assignment for an internal candidate

- 1 Open the job application for the candidate that you want to transfer.
- 2 Select Actions > Move To Hire.
- 3 Select Actions > Add Assignment.
- 4 On the Request To Add Work Assignment form, use the following guidelines to enter field values.

Effective Date	Required. Enter the date that this action request becomes effective. This is used for audit logs.
Reason	You can select a reason for the action.
Employment ID	The employment ID defaults in.
General:	
Home Country	If the resource's home country is different from the employment country, you can select a home country.
Birth City, Birth Country	These fields are country configurable and may not appear.
Relationship To Organization	Select the new hire's relationship with the organization (employee, intern, etc).
Relationship Status	Select the relationship status the employee will have once hired. It probably will be Active.
Work Type	Select the work type (FT, PT, and so on)
Working Remotely	Select this check box if the employee will be working remotely.

Hire Source:

This information defaults from the job application.

5 **Personal Information:**

Gender	Select the candidate's gender.
Hispanic Or Latino Origin	This field refers to the ethnicity of the candidate (which, for EEO purposes is different from the race). Select this checkbox to indicate that the candidate's ethnicity is Hispanic or Latino.
Race	Select the check box that best describes the candidate's race. (Preferably, the candidate should have self-identified).
Disability Type	If the candidate is disabled, select the disability type.
Nationality, Nationality Country	Select the nationality and country of nationality.
Veteran Code	If the candidate is a veteran, select the veteran code.
Religion	This field is country configurable.
Marital Status	Select the candidate's marital status.
Birthdate	Enter the candidate's birthdate.
Point Of Origin	For candidates who will travel for the organization, you can select a point of origin (which is different from the location). It would indicate where a candidate's traveling would originate. Points of origins are defined in Administrator > Setup > Resource Components > Personal Information > Point Of Origin.

Dates:

The resource's original dates default in these fields. Adjust the dates as needed. Your personnel policies will guide what dates are entered when a resource is rehired. If a start date is included in the offer, it will default here.

Work Assignment:

Note: Most of the information in this section defaults from the requisition or job application. Some of the fields do not apply to all countries.

Assignment Type	If your organization uses assignment types, you can select the assignment type applicable to the resource.
Position	The resource's new position.
Job	The resource's new job.
Professional Category	(Country-specific) If the resource belongs to a professional category, select the professional category.
Organization Unit	The organization unit that will the resource will be assigned to.
Legal Entity	If your organization uses legal entities, you can associate the candidate with a legal entity.
Legal Establishment	(Country-specific) If you select a legal entity, you can also select a legal establishment.

Cost Center	The cost center to be used when interfacing the resource's salary to a payroll system.
Project	The project to be used when interfacing the resource's salary to a payroll system.
Location	The location that the resource will be assigned to.
Preferred Job Title	If do not want to use the position as a title, you can type a preferred job title.
Work Schedule	The work schedule (for example, Weekdays 9 a.m. to 5 p.m.)
Shift	if applicable, the shift that the resource will work.
Bargaining Unit	(Country-specific) For unionized positions, you can select a bargaining unit.
Union	(Country-specific) If the position is unionized, select the union.

Grant Management:

Note: This section appears only if the organization is configured to interface with the Lawson HRM Grant Management application. This section will likely be filled by an HR specialist. This section will just pass information that will be interfaced to the Grant Management application. The organization must also be configured to use the Chart of Accounts feature.

Labor Distribution	Select this check box if this work assignment is subject to labor distribution.
Salary Encumbrance	Select this check box if this work assignment is subject to salary incumbrance
Encumbrance Fringe Rate	Type the encumbrance fringe rate.
Fringe Encumbrance Account Category	Select the account category that the fringe encumbrance amounts will be posted to.
Company	Select the GL company to which the Grant Management transactions will be posted
Fringe Encumbrance Account	Select the GL account to which fringe encumbrance amounts will be posted.
Effort Reporting	Select this check box if the employee is subject to effort reporting.
Effort Currency	If you selected Effort Reporting, select the reporting currency.
Primary Certifier	Select the primary certifier for effort reporting.

Secondary Certifier

Select the secondary certifier for effort reporting.

Manager Information

Direct Manager	The resource's direct manager.
Dotted Line Manager	If applicable, the resource's dotted line manager.

Assignment Is Manager If the position is a managerial position, select the manager role it is associated with.

Trial and Notice Periods:

Trial Period Select a trial period to calculate the trial period end automatically.

Note: If you select a trial period, you cannot select a trial period end date override.

Trial Period End Date Override Select a trial period end override to specify a trial period end date that is not calculated by the system.

Note: If you select a trial period, you cannot select a trial period end date override.

Notice Period During Trial Period (Country-specific) If you want to give the resource advanced notice in case of termination during the trial period, select the notice period. If you

Notice Period After Trial Period (Country-specific) Select the notice period that the resource is entitled to after completing the trial period

Pay Information:

Pay Rate The pay rate should match the pay rate on the offer. If you define the pay rate, you must also define the pay rate currency.

Important: If a pay rate was already approved in a contract, you should not override it.

Pay Rate Currency Select the currency in which the pay rate is expressed.

Step And Grade Schedule Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.

Grade If you selected a step and grade schedule, select the resource's pay grade.

Step If you selected a step and grade schedule, select the resource's pay step.

Payment Schedule Select the payment schedule, for example the last day of each month.

Pay Rate Type The pay rate type (Hourly, Annual Salary, or Monthly Salary).

Important: If an approved contract already exists, the pay rate type should match the contract's pay rate type.

Number Of Months If the pay rate type is Monthly Salary, type the number of months. The default is 12.

Pay Frequency Select the pay frequency, for example, Monthly

Full Time Equivalent	Type the full time equivalent factor associated with the resource. This is the percentage of standard full time hours the resource works.
Full Time Annual Hours	Type the number of full-time annual hours for the resource's assignment. For example, 2080 if the standard full time week is 40 hours, or 1820, if the standard full time week is 35 hours.
Exempt From Overtime	(Valid for US resources only) Select this check box if this is an exempt position.

Collective Agreement:

Note: These fields display only if the collective agreement feature is configured for your organization.

Collective Agreement, Population Category, Position/Level If the position is regulated by a collective agreement, select the collective agreement name, the collective agreement population category, and the collective agreement position/level. For more information on collective agreements see the *Lawson Compensation User Guide*.

Compensation Analysis:

Salary Structure Depending on the compensation structure used for the position, select either a salary structure and salary structure grade or a step and grade schedule, pay grade, and pay step.

Geographic Differential Code If the new hire will be working outside his or her home country and a geographic salary differential applies, select the appropriate geographic differential code.

Salary Structure Grade If you selected a salary structure, select a salary structure grade.

Notional Salary (Country-specific) If applicable, type the employee's notional salary. This field is used to track the salary an international assignee would have received in their home country. This salary may continue to be used to determine benefits, merit increases, and so on.

If you enter a notional salary, select the currency in which the notional salary is expressed.

Contract:

Note: This section will not appear if your organization is not configured to use employment contracts.

If a work contract is applicable to this resource, define or review the contract information.

- If an approved contract was created with the offer, this information is read-only. The Add Assignment action will create the approved contract record and document in Global HR with a status of Active. If changes are needed, a contract amendment can be created in Global HR.
- If an approved contract does not exist, you can enter the contract information. The Add Assignment action will create the contract record and the contract document in Global HR with a status of Draft. It can be modified and approved in Global HR.

Reason For Contract Select the reason for the contract

Contract Type Select the contract type (for example, fixed-length or indeterminate)

Contract Template	Select the contract template. The contract template contains all the paragraphs to be included in the contract.
Contract Number	You can type the contract number, if known at this stage.
Begin Date	Select the date that the contract takes effect.
Duration	Select the contract duration, for example 1 Year.
End Date	The system can calculate the contract end date from the duration. However, you can override the end date if, for example, the end date falls on a weekend. Note: This field is required for fixed-term contracts.
Contracted Time	Select the contracted work time, for example, 40 hours per week, or 11 months per year.
Contractual FTE	Type the percentage of standard full time hours the resource should work according to the contract.
Renewal Notification Date	Enter the date when a notification will be sent for renewing the contract.
Renewal Date	Enter the date by which the contract must be renewed.

Attachments:

You can attach up to three attachments. When the action is completed, these attachments will appear on the resource's record.

Comments

Type additional information as needed.

6 Click Submit

The add assignment request is routed for approval.

When the final approver approves this request, a new work assignment is added to the resource's current work assignment. The HR generalist can determine which of the work assignments will be the primary assignment.

Note: While the request is being routed, you can monitor its status by clicking the Approval Tracking link on the job application.

This chapter describes Talent Acquisition reporting capabilities and reporting templates.

- ["Lawson Talent Management Suite reporting capabilities" on page 257](#)
- ["Talent Acquisition report templates" on page 258](#)

Lawson Talent Management Suite reporting capabilities

Every list in Lawson Talent Management Suite can be turned into a report.

The Options menu item provides the following reporting tools:

- Personalize permanently change a list for yourself. (You can reset the list to its original settings at any time) You can add fields, remove fields, add subtotals, change the sorting order, and filter for a specific instance.
- When the list is as you want it, or if you want to create a report from the original list, you can export the report to a PDF file or to a CSV file.
- Print To File to PDF lets you print not only the primary list, but the underlying details as well.
 - On a tree view you can export the following level of detail to a PDF file: Root Level Only, Root Level Only With Details, All Levels, All Levels With Details, or Selected Record With Details.
 - For multiple-panel lists, you can export the following level of detail to a PDF file: Current List Only, Current List With Details, or Selected Record With Details.
 - The PDF files you generate are stored on your desktop under Start > My Print Files.
- Export To CSV lets you export an original or modified list to a CSV file and manipulate it to produce an Excel report.
- The Create Report option lets you create a report by filtering the list from which you start. You can view the report you create for a list under Options > Related Reports.

In addition, the Lawson Talent Management Suite provides report templates that you can modify for your own needs, using the Personalize feature.

Talent Acquisition report templates

HR administrators, recruiters, and recruiting administrators have access to all the report templates defined for Talent Acquisition.

Access these report templates under

Administrator > Reports > Talent Acquisition

or

Generalist > Reports > Talent Acquisition

or

Recruiter > Reports

About Landmark Embedded Analytics cubes

Some of the reports are Landmark Embedded Analytics cubes. They differ from the other reports in some major areas.

- The data displayed is not real-time data. It is the data as it stood when the analytics cube was last refreshed. A process must be set in place by your organization to have a system administrator schedule refreshing the cube as often as it makes sense for your organization. Cubes can also be refreshed on demand.

For information on Landmark Embedded Analytics cubes, see the *Lawson Talent Management Configuration Guide*.

- By default, the cube displays data for the current period. To view data for a previous or future period, click the period that displays, and click the - button to access a past period or click the or + button to access a future period.
- The left-most column contains the cube dimension (or dimensions). For example, hiring manager and location. Each cube has default dimensions. Click Dimensions to view the dimensions that you can use. Click the > arrow to add a dimension and the < arrow to remove a dimension. Click Reset to reset the dimensions. You can also use the Move up and Move down buttons to reorder the dimensions.

Tip: The system automatically resets the dimensions to their original values when you leave the form.

- The other columns represent measures for the dimensions. For example, the total number of requisitions for a location.
- Some measure values have links that bring up a list. This list represent real-time data. So it is possible that the total number of records may not correspond to the record count that displays on the cube, if the data changed after the cube was refreshed.
- Some of the cubes have graphic representations. However the graphics are not interactive; they do not give you access to more detailed data.

- If you have Personalize security, you can change both the dimension defaults and the measures that display permanently. To personalize a cube, select Options > Personalize.

Use the Dimensions tab to change the Default dimensions that appear when you open the form.

Use the Measures tab to add or remove measures.

Recruiting Costs templates

Detail Costs By Requisition

(Recruiting Costs > By Requisition)

This report displays recruiting costs by hiring manager. You can change the dimension to display recruiting costs by location or by organization unit.

Total Costs

Note: This is a Landmark Embedded Analytics cube.

(Recruiting Costs > Totals)

For administrators and HR generalists, this report displays total recruiting costs for the selected period by hiring manager. The report includes the number of requisitions, number of openings, number of filled requisitions, total costs, and average cost per requisition. Select a hiring manager to view a bar graph representation by hiring manager.

For recruiters, this report displays the same information by recruiter, location, and status. Select a recruiter to view a bar graph representation by recruiter. Select a location to view a bar graph representation by location for the recruiter. Select a status to view a bar graph representation by status for the recruiter and location.

Click Dimensions to select other dimensions. For example, you may want to view the information by organization unit.

Note: For recruiters, Recruiter is always the top dimension.

Requisition Costs By Organization Unit

(Recruiting Costs > By Organization Unit)

This report template provides detail and total recruitment cost information by organization unit. The Organization Units are listed in the hierarchy or structure view. The requisition cost details list is only for the selected organization unit in the top list, not for the selected record and all its descendants.

Requisition Costs By Cost Name

(Recruiting Costs > By Cost Name)

This report template provides detail recruitment cost information sorted and subtotaled by cost name and hiring manager. The template can be modified to sort and subtotal/total by some common recruitment elements such as recruiter ID, direct manager, organization unit or job category.

Cost Name Totals

Note: This is a Landmark Embedded Analytics cube.

(Recruiting Costs > Cost Name Totals)

For administrators and HR generalists, this report displays cost name totals for the selected period by cost name and hiring manager. The report includes the requisition costs, number of requisition, and average cost per requisition, with a bar chart representation of each cost. Select a cost to view the bar graph by cost name. Select a hiring manager to view the bar graph by hiring manager for the cost.

For recruiters, this report displays the same information by recruiter, cost name, and hiring manager. Select a recruiter to view the bar graph by recruiter. Select a cost cost to view the bar graph by cost name for the recruiter. Select a hiring manager to view the bar graph by hiring manager for the recruiter.

Click Dimensions to select other dimensions. For example, you may want to view the information by location rather than by hiring manager.

Note: For recruiters, Recruiter is always the top dimension.

Offer Details

(Recruiting Costs > Offer Details)

This template lists job applications with various offer costs for each application. Additional offer cost types can be added using the 'Modify List Definition' feature. Applications where an offer was accepted are included in the list.

Recruitment Activity report templates

Recruitment Activity Summary

(Recruitment Activity > Summary)

This report template provides a list of recruitment activity for requisitions. The user can open and view details about a specific requisition. An average number of days active is given for subtotal and total breaks. This list can be saved and modified to have different sort and subtotal breaks, such as recruiter ID, direct manager, organization unit, and job category.

Recruitment Activity Summary Totals

Note: This is a Landmark Embedded Analytics cube.

(Recruitment Activity > Summary Totals)

For administrators and HR generalists, this report displays the recruitment activity summary for the selected period by hiring manager and location, including the number of requisitions, the number of days active, the number of openings, the number of job applications in process, the number of interviews, the number of offers, and the number of filled positions.

For recruiters, this report displays the same information by recruiter, hiring manager, and location.

Click Dimensions to select other dimensions. For example, you may want to view the information by position and hiring manager.

Note: For recruiters, Recruiter is always the top dimension.

Requested Vs Filled Openings

Note: This is a Landmark Embedded Analytics cube.

(Recruitment Activity > Requested Vs Filled Chart)

For administrators and HR generalists, this report displays the number of openings versus the number of filled positions for the selected period by hiring manager and location in both list and bar graph form. If you select a hiring manager the bar graph displays the Openings versus Filled information for each hiring manager. If you select a location (under a hiring manager), the bar graph displays the Openings versus Filled information for each location.

For recruiters, this report displays the same information by recruiter, location, and status. Select a recruiter to view the bar graph by recruiter. Select a location to view the bar graph by location for the recruiter. Select a status to view the bar graph by status for the recruiter.

Click Dimensions to select other dimensions. For example, you may want to see the information by position.

Note: For recruiters, Recruiter is always the top dimension.

Time To Fill report templates

Note: In Time To Fill calculations, the days that a requisition is on hold are deducted from the days that the requisition is in Open status.

Time To Fill calculation is: $((\text{CurrentDate} - \text{DaysOpen}) - \text{DaysOnHold})$. The number of days on hold is calculated from when the req is placed on hold until when it goes to another status.

Time To Fill By Requisition

(Time To Fill > By Requisition)

This report template calculates the average number of days to hire each of the candidates for a requisition. Select a hiring manager and requisition to view the Hire information below.

Note: 'Hired' for the purposes of this report template means the Offer Status for the candidate is Accepted. It does not necessarily mean that the 'Hire' action has been taken.

Average Time To Fill

Note: This is a Landmark Embedded Analytics cube.

(Time To Fill > Average Time To Fill)

For administrators and HR generalists, this report displays the average time to fill an opening by hiring manager and location for the selected period. For each selected hiring manager or location, the report displays the number of openings, the number of remaining openings, the number of filled openings, the average number of days to fill openings, and the optimal number of days to fill an opening (if configured for the organization).

For recruiters, the report displays the same information by recruiter, location, and status.

Click Dimensions to select other dimensions. For example, a recruiter may want to see the information by hiring manager. An administrator may want to see the information by recruiter.

Note: For recruiters, Recruiter is always the top dimension.

Time To Fill Analysis

Note: This is a Landmark Embedded Analytics cube.

(Time To Fill > Time To Fill Analysis)

This report displays time fill analysis for the selected period. For each requisition, the report displays the average days to fill, the number of days to fill, and the average number of days the job applications stayed in each process.

Click Dimensions to select other dimensions. For example, to view all open requisitions, you may want to add Requisition Open Period as the top dimension.

Candidate Analysis report templates

Candidate Analysis By Source

Note: This is a Landmark Embedded Analytics cube.

(Candidate Analysis > By Source)

For administrators and HR generalists, this report displays candidate analysis by source for the selected period. The report displays the number of candidates, number of interviews, number of offers, and number of hires by source and specific source in both list and bar graph form. Expand a source to view the specific sources for that source. The bar graph always shows the information for the level that you select. If you select a source, the bar graph displays all the sources. If you select a specific source, the bar graph displays all the specific sources for the source.

For recruiters, this report displays the same information by recruiter, source, and specific source.

Click Dimensions to select other dimensions. For example, you may want to see the information by hiring manager and source.

Note: For recruiters, Recruiter is always the top dimension.

Candidate Source Analysis by Organization Unit

Note: This is a Landmark Embedded Analytics cube.

(Candidate Analysis > By Organization Unit)

For administrators and HR generalists, this report displays candidate source analysis by organization unit for the selected period. The report displays the number of candidates, number of interviews, number of offers, and number of hires by organization unit in both list and bar graph form. Expand the organization unit levels to see the information for that level. The bar graph always shows the information for the level that you select. If there is more than one child organization unit, the bar graph displays all the children, no matter which one you select.

For recruiters, this report displays the same information by recruiter and organization unit.

Click Dimensions to select other dimensions. For example, you may want to view the information by hiring manager.

Note: For recruiters, Recruiter is always the top dimension.

Candidate Referrals

(Candidate Analysis > Candidate Referrals)

This report template displays the status of referred candidates. It can also be used as a reference list for referral payouts. The list can be filtered by a range of hire dates. Because the referring source is a free-form value entered by the candidate, the report template is organized by source. Users can use the filter to locate a specific referring source (such as a current employee).

Hired Referrals

(Candidate Analysis > Hired Referrals)

This report template provides a list of candidates that have gone through the 'Hire' Selection Process. The list can be filtered by a range of hire dates. Because the referring source is a free-form value entered by the candidate, the report template is organized by source. Users can use the filter to locate a specific referring source (such as a current employee).

Offer Status

Note: This is a Landmark Embedded Analytics cube.

(Candidate Analysis > Offer Status)

This report template provides offer analysis by hiring manager and category for the selected period. The report displays the number of offers extended, the number of offers accepted, and the percentage of offers accepted.

For recruiters, this report displays the same information by recruiter and category.

Click Dimensions to select other dimensions. For example, Administrators may want to view the information by recruiter; recruiters may want to see the information by hiring manager.

Note: For recruiters, Recruiter is always the top dimension.

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