Oracle

HCM and Taleo Enterprise Fusion-Taleo Integration Configuration Guide

Release 17

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HCM and Taleo Enterprise Fusion-Taleo Integration Configuration Guide

Release 17

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Revision History

Date	Modification	Chapter
November 30, 2016	Added new pairing: Fusion R12 with Taleo 15A and 15B.	Fusion and Taleo Release Pairings
February 26, 2016	Added new pairing: Fusion R11 with Taleo 15A.	Fusion and Taleo Release Pairings
February 26, 2016	Added procedures to import data into Fusion depending on the Fusion release.	Import Network Data into Fusion
February 26, 2016	Added details on exporting network data using Taleo Connect Client.	Export Network Data Using Taleo Connect Client
February 26, 2016	Added three requisition fields that must be configured in Taleo Recruiting Administration.	Taleo Settings Configuration Impacts
July 17, 2015	Updated release pairings.	Fusion and Taleo Release Pairings
July 14, 2015	Initial publication.	

Introduction

The out-of-the-box (OOTB) integration between Fusion Human Capital Management (HCM) and Taleo Recruiting seamlessly integrates the two best of breed solutions in the industry. The OOTB integration enables the exchange of work structure, candidate, and worker data between Fusion HCM and Taleo Recruiting.

The OOTB integration solution presents both Fusion and Taleo customers the unique opportunity to leverage the Fusion HCM system of record with the Taleo Recruiting application. The OOTB integration solution provides a typical recruiting integration model that allows customers to create and manage job requisitions in Taleo using foundation data such as Organizations, Locations and Job Fields (OLF), Departments, Legal Employers and Business Units defined within the Fusion system. Candidates selected and hired in Taleo are then imported into Fusion. Subsequent tasks like creating workers are then completed in Fusion.

The OOTB Fusion HCM - Taleo Recruiting Integration solution is targeted to existing Fusion HR customers who are performing a new Taleo Recruiting implementation and who will only use Taleo for all their recruiting related activities.

NOTE: This integration is currently generally available only to new Taleo customers who have yet to begin their implementation of Taleo Recruiting, subject to meeting the Fusion and Taleo prerequisites. It is under controlled availability for customers who are already live with Taleo Recruiting but are interested in exploring options to migrate their existing custom integrations and undergoing any change management associated with meeting the prerequisites. Contact your client executive or account manager for additional information on qualification and next steps.

In the event that a built-in Fusion HCM - Taleo Recruiting integration solution does not meet the customer's needs (for example, the New Hire Export from Taleo), it is possible to implement a tailored integration with a COR (Change Order), an ODA (Ordering Document or Exhibit Amendment), or a SOW (Statement Of Work) and at additional costs to customer.

Fusion and Taleo Release Pairings

The OOTB integration solution is certified for the following release pairings:

- » Fusion R8 with Taleo 14A, 14B
- » Fusion R9 with Taleo 14A, 14B
- » Fusion R10 with Taleo 14A, 14B, 15A MP8
- » Fusion R11 with Taleo 15A, 15B
- » Fusion R12 with Taleo 15A, 15B

Overview

The main flows of the OOTB Fusion HCM - Taleo Recruiting Integration solution are illustrated below.
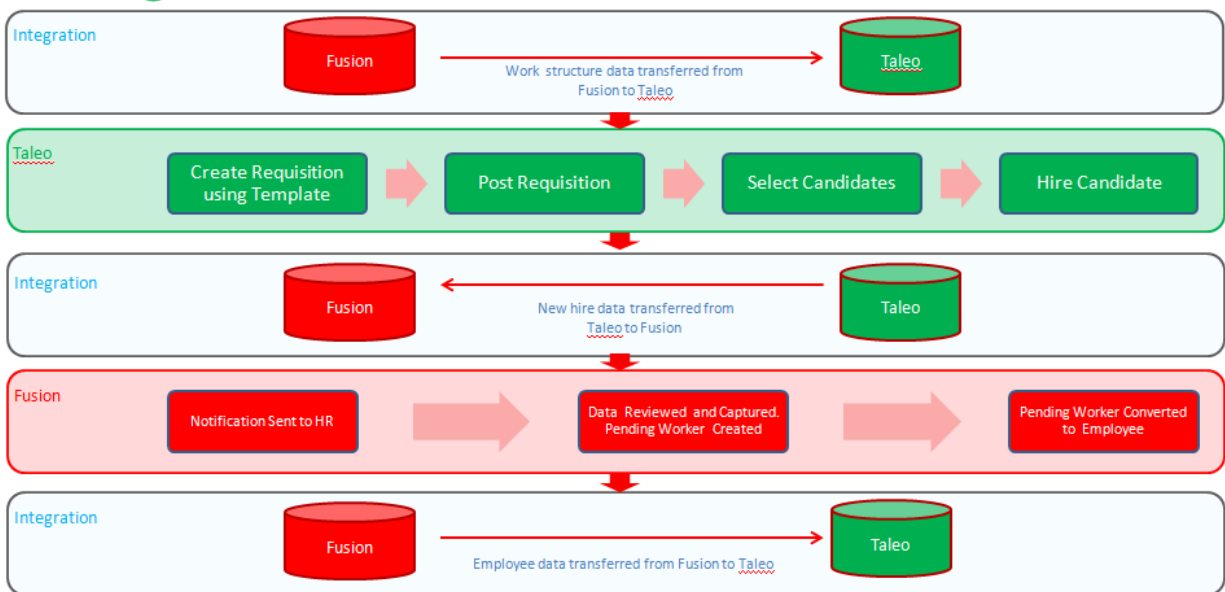
The configuration of the OOTB Fusion HCM - Taleo Recruiting Integration solution consists of these fundamental steps:

1. Initial Fusion and Taleo setup
2. Initial data load from Fusion into Taleo
3. Configuration of the synchronization between Fusion and Taleo
4. Mapping of third-party plans
5. Recruiting related tasks in Taleo
6. Requisition synchronization process
7. Hiring related tasks and employee synchronization in Fusion

To enable the integration between Fusion HCM and Taleo Recruiting, customers will need to log a Service Request (SR) providing the details of the environments that they want to have connected. Additional information can be found on My Oracle Support.

If you are using the delivered integration between Fusion HCM and Taleo Recruiting, follow the process as described in the "Taleo Zone Refresh with Fusion HCM P2T" white paper and be sure to use the SR template "Taleo Zone Refresh with Fusion HCM P2T" for a coordinated Fusion HCM P2T and Taleo Zone Refresh. You must suspend normal integration process scheduling between production environments until both the P2T and Refresh are completed.

Also, it is not possible to perform a Taleo refresh from staging to production (T2P), which is normally done in preparation for go-live. This is very important to preserve data integrity.

Step 1: Initial Fusion and Taleo Setup

During this phase of the integration, you will configure Taleo elements and prepare for the initial data load.

1.1.   Configure Taleo

The Taleo product must conform to a specific configuration to use the out-of-the-box integration. This involves the following steps:

» Configuring Foundation Data, that is the Organization, Location and Job Field structures.
» Creating user-defined fields and user-defined selections for Position, Grade, and Legal Employer.
» Creating exportable statuses.
» Setting up security policies.

1.2.   Configure Selected Candidate Notification in Fusion

You must set up the notification in Fusion to notify the hiring manager or other users, when the selected candidate is imported from Taleo to Fusion. The hiring manager completes the hiring tasks in Fusion upon receiving the notification.

1.3.   Export Network Data using Taleo Connect Client

As a part of this setup, you must extract the network data on Institution List, Certifications and Study Levels from Taleo using Taleo Connect Client (TCC).

1.4.   Import Network Data into Fusion

You must load the network data extracted from Taleo into Fusion. If you are using Fusion R8 or R9, you will use the spreadsheet loader. If you are using Fusion R10, you will use HDL (HCM Data Loader).

Step 2: Initial Data Load from Fusion into Taleo

During this phase of the integration, you will export all Fusion data to Taleo.

2.1.   Export Work Structures (Foundation) Data from Fusion to Taleo

You must export recruiting data (work structures and employee data) from Fusion to Taleo. This data will be used for recruiting-related tasks in Taleo.

2.2.   Validate Data is Received in Taleo

You must validate in Taleo that all the data has been correctly synchronized between Fusion and Taleo.

Step 3: Configuration of Synchronization Between Fusion and Taleo

3.1   Schedule Regular HCM-Taleo Integration Related ESS Processes

Use scheduled processes to import candidates and requisitions into Fusion. The scheduled processes also update Taleo with the ongoing changes (modification and addition) to the work structures data in Fusion. These processes facilitate synchronizing the worker data changes from Fusion to Taleo.

Step 4: Mapping of Third-Party Plans

The mapping must be completed before the hiring of the pending worker.

Step 5: Recruiting Related Tasks in Taleo

5.1.   Create and Approve Requisitions in Taleo
The integration is ready for recruiting-related tasks. You can create requisitions in Taleo using the imported requisition templates or your own requisition templates.

5.2.   Create and Hire New Candidates in Taleo
You select and hire candidates for the open requisitions. Candidates are ready to be exported to Fusion when they reach the exportable step or status.

Step 6: Requisition Synchronization Process

A synchronization of requisitions is performed. Requisitions created in Taleo Recruiting are exported from Taleo and imported into Fusion HCM.

Step 7: Hiring Related Tasks and Employee Synchronization in Fusion

7.1.   Process the Selected Candidate as a Pending Worker in Fusion
The hiring manager is notified when the candidate is imported in Fusion. The hiring manager creates a Pending Worker and then converts the Pending Worker into a Worker or a Contingent Worker.

7.2.   Process the Selected Candidate as a Rehire or Internal Candidate in Fusion
If the selected candidate is a rehire or an internal candidate, the hiring manager must follow the process prescribed in this guide to complete the rehire or the transfer (or promotion) of the internal candidate.
Once the hiring tasks are completed in Fusion, the worker data is synchronized with Taleo using the scheduled ESS Processes. This updates the candidate record and creates a user account for the new worker in Taleo.

Step 1 – Initial Taleo and Fusion Setup

Configure Taleo

The following steps are required to configure a Taleo zone for the Fusion-Taleo Integration. Note that the Taleo Recruiting menu option is included in the Fusion Navigator for users who have the Oracle Taleo Recruiting Cloud Service Duty assigned to their user role.

1. Setting up the Organization structure
2. Setting up the Location structure
3. Setting up the Job Field structure
4. Creating the Job ID user-defined field
5. Creating the Position user-defined selection and user-defined field
6. Disabling the Taleo default Position field
7. Creating the Grade user-defined selection and user-defined field
8. Creating the Legal Employer user-defined selection and user-defined field
9. Enabling the Department setting
10. Creating exportable statuses
11. Setting up security policies
12. Configuring user types
13. Assigning a default user group
14. Activating requisition types
15. Activating network data

Foundation Data

Taleo defines the data structure of each company as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF represents the fundamental data structure by which information is organized in the application. Using OLF, each company is able to personalize the system to reflect how it does business.

Fusion being the system of records (SOR) for foundation data, Taleo will need to be provisioned with the same foundation data found in the Fusion system. As such, Organizations, Locations, Job Fields, and Requisition Templates found in Taleo will be created based on Fusion data.
You must first synchronize Fusion foundation data with Taleo. You should not modify this data in Taleo.

All form of data modification should be done in Fusion.

When an OLF integration is performed, the Taleo application is automatically put into Maintenance Mode. In Maintenance Mode, the application users cannot use the system. Recruiters and hiring managers in the Recruiting Center as well as candidates in Career Sections are logged out automatically. The application displays a message to users indicating that the application is in Maintenance Mode. It is therefore very important to carefully plan the scheduling and execution of any OLF integration to minimize the impacts.

Organization Structure

Organization is one of the three Taleo fundamental hierarchical data structures around which the application is organized; it describes the hierarchical structure of an organization.

Fusion Business units will be synced into Taleo as Organizations. Fusion departments are not reflected in the Organization structure.

The Organization structure in Taleo should be a single level to match it with the Business Unit hierarchy in Fusion for this integration. Therefore, it is highly recommended to maintain a flat list of Fusion business units to have them replicated in Taleo.

» Level 1: Business Unit

It is critical to construct the Taleo structure with appropriate levels based on the client's organization.

Fusion will use business units internal IDs as their key identifier to map to the Taleo Organization structure.

The internal Fusion DB identifier will be used to identify Organization elements in Taleo. The Customer ID field will be used to store this ID.

Note: The reference industry is not provided by Fusion. It will be set according to the Default Reference Industry setting available in Taleo SmartOrg module. It is your company's responsibility to set the Default Reference Industry properly before the integration starts.

Organization Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Business Unit Internal ID
Organization Customer ID	Business Unit Internal ID
Organization Code	"BUCOD" + Internal ID with first three numbers stripped
Parent Organization Code	-1 (hardcoded)
Description (multilingual)	Business Unit Name
Industry	(left blank)
Status	Business Unit Status
Sequence Number	0 (hardcoded)

Setting up Organization Structure

Prerequisites

» To setup the organization structure, you must have the Manage Foundation Data permission (Configuration > [SmartOrg] Administration > [Users] User Types).

» Organization must be configured as a single level structure.

» It is important to configure the Default Reference Industry setting in Taleo (Configuration > [SmartOrg] Settings) before setting up the organization structure.

» The application must be in Implementation Mode (or Maintenance Mode if using Taleo version 13C).

Instructions

1. On the Configuration menu, locate the SmartOrg section. Click the **Administration** link.

2. Locate the Organizations section. Click the **Structure Management** link.

3. Click the **Edit** link.

   In this example, three Organization levels have already been defined. Remember that in order to generate the Organization hierarchy out of the Fusion system, the Organization structure in Taleo must have one level. So you will modify the name of Level 1 and ensure that it is the only one displayed.

4. The Description should just be displayed as Business Unit. Enter "**Business Unit**" in the Level 1 field.
5. De-select the Displayed checkbox for Level 2 and 3 or delete the entries Level 2 and Level 3.
6. Click the **Save** button.

Location Structure

Location is one of the three Taleo fundamental hierarchical data structures around which the system is organized. Location represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location).

To generate the Location hierarchy out of the Fusion application, the Location structure in Taleo must have four levels and the following configuration:

- » Level 1: Country
- » Level 2: State/Province
- » Level 3: City
- » Level 4: Work Location (the Work Location option must be selected to confirm that the fourth level is a Work Location level)

Fusion work locations must:

- » have a country value in the address.
- » have a state value in the address if a state value is available. Locations without a state value, for example Singapore, will be treated as exceptions.
- » have a city value in the address if a city value is available. There are valid locations without cities like "Singapore" that would be treated as exceptions.
- » be active.

When importing geography data into Taleo, the location hierarchy is based on street addresses of work locations stored in Fusion. You should update work locations in Fusion prior to initial Taleo load, which will ensure that the data copied to Taleo is correct. Potential issues to consider are outdated work locations where your company no longer operates, or locations whose addresses have changed due to

postal or political changes. It is good practice to review the Taleo location hierarchy after initial synchronization to ensure data integrity.

In the first example, the country, the state, and the city did not exist based on the information provided. As a result, the country, the state, and the city have been created at the same time to host the work location at the 4th level.
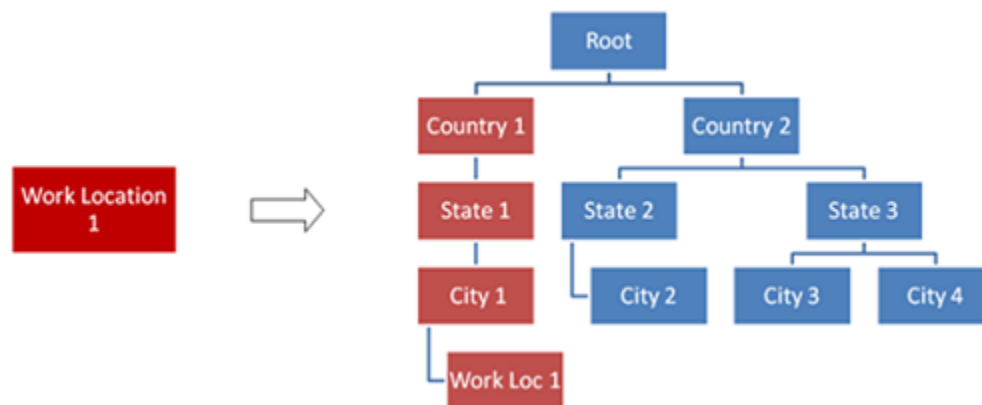
In the second example, the country, the state, and the city have been found based on the information provided. As a result, the work location has been created at the 4th level under the appropriate existing structure.
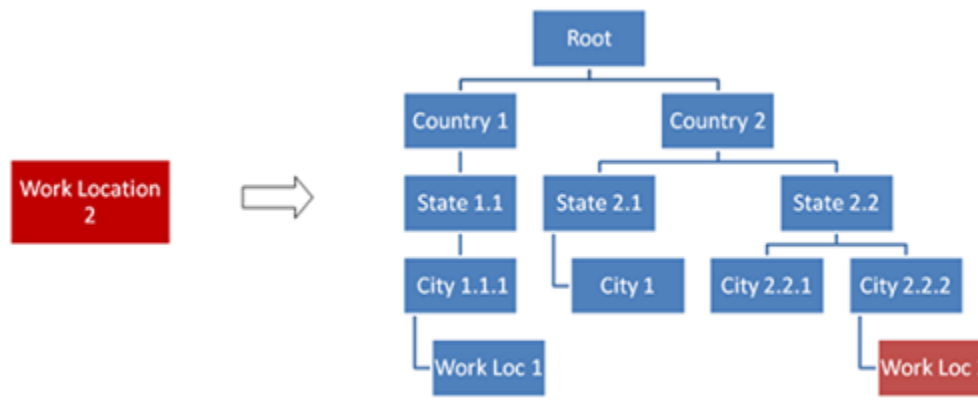
Location Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Location Internal ID
Location Customer ID	Location Internal ID
Location Code	Location Code The location code must be unique. If the Fusion location code is used in multiple sets, the

Location Mapping	
Taleo Field	**Fusion Field**
	integration will fail.
Location Name	Location Name
Location Zip/Postal Code	Location Postal Code
Location Work Location Address 1	Location Address Line 1
Location Work Location Address 2	Location Address Line 2 and Line 3
Location Status	Location Status
Country Code	Location Country
Country Name	Location Country Name
State Code	Location State Internal ID
State Name	Location State
City Name	Location City Name
Locale	en (hardcoded)

Setting up Location Structure

Prerequisites

» To setup the location structure, you must have the Manage Foundation Data permission (*Configuration > [SmartOrg] Administration > [Users] User Types*).

» Location must be configured as a 4 level structure.

» The application must be in Implementation Mode (or Maintenance Mode if using Taleo version 13C).

Instructions

1. On the Configuration menu, locate the SmartOrg section. Click the **Administration** link.

2. Locate the Locations section. Click the **Structure Management** link.

3. Click the **Edit** link.

4. To generate the Location hierarchy out of the Fusion system, the Location structure in Taleo must have four levels and the following configuration:

   » Level 1: Country
   » Level 2: State/Province
   » Level 3: City
   » Level 4: Work Location

5. For the Level 4: Work Location level, select the Work Location option to confirm that the fourth level is a Work Location level.

6. Make sure the Displayed column is selected for each of the four level (Yes must appear beside each level).

7. Click the **Save** button.

Job Field Structure

Job Field is one of the three Taleo fundamental hierarchical data structures around which the system is organized. Job Field represents the employment sectors or domains.

In Fusion, job fields are referred to as job families. Fusion does not maintain a hierarchical structure of job families. Hence, the Taleo Job Field structure will be flat. Only one job field level is necessary.

  » Level 1: Job Family

The internal Fusion DB identifier will be used to identify Job Field elements in Taleo. The Customer ID field will be used to store this ID.

Note: The reference job field will be set according to the Default Reference Job Field setting available in the Taleo SmartOrg module. It is your responsibility to set the Default Reference Job Field properly before the integration starts.

Job Field Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Job Family Internal ID
Job Field Customer ID	Job Family Internal ID
Job Field Code	"COD-"+JobFamilyId (starting from 4th char) (Derived) The code must be unique. If the code is used in multiple sets, the integration will fail.
Job Field Name	Job Family Name
Job Field Status	Job Family Status
Job Field Parent	Hard coded to root (flat structure)

Setting up Job Field Structure

Prerequisites

  » To setup the job field structure, you must have the Manage Foundation Data permission (*Configuration > [SmartOrg] Administration > [Users] User Types*).
  » Job Field must be configured as a single level structure.
  » It is important to configure the Default Reference Industry setting (*Configuration > [SmartOrg] Settings*) before creating the Job Field structure.
  » The application must be in Implementation Mode (or Maintenance Mode if using Taleo version 13C).

Instructions

1. On the Configuration menu, locate the SmartOrg section. Click the **Administration** link.

2. On the SmartOrg Administration menu, locate the Job Fields section. Click the **Structure Management** link.

3. Click the **Edit** link.

4. Only one job field level is necessary. In the Level 1 field, enter "**Job Family**".

5. If other levels are included, de-select the Displayed checkbox or delete the levels Function and Specialty.

6. Click the **Save** button.

Creating the Job ID User-defined Field

Instructions

1. On the Configuration menu, locate the Recruiting section. Click the **Administration** link.

2. Locate the Fields section. Click the **Requisition** link.

3. Click the **Create User-defined Field** link.

4. In the Type list, select **Text**.

5. In the Name field, type "**Fusion_JobID**". The value in the field Name is used within the system to associate the UDF with the value of the Label field.

6. In the Label field, type "**Fusion Job ID**". The label will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

7. In the Attributes section, enter the following information:

   » Max. Num. Chars: Enter "255".

   » Width: Enter "255".

   » Num. of lines: Enter "1".

8. Click the **Save** button.

9. Click the **Done** button.

10. Back on the Requisition Fields list, click the **Show User-defined Fields** link.

11. Click the **Fusion Job ID** field you just created.

12. Click the **Edit Field Availability** link.

13. Select the **Taleo Recruiting** option.

14. Click the **Save** button.

15. To make the user-defined field visible in the Taleo Recruiting Center, you need to determine if and where the user-defined field should be displayed (for example, requisition form or requisition template). For details, refer to the Field Layout chapter in the *Oracle Taleo Enterprise – Recruiting Configuration Guide*.

Position

A position represents a job within a company, it indicates the type of work offered in the requisition. Positions are hierarchical, defining the business employee structure. Typically, the top most positions are managed by HR team in the system. Other positions can be managed by managers.

Both Taleo and Fusion manage the notion of positions. However, Taleo has a limitation to fill an open job for a requisition. While the requisition can be open to fill multiple positions, it provides the ability to capture only one position.

The solution retained is a workaround allowing the ability to hire multiple candidates through the same job opening, each new hire being assigned to a distinct offer and position. Fusion positions will be stored in Taleo in the form of a large user-defined selection (LUDS). Each offer will be associated with one position element of the Position LUDS. In other words, Fusion positions refer to a Taleo large user-defined selection of position elements. The position will be stored in the offer being made to the candidate.

The internal Fusion DB identifier will be used to identify Position elements in Taleo. The Customer ID field will be used to store this ID. The external code field will be filled with a meaningless value that should not be displayed on the UI.

Position Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Position Internal ID
Position Element Customer ID	Position Internal ID
Position Code	Position Code For Taleo to uniquely identify Position Code, customers must first verify that Position Code is uniquely defined across business units in Fusion.
Description (multilingual)	Position Name
Status	Position Status
Effective From	(left blank)
Effective To	(left blank)
Complete	TRUE (hardcoded)
Sequence	0 (hardcoded)
LUDS Type	Fusion_Positions (hardcoded)
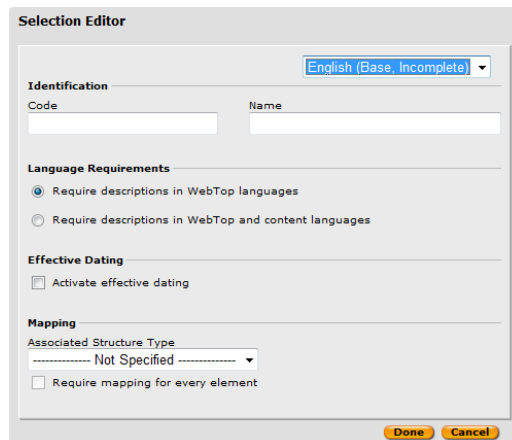
There are three parts to configuring Position:

» Creating the Position large user-defined selection (LUDS)
» Creating the Position user-defined field
» Disabling the Taleo Default Position field

Creating the Position Large User-defined Selection (LUDS)

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Selection Lists** link.
2. Click the **Large Selections** tab.
3. Click the **Custom** tab.
4. Click the **New…** button.

5. Enter "**Fusion_Positions**" into the Code field.
6. Enter "**Fusion_Positions**" into the Name field.
7. In the Language Requirements section, select the option **Require descriptions in WebTop languages**. The selection and its elements will be available in the Recruiting Center only.
8. Do not select the option **Activate effective dating**.
9. In the Associated Structure Type list, select **Organization**. The only goal of doing an OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.
10. Click the **Done** button.

Creating the Position User-defined Field

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Offer** link.

2. Click the **Create User-defined Field** link.

3. In the Type list, select **Fusion_Positions**.

4. In the Name field, type "**Fusion_Positions_UDF**". The value in the field Name is used within the system to associate the UDF with the value of the Label field.

5. In the Label field, type "**Fusion Positions**". The label will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

6. In the Attributes section, enter the following information:

   » Display Code
   » Display Description
   » Display the folder tree

7. Click the **Save** button

8. Click the **Done** button.

9. Click the **Show User-defined Fields** link.

10. Click the **Fusion Positions** link.

11. Click the **Edit Field Availability** link.

12. Select the **Taleo Recruiting** option.

13. Click the **Save** button.

Disabling the Taleo Default Position Field

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Requisition** link.

2. Locate the Position field. You may have to scroll down. Click the **Position** link.

3. Click the **Edit Field Availability** link.

4. Under Show Standard Fields, do not select any option.

5. Click the **Save** button.

Grade

In Fusion, grades show the relative status of employees within an enterprise and are often used as the basis for eligibility to Compensation and Benefits.

Taleo does not have any entity that can be directly mapped to Fusion Grades. This information will be captured in Taleo using a large user-defined selection (LUDS).

The internal Fusion DB identifier will be used to identify Grade elements in Taleo. The Customer ID field will be used to store this ID. The external code field will be filled with a meaningless value that should not be displayed on the UI.

Grade Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Grade Internal ID
Grade Element Customer ID	Grade Internal ID
Grade Element Code	Grade Code
Description (multilingual)	Grade Name
Status	Grade Status
Effective From	(left blank)
Effective To	(left blank)
Complete	TRUE (hardcoded)
Sequence	0 (hardcoded)
LUDS Type	Fusion Grades (hardcoded)

There are two parts to configuring Grade:

» Creating the Grade large user-defined selection (LUDS)
» Creating the Grade user-defined field

Creating the Grade Large User-defined Selection (LUDS)

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Selection Lists** link.

2. Click the **Large Selections** tab.

3. Click the **Custom** tab.

4. Click the **New…** button.

5. In the Code field, enter "**Fusion_Grades**".

6. In the Name field, enter "**Fusion_Grades**".

7. In the Language Requirements section, select the option **Require descriptions in WebTop languages**. The selection and its elements will be available in the Recruiting Center only.

8. Do not select the option **Activate effective dating**.

9. In the Associated Structure Type menu, select **Job Field**. The only goal of doing an OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.

10. Click the **Done** button.

Creating the Grade User-defined Field

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Requisition** link.

2. Click the **Create User-defined Field** link.

3. In the Type list, select **Fusion_Grades**.

4. In the Name field, type "**Fusion_Grades_UDF**". The value in the Name field is used within the system to associate the UDF with the value of the field Label.

5. In the Label field, type "**Fusion Grades**". The label will be displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

6. In the Attributes section, enter the following information:

   » Display Code
   » Display Description
   » Display the folder tree

7. Click the **Save** button.

8. Click the **Done** button.

9. Back on the Requisition Fields list, click the **Show User-defined Fields** link.

10. Click the **Fusion Grades** link.

11. Click the **Edit Field Availability** link.

12. Select the **Taleo Recruiting** option.

13. Click the **Save** button.

Legal Employer

In Fusion, a Legal Employer is a legal entity that is responsible for employing people in a particular country. This information is required to create an employee record in Fusion.

Taleo does not have any entity that can be directly mapped to Fusion Legal Employer. This information will be captured in Taleo using a large user-defined selection (LUDS).

The internal Fusion DB identifier will be used to identify Legal Employer elements in Taleo. The Customer ID field will be used to store this ID. The external code field will be filled with a meaningless value that should not be displayed on the UI.

Legal Employer Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Legal Employer (Legal Entity) Internal ID
Legal Element Customer ID	Legal Employer Internal ID
Legal Element Code	LECOD-LegislationCode (from 3rd Char) (Derived)
Description (multilingual)	LECOD-LegislationCode (from 3rd Char) (Derived)
Status	Legal Employer Status
Effective From	(left blank)
Effective To	(left blank)
Complete	TRUE (hardcoded)
Sequence	0 (hardcoded)
LUDS Type	Fusion_LegalEmployers (hardcoded)

There are two parts to configuring Legal Employer:
   » Creating the Employer large user-defined selection (LUDS)
   » Creating the Employer user-defined field

Creating the Employer Large User-defined Selection (LUDS)

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Selection Lists** link.

2. Click the **Large Selections** tab.

3. Click the **Custom** tab.

4. Click the **New…** button.

5. In the Code field, enter "**Fusion_LegalEmployers**".

6. In the Name field, enter "**Fusion_LegalEmployers**".

7. In the Language Requirements section, select the option "**Require descriptions in WebTop languages**". The selection and its elements will be available in the Recruiting Center only.

8. Do not select the option "Activate effective dating".

9. In the Associated Structure Type menu, select **Organization**. The only goal of doing an OLF mapping is to filter down the list of possible values based on the OLF of the requisition. If there is no desire to filter down the values, it is suggested not to use such mapping.

10. Click the **Done** button.

Creating the Employer User-defined Field

Instructions

1. From the Recruiting Administration page, locate the Fields section. Click the **Requisition** link.

2. Click the **Create User-defined Field** link.

3. In the Type list, select **Fusion_LegalEmployers**.

4. In the Name field, type "**Fusion_LegalEmployers_UDF**". The name is used internally.

5. In the Label field, type "**Fusion Legal Employer**". The label is displayed to candidates in the career section, and to recruiters and hiring managers in the Recruiting Center.

6. In the Attributes section, select the following:

   » Display Code
   » Display Description
   » Display the folder tree

7. Click the **Save** button.

8. Click the **Done** button.

9. Back on the Requisition Fields list, click the **Show User-defined Fields** link.

10. Click the **Fusion Legal Employer** link.

11. Click the **Edit Field Availability** link.

12. Select the **Taleo Recruiting** option.

13. Click the **Save** button.

14. To make the user-defined field visible in the Taleo Recruiting Center, the customer needs to determine if and where the user-defined field should be displayed (for example, requisition form or requisition template).

Department

In Fusion, a Department is a division or an operational group in which employees work and is defined as an internal organization.

A Fusion Department is directly mapped to a Taleo Department. This information is required to create an employee record in Fusion.

The internal Fusion DB identifier will be used to identify Department elements in Taleo. The Customer ID field will be used to store this ID. The external code field will be filled with a meaningless value that should not be displayed on the UI.

Department Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Department Internal ID
Department Customer ID	Department Internal ID
Department Code	Department Code + Internal ID with first three numbers stripped
Department Name	Department Name
Department Location	Department Location
Status	Department Status

Enabling the Department Setting

Instructions

1. On the Configuration menu, locate the Recruiting section. Click the **Settings** link.
2. Search for the **Enable Department** setting.
3. Click the **Enable Department** link.
4. Click the **Edit** link.
5. Select the **Yes** option.
6. Click the **Save** button.

Disabling the Link Requisition Organization to Department Organization Setting

The setting is protected. Contact Oracle Support to have the setting disabled.

Instructions

1. Search for the **Link Requisition Organization to Department Organization** setting.
2. Click on the setting name.
3. Click **Edit**.
4. Select **No**.
5. Click **Save**.

Requisition Template

A Requisition Template is a requisition file containing information that will likely be reused for a similar job position and may be created for each position or job category. Depending on your organization's policies, the Requisition Template may be very detailed or may include only basic information.

Fusion Jobs are imported in Taleo as Requisition Templates.

Recruiters using Taleo are expected to create requisitions using Requisition Templates to make use of the Fusion delivered job codes. They should not modify the Organization or Location information in the requisition from what has been defaulted from the requisition template.

The sequence of this integration is crucial. Organization, Location, Job Field, Position, Grade, Legal Employer and Department foundation data must be sent to Taleo prior to sending requisition template data. Otherwise, the Requisition Template integration may fail because requisition templates refer to this data.

Note: Fusion job codes must be active and effective.

Requisition Template Mapping	
Taleo Field	**Fusion Field**
Record Identifier	Job Code
Job Code	Job Code
Title	Job Name
Job Field	Job Family
Organization	Hard coded to root
Requisition Type	Hard coded to 6 – Universal
Status	Hard coded to 1- Active
Fusion Job ID	Job ID
Base Language – en	Default is English
Active Language – en	All languages are sent

Exportable Statuses

The Exportable Statuses feature available in Taleo is used to determine which candidate submissions are considered "ready to be exported" before being exported to Fusion.

For the Exportable Statuses feature, Taleo Recruiting allows the configuration of workflow/step/status combinations candidate submissions need to reach in order to be considered "ready to be exported". Taleo Recruiting makes it possible to configure several of these combinations. Only one single export of a candidate for a specific requisition is allowed. If the same candidate on the same requisition is exported more than once (due to an incorrect configuration or to user intervention), the later exports/updates will be ignored by Fusion.

As of FP 14A, the Exportable Statuses feature is also available in Taleo Onboarding (Transitions). It is possible to configure a point during a transitions process when candidate submissions are "ready to be exported" into Fusion. A type of action called "Mark as ready to be exported" is available when creating tasks in Taleo Onboarding (Transitions). When candidate submissions reach a step consisting of such a task, the candidate submission is marked as being "ready to be exported".

For details on how to configure the "ready to be exported" task in Taleo Onboarding (Transitions), refer to the *Taleo Onboarding (Transitions) Configuration Guide*.

Note: If the same candidate submission is marked as being "ready to be exported" by both a workflow/step/status combination and a Transitions process without having been exported between both situations, the candidate submission will be exported only once to Fusion.

Note: The Employee ID must be unique; you must not recycle the Employee ID. In other words, when a person leaves the company (for example, John Smith, Employee ID 12345), you may not assign that person's Employee ID to another person. If the terminated person is re-hired (in this example, John Smith), you must assign the same Employee ID (Employee ID 12345).

Note: The list of fields sent is fixed. If you need to send other candidate information from Taleo to Fusion, such as Taleo user-defined fields, you will need to use other integration techniques.

Note: When importing new candidates from Taleo, the Candidate Employee Number field in Taleo must be empty. When Fusion receives the Candidate Employee Number field with a value, the conversion of the candidate to a Pending Worker cannot be done because Fusion considers the candidate as being an employee.

Note: When importing new hire data from Taleo, the education entries of the candidate must have a start date. Otherwise, Fusion will display errors and manual corrections will be required.

New Hire Mapping	
Taleo Field	**Fusion Field**
Requisition Contest Number	
Candidate Number	

Candidate Employee Number Employee/User Employee ID	Person Number
Candidate First Name	Person First Name
Candidate Middle Name	Person Middle Name
Candidate Last Name	Person Last Name
Candidate Email Address	Person Personal E-Mail
Candidate Address Line 1	Person Home Address Line 1
Candidate Address Line 2	Person Home Address Line 2
Candidate Residence Location Country	Person Home Address Country
Candidate Residence Location State	Home Address State
Candidate Residence Location Region Name	Home Address County
Candidate City	Person Home Address City
Candidate Zip Code	Person Home Address Postal Code
Candidate Home Phone	Person Home Phone
Candidate Work phone	Person Work Phone
Candidate Pager Phone	Person Pager Number
Candidate Social Security Number	Person National ID
Candidate Birthday	Person Date of Birth
Requisition Department	Work Assignment Department
Requisition Hiring Manager	Work Assignment Manager
Requisition Organization	Work Assignment Business Unit
Requisition Primary Location	Work Assignment Location
Requisition Legal Employer	Work Assignment Legal Employer
Requisition Grade	Work Assignment Grade
Requisition Job Template	Work Assignment Job
Offer Actual Start Date	Work Relationship Start Date and Compensation Start Date
Offer Relocation Amount	Other Compensation Relocation Amount
Offer Relocation Type Description	Other Compensation Relocation Package
Offer Sign on Bonus	Other Compensation Sign on Bonus

Offer Salary (Annualized Salary)	There is no direct mapping for this field. Pending Worker is assigned with one of existing annual salary basis; the value of Taleo Offer Salary will be assigned to annual amount.
Offer Annual Bonus	Other Compensation Annual Bonus Amount
Offer Car Allowance	Other Compensation Car Allowance
Offer Commission Amount	Other Compensation Commission Amount
Offer Commission Type Description	Other Compensation Commission Package
Offer Expense Account	Other Compensation Expense Account
Offer Stock Option	Other Compensation Options
Offer Stock Option Type Description	Other Compensation Option Package
Offer Fusion Position	Work Assignment Position
Candidate Profile Studies – Institution Description and Other Institution Name	Profile Education Entry - School or Profile Education Entry –School Name
Candidate Profile Studies – Program Description and Other Course Title	Profile Education Entry -Major
Candidate Profile Studies – Location Country Code	Profile Education Entry – Country
Candidate Profile Studies – Location State Code	Profile Education Entry – State
Candidate Profile Studies – Study Level	Profile Education Entry – Degree
Candidate Profile Studies – GPA	Profile Education Entry – GPA
Candidate Profile Studies – Start Date	Profile Education Entry – From Date
Candidate Profile Studies – Graduation Date	Profile Education Entry – Date Acquired

Candidate Profile Experiences - Employer Description and Other Employer Name	Profile Work Experience Entry – Employer Name
Candidate Profile Experiences - Job Function Name	Profile Work Experience Entry - Job Family
Candidate Profile Experiences - Other Job Title	Profile Work Experience Entry – Other Job Function
Candidate Profile Experiences - Begin Date	Profile Work Experience Entry - Start Date
Candidate Profile Experiences - End Date	Profile Work Experience Entry - End Date
Candidate Profile Experiences - Responsibility	Profile Work Experience Entry - Achievements
Candidate Profile Experiences - Current Employer checkbox	Profile Work Experience Entry – Current Job
Candidate Profile Certifications - Description	Profile Certification Entry - License Name
Candidate Profile Certifications - Other Certification Name	Profile Certification Entry – Item_Text2000_1
Candidate Profile Certifications - NumberID	Profile Certification Entry - Number
Candidate Profile Certifications - Location Country	Profile Certification Entry - Country
Candidate Profile Certifications - Location State	Profile Certification Entry - State
Candidate Profile Certifications - Issuing Organization	Profile Certification Entry – Issued By
Candidate Profile Certifications - Date Received	Profile Certification Entry - Issue Date
Candidate Profile Certifications Expiration Date	Profile Certification Entry - Expiration Date

Creating Exportable Statuses

Prerequisites

» To configure exportable statuses, you must have the Access Administration permission (Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration).

Instructions

1. On the Configuration menu, locate the Recruiting section. Click the **Administration** link.

2. Click the **Exportable Statuses** link.

3. Click the **Create** link.

4. Enter "**FusionHCM**" into the External System field.

5. Select a workflow, a step, and a status.

6. Click the **Save** button.

When candidate submissions reach the specified combination, the next time Fusion makes an export query to Taleo, Taleo will only export candidate submissions having reached the specified combination.

In the list of exportable statuses, invalid combinations are identified in red. For example, if an exportable status is defined on a status that no longer exists, this exportable status will be displayed in red.

The integration service looks in the candidate submissions history and only exports submissions having reached the configured workflow/step/status combination within the given time frame. Submissions are exported even if they are not currently at the workflow/step/status; they only need to have reached it at some point in the given time frame.

Every change to an exportable status is recorded in the History section, making it possible to determine the configuration at a given point in time.

For details on how to configure the "ready to be exported" task in Taleo Onboarding (Transitions), refer to the *Taleo Onboarding (Transitions) Configuration Guide*.

Employee Creation

The employee integration supports two distinct business scenarios.

Scenario 1: Employees hired outside of Taleo

This integration applies to all employees who have been created directly in Fusion, prior or even after Taleo implementation. Those employees will need to exist in Taleo to provide them access to internal job postings and support internal mobility.

This integration will come in a two-step approach:

- » Create or update candidate account through the Candidate integration feed.
- » Create or update user account and associate it to the candidate account through the Employee integration feed.

For the Fusion-Taleo Integration solution, Fusion employees will be associated to Taleo default user types. For details on user types, see User Types.

Note: You must migrate candidate profile first, after which you may migrate user employee data.

Scenario 2: Employees hired through Taleo

This integration is the continuation of the new hire export integration. It applies to candidates being hired through a Taleo Recruiting process becoming internal employees. Once a new hire is sent by Taleo, Fusion will make sure the person has a user account in Taleo and is recognized as an internal employee.

This integration will come in a two-step approach:

- » Update the existing candidate account through the Candidate integration feed.
- » Create a new user account if required and associate it to the candidate account through the Employee integration feed.

For the Fusion-Taleo Integration solution, Fusion employees will be associated to Taleo default user types. For details on user types, see User Types. For Single Sign-On (SSO) it is necessary to configure the Taleo user types. Contact Oracle for details.

Note: You must migrate candidate profile first, after which you may migrate user employee data.

Candidate Mapping	
Taleo Field	**Fusion Field**
Key Record Identifier	User Name
Candidate Username	User Name
First Name	Worker First Name
Middle Name	Worker Middle Name
Last Name	Worker Last Name
Home Address	Home Address Line 1+ Home Address Line 2
Home Address 2	Home Address Line 3+ Home Address Line 4
Home City	Home Address Line City
Zip/Postal Code	Postal Code

Candidate Mapping	
Taleo Field	**Fusion Field**
Birthday	Worker Date of Birth
Email	Worker Primary Email Address
Home Phone	Worker Home Phone
Work Phone	Worker Work Phone
Fax Phone	Worker Fax
Mobile Phone	Worker Home Mobile Phone, (Or if this is not defined then Worker Work Mobile)
Pager Phone	Worker Pager
Internal Candidate	TRUE/FALSE (hardcoded)
National ID	Worker National Identification Number

Employee Mapping	
Taleo Field	**Fusion Field**
Record Identifier	User Name
User Login Name	User Name
First Name	Worker First Name
Middle Initial	Worker Middle Name
Last Name	Worker First Name
Employee Number/ID	Person Number
Work Phone	Worker Work Phone
Extension	Worker Work Phone Extension
Email	Worker Primary Email Address
Correspondence Language	Correspondence Language
Title (multilingual)	Worker Primary Assignment Job Name
Address 1	Work Location Address Line 1
Address 2	Work Location Address Line 2
Address 3	Work Location Address Line 3 + Work Address Line 4
City	Work Location Address City
State	Work Location Address State

Employee Mapping	
Taleo Field	**Fusion Field**
Country	Work Location Address Country
Zip/Postal Code	Work Location Address Postal Code
Organization	Business Unit
Location	Work Location
Department	Department
Job Role Code	EMPLOYEE (hardcoded)
Employee Status	CURRENT / TERMINATED (According to employee status in Fusion)
User Account Status	User Account Status
Manager	Worker's Manager's User Name in the superior position
Configuration Profile	Hiring Manager / Recruiter (hardcoded)
	Any user being a supervisor (someone who has direct reports) will be assigned the Hiring Manager configuration profile. Otherwise, the Recruiting configuration profile is assigned to the user.
	If the user configuration profile is changed manually in Taleo, there are good chances that Fusion will overwrite it on next user update.
Confirm Profile	False (hardcoded)
User Types	User Roles

The Employee ID must be unique; you must not recycle the Employee ID. In other words, when a person leaves the company (for example, John Smith, Employee ID 12345), you must not be allowed to assign that person's Employee ID to another person. If the terminated person is re-hired (in this example, John Smith), you must assign the same Employee ID (Employee ID 12345).

The scope of this integration is limited to new employees in Fusion HCM. The user you configured to receive import notifications will also be alerted to re-hires and internal mobility business. The user will either process the candidates manually or notify the HR specialist.

Taleo User Types map to Fusion User Roles. In addition to these predefined roles, custom roles can be created in Fusion by mapping them to Taleo User Types. There must be a match between the Fusion Role Code and the Taleo User Type Code. This way, you can manage the full set of Taleo User Types from Fusion. For details on user types, see User Types.

Security Policies

Fusion is using Single Sign-on to let users access Taleo. The password assigned to employee users will be meaningless because Fusion will be authenticating these users using SAML. For this reason Fusion does not need to set a password upon employee users creation. The password will be generated automatically when creating a user account.

Setting up Security Policies

Prerequisites

» To setup security policies, you must have the Manage Security Policies permission (Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Security Management).

Instructions

1. On the Configuration menu, locate the Security section. Click the **Security Policies** link.
2. Locate the User Accounts section. Click the **Edit** link.
3. In the Security Policies Editor page, set the following options as follows:
   » When creating a user account, send an email to user to confirm registration and password = NO
   » When creating a user account, generate automatically a user name = NO
   » When creating a user account, generate automatically a password = YES
4. Click the **Save** button.

User Types

The Fusion-Taleo Integration solution relies on specific user types provisioned in the system in order to be used for the employee creation process.

Taleo provides a set of default user types. These default user types may change over releases and may also be modified or even deleted. For the Fusion-Taleo Integration solution, Fusion employees will be associated to Taleo user types. The following table presents the mapping between Fusion roles and Taleo user types.

Note: You must validate that your zone has the required Taleo user types active. If not, you will need to create them manually.

Fusion Role Code	Taleo User Type Code	Taleo User Type Name
PER_RECRUITING_ADMINISTRATOR_JOB	01-RecruitingAdmin	Recruiting - Administrator
PER_POWER_RECRUITER_ABSTRACT	02-PowerRecruiter	Recruiting - Power Recruiter
PER_BASIC_RECRUITER_ABSTRACT	03-BasicRecruiter	Recruiting - Basic Recruiter
PER_LINE_MANAGER_ABSTRACT	04-PowerManager	Recruiting - Power Manager
PER_EMPLOYEE_ABSTRACT	10-Employee	Recruiting - Employee

Note: The user type codes must follow the exact naming convention. These user types must also be kept active in the system.

It is recommended to centralize the assignation of roles in Fusion IDM. You can provision additional roles in Fusion to control what users will get as user types in Taleo. Just keep in mind that the mapping is being done on Fusion User Role Code = Taleo User Type Code. Make sure you have corresponding user types in Taleo with the proper set of privileges and then it will work seamlessly.

You can however manage user types manually directly in Taleo. If you add more user types than what Fusion sends, Fusion will not reset them. However, if you remove a user type that Fusion previously sent, it will come back on the next user update if this role is still part of the user's Fusion role set. Roles sent by Fusion that do not find a corresponding user type in Taleo will simply be ignored. You will not get an error for inexistent user types.

Configuring User Types

Prerequisites

» To configure user types, you must have the Manage User Types permission (Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > User Management).

Instructions

1. On the Configuration menu, locate the SmartOrg section. Click the **Administration** link.

2. Click the **User Types** link.

3. Make sure these default user types are made available and are active.

   » Recruiting - Administrator

   » Recruiting - Power Recruiter

   » Recruiting - Basic Recruiter

   » Recruiting - Power Manager

   » Recruiting - Employee

4. If they are not available, create them using the proper user type name and code.

Taleo User Type Code	Taleo User Type Name
01-RecruitingAdmin	Recruiting - Administrator
02-PowerRecruiter	Recruiting - Power Recruiter
03-BasicRecruiter	Recruiting - Basic Recruiter
04-PowerManager	Recruiting - Power Manager
10-Employee	Recruiting - Employee

5. Define the desired permissions for these default user types.

6. Click **Save**.

User Groups

A user group is a group of people who need to have access to the same information for example, a group of people who works on the same requisitions. User groups are mandatory for a user to be effective in Taleo Recruiting.

Fusion does not set user groups during synchronization. System administrators have to set a user group manually after users have been created. Note that as of version 14A, system administrators have the ability to assign a default user group to newly created users. The Default User Groups setting can be used to indicate which user group new users will be automatically assigned. The default user group is automatically assigned only when no user group was manually assigned during the user account creation process. When the setting value is left empty, no default user group is assigned when creating new users.

The Fusion-Taleo Integration solution benefits from this feature. The setting does not have to be defined in order to make the integration work, but it will ease the life of system administrators.

Assigning a Default User Group

Instructions

1. On the Configuration menu, locate the General Configuration section. Click the **Settings** link.
2. In the Refine by field, select **Name**.
3. Type "**Default User Group"** in the field.
4. Click the setting name.
5. Click **Edit**.
6. Click **Add**.
7. Select one or multiple user groups.
8. Click **Select**.
9. Click **Done**. When creating new users, the selected user groups will be assigned if no user group was manually assigned during the user account creation process.

Requisition Types

Fusion creates requisition templates having a Universal requisition type. This requisition type must be active.

Activating Requisition Types

Instructions

1. On the Configuration menu, locate the Recruiting section. Click the **Administration** link.
2. On the Taleo Recruiting Administration menu, locate the General Configuration section. Click the **Requisition Types** link.
3. Click the **Universal (all job requisition types)** item.
4. Click the **Add** button.
5. You can reorder the types as needed. Click **the Universal (all job requisition types)** item.
6. Click the **Move up** button.
7. Click the **Done** button. The Universal requisition type will now be available to Recruiting Center users when creating a requisition.

Network Data

Taleo Recruiting uses network data to allow the creation of requisitions and candidate submissions. To make this possible for the Fusion-Taleo integration solution, network data must be activated. You will need to determine which items of the network data you want to activate. Available network data are:

- » Certifications
- » Employers
- » Institutions
- » Programs

Activating Network Data

Instructions

1. On the Configuration page, locate the SmartOrg section. Click the **Administration** link.

2. On the SmartOrg Administration page, locate the Network Data section. Click the **Certifications** link.

3. Click the **Activate All** button.

4. Click the **Yes** button.

5. Return to the SmartOrg Administration page.

6. Repeat the process for any remaining network data, such as Employers, Institutions, and Programs.

Recommended Practices When Configuring Taleo

Fusion being the system of records (SOR) for foundation data, Taleo will need to be provisioned with the same foundation data found in the Fusion system. As such, Organizations, Locations, Job Fields, Departments, LUDS, and Requisition Templates found in Taleo will be created based on Fusion data. As a result, it is important to not do any changes directly in Taleo to avoid consequences and issues on data integrity and data synchronization.

Below is a list of tasks that should not be performed in Taleo. Also listed, are tasks that can be performed and that will have no negative impacts on the integration.

System Administrator Managing Organizations in Taleo

Actions that can be performed:

» Viewing the Organization structure. (Configuration > SmartOrg Administration > Organizations > Structure Management)
» Validating that the Organization structure contains one level, that is Business Unit. (Configuration > SmartOrg Administration > Organizations > Structure Management)
» Adding or updating the description of each activated languages. Fusion will only provide languages activated in Fusion. Any other languages required in Taleo will be provided with a default language (English). As a result, it is important to review the translation of the language Description field for all activated languages. (Configuration > SmartOrg Administration > Organizations > Element Management)

Actions that should not be performed:

» Adding and deleting levels in the Organization structure. (Configuration > SmartOrg Administration > Organizations > Structure Management)
» Modifying the Organization status (Active, Inactive). (Configuration > SmartOrg Administration > Organizations > Element Management)
» Modifying the Organization code. (Configuration > SmartOrg Administration > Organizations > Element Management)
» Creating, deleting, editing, moving or deactivating a child of the Organization structure. (Configuration > SmartOrg Administration > Organizations > Element Management)

System Administrator Managing Locations in Taleo

Actions that can be performed:

» Viewing the Location structure. (Configuration > SmartOrg Administration > Locations > Structure Management)

» Validating that the Location structure contains four levels, that is Country, State/Province, City and Work Location. (Configuration > SmartOrg Administration > Locations > Structure Management)

» Adding or updating the description of each activated languages. Fusion will only provide languages activated in Fusion. Any other languages required in Taleo will be provided with a default language (English). As a result, it is important to review the translation of the language Description field for all activated languages. (Configuration > SmartOrg Administration > Locations > Element Management)

Actions that should not be performed:

» Adding and deleting levels in the Location structure. (Configuration > SmartOrg Administration > Locations > Structure Management)

» Modifying the Location status (Active, Inactive). (Configuration > SmartOrg Administration > Locations > Element Management)

» Modifying the Location code. (Configuration > SmartOrg Administration > Locations > Element Management)

» Creating, deleting, editing, moving or deactivating a child in the Location structure. (Configuration > SmartOrg Administration > Locations > Element Management)

System Administrator Managing Job Fields in Taleo

Actions that can be performed:

» Viewing the Job Field structure. (Configuration > SmartOrg Administration > Job Fields > Structure Management)

» Validating that the Job Field structure contains one level, that is Job Family. (Configuration > SmartOrg Administration > Job Fields > Structure Management)

» Adding or updating the description of each activated languages. Fusion will only provide languages activated in Fusion. Any other languages required in Taleo will be provided with a default language (English). As a result, it is important to review the translation of the language Description field for all activated languages. (Configuration > SmartOrg Administration > Job Fields > Element Management)

Actions that should not be performed:

» Adding and deleting levels in the Job Field structure. (Configuration > SmartOrg Administration > Job Fields > Structure Management)

» Modifying the Job Field status (Active, Inactive). (Configuration > SmartOrg Administration > Job Fields > Element Management)

» Modifying the Job Field code. (Configuration > SmartOrg Administration > Locations > Structure Management)

» Creating, deleting, editing, moving or deactivating a child of the Job Field structure. (Configuration > SmartOrg Administration > Job Fields > Structure Management)

System Administrator Managing Departments in Taleo

Actions that can be performed:

» Viewing Departments. (Configuration > Recruiting Administration > Department List)
» Adding or updating the description of each activated languages. Fusion will only provide languages activated in Fusion. Any other languages required in Taleo will be provided with a default language (English). As a result, it is important to review the translation of the language Description field for all activated languages. (Configuration > Recruiting Administration > Department List)
» Selecting a hiring manager or recruiter. (Configuration > Recruiting Administration > Department List)
» Setting approver preferences. (Configuration > Recruiting Administration > Department List)
» Changing the parent department. (Configuration > Recruiting Administration > Department List)

Actions that should not be performed:

» Activating and deactivating Departments. (Configuration > Recruiting Administration > Department List)
» Modifying the Department code. (Configuration > Recruiting Administration > Department List)
» Linking Departments to Organizations and Locations. (Configuration > Recruiting Administration > Department List)
» Enabling the setting "Link Requisition Organization to Department Organization" because this will break the integration. (Configuration > Recruiting Administration > Settings)

System Administrator Managing Position, Grade, Legal Employer LUDS in Taleo

Actions that can be performed:

» Creating the Position user-defined selection. (Configuration > Recruiting Administration > Selection Lists)
» Disabling the Taleo default Position field. (Configuration > Recruiting Administration > Fields)
» Creating the Grade user-defined selection. (Configuration > Recruiting Administration > Selection Lists)
» Creating the Legal Employer user-defined selection. (Configuration > Recruiting Administration > Selection Lists)

Actions that can be performed:

» Change Fusion large user-defined field properties other than those prescribed in this guide.
» Add, update, delete, activate, deactivate elements. (*Configuration > Recruiting Administration > Selection Lists*)

HR Administrator Managing Requisition Templates in Taleo

Actions that can be performed:

» Adding prescreening questions, screening information or any content exclusive to Taleo Recruiting. (*Recruiting > Libraries > Templates*)

» Activating additional languages for the requisition template. (*Recruiting > Libraries > Templates*)

» Adding a user group in the requisition template. (*Recruiting > Libraries > Templates*)

» Deleting draft requisition templates. (*Recruiting > Libraries > Templates*)

» Deactivating active requisition templates. (*Recruiting > Libraries > Templates*)

» Editing requisition templates.

Actions that should not be performed:

» Creating requisition templates from scratch. (*Recruiting > Libraries > Templates*)

» Duplicating requisition templates. (*Recruiting > Libraries > Templates*)

» Deleting active requisition templates. (*Recruiting > Libraries > Templates*)

» Modifying the Job Code, Organization or Location of requisition templates. (*Recruiting > Libraries > Templates*)

» Modifying the Job ID. (*Recruiting > Libraries > Templates*)

» The job codes of the requisition templates (created through duplication) must not have a similar naming convention than the job codes created by Fusion to avoid any possible conflicts.

Note: There is a permission to allow users to create requisition templates but there is no distinction between creating templates from scratch or by using an existing template (Configuration > SmartOrg Administration > User Types > Recruiting > Requisitions > Templates > Create templates).

Recruiter Creating Requisitions in Taleo

Actions that can be performed:

» Creating requisitions using requisition templates to make use of the Fusion delivered job codes. (*Recruiting > Requisitions > Create Requisition*)

» Selecting a department, a hiring manager, a job field, a legal employer, a grade, etc. when creating requisitions. The more information you provide within the requisition, the more seamless the pending worker process will be in Fusion once the candidate is hired. The pending worker process may require information that might not have been provided initially in the requisition. If this is the case, this information will have to be provided manually in Fusion. If you omit to provide this information, the process will not be blocked. (*Recruiting > Requisitions > Create Requisition*)

Actions that should not be performed:

» Modifying the Organization or Location information in the requisition from what has been defaulted from the requisition template. (*Recruiting > Requisition File*)

» Modifying the Fusion Job ID field.

» Modifying the requisition template used to create the requisition. (*Recruiting > Requisition File*)

Note: To allow users to only create requisitions from a template, these permissions must be granted (Configuration > SmartOrg Administration > User Types > Recruiting > Requisitions > General):
- *Create requisitions - Only from a requisition template (all requisition types, except contingent)*
- *Create requisitions - Only from a requisition template (contingent recruitment)*

Recruiter Creating Offers in Taleo

Action that can be performed:

» Indicating that the position is filled when the offer is made to the candidate. The position is an important piece of information that is required during the pending worker process in Fusion. If the position is not provided, the Fusion HR Specialist may have to manually enter it in Fusion.

Recruiter Creating Candidates and Candidate Submissions in Taleo

Actions that can be performed:

» Creating candidate files.

» Editing candidate files.

» Matching candidates to requisitions.

» Deleting external candidates.

» Editing candidate submissions.

Action that should not be performed:
» Deleting internal candidates.

Note: There is a permission to allow users to delete candidates. However, there is no distinction between deleting internal candidates and external candidates. (Configuration > SmartOrg Administration > User Types > Recruiting > Candidates > General > Delete candidate files)

When using the Revert action or the Reset Selection Process action on a candidate submission and then rehiring the candidate, the candidate will be imported again into Fusion because the candidate will be considered as being already hired for that submission.

Any changes made to data by Onboarding (Transitions) or Legacy Onboarding to candidate information before a candidate submission is exported to Fusion (New Hire Export) will be taken into account (exported to Fusion). However, any changes made afterwards will be ignored (not exported to Fusion). Data gathered by and for Legacy Onboarding is not exported to Fusion as part of the standard integration. If this is needed, a new custom integration point needs to be created.

In Taleo, the user name of a user should be 4 characters in length at a minimum. It will not be possible to import users having a user name of less than 4 characters.

HR Administrator Managing Employee Information in Taleo

Actions that can be performed:

» Viewing the employee user account information. (Configuration > SmartOrg Administration > User Accounts > Employee Information)

» Changing the picture of the employee. (Configuration > SmartOrg Administration > User Accounts > Employee Information)

» Adding and removing user types. (Configuration > SmartOrg Administration > User Accounts > User Types)

» Adding user groups. (Configuration > SmartOrg Administration > User Accounts > User Groups)

» Changing permissions. (Configuration > SmartOrg Administration > User Accounts > User Types > View Permissions)

» Changing preferences. (Configuration > SmartOrg Administration > User Accounts > General Preferences)

Actions that should not be performed:

» Changing personal information. (Configuration > SmartOrg Administration > User Accounts > Personal Information)

» Changing employee information. (Configuration > SmartOrg Administration > User Accounts > Employee Information)

» Generating a password. (Configuration > SmartOrg Administration > User Accounts > Account Information)

» Changing the user name because this is a key identifier for the Fusion synchronization. (Configuration > SmartOrg Administration > User Accounts > Account Information)

The Employee ID must be unique; customers must not recycle the Employee ID. In other words, when a person leaves the company (for example, John Smith, Employee ID 12345), it must not be allowed to assign that person's Employee ID to another person. If the terminated person is re-hired (in this example, John Smith), the customer must assign the same Employee ID (Employee ID 12345).

Taleo Settings Configuration Impacts

Setting	Location in Taleo	Comments
Organization Content Languages	Configuration > Career Section Administration > Settings	Taleo may need more languages than those supported by Fusion. Ideally, languages should be in line between Fusion and Taleo. If more languages are active in Taleo, the translations in Taleo will have to be reviewed because Fusion will send the content in English for these unsupported languages.
Requisition File Creation	Configuration > SmartOrg Administration > Configuration Profiles > select a configuration profile > Configuration Profiles	It is important to setup the requisition file properly to display the fields needed for the Fusion-Taleo integration. You might want to display the Legal Employer and the Grade fields. You may also want to display the Offer Position field which must be shown in the offer to capture the position at the time for the offer.
View or Edit Requisition File	Configuration > SmartOrg Administration > Configuration Profiles > select a configuration profile > Configuration Profiles	Requisition files should be configured using appropriate fields as for any configuration.
Enable Department	Configuration > [Recruiting] Settings	This setting must be enabled, unless the department concept is not used in the Fusion-Taleo integration.
Enable Position	Configuration > [Recruiting] Settings	This setting must be disabled because positions are managed using a user-defined field.
Default Reference Industry	Configuration > [SmartOrg] Settings	This setting must be set properly to respond to your business need. Fusion will use the value in this setting when importing Organizations.
Default Reference Job Field	Configuration > [SmartOrg] Settings	This setting must be set properly to respond to your business need. Fusion will use the value in this setting when importing Job Fields.
Automatic Hire	Configuration > [Recruiting] Settings	Verify if the hiring can be automated depending on the process. It might have an impact on the new hire export or it might impact the employee import process. You need to validate if the Offer

Setting	Location in Taleo	Comments
		Position is captured with the Automatic Hire.
Confirm Employee Presence Reminder	Configuration > [Recruiting] > Settings	Might not be relevant in the Fusion-Taleo integration because the confirmation comes from Fusion. There is no impact to enable it.
Department Autofill Activation	Configuration > [Recruiting] > Settings	This setting should be activated if departments are used.
Enable Requisition Question and Skill Validity Rule	Configuration > [Recruiting] > Settings	This setting does not impact the Fusion-Taleo integration. It is up to you to decide to use this option. If the setting is enabled, it requires that you review the Job Templates created by Fusion and add prescreening details.
Link Requisition Location to Department Location	Configuration > [Recruiting] > Settings	Because Fusion sends the department location to Taleo, this feature can be used to force such location in the requisition creation process.
Link Requisition Organization to Department Organization	Configuration > [Recruiting] > Settings	This setting highly impacts the Fusion-Taleo integration. Fusion is not sending the organization. The setting must be set to No if the department integration is enabled. Otherwise, the department integration process will be blocked.
Preserve Imported Requisition Data	Configuration > [Recruiting] > Settings	Because the integration does not import everything protected by this setting, this setting should be disabled.
Requisition Action Requires Effective Department	Configuration > [Recruiting] > Settings	This setting does not impact the Fusion-Taleo integration. Fusion will set the department status during the integration. It is up to you to decide if you want to use this option.
Send Department Information to eQuest When Posting Requisitions	Configuration > [Recruiting] > Settings	This setting does not impact the Fusion-Taleo integration. It is up to you to decide if you want to use this option.
Automatically reject all submissions when the requisition is canceled	Configuration > [Recruiting] > Administration > Fields > Requisition > click on the field > Edit Field Availability	This field must be made available in Taleo Recruiting.
Automatically reject all submissions when the requisition is filled	Configuration > [Recruiting] > Administration > Fields > Requisition > click on the field >	This field must be made available in Taleo Recruiting.

Setting	Location in Taleo	Comments
	Edit Field Availability	
When a candidate is hired for the requisition, automatically change his/her status to declined for all other requisition	Configuration > [Recruiting] > Administration > Fields > Requisition > click on the field > Edit Field Availability	This field must be made available in Taleo Recruiting.

Configure Selected Candidates Notifications in Fusion

When a new hire is imported into Fusion, the hiring manager receives a notification. The manager then processes the new hire by creating a Pending Worker in Fusion. Depending on the configuration of approval rules, someone other than the hiring manager may also receive a notification. This configuration may be changed as required.

The steps below illustrate how to configure the notifications for Taleo selected candidates who are ready to be processed in Fusion.

Configuring Selected Candidates Notification

Prerequisites

 » Configure Fusion so that the system will notify a specified user when a candidate ready to be hired has been imported from Taleo. This notification is in addition to the one that is sent to the hiring manager.

Instructions

1. Log in Fusion as a user with the Application Administrator user role.
2. Navigate to the **Setup and Maintenance** work area.
3. Click the **Navigator** icon.
4. Click the **Setup and Maintenance** link.
5. Click the **All Tasks** tab.
6. Enter **"Manage Approval Transactions for Human Capital Management"** into the Name field.
7. Click the **Search** button.
8. Click the **Go to Task** icon.
9. Enter **"OracleTaleo Imported Notification"** into the Name field.
10. Click the **Search** button.
11. Click the **Configure** button.
12. Select the **Management Hierarchy** node.
13. Click the **Add Approver Participant** icon for the Users approver type.
14. Click the **Action Type** list.
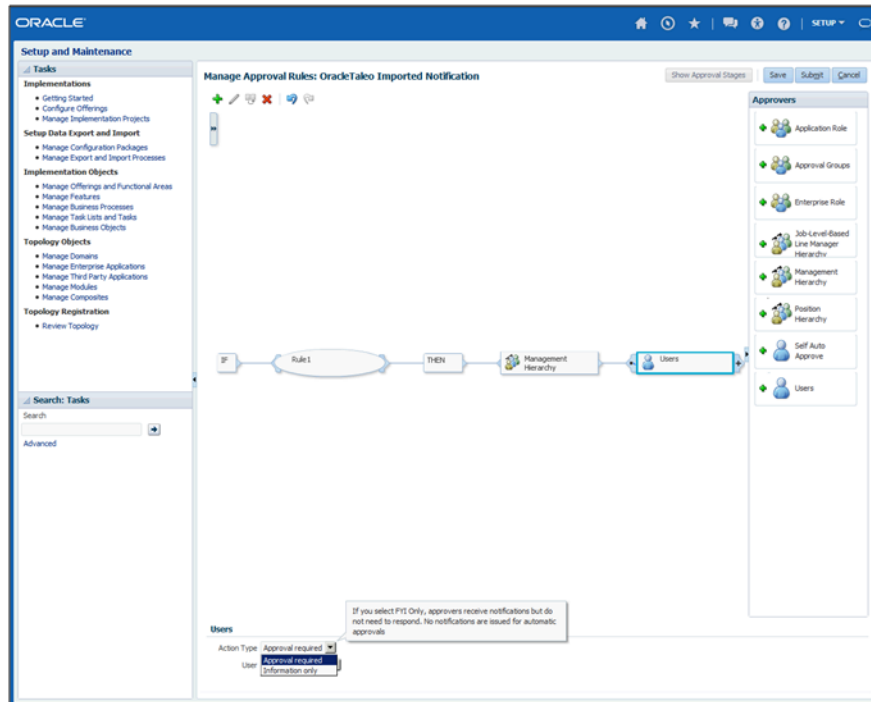
15. Click the **Information only** item.

16. Enter the email address of the user who will receive notifications into the Users field. If you want to add multiple people to the notification list, use the Add button as desired.

17. Click the **Submit** button.

18. Click the **Yes** button.
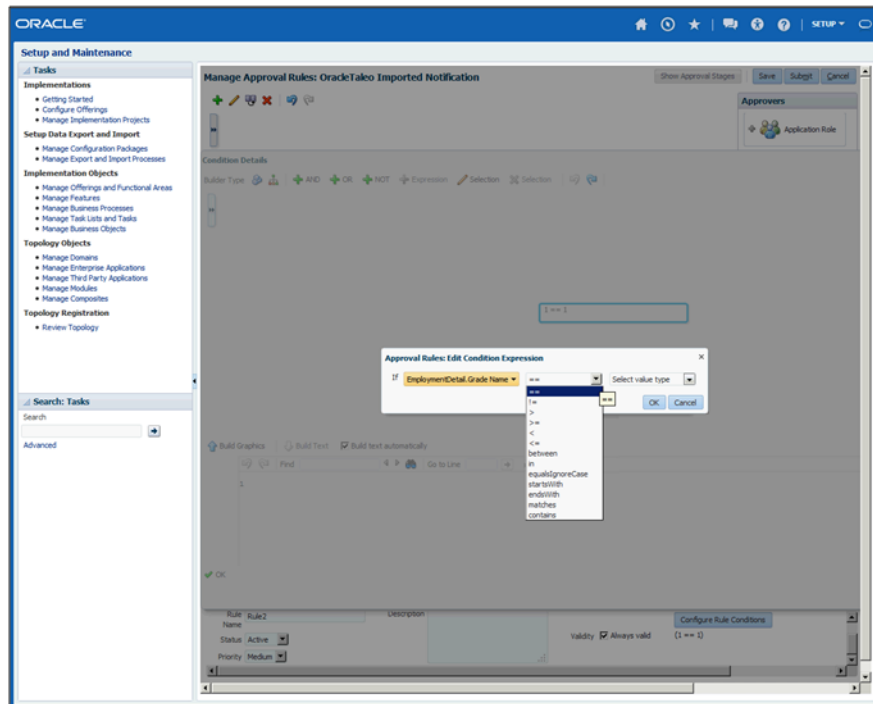
19. Click the **OK** button.

Next, you will create a new rule to send notification if the selected candidate has a grade starting with M (M grade for this Legal Employer indicates a Manager grade).

**Creating New Rule for the Oracle Taleo Imported Notification Transaction**

Instructions

1. Search for the transaction and click the **Configure** button.

2. Click the **Add New Rule** icon.

3. Click **Rule2**.

4. Click the **Configure Rule Conditions** button.

5. Select the rule.

6. Click the **Edit Selected Node** icon.

7. Click **Select Attribute** item.

8. Click the **Employment Detail** item.

9. Click the **Grade Name** item.

10. Click the **Operator** list.

11. Click the **Starts With** item.

12. Click the **Select value type** list.

13. Click the **Enter a value** item.

14. Enter **"M"** into the **Values** field.

15. Click the **OK** button.

16. In the Condition Details window, click the **OK** button.

17. Click the **Add Approver Participant** icon for the Users approver type.

18. Click the **Action Type** list.
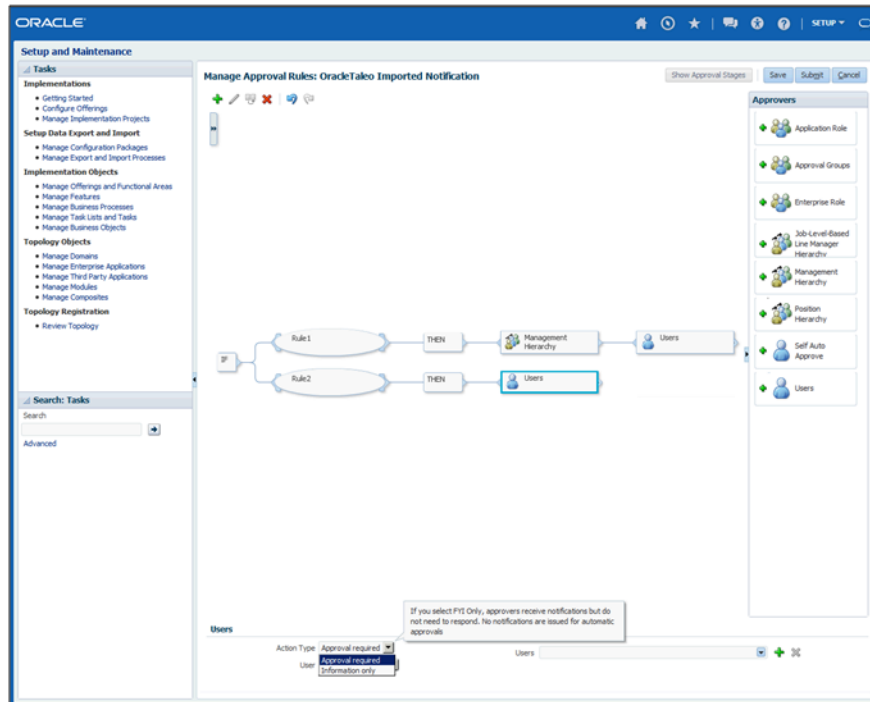
19. Click the **Information only** item.

20. If you do not know the email or user name of the person to be notified, you can use the Search function. The ten most recently used persons will be shown in the list without conducting a new search. Click the button to the right of the Search: Users field. If you do not see the desired person, click on the Search link.

21. Select a user from the list.

22. Click the **Submit** button.

23. Click the **Yes** button.

24. Click the **OK** button.

Export Network Data Using Taleo Connect Client

One of the steps when configuring the out-of-the-box integration between Fusion HCM and Taleo Recruiting is to synchronize Taleo reference data on Institutions, Certifications, and Study Levels with Fusion. You need to use Taleo Connect Client (TCC) to extract reference data from Taleo. It is your organization's responsibility to maintain Fusion profile elements with the reference data seeded in Taleo.

Data must be extracted from Taleo for the following entities:

- » Institutions
- » Certifications
- » Study Levels

Taleo reference data libraries for Institutions and Certifications will change over time as new entries are continuously being added and existing entries may be updated. A good practice is to perform a synchronization of reference data periodically. Taleo reference data is usually updated in Taleo customer zones approximately every 8 weeks. Regarding the reference library for Study Levels, this data does not change over time. It will therefore not be necessary to update the list of degrees after the initial synchronization.

Managing the synchronization of ongoing changes to Taleo reference data can be accomplished the following way:

- » The initial extract must be a complete extract.
- » Ongoing changes, for example the modification or addition of new institutions or certifications, must be extracted using the LastModificationDate filter and the date of the last data extract.

To extract network data from TCC, you need:

- » TCC extract definitions (sq.xml files) for all three entities.
  - ○ Two sets of scripts are available depending on the load method used: spreadsheet loader based process and HDL based process. Use the proper script with corresponding methods of loading data to Fusion.
- » TCC has to be installed and setup as required.

Extracting Network Data using TCC

Instructions

1. Open Taleo Connect Client.
2. In the Ping the Taleo product page, enter the following information:
   - » In the Product field, select **Smartorg 13A**.
   - » In the Protocol field, select **HTTPS**.
   - » In the Host field, enter the Taleo host URL. Example: fusn15ar10ovm70.qc.taleo.net

> » In the Port field, enter **443**.

> » In the Authentication section, select **Basic authentication**.

> » Enter the credentials (user and password) of the integration user who can access Taleo and export data.

3. Click **Ping**.

4. Click **File**, then select **New**, **New Configuration Wizard**.

5. In the New Configuration Wizard page, enter the following information:

> » In the Content section, select **Based on an export specification** and select the *_sq.xml file.

6. Click **Next**.
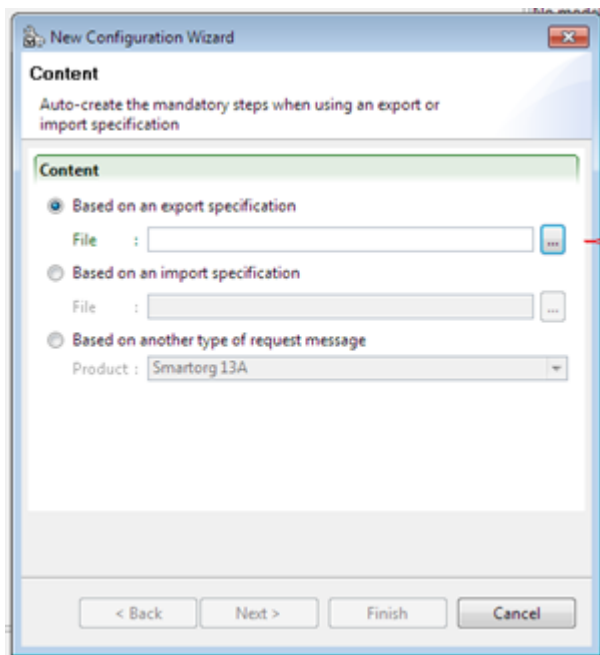
7. Validate the endpoint.

8. Click **Finish**.

9. In the General page, enter the following information:

   » In the Response section, select **Pre-defined value**.

   » In the File field, enter the path where the xml files are located and name the corresponding dat (.dat) file to be created that is:

     a) EducationEstablishment.dat – for Institutions

     b) ContentItem.dat – for Study Levels

     c) ContentItem.dat – for Certifications

10. Click **Save** in the tool bar and save the configuration file in the same folder as the xml files.

11. Execute the configuration file to generate the corresponding dat file in the same folder set under the Response section.

12. Zip the dat file created after executing the configuration file (to be used in Fusion for importing).

13. Repeat the same process for each dat file (institution, study level and certification).

Import Network Data into Fusion

Depending on the Fusion release, you will need to follow a specific procedure to import data into Fusion.

- » If you are using Fusion R8 or R9, you will load network data using the spreadsheet loader.
- » If you are using Fusion R10 with HDL configured to Limited mode, you will load network data using the spreadsheet loader.
- » If you are using Fusion R10 with HDL configured to Full mode, you will load network data using HCM Data Loader.

Import Network Data into Fusion – Fusion R8, R9 and R10 HDL Limited Mode

This step only needs to be performed once as part of the Fusion setup for the Fusion HCM - Taleo Integration, unless you have added new education establishments, licenses or degrees in Taleo.

I. Check if you have Oracle ADF Desktop Integration Add-in for Excel

Before you can start the Import Taleo Network Data task, you must check whether you have the Oracle ADF Desktop Integration Add-in for Excel. Instructions below are based on MS Excel 2007.

1. On your desktop, click the **Start** button.

2. In the Start menu, select **All Programs > Microsoft Office > Microsoft Office Excel 2007** (or 2010).

3. Once Microsoft Excel is started, click the **Office** button.

4. In the Office window, click **Excel Options**.

5. In the Excel Options window, click the **Add-Ins** tab, and find the **Oracle ADF Desktop Integration Add-in for Excel** in the list of add-ins.

   a. If you found Oracle ADF Desktop Integration Add-in for Excel, click **OK** and you are ready for the Oracle ADF Desktop Integration Add-in for Excel task.
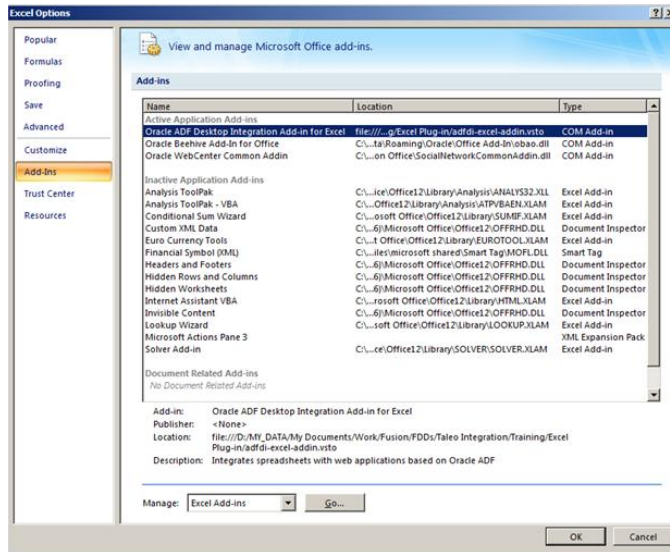
> b. If you did not find the Oracle ADF Desktop Integration Add-in for Excel, you need to follow the steps in prerequisite sections II and III below.

II. Install Oracle ADF Desktop Integration Add-in for Excel

You need to launch the Oracle ADF Desktop Integration Add-in for Excel. Choose one of the two options below.

Option A. Execute the file Setup.exe in Oracle ADF Desktop Integration Add-in for Excel .zip included in training materials.

Option B. Download it from the Fusion application:

1. Log in as HR Specialist to Fusion.
2. Open Navigator menu.
3. Click on Download Desktop Integration.

The installation of the ADF Desktop Integration add-in starts. Depending on software already installed, you might be prompted to install other mandatory prerequisites, and in some cases to reboot your computer.

Once Microsoft Office customization has been successfully installed, click Close to exit.

## III. Configure Excel to Run an Integrated Excel Workbook

You need to configure Microsoft Excel settings to make it accessible from ADF Desktop Integration. You only need to perform this procedure once for a given installation of Excel.

1. On your desktop, click the **Start** button.
2. In the Start menu, select **All Programs > Microsoft Office > Microsoft Office Excel 2007** (or 2010).

3. Once Microsoft Excel is started, click the Office button.
4. In the Office window, click Excel Options.
5. In the Excel Options window, click the Trust Center tab, then click the Trust Center Settings button.
6. In the Trust Center window, click the Macro Settings tab, then check the Trust access to the VBA project object model checkbox. Click OK.
7. Back in the Excel Options window, click OK.
8. Back in Excel, close the application and you are ready for Oracle ADF Desktop Integration Add-in for Excel task.

**IV. Verify that Countries and States are created in Fusion**

1. Login to Fusion as **HR Specialist** (who has Workforce Profile Administration Duty).

2. Navigate to **Setup and Maintenance.**

3. Search for the task **Manage Geographies.**

4. Click **Search** button. This gives you list of all countries.

5. For more information how to manage geographies refer to the Fusion help. (https://efops-rel8st6-cdrm-external-fs.us.oracle.com/helpPortal/faces/AtkHelpPortalMain?_afrLoop=1358989366264000&_afrWindowMode=0&_afrWindowId=null&_adf.ctrl-state=rvik8l323_1).

6. You are logged in with HR Specialist user role.
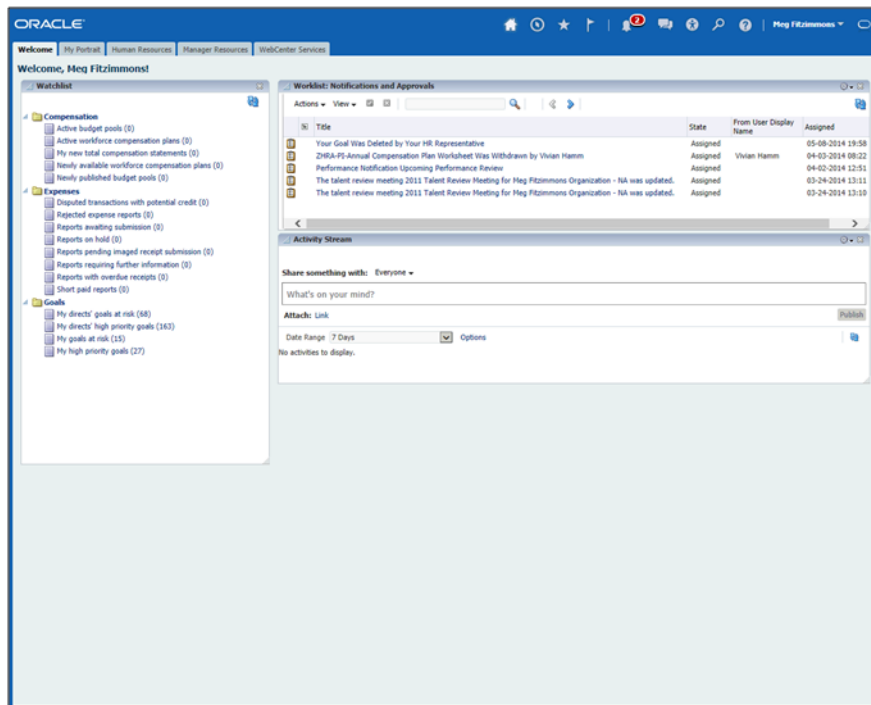
7. Click the **Navigator** button.

8. Click the **Data Exchange** link.

9. Click the **Initiate Spreadsheet Load** link.

10. Click the **Create Spreadsheet** button for the **Create Educational Establishment** business object.

11. Click the **Save as** option.

12. Change the spreadsheet name and location as necessary and click the **Save** button.

13. Open the spreadsheet containing the educational establishment data exported from Taleo (Source sheet) in Microsoft Excel.

14. Click the **Office** button.

15. Click the **Open** menu.

16. Select the file you downloaded from the Fusion Data Exchange work area. Select the **HcmGenericSpreadsheet.xlsx** file.

17. Click the **Open** button.

18. Click the **Yes** button.

19. Login using the same credentials used earlier. Click in the **User ID** field.

20. Enter "**TM-MFITZIMMONS**" into the User ID field.

21. Press [**Tab**] to navigate to the Password field.

22. Enter "**Welcome1**" into Password field.

23. Click the **Sign In** button.

24. Unprotect the spreadsheet to manipulate the spreadsheet data. Click the **Review** menu.

25. Click the **Unprotect Sheet...** button.

26. Take a note of the column order in the Target spreadsheet and switch to the Source spreadsheet.

27. Verify that the data columns of the source spreadsheet are in the same order as they were in the target spreadsheet and select all the data cells of the source spreadsheet. Click the top left data cell of the Source spreadsheet.

28. To select all data cells in the Source spreadsheet press [**Ctrl+Shift+End**].

29. Copy the selected data. Press **[Ctrl+C]**.

30. Switch to the Target spreadsheet.

31. The gray cells are for Fusion use. Select the top left white cell of the data row. Press the [**Ctrl**] key and click the **Name** cell.

32. Paste the copied data.

33. Press [**Ctrl+V**].

34. Click the **Upload** button.

35. Click the **OK** button.

36. Wait until the upload is finished.

37. Click the **OK** button.

38. Copy the **Batch Name** value.

39. Click the **Batch Name** cell.

40. Press **[Ctrl+C]**.

41. Navigate to **Fusion application**.

42. If you need to login again, use the same credentials you used to download the spreadsheet and navigate to the Data Exchange work area.
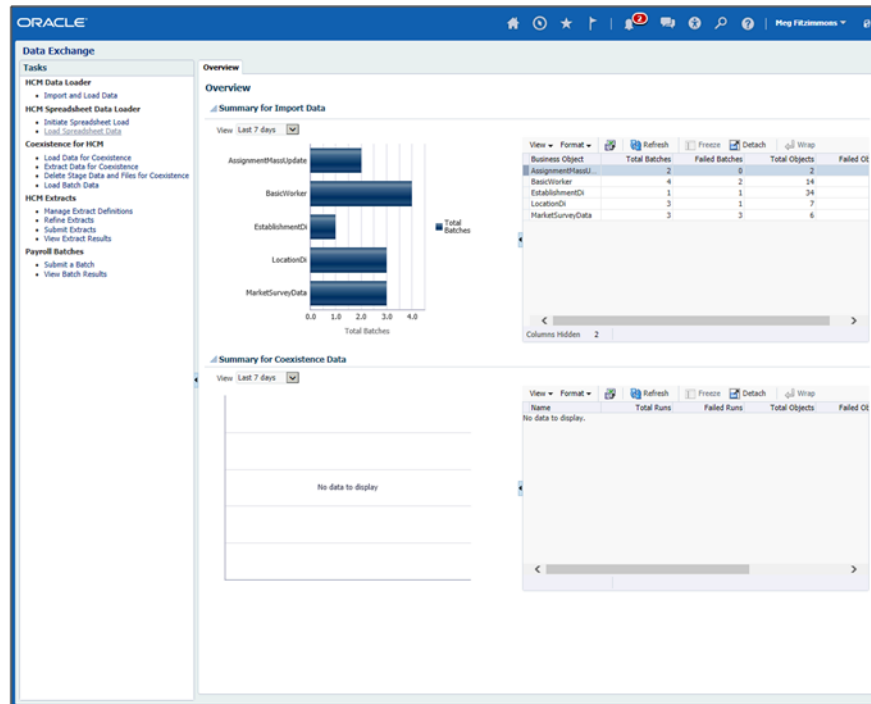
43. Click the **Load Spreadsheet Data** link.

44. Paste the patch name you copied from the target spreadsheet to the Batch Name field.

45. Click in the **Batch Name** field.

46. Press [**Ctrl+V**].

47. Click the **Search** button.

48. You see the details of the upload batch when you click on the search result row: how many objects were successful, how many failed, etc.

49. Repeat the same steps for Create Talent Profile Content Item spreadsheet. In the spreadsheet, enter the following data: **Taleo Degrees and Study Levels** (Fusion Degrees) and **Licenses and Certification**. All these data items can be uploaded using the same spreadsheet in the same load.

    Note: Ensure the date formats are consistent throughout Taleo, Excel and Fusion.

50. The Import Network Data task is complete.

Import Network Data into Fusion – Fusion R10 HDL Full Mode

As of Fusion R10, the HCM Data Loader (HDL) has been introduced. If the Fusion environment has the HDL activated in Full mode, the HDL load is the only way to import reference data into Fusion. The following instructions provide details on how to load data using HDL in a R10 Fusion environment.

Importing Network Data using the HCM Data Loader in Full Mode

Instructions

1. Log into Fusion with the user that has the Data Exchange HCM Data Loader access.

2. In the Navigator menu, click **My Workforce**.

3. Select **Data Exchange**.

4. Under HCM Data Loader, click **Import and Load Data**.
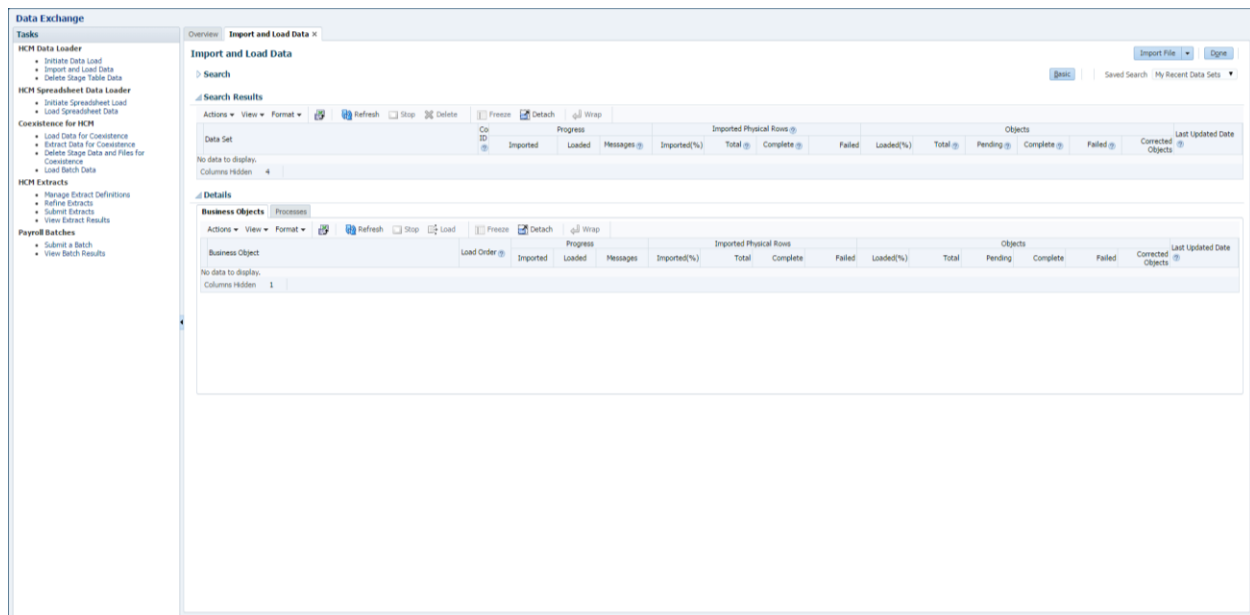
5. Click the down arrow besides the **Import File** button and select **Import Local File**.

6. In the **Select File** dialog, click **Choose File**.

7. Find and select the zipped file that contains the EducationEstablishment.dat file.
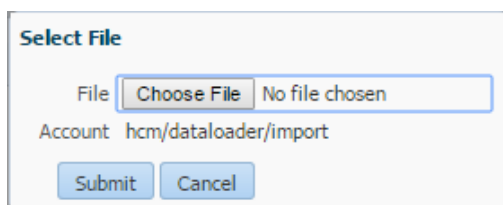
8. Back in the Select File dialog, click **Submit**.

9. In the Schedule Request window, click **Submit**.

10. Close the Confirmation dialog by clicking **OK**.

11. Refresh the Import and Load Data window periodically, until the loading operation is completed. After each refresh, you see the details of the upload (how many objects were successful, how many failed, etc.).

12. Repeat the steps 2 to 11 for the Licenses and Certifications Content Item. You will choose the zipped file that contains the ContentItem.dat file related to Licences and Certifications.

    Note: Ensure the date formats are consistent throughout Taleo and Fusion.

13. Repeat the steps 2 to 11 for the Degrees Content Item. You will choose the zipped file that contains the ContentItem.dat file related to Degrees.

Taleo to Fusion Mapping

The following mapping tables present the Taleo Connect Client (TCC) field paths for the matching Fusion fields formatted for the Spreadsheet Data Loader. The tables contain a Spreadsheet Loader column, the corresponding Fusion field as seen on the screens and the Taleo source field as described in the TCC Data Dictionary.

The extracted Taleo values will be found in a .csv document following the export from TCC. The content of this .csv file can be modified in order to pass Fusion upload edits.

Once data has been extracted, it can be loaded into Fusion using the Spreadsheet Loader.

TALEO INSTITUTION TO FUSION ESTABLISHMENT MAPPING			
Spreadsheet Loader Column	**Fusion Field Name**	**Taleo TCC Field Path**	**Comment**
Name	Name	CieInstitution.Description	Mandatory
Description	Description	CieInstitution.Description	Mandatory
Code	Code	CieInstitution.Number	Mandatory Key Identifier for updates
Location	Location	N/A	Not Required
Country	Country	CieInstitution.Location.Parent.Name	Not Required
State or Province	State or Province	N/A	Not Required

Note: Do not change the Code in Fusion for Establishment. This may impact ongoing data synchronization.

This import is dependent on how the geography hierarchy for each country was configured in Fusion. There must be an exact match between Taleo countries and Fusion countries. The synchronization with the state/province was intentionally omitted due to the high risk of mismatch. If you encounter an error while loading countries due to differences in the values expected in this field, you can safely remove the values from this column in the upload.

TALEO STUDY LEVEL TO FUSION DEGREE MAPPING			
Spreadsheet Loader Column	**Fusion Field Name**	**Taleo TCC Field Path**	**Comment**
Content Type	N/A	"DEGREES"	Mandatory
Item Code	Item Code	StudyLevel.Code	Key Identifier. Stripped to 30 characters.

TALEO STUDY LEVEL TO FUSION DEGREE MAPPING			
Spreadsheet Loader Column	**Fusion Field Name**	**Taleo TCC Field Path**	**Comment**
Name	Name	StudyLevel.Description	Mandatory
Description	Description	StudyLevel.Description	Not Required
Date From	Date From	01/01/1951	Mandatory
To Date	To Date	N/A	Not Required

Note: Do not change the Item Code in Fusion for Degrees. This may impact data synchronization.

An ongoing data synchronization is not necessary because Taleo Study Levels do not change.

TALEO CERTIFICATION TO FUSION LICENSE/CERTIFICATION MAPPING			
Spreadsheet Loader Column	**Fusion Field Name**	**Taleo TCC Field Path**	**Comment**
Content Type	N/A	"Licenses and Certifications"	Mandatory
Item Code	Item Code	Certification.Number	Key Identifier for updates
Name	Name	Certification.Description	Mandatory
Description	Description	Certification.Description	Not Required
Date From	Date From	Certification.CreationDate	Mandatory
To Date	To Date	N/A	Not Required

Note: Do not change the Item Code in Fusion Certifications. This may impact ongoing data synchronization.

Step 2: Initial Data Load from Fusion to Taleo

After the SaaS team confirms the system is ready for integration and you have finished configuring the Taleo zone, you must perform the initial data load: exporting all work structures, employees, contingent workers, and users from Global Human Resources to Taleo Recruiting.

Prior to performing the initial data load, you may want to review the topology to validate the configuration. This will allow you to see the Taleo Recruiting endpoint URL.

1. Sign in as a user with the Implementation Consultant user role.
2. Navigate to Setup and Maintenance.
3. In the Topology Registration section located in the left menu, click Review Topology.
4. Click the Diagnostic Tests tab.
5. Click the Enterprise Application Configuration tab.
6. In the Enterprise Application drop-down list, select Oracle Taleo Recruiting Cloud Service.
7. Click the Run button next to the row Validate External Enterprise Application Endpoint URL.
8. You should see the below page displaying the Taleo Recruiting instance details. You can click View > Expand all to see all rows in this page.

Export All Fusion Data to Taleo

This is done by running the **Export All Oracle Taleo Recruiting Cloud Service Data** process. You need to run this process only once per data object, in the beginning, to send all Fusion HCM data of that data object to Taleo Recruiting to enable the creation of job requisitions.

Below are the steps to export initial work structures, employees, contingent workers, and user data from Fusion HCM to Taleo using the **Export All Oracle Taleo Recruiting Cloud Service Data** process.
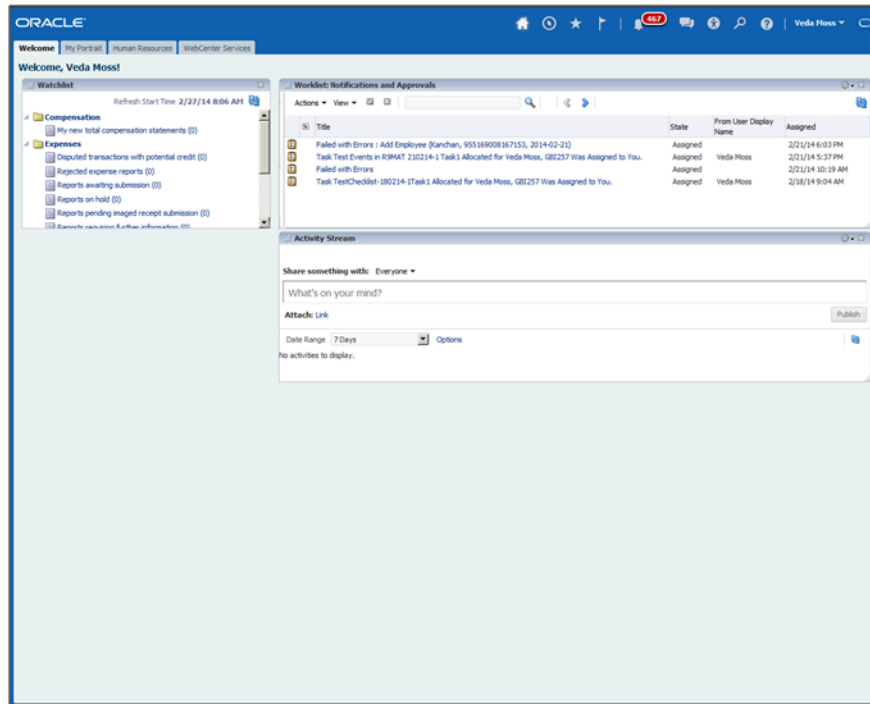
1. Sign in as a user with the HCM Integration Specialist user role.
2. Navigate to the **Scheduled Processes** work area, and click the **Navigator** icon to open the Navigator menu.
3. Click the **Scheduled Processes** link.
4. Click **Schedule New Process**.
5. In the Schedule New Process window, click the button to the right of the **Search: Name** field.
6. Click the **Search**... link.
7. In the Name field, enter "**Export All Oracle Taleo Recruiting Cloud Service Data**".
8. Click the **Search** button.
9. Select the **Export All Oracle Taleo Recruiting Cloud Service Data** process.
10. Click the **OK** button.
11. In the Schedule New Process window, click the **OK** button.
12. Click the **Export Object** list.
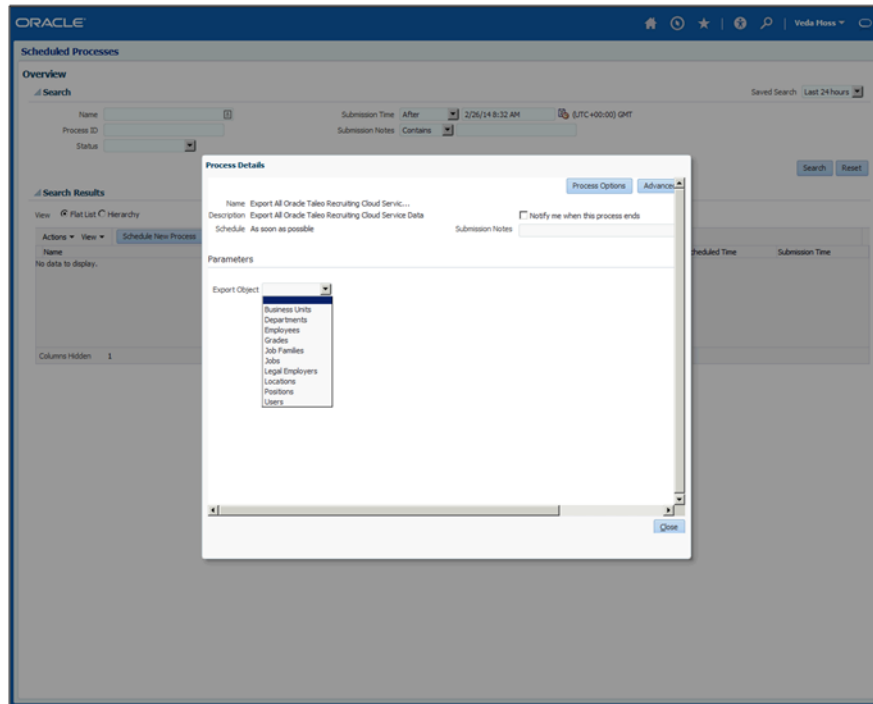
13. Select an export object. This field must not be left blank.
14. Click the **Locations** list item.
15. Scroll to reveal the rest of the window buttons.
16. Click the **Submit** button.
17. You may want to take the note of the process ID.
18. Click the **OK** button.
19. Click the **Close** button.
20. To see the process, refresh the table. Click the **Refresh** icon.
21. If you want to wait for the process results, keep clicking the Refresh icon until the status changes from Running to Succeeded, Warning or Error.

» **Succeeded** means all available records were transferred successfully. The log file will indicate how many records were transferred.

» **Warning** means not all records were transferred, few encountered an error while transferring. The log files will have details about the records which could not get transferred and why.

» **Error** means the process failed and you must check the log files for details.

22. Click the **Refresh** button.
23. Once the process has finished, you can see the details of the process by selecting it. In this case, click on the **Export All Oracle Taleo Recruiting Cloud Service Data** process.
24. If the process finishes with the **Succeeded** status, click the attachment link to view the results. Below is an example of the attachment of a successful Export All Oracle Taleo Recruiting Cloud Service Data process:

"The job has completed in UPDATE status

18 records for PER_INTG_BU were transferred successfully to Oracle Taleo Recruiting Cloud Services in the current batch

The job has completed in UPDATE status

No records for PER_INTG_BU was transferred to Oracle Taleo Recruiting Cloud Services in the current batch.

The job has completed in SUCCESS status".

25. If the process finished with the **Error** status, click the attachments to view the error details.
26. View the error reports and when ready click the **OK** button.
27. Resolve the issues highlighted in the error logs and then you can run the Recover Export Oracle Taleo Recruiting Cloud Service Data process to continue the interrupted process. Recover Export Oracle Taleo Recruiting Cloud Service Data process allows you to resubmit any of the failed Export Taleo Recruiting Cloud Service Data processes. It is useful when partial data was exported and the job failed for some infrastructure reasons.
28. Repeat the previous steps for each of the following objects to export them:

   » Business Units
   » Job Families
   » Legal Employers
   » Departments
   » Grades
   » Positions
   » Jobs
   » Employees (and contingent workers)
   » Users

Note: It is important to export Locations, Business Units, Job Families first, Locations before Departments and Business Units, Job Families before Job, Users at the end.

Validate Data is Correctly Received in Taleo

If you want to verify that the data has been successfully imported from Fusion into Taleo, you can perform the following steps.

Instructions

1. On the Configuration menu, locate the SmartOrg section. Click the **Administration** link.

2. Click the **Element Management** link under Organization.

3. Verify all the Business Units have been imported in Taleo.

4. Click the **SmartOrg Administration** link in the breadcrumb.

5. Click the **Element Management** link under Location.

6. Verify all the Locations have been imported in Taleo.

7. Click the **SmartOrg Administration** link in the breadcrumb.

8. Click the **Element Management** link under Job Field.

9. Verify all the Job Fields have been imported in Taleo.

10. Click the **Configuration** link in the breadcrumb.

11. Click the **Administration** link under Recruiting.

12. Click the **Department List** link.

13. Verify all the Departments.

14. Click the **Close** link.

15. Click the **Selection Lists** link under Fields.

16. Click the **Large Selections** tab.

17. Click the **Custom** tab.

18. Verify all the data for the customer defined fields have been imported into Taleo.

19. Click the **Taleo Recruiting Administration** link in the breadcrumb.

20. Click the **Home** object.

21. Click **Recruiting**.

22. Click the **Libraries** object.

23. Click **Templates**

24. Select **All** in the quick filter.

25. Verify the requisition templates.

26. Click the **Home** object.

27. Click the **Configuration** link.

28. Under SmartOrg, click **Administration**.

29. Under Users, click the **User Accounts** link.

30. Click a **User Type**.

31. Click Show next to **Employee**.

Step 3: Configuration of Synchronization between Fusion and Taleo

ESS Processes enable data exchange between Fusion and Taleo. These processes export the work structure and employee data in Taleo during the initial setup. These processes also export the ongoing work structure and worker data changes from Fusion to Taleo. These ESS processes import the ongoing candidate and requisition data from Taleo to Fusion.

The work structure data sync between Fusion and Taleo (both initial and incremental) automatically sets Taleo in Maintenance Mode during the duration of the data exchange. When Taleo is set to Maintenance Mode from Production Mode, it ends the user sessions i.e. automatically logs off all the users logged into Taleo. Therefore, depending on the frequency of changes to these objects within the business, the ongoing work structure updates must be scheduled to run nightly (during the maintenance window) or less frequently if changes are infrequent. However, the new hire and requisition data sync does not set Taleo in Maintenance Mode. These processes may be scheduled to run on an hourly basis or as needed.

The table below displays the recommended synchronization schedule for the respective processes:

ESS Process Name	Data Exchanged	Sets Taleo Maintenance Mode?	Recommended Schedule
Export All Oracle Taleo Recruiting Cloud Service Data	Locations	Y	Once during initial setup
	Business Units	Y	Once during initial setup
	Job Families	Y	Once during initial setup
	Legal Employers	N	Once during initial setup
	Departments	N	Once during initial setup
	Grades	N	Once during initial setup
	Positions	N	Once during initial setup
	Jobs	N	Once during initial setup
	Employees (and contingent workers)	N	Once during initial setup
	Users	N	Once during initial setup
Export Changed Oracle Taleo Recruiting Cloud Service Data	Locations	Y	Nightly or Weekly
	Business Units	Y	Nightly or Weekly
	Job Families	Y	Nightly or Weekly
	Legal Employers	N	Nightly or Weekly
	Departments	N	Nightly or Weekly
	Grades	N	Nightly or Weekly
	Positions	N	Nightly or Weekly
	Jobs	N	Nightly or Weekly
	Employees (and contingent workers)	N	Nightly
	Users	N	Nightly
Import Oracle Taleo	New Hire Data	N	Hourly

Recruiting Cloud Service Data			
	Requisition Data	N	Hourly
Recover Export Oracle Taleo Recruiting Cloud Service Data		N	Ad-Hoc (if system goes down in the middle of a run)

Schedule Regular HCM-Taleo Integration Related ESS Processes in Fusion

Following are the steps to schedule regular ESS processes to:

» Export incrementally changed data from Fusion HCM to Taleo using the Export Changed Oracle Taleo Recruiting Cloud Service Data process.

» Import candidates (ready to hire) and requisitions from Taleo to Fusion HCM using the Import Oracle Taleo Recruiting Cloud Service Data process.

Export Incrementally Changed Data from Fusion HCM to Taleo

Instructions

1. Sign in as a user with the HCM Integration Specialist user role.

2. Navigate to the **Scheduled Processes** work area.

3. Click the **Navigator** icon to open the Navigator menu.

4. Click the **Scheduled Processes** link.

5. Schedule **Export Changed Oracle Taleo Recruiting Cloud Service Data** process.

6. Click the **Schedule New Process** button.

7. Click the button to the right of the Name field.

8. Click the **Search...** link.

9. In the Name field, enter "**Export Changed Oracle Taleo Recruiting Cloud Service Data**". Note that the search is case sensitive.

10. Click the **Search** button.

11. Click on the **Export Changed Oracle Taleo Recruiting Cloud Service Data** row.

12. Click the **OK** button.

13. In the Schedule New Process window, click the **OK** button.

14. Select the data object to be exported. Click the button to the right of the Export Object field.

15. Click on the **Locations** list item.

16. In the **Export Data Range** field, enter the number of days since the last export. For processes scheduled to run daily or more often, enter **1**. This field must not be left blank.

    Note: "Changed Since" field is called "Export Data Range" as of Rel. 9.

17. Switch the view from Basic to Advanced to enable the Scheduling and Notifications tabs.

18. Click the **Advanced** button.

19. Click the **Schedule** tab.

20. Choose when the process should be run. Select the **Using a schedule** option.

21. Click the button to the right of the Frequency field. The likely volume and frequency of hiring people in your enterprise will determine how often you run this process.

22. Choose the desired frequency. If unsure, start with daily frequency. Select **Daily** in the Frequency drop down list.

23. For nightly frequency leave Every 1 Day(s) unchanged.

24. Because exporting some of the foundation data objects puts Taleo into Maintenance Mode, consider carefully what time you wish the nightly process to be run and change the Start Time accordingly. For more details, see the note on scheduling the Enterprise Scheduling Service (ESS) processes in Fusion in the Set Up Ongoing Synchronization section.

25. Choose the date the process should be run until, for example, 12/31/4712.

26. You may need to change user date preferences to a format that has 4-digit year, for example dd/MM/yyyy.

27. You can specify persons to notify when the process ends, in the Notification tab. Click the **Notification** tab.

28. Use the **Create and Delete** icons to add or remove people to be notified.

29. Scroll to the right to show the remaining buttons of the window. Click the scrollbar box.

30. Click the **Submit** button.

31. You may want to take a note of the process number. Click the **OK** button.

32. Click the **Close** button.

33. To see the scheduled process, refresh the table. Click the **Refresh** button.

34. Repeat the previous steps for each of the following objects to export them:

    » Business Units
    » Job Families
    » Legal Employers
    » Departments
    » Grades
    » Positions
    » Jobs
    » Employees (and contingent workers)
    » Users

Note: It is important to export Locations, Business Units, Job Families first, Locations before Departments and Business Units, Job Families before Job, Users at the end.

Import Candidates (ready to hire) and Requisitions from Taleo to Fusion HCM

Instructions

1. Click the **Schedule New Process** button.

2. Click the button to the right of the Name field.

3. Click the **Search...** link.

4. In the Name field, enter "**Import Oracle Taleo Recruiting Cloud Service Data**". Note that the search is case sensitive.

5. Click the **Search** button.

6. Select **Import Oracle Taleo Recruiting Cloud Service Data** process from the search results.

7. Click the **OK** button.

8. In the Schedule New Process window, click the **OK** button.

9. Click the button to the right of the Import Object field.

10. Click on the **New Hire Data** list item.

11. In the **Import Data Range** field, enter the number of days since the last import. For processes scheduled to run daily or more often, enter **1**. This field must not be left blank.

    Note: "Changed Since" field is called "Export Data Range" as of Rel. 9.

12. Switch the view from Basic to Advanced to enable the Scheduling and Notifications tabs. Click the **Advanced** button.

13. Click the **Schedule** link.

14. Choose when the process should be run. Select the **Using a schedule** option.

15. Click the button to the right of the Frequency field.

16. Choose the desired frequency. If unsure, start with hourly frequency. Click on the **Hourly/Minute** list item.

17. For hourly frequency leave Every 1 Hour(s) 0 Minute(s) unchanged.

18. Choose the date the process should run until, for example, 12/31/4712.

19. You may need to change user date preferences to a format that has 4-digit year, for example dd/MM/yyyy.

20. Scroll to the right to show the remaining buttons of the window. Click the scrollbar box.

21. Click the **Submit** button to submit the process.

22. You may want to take a note of the process number. Click the **OK** button.

23. Click the **Close** button.

24. To see the scheduled process, refresh the table by clicking the **Refresh** button.

25. Repeat the above steps to import requisitions.

Step 4: Mapping of Third-Party Plans

The mapping must be completed before the hiring of the pending worker.

Performing Mapping of Taleo Plans to Fusion Plans and Components

Predefined Taleo plans (known as offer standard fields in Taleo) which can carry an amount or number in the offer are:

- » Annual Bonus
- » Car Allowance
- » Commission
- » Expense Account
- » Relocation Amount
- » Sign-on Bonus
- » Stock
- » Options

There are plans which may be used to qualify the above plans based on customer requirements. These plans have a fixed list of values which can be selected. In Taleo, these are known as Small Standard User-defined Selections.

- » Commission Package: Executive, MBO, Type 1, Type 2.
- » Option Package: Employee prgrm, Incentive prgrm, Not Applicable.
- » Relocation Package: Executive, New Grads, Standard, Std.w/real est, Unknown
- » Stock Package: Employee Prgrm, Incentive Prgrm, Not Applicable

Each Taleo Plan is mapped to a Fusion Plan and Component (options). See the step Map the Taleo Plan to an Individual Compensation Plan below.

One or more Taleo Plans can be mapped to the same Fusion Plan and Component if it makes sense.

Since Taleo Plans do not have components, the plan name itself is used for the component. If the plan has a package plan associated (for example, Option Package for Option plan), all possible values of the choice list are listed as components. You can see all the possible combination of Taleo Plan and components in the table. You can map all the options for a Taleo Plan to the same Fusion plan and option or keep them different. If data for any Taleo Plan-component combination is found during import but the combination is not mapped, the data will not be imported.

Instructions

1. Map the Taleo Plan to an Individual Compensation Plan (elements and plans may need to be defined first).

Step 5: Recruiting Related Tasks in Taleo

Create and Approve Requisition in Taleo

Below is an example of how to create a requisition in Taleo.

Instructions

1. Click the **Recruiting** link.

2. Click **Create Requisition**.

3. Click the **Requisition Template Selector** button.

4. Select a requisition template.

5. Click the **Department Selector** button.

6. Select a department.

7. Click the **Next** button.

8. Click the **Organization Selector** button.

9. Select an organization.

10. Click the **Location Selector** button.

11. Select a location.

12. Click the **Job Field Selector** button.

13. Select a job field.

14. Click the **Create** button.

15. Click the **Hiring Manager Selector** button.

16. Select a Hiring Manager.

17. Click the **Fusion Grade Selector** button.

18. Select a Fusion grade.

19. Click the **Fusion Legal Employer Selector** button.

20. Select a legal employer.

21. Click the **Save** button.

22. Click the **Requisitions** link.

23. Click the **dropdown button** to activate the menu.

24. Click the **Request Approval** list item.

25. Click the **Select** button.

26. Click the **Actions dropdown button** to activate the menu.

27. Click the **Approve** list item.

28. Click the **Done** button.

29. Click the **Requisitions** menu.

Create and Hire New Candidate in Taleo

Below is an example of how to create and hire a new candidate in Taleo.

Instructions

1. Click the **Create Candidate** button.

2. Click the **Create a job-specific submission** option.

3. Click the **next** button.

4. Select a job-specific submission.

5. Select the **candidate file creation** template. Click the **Next** button.

6. Enter a name into the First Name field.

7. Enter a last name into the Last Name field.

8. Enter the SSN into the Social Security field.

9. Enter a valid email address into Email Address field.

10. Click the **Next** button.

11. Complete the required fields in the candidate file.

12. Click **Save**.

13. Click **Save**.

14. The number corresponding to the requisition represents the number of candidates associated to the requisition. Click the number link.

15. Click the name of a candidate.

16. In the **More Actions** menu, select the **Change Step/Status** list item.

17. Click the **Passed HR Screen** list item.

18. Click the **Save and Continue** button.

19. Click the **1st Interview** list item.

20. Click the **Passed Interviews** list item.

21. Click the **Save and Continue** button.

22. Click the **Save and Close** button.

23. Click the **More Actions** list item.

24. Click on **More Actions** and then select **Create Offer**.

25. Select the desired start date.

26.   Click the **Tentative** option.

27.   Enter "**35000**" into the **Annualized Salary** field.

28.   Click the **Pay Basis** button.

29.   Click the **Yearly** list item.

30.   Scroll down the Offer tab to view the Fusion Position field. A Fusion Position can be selected by clicking on this selector. For this demo we are not using any Positions.

31.   Click the **Save and Close** button.

32.   Click the **More Actions** list item.

33.   Click the **Request Approval** list item.

34.   Click the **Approve** list item.

35.   Enter "**Approve**" into the field.

36.   Click the **More Actions** link.

37.   Click the **Extend Offer** list item.

38.   Click the **More Actions** dropdown button to activate the menu.

39.   Click the **Capture Response** list item.

40.   Click the **Previous** button.

41.   Click the **Done** button.

42.   Click the **Change Step/status** list item.

43.   Click the **Hired - External** list item.

44.   Click the **Save and Close** button.

Step 6: Requisition Synchronization Process

As part of the Fusion HCM - Taleo Recruiting Integration solution, a synchronization of requisitions is performed. Requisitions created in Taleo Recruiting are exported from Taleo and imported into Fusion HCM.

In Fusion, requisitions are created as being vacancies. Vacancies are displayed in the organization chart in Fusion, as a new vacancy under the hiring manager defined in the requisition. When the requisition status changes in Taleo, for example, Filled, Deleted, Cancelled or Rejected, the vacancy disappears from the Fusion organization chart.
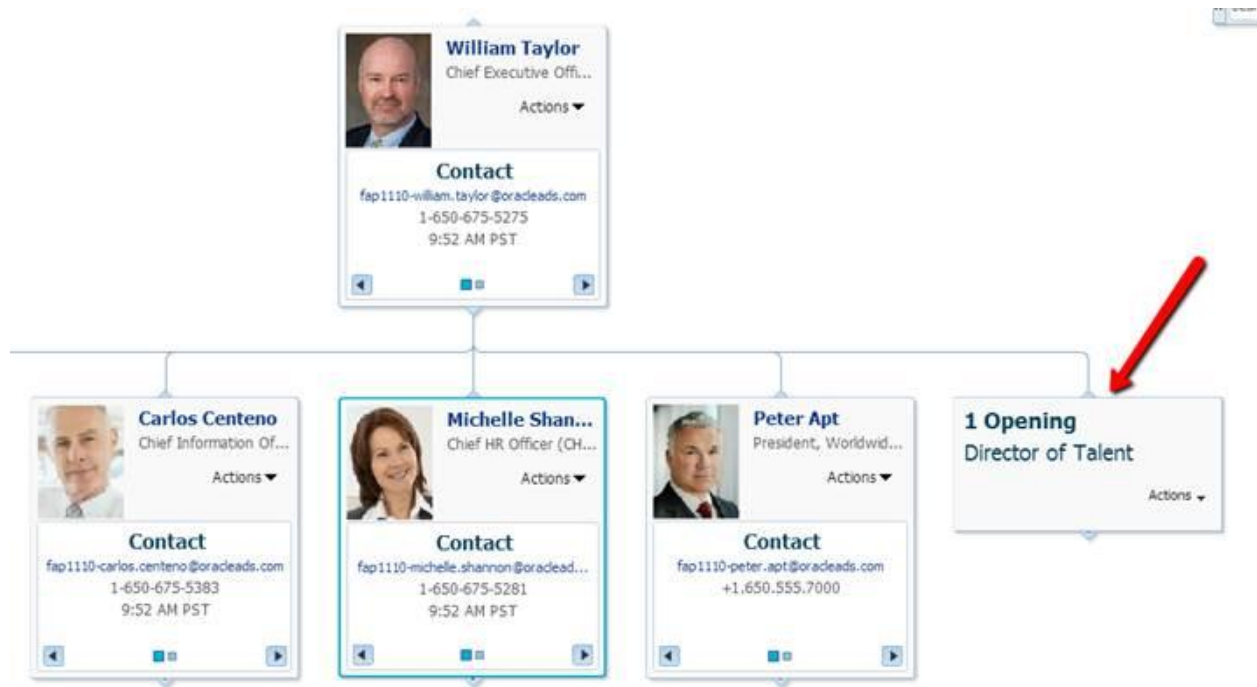
Requisition Mapping	
Taleo Field	**Fusion Field**
Requisition Number	REQUISITION_NUMBER
Requisition Title	REQUISITION_TITLE
Requisition Status	REQUISITION_STATUS
Hiring Manager	MANAGER_USER_NAME
Target Start Date	TARGET_START_DATE
Employee Status	EMPLOYEE_STATUS
Job Schedule	JOB_SCHEDULE

| Requisition Mapping	
Taleo Field	**Fusion Field**
Justification	REQUISITION_JUSTIFICATION
Number Of Openings	TOTAL_OPEN_HEADCOUNT
Fusion Job ID	JOB_ID
Organization Code	ORGANIZATION_ID
Primary Location Code/Id	PRIMARY_LOCATION_ID
Number Of Hired	TOTAL_HIRED_HEADCOUNT
Number Of Available Openings This is not an actual field in Taleo. It is a calculation of the number of openings and the number of hired candidates.	TOTAL_AVAILABLE_HEADCOUNT

Step 7: Hiring Related Tasks in Fusion

Process Selected Candidate as Pending Worker in Fusion HCM

The steps below illustrate how to:

» Process a selected candidate as a pending worker (by clicking the Process as Pending -Worker button in candidate notification process).

» Convert pending workers using Quick Convert process and Convert.guided process.

Instructions

1. You are logged in as a user with HR Specialist and Line Manager roles.

2. There are 3 ways to see your Selected Candidate notifications:

   a. **Welcome page:** Depending on the setup, your worklist and notifications may be included in Fusion Welcome page. This is the first way to see your Selected Candidate notifications.

   b. **Notifications icon**: The second way to see your recent Selected Candidates notifications is to click the Notifications icon.

   c. **New Person work area**: The third place to see selected candidates notifications. To use this method, navigate to the New Person work area. Click the Navigator button.

3. If you are an HR Specialist, you can also use the **New Person** link in the Workforce Management section of the Navigator. If you are a Manager, then use the **New Person** link in the Manager Resources section of the Navigator.
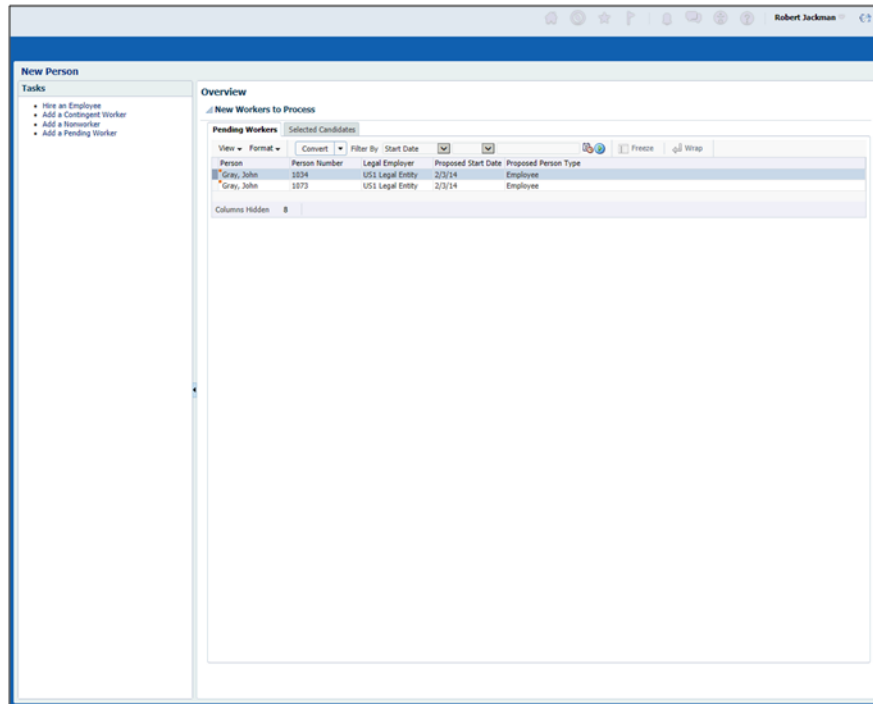
4. To see the notifications, click the **Selected Candidates** tab.
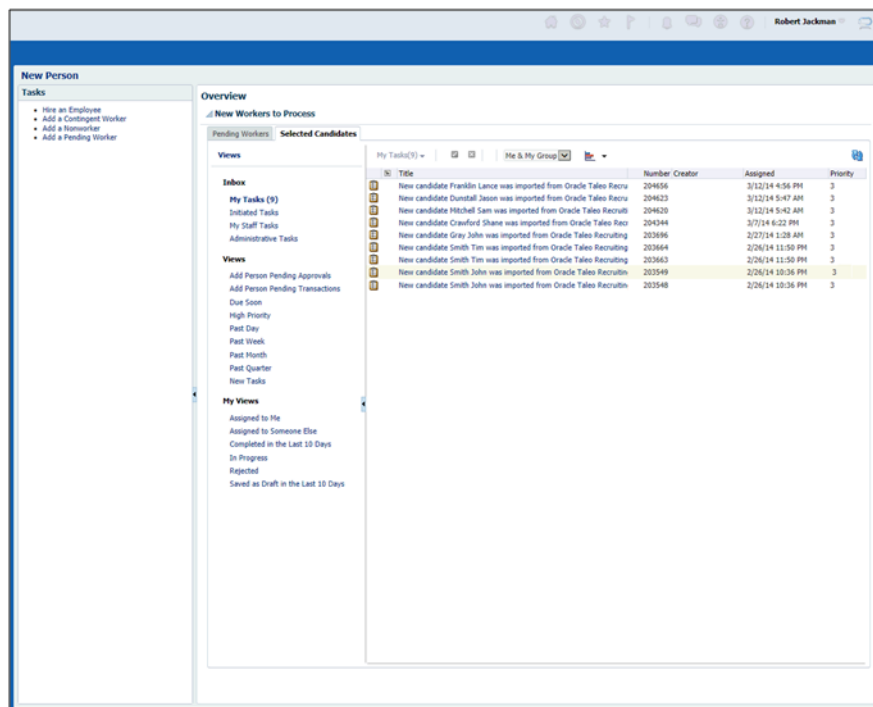
5. Click the notification header for one of the newly imported candidates.

6. Review the notification to assure it is the correct person, then process the candidate as pending worker by clicking the **Process as Pending Worker** button.

7. This launches the **Add Pending Worker** process, where the data is prepopulated with the candidate data that was imported from Taleo.

   Fill in missing data or correct the imported data as necessary, assuring that at least all required fields are entered correctly.

   Pay special attention to Proposed Start Date and Legal Employer fields because returning later to change either of these values may reset all the field values that were imported from Taleo or entered during this process.

8. Click the **Proposed Worker Type** list.

9. Click the **Employee** list item.

10. Click the **Title** list.

11. Click the list item for the appropriate title for this employee.

12. Click the **Gender** list.

13. Click the list item for the appropriate gender for this employee.

14. Click in the **National ID Type** dropdown.

15. Click the **Next** button.

16. Check the Address details for missing information, and complete any desired fields.

17. Check the phone details for missing, or inaccurate information. Begin completing this area by entering data into the **Country Code** field. In this example, we entered "united" and all the countries beginning with that value are displayed.

18. Select the desired country.

19. In our example above, you will notice that the imported phone number includes area code while the **Area Code** field is empty. You can move the **925** by first selecting the text, then cut by pressing [**Ctrl+X**]. Next, click in the **Area Code** field and paste by pressing [**Ctrl+V**]. Fix any similar issues with your import as required.

20. Click the **Marital Status** list.

21. Select the appropriate list item for this employee.

22. Click the **Ethnicity** list.

23. Click the appropriate list item for this employee.

24. To see the rest of the page, press [**Page Down**].

25. Click the **Contact Type** list.

26. Click the appropriate list item for this employee.

27. Click in the **Last Name** field.

28. Enter the last name of the contact into the **Last Name** field.

29. Navigate to the next field using the tab key.

30. Enter the first name of the contact into the **First Name** field.

31. Click the **Title** list.

32. Click the appropriate list item for this employee.

33. Click the **Add Row** button

34. Click the ***Type** list.

35. Select a contact type, such as **Home Phone**.

36. Fill in the all fields for the contact type selected.

37. Click the **Worker Category** list.

38. Select the appropriate list item for this employee, such as **White Collar**.

39. Click the **Assignment Category** list.

40. Click the appropriate list item for this employee.

41. Click the **Hourly Paid** or **Salaried** list.

42. Click the appropriate list item for this employee.

43. If desired, enter a value for the **Probation Period**. For a 2 week probation and notice, you would enter "**2**" into the field.

44. Click the **Probation Unit** list.

45. Click the **Weeks** list item.

46. The Probation End Date was populated by the system. Click in the **Notice Period** field.

47. If you selected a Probation period, enter a value into the **Notice Period** field. For our example of a 2 week probation and notice period, you would enter "**2**".

48. If you entered a **Notice Period** value, click the **Notice Period Unit** list.

49. For a 2 week notice period, you would click the **Weeks** list item.

50. Even though **Tax Reporting Unit** is not a required field, it should be entered, otherwise the Compensation and Payroll records will not be properly created after converting the Pending Worker. Click the **Tax Reporting Unit** list.

51. Click the appropriate Country list item.

52. To see the rest of the page, press [**Page Down**].

53. Click in the **Salary Amount** field.

54. Select a Salary Basis. For example, "US Annual Salary", UK Weekly Salary", Canadian Executive Monthly Salary".

55. Enter the desired value into the **Salary Amount** field. For example, "**35000**".

56. Tab out of the field to update the analytic by pressing [**Tab**].

57. Edit or delete Other Compensation as appropriate. To add an Award not already here, press Award Compensation. Select a plan, an option and enter an amount.

58. Click the **Next** button.

59. Enter a value for the graduation year. Click in the **Year Acquired** field.

60. Enter the year graduated into the **Year Acquired** field.

61. To see the Licenses and Certifications information, click the **Licenses and Certifications** link.

62. Click the **Next** button.

63. Usually the user roles are already populated here by auto provisioning. If any roles are missing you can add them by clicking **Add Role** button or remove unnecessary roles by clicking the **Remove** button.

64. Review the data and move down by pressing [**Page Down**].

65. Submit the process by clicking the **Submit** button.

66. Click the **Yes** button.

67. Click the **OK** button.

68. Now wait for approvals. Click the **Notification** button to check the status.
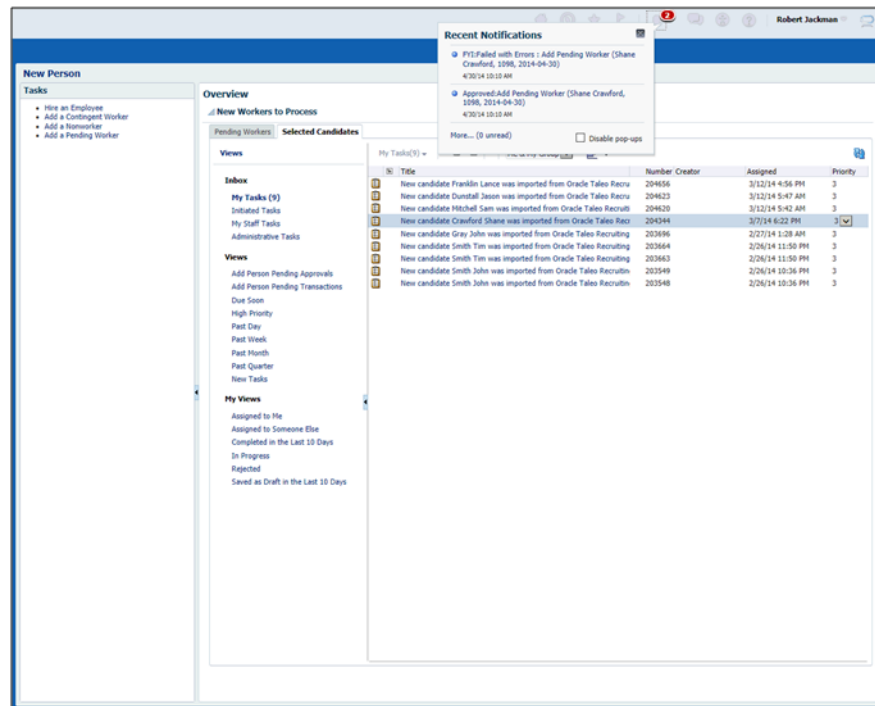
69. Click on the status notification (Approved, Failed, etc.) if you would like to see the transaction summary.

70. Review the transaction summary and close the notification.

71. Now convert one or more new workers by clicking the **Pending Workers** tab.

72. Select the desired employee record.

73. Because you know that all the details are already correctly entered and you do not want to review, modify or add any more details, use the **Quick Convert** system process which is run behind the scenes.

74. Click the button to the right of the Convert field.

75. Click the **Quick Convert** dropdown action item.

76. Click the **OK** button.

77. Click the **OK** button.

78. If you need to review, add or modify any of the Pending Worker data before converting, or if you are a manager, you should be using **Convert Pending Worker** guided process instead of Quick Convert process.

79. To use the Convert guided process to convert the Pending Worker, select the employee record desired.

80. Click the **Convert** button.

81. At the **Convert Pending Worker** guided process you can modify or add most of the details.

Note: Because the list of values are dependent on Start Date or Legal Employer then after changing Start Date or Legal Employer you may be required to re-enter all the data.

82. You have successfully processed a selected candidate as a pending worker and converted him/her to an employee.

    The converted worker details are sent back to Taleo with all other Fusion data changes during the Export Changed Oracle Taleo Recruiting Cloud Service Data process you scheduled in Fusion.

    In Taleo, the candidate record is updated with this information and the candidate is marked as an internal candidate. Also a user profile is created for this worker.

Process Selected Candidate for Rehire in Fusion HCM

Selected candidates notification may have a Process as Pending Worker button disabled for two reasons:

- » The Candidate has been already processed as a pending worker, or
- » The Person record for Selected Candidate exists in Fusion (selected candidate is either ex-worker or internal candidate).

When the candidate already exists as a person in Fusion then the user needs to process the candidate manually.

The hiring manager can process the candidate only if the selected candidate reports already to the hiring manager and the offered assignment would be considered a transfer or promotion of the current assignment and knows all the information to process the candidate.

In all other cases the candidate should be processed by an HR Specialist.

The following decision flow illustrates what users should do when the selected candidate is an ex-worker.

If the candidate is an internal candidate, follow the Process Candidate for Internal Candidate.
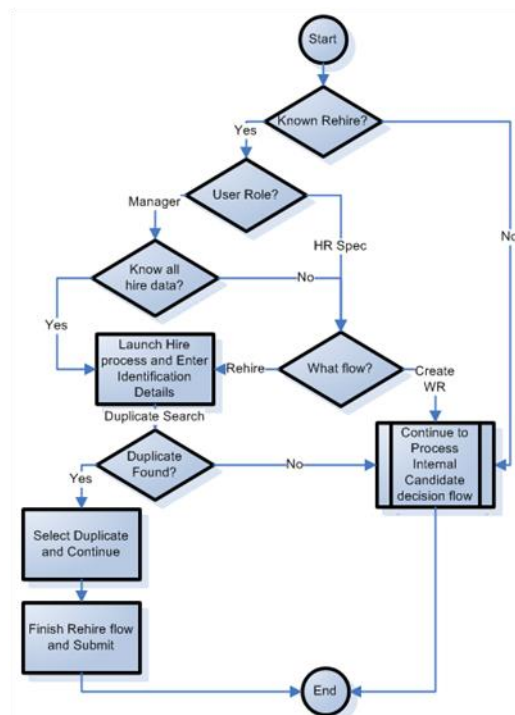
This demonstration illustrates how to process a selected candidate as a rehire:

- using Hire process that is available for HR Specialist and Line Manager user roles;
- using Create Work Relationship process that is available for HR Specialist only.
1. You are logged in as a user with Line Manager and HR Specialist user roles.

2. You may use Hire an Employee process to rehire a candidate if you:

   a. are a hiring manager or a HR Specialist,

   b. know that the selected candidate is a rehire, and you have all the information necessary to rehire the candidate

   First process a selected candidate as a Rehire using **Hire an Employee** process flow.

3. Navigate to **New Person** work area. Click the **Navigator** button.

4. Click the **New Person** link.

5. Click the **Selected Candidates** tab.

6. Click one of the notifications similar to: **New Candidate xxxx was imported from Oracle Taleo Recruiting…**

7. The **Process as Pending Worker** button is disabled. You know that this candidate is a rehire. Verify the information and click the Close **(X)** button.

8. Click the Close **(X)** button.

9. Click the **Hire an Employee** link.

10. Click the **Legal Employer** list.

11. Select the appropriate employer for this rehire.

12. Enter the employee last name into the **Last Name** field.

13. Press [**Tab**] to move to the **First Name** field.

14. Enter the employee first name into the First Name field.

15. Click the **Next** button to trigger duplicate search.

16. Click the **Select Person** button for the employee.

17. Click the **OK** button.

18. Verify the existing information, add the details of the new work relationship and submit the transaction for approval.

19. Next process a selected candidate as a rehire by adding a Work Relationship to the selected candidate. Navigate to Person Management work area (available for HR Specialist user role).

20. Click the **Navigator** button.

21. Click the **Person Management** link.

22. Enter a name into the Name field.

23. Click the **Advanced** button.

24. Click the **Include terminated work relationships** option.

25. Click the **Search** button.

26. Click the record you created.

27. Click the **Actions** menu.

28. Click the **Create Work Relationship** menu.

29. Verify the existing information, add the details of the new work relationship and submit the transaction for approval.

Process Selected Candidate for Internal Candidate in Fusion HCM

Selected Candidates notification may have Process as Pending Worker button disabled for two reasons:

» The Candidate has been already processed as a pending worker, or
» The Person record for Selected Candidate exists in Fusion (selected candidate is either ex-worker or internal candidate).

When the candidate already exists as a person in Fusion then the user needs to process the candidate manually.

The hiring manager can process the candidate only if the selected candidate reports already to the hiring manager and the offered assignment would be considered a transfer or promotion of the current assignment and knows all the information to process the candidate. In all other cases the candidate should be processed by an HR Specialist.

The following diagram illustrates the decision logic and different ways of processing a selected internal candidate in Fusion.

Process is triggered by a Notification of a Selected Internal Candidate (person record, with either active or inactive work relationship, exists in Fusion).

LE - Legal Employer
WR - Work Relationship
ASG - Assignment