Talent Acquisition: Guide for Administrators

Version 26
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About this Guide

This **Sage People Talent Acquisition: Guide for Administrators** provides a guide to Sage People Recruit for the Administrator responsible for supporting Recruiters or recruitment teams.

- The Overview (see page 14) summarizes Sage People Recruit.
- What You Need to Do (see page 15) summarizes your responsibilities and provides links to the content of this guide.

Using Sage People Recruit to run recruitment campaigns is covered in the **Sage People Recruit: Guide for Recruiters**.

Enhancements in this release are shown:

- **New** indicates a completely new feature for this release.
- **Enhanced** indicates a significantly enhanced feature for this release.
- **Highlighted text** indicates other enhancements.

Related Guides

**Talent Acquisition: Guide for Recruiters**

**Coverage summary**

How to set up and edit Vacancies, manage Candidates and Applications. Includes Agency management, uploading resumes, and conducting skill searches.

**Typical target audience**

You have responsibility for running recruitment campaigns for your organization.


**Coverage summary**

How to use Sage People Resource Manager. Covers Resource Plan creation through automatic generation of Resource Needs based on an existing organization, and by entry of individual Resource Needs. Includes a complete list of available fields and brief descriptions of the pre-configured reports supplied with the package.

**Typical target audience**

You have a role including resource planning, creating what-if resourcing models, or resource analysis within your organization.
Frequently Asked Questions

How many batch jobs can run at the same time?

Salesforce imposes a limit of 5 on the number of concurrent Apex batch jobs. This includes:

- Daily batches controlled with HCM Configure settings:
  - Action Creation
  - Action Digest
  - Action Emails Send
  - Handle Future Job History Dating
  - Handle Future Salary Dating
  - Handle Leavers
  - Hold Absence Balances
  - HR Request Finalize
  - Internal Communications Confirmation
  - Update Is Manager Field
  - Stock Option Vesting
  - Anonymize Surveys
  - Reuse Surveys
  - Update Survey Completion

- Recruit daily batch for Approval Reminders, controlled with the Recruit Configuration Reminder Email Sent Time.

- Batches triggered by edits, for example for sharing and Action Events.

- Scheduled reports and dashboards.

Optimize performance by:

- Staggering start times for configurable batches, wherever possible ensuring there is time for each batch to run to completion before the next one starts.

- Agreeing the order and timing of execution with administrators and HR Managers, ensuring batches run so the results are ready when needed.
How many external emails can I send in a day?

Salesforce imposes a limit of 5000 (five thousand) on the number of emails that can be sent to external email addresses per day, per org. You can send an unlimited number of emails to your organization's internal users, including portal users.

How can I change the look of the Candidate Portal?

Edit the cascading stylesheet (css) that controls the appearance of the Portal (see page 210). You will need to be familiar with the css stylesheet language. If your organization has more than one Candidate Portal, you can have separate css files for each (see page 206).

How do I make the Candidate Portal responsive?

There is a checkbox setting on the Applicant (Candidate) Portal Configuration page for Applicant Portal: Use Responsive Layout (see page 188).
How do I get a view of the relationships between database objects?
Frequently Asked Questions

How do I get a view of the relationships between database objects?

Use the Schema Builder to explore the Sage People database, showing the objects and relationships between them.

- Go to Setup > App Setup > Schema Builder.

For each object, the Schema Builder shows:

Use the Object Selector to choose the objects you want to display.

The Object Selector lists all objects in all packages you have installed in your org.

By default all objects are selected.

To display a subset of objects, use the picklist:

To center the display on a specific object:

- Enter the object name in the Search field:
- When the object name is displayed, select Find Object:

At the bottom right of the Schema Builder canvas is a small representation of the complete canvas.

Use the highlight to scroll the main window over the canvas:
How do I give Sage People Support access to my data?

If you raise a Support Case with Sage People, you may be asked to allow the Support team to login to your org as you so they can thoroughly investigate the issue.

1. Go to Setup > Personal Setup > My Personal Information > Grant Login Access

   Sage People displays the Grant Login Access page.

2. In the Sage People Support row, select the picklist in the Access Duration column and choose the duration of access you want to grant.

   It is good practice to keep Access Duration as short as possible - Support typically offer guidance on the length of time they need.
Overview

Sage People Recruit is a Software-as-a-Service (SaaS) cloud based application that defines, and enables you to manage the talent acquisition process within your organization.

Recruit is designed to handle the complete process from specifying the initial vacancy requirement right up to the final offer stage. It can assist with advertising the position, tracking applications and obtaining interview feedback. You can integrate vacancies with your websites using one or more Recruit Candidate Portals, and enable recruitment agencies to submit candidate details in a controlled way through the Recruit Agency Portal.

With fully automated workflows and the ability to change and customize the selection and interviewing criteria, you can configure the solution to meet your individual company’s needs, making it as in depth or as simple as your business requires.

What's more, Sage People Recruit is part of an integrated suite of HR applications, enabling newly recruited team members to quickly become part of your organization. For more information on the complete Sage People system, please visit: www.sagepeople.com
What You Need to Do

As a Recruit Administrator your role is to configure and maintain the Sage People Recruit site for use by a number of recruiters or recruitment teams. Recruiters set up vacancies, and manage the acquisition and assessment of candidates for those vacancies.

Details may vary between organizations, but typically your responsibilities include:

• Setting up Recruiters as Sage People Recruit Users (see page 31), and maintaining user information (see page 33).
• Creating and configuring Views for Recruiters (see page 21).
• Managing the field sets and field labels associated with Vacancies (see page 42), Candidates (see page 50), and Applications (see page 63).
• Setting up the system to receive emailed applications.
• Managing access to Recruit records (see page 75).
• Setting up Resume Parsing, if your organization subscribes to this service (see page 58).
• Setting up and running Recruitment reports and dashboards (see page 84).
• Setting up emails and workflows (see page 112).
• Maintaining approval processes (see page 123).
• Setting up and managing recruitment forms (see page 142).
• Setting up and maintaining your organization's selection criteria library (see page 154).
• Maintaining configuration details for:
  o The Sage People Recruit core package (see page 160)
  o Agency Portals (see page 174)
  o Candidate Portals (see page 188)
  o Job Board postings (see page 211)
  o External APIs (see page 237)
Logging in to Sage People

For the First Time

As part of Sage People implementation you are sent a welcome email containing:

- A link to your Sage People site.
- Your unique user name.
- A temporary password.

To login for the first time:

1. Select the link in the welcome email.
   Sage People displays the Change Password page:

2. Enter a new password. Your password must contain at least 8 characters and include a combination of letters and numbers.

3. Choose a security question from the picklist and provide your answer. You will be asked for the answer to the security question if you forget your password.

4. Select Save.

You are now ready to login to Sage People using your unique user name and password combination.
After You Have Changed Your Password

1. Go to the Sage People login page:
   https://fs.cloudforce.com/
   Sage People displays the customer login page:

   ![Login screen](image)

2. Enter your unique user name and password.
3. Select **Login**.
   Sage People takes you straight to your Sage People system.

Login with Single Sign-On

If your organization uses single sign-on technology your login process is:
1. Go to the web address provided by your organization.
2. Use your company provided single sign-on credentials to get access to Sage People.
   Your browser may need additional configuration so that you can take full advantage of single sign-on. Refer to your System Administrator or HR representative for more information.
   When you have successfully logged in you are redirected to the Home Page (see page 18).
Navigating Around

What you see when you first log in depends on how the System Administrator has configured the home page, application tabs and profile. A typical home page might look like this:
App Menu

The App Menu is a picklist giving you access to Sage People Recruit and other Salesforce applications, if you are licensed for both. Set this to Sage People Recruit.

Main view

The main view contains the main items being viewed. The home page main view consists of a configurable group of dashboards showing key indicators of the recruitment processes.
# Tabs

## Key Tabs

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Home</td>
<td>Returns you to the initial page after login. This page contains a dashboard, your calendar and tasks list for upcoming interviews and candidates you need to assess.</td>
</tr>
<tr>
<td>Applications</td>
<td>An application is the record of one candidate applying for one vacancy. Use it to schedule interviews, record assessments of candidates, and move the application through the selection process. Applications for specific candidates or vacancies are also accessed through the Candidates and Vacancies tabs. Applications are created automatically when receiving candidate emails with the vacancy reference in the subject line.</td>
</tr>
<tr>
<td>Candidates</td>
<td>Candidates are people who have applied for one or more vacancies. Each candidate record shows the common details across all their applications: their personal details, current employment and CV or resume.</td>
</tr>
<tr>
<td>Vacancies</td>
<td>A vacancy is an opening within your company for one or more people. Each vacancy is defined with its own set of job requirements. It describes what you are looking for and how you will evaluate candidates. Vacancies are assigned a status (pending, active, filled and so on) and are linked to associated Applications and shortlisted Candidates.</td>
</tr>
</tbody>
</table>

## Other Tabs, alphabetical order

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agencies</td>
<td>Agencies are the recruitment organizations used by your company to find candidates and put them forward for vacancies. Sage People Recruit enables you to run and manage an Agency Portal site for the agencies you use.</td>
</tr>
<tr>
<td>Assessment Events</td>
<td>Assessment Events can be linked to a specific selection stage for a vacancy. Each Event record gives the date, time and duration of the event, as well as its location, the maximum number of places available, and both internal and external contact details. An Assessment Event can be open, or by invitation only.</td>
</tr>
<tr>
<td>Assessment Queues</td>
<td>Assessment Queues are used to pass the assessments required for a selection stage to one or more assessors. To use an assessment queue for a selection stage, check the Auto Queue checkbox when configuring the selection stage.</td>
</tr>
<tr>
<td>Candidate Portals</td>
<td>A Candidate Portal enables you to display Vacancy details through an existing website, typically to populate your company’s careers pages. You can set up multiple Candidate Portals, each carrying vacancies of a particular type or for a specific location or country. Each Portal can be supported with dedicated text, images, and links.</td>
</tr>
<tr>
<td>Candidate Searches</td>
<td>View the results of all searches for candidates and start a new search. You can search on any combination of criteria from the Criteria Library, Selection Stage name, Location, or text match across Candidate, Application, Job History, and Resume records. Include Google X-ray search to extend your search to LinkedIn profiles.</td>
</tr>
<tr>
<td>Check List</td>
<td>You can add check list items to a candidate record for any additional items you wish to check for that candidate.</td>
</tr>
<tr>
<td>Criteria Library</td>
<td>Criteria used to specify the job requirements for vacancies. This includes suggested interview questions to help assess a candidate’s suitability for the job. Stored criteria are available when configuring new vacancies.</td>
</tr>
</tbody>
</table>
Navigating Around Sidebar

<table>
<thead>
<tr>
<th>Tab</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dashboards</td>
<td>Pre-defined graphical summaries of underlying reports. A dashboard can have up to 20 component charts or tables, each one providing a visual summary of report data. The Dashboards tab has options for cloning and editing existing dashboards. Use the Reports tab for an option to create your own dashboards.</td>
</tr>
<tr>
<td>External Test Providers</td>
<td>Suppliers of tests assigned to selection stages used during the recruitment process to help you assess the suitability of Candidates. Each Provider has a page providing links to the tests available in your organization.</td>
</tr>
<tr>
<td>Form Definitions</td>
<td>Form templates for use during the recruitment process. Each form you use is created from a form definition. Completed forms are accessible through the Forms tab.</td>
</tr>
<tr>
<td>Forms</td>
<td>Forms submitted as part of the recruitment process such as those used for pre-qualification, job application, or onboarding. Each submitted form is based on a template. Templates are accessible through the Form Definitions tab.</td>
</tr>
<tr>
<td>Offer Template</td>
<td>Each Offer Template defines the content of the offer letter to be sent to successful candidates towards the end of the recruitment process. A template is used to create a tailored offer letter by adding details that are specific to each vacancy and candidate, such as salary and start date.</td>
</tr>
<tr>
<td>Recruit Noticeboard</td>
<td>The Recruit Noticeboard enables you to add web formatted text, images, and links to appear as part of your Sage People Recruit Candidate and Agency Portals.</td>
</tr>
<tr>
<td>Reports</td>
<td>Built in and extensible management reports for reviewing and managing stored information. The Reports tab also includes an option for creating your own custom reports and dashboards.</td>
</tr>
<tr>
<td>Vacancy Codes</td>
<td>Vacancy Codes store the classifications used by Job Boards to enable you to post vacancies to the right area - such as location, industry and sector.</td>
</tr>
<tr>
<td>Workplaces</td>
<td>A Workplace is a location with one or more vacancies that can be viewed through a Candidate Portal. Workplaces enable central management of vacancies for multiple locations, such as those used by a parent and subsidiary companies.</td>
</tr>
</tbody>
</table>

Sidebar

The sidebar on the left of most Sage People pages provides convenient access to the following links and commands:

<table>
<thead>
<tr>
<th>Search</th>
<th>Calendar shortcut to your last used calendar view</th>
<th>Custom Links</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recent Items list</td>
<td>View Personal Tags picklist</td>
<td>Recycle Bin shortcut</td>
</tr>
<tr>
<td>Create New... picklist</td>
<td>Messages and Alerts</td>
<td></td>
</tr>
</tbody>
</table>

The options in your sidebar may vary if your System Administrator has customized your home page layout.

If your System Administrator has enabled the collapsible sidebar, you can show or hide the sidebar as needed. Select the edge of the sidebar or type ALT+S to open or close the sidebar.

Opening the sidebar using ALT+S automatically places your cursor in the Search box.
Using Views

Views enable you to apply a set of filters to your Sage People data so that you can focus in on a subset of all the records. Views:

- Support data from a single object (tab) at a time.
- Can be printed.
- Cannot be transformed into a report.
- Can be cloned and then edited to produce a new view.

For example, you could create a view to show all candidates with New York as their home city and with a preference for your Head Office location.

Views can be created for use only by you, or to be shared with a defined group of users.

To see the views you have available, go to the top of any tab home page and select the View picklist:
Creating a New View

You can create a new view by:

- Copying an existing view by saving it under a new name, editing it to make the changes you want.
- Creating a new view from scratch.

To copy and rename an existing view:

1. At the top of the list page or tab home page hosting the view you want to copy, select the View picklist, choose the view to form the base for your new view, and select **Edit**:

   ![Edit View page](image)

   Sage People opens the Edit View page.

2. In **View Name** enter a new name for your new view to prevent the original from being overwritten, or the new view being saved with the same name as the original.

3. Make the changes you need to create your new view.

4. Select **Save As**.

   If you have not entered a new name for your view:
   
   - Selecting **Save As** saves the new view with the same name as the original and both will appear in the list of available views. You can change a view name by selecting it, selecting Edit, and renaming it.
   - Selecting **Save** instead of Save As overwrites the original view.
To create a new view from scratch:

1. Go to the top of the list page or tab home page where you want a new view and select **Create New View**:

   Sage People displays the **Create New View** page:

   ![Create New View page](image)

   - **Step 1. Enter View Name**
     - **View Name**: Specify the name of the new view.
     - **View Unique Name**: Enter a unique identifier for the view.

   - **Step 2. Specify Filter Criteria**
     - **Filter By Owner**:
       - All Applications
       - My Applications
     - **Filter By Additional Fields (Optional)**:
       - Select fields and operators to filter records.

   - **Step 3. Select Fields to Display**
     - **Available Fields** vs. **Selected Fields**
     - Add or remove fields.

   - **Step 4. Restrict Visibility**
     - **Visible only to me**
     - **Visible to all users (includes partner and customer portal users)**
     - **Visible to certain groups of users**

   The exact content of this page depends on the kind of record you are viewing.
2. Complete the fields as follows:

**Enter View Name section**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>View Name</td>
<td>The name to appear in the View picklist.</td>
</tr>
</tbody>
</table>
| View Unique Name | If you have Customize Application permission, enter a unique name to be used by the system. The View Unique Name:  
|                  | • Must begin with a letter.                                                 |
|                  | • Must use only alphanumeric characters and underscores.                   |
|                  | • Must not end with an underscore.                                          |
|                  | • Must not use two consecutive underscores.                                 |
|                  | If you leave this field blank, Sage People constructs a unique name from the View Name you have entered. |

**Specify Filter Criteria section**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
</table>
| Filter By Owner  | Select the radio button corresponding to the set of records you want to filter against. The options vary depending on the kind of record. For Applications views you will see:  
|                  | • All Applications  
|                  | Select to create a view that filters data for all Applications.             |
|                  | • My Applications  
|                  | Select to create a view that filters data for your Applications.            |
Filter By Additional Fields

Select your filter criteria. This is optional. The fields and values available to you vary depending on the kind of record. You can apply multiple filters to act on your data.

As an example, to create a view to display all Applications for the Sales Manager Vacancy that are at the Interview stage:

1. In the first Field select the picklist and choose Vacancy:

   ![Image of filter by additional fields]

2. In Operator select the picklist and choose equals:

   ![Image of operator options]

3. In Value enter the name of the Vacancy, in this case, Sales Manager:

   ![Image of filter by additional fields with Sales Manager value]

4. Repeat the process for the second row of Filter By Additional Fields to add Current Stage equals Interview:

   ![Image of filter by additional fields with Current Stage and Interview values]
Select Fields to Display section

Available Fields

Picklist. Select the fields you want to display in the View you are creating. Select Add to move them to the Selected Fields list.

You can choose up to 15 different fields to display in your view. You can display only the fields that are available in your page layout. When you select a long text area field, up to 255 characters are displayed in the list view.

Use Remove to take fields off the Selected Fields list.

Use the Up, Down, Top, and Bottom arrows to sort your selected fields into the order you want the view to display them.

Restrict Visibility section

Radio buttons. Select the button corresponding to who you want to be able to use the view you are creating:

- Visible only to me
- Visible to all users
- Visible to certain groups of users.

Sage People displays additional fields enabling you to select the groups you want to share the View you are creating:

3. Select Save.

The view you created is displayed and added to the picklist of views for you to use again.
Configuring Views

View pages are displayed when you select a View from the View picklist on a tab Home page. To add or remove buttons displayed on a View page:

1. Go to Setup > App Setup > Create > Objects.
2. Select the label for the object associated with the View page you want to change. For example, to add or remove buttons displayed on Team Member view pages, select the Team Member label.
   
   Sage People displays the Custom Object page for the object you selected.
3. On the Custom Object page, go to the Search Layouts section.
4. In the Search Layouts section, select Edit next to the List View layout for the object, for example Team Members List View.
   
   Sage People displays the Edit Search Layout page.
5. In the Custom Buttons section:
   
   o Select Available Buttons and select Add to add them to the List View.
   o Select Selected Buttons and select Remove to remove them from the List View.
6. Select Save.
Getting an Overview of the Sage People Database

Use the Schema Builder to explore the Sage People database, showing the objects and relationships between them.

- Go to Setup > App Setup > Schema Builder.
For each object, the Schema Builder shows:

Use the **Object Selector** to choose the objects you want to display.

The Object Selector lists all objects in all packages you have installed in your org.

By default all objects are selected.

To display a subset of objects, use the picklist:

To center the display on a specific object:

- Enter the object name in the Search field:
- When the object name is displayed, select **Find Object**:

At the bottom right of the Schema Builder canvas is a small representation of the complete canvas.

Use the highlight to scroll the main window over the canvas:
Sage People Recruit User

To use Sage People Recruit you need to be a registered user. Your Systems Administrator can add new people as users.

To set up a new user:

1. From your User menu, select Setup:

   ![Setup Menu](image1)

2. In the left panel go to Administration Setup and select Manage Users > Users:

   ![Administration Setup](image2)

   Sage People displays the Users page.

3. Select New User:

   ![New User Page](image3)

   Sage People displays the New User page.
4. Complete the fields necessary to define a new user in line with your company policy. Mandatory fields are marked with a red bar:

**Mandatory fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Name</td>
<td>Text. The user's last name or family name.</td>
</tr>
<tr>
<td>Alias</td>
<td>Text. A shortened version of the user name.</td>
</tr>
<tr>
<td>Email</td>
<td>A valid email address for the new user. The new user is sent an email containing their initial password.</td>
</tr>
<tr>
<td>Username</td>
<td>Usually the same as the Email unless you have multiple Salesforce and Sage People user accounts, in which case you can enter alternative details. Alternative details do not need to be a real email address as it will never receive emails from Sage People Recruit, but it must be in email format, that is <a href="mailto:abc@xyz.com">abc@xyz.com</a>.</td>
</tr>
</tbody>
</table>

**Profile**

- **System Administrator**
  A System Administrator has full access to the whole system including security controls and adding new users.

- **Recruit Manager**
  A Recruit Manager has full access to Sage People Recruit except for security and adding new users.

- **Recruit User**
  A Recruit User can process applications but cannot create new vacancies.

**Generate new password and notify user immediately**

Checkbox. Check so that the new user receives a password by email to the email address you specified. Note that the email will be from Salesforce, as Sage People Recruit is hosted on Salesforce. The username and password are one and the same.

5. Select **Save** to save the New User details and close the New User page, or select **Save & New** to save details and create another new user.

Once the new user has received their introduction email containing their username and initial password, they can login by selecting the link in the introductory email or at the login page.
Managing User Information

Deactivating Users

If a user leaves your organization, you can deactivate their account to make their license available for reuse.

To deactivate a user:

1. From your User menu, select **Setup**:

   ![Setup](image1)

2. In the left panel go to Administration Setup and select **Manage Users > Users**:

   ![Administration Setup](image2)

   Sage People displays the Users page.

3. Select a view that shows the users you want, for example **Active Users**.

4. Select **Edit** next to the name of the user you want to deactivate:

   ![Edit](image3)

   Sage People displays the User Edit page.

5. On the User Edit page, uncheck **Active**:

   ![User Edit](image4)

6. Select **Save**.

   The user is deactivated and you can reallocate their license.
Resetting Passwords

If a user forgets their password, the System Administrator can reset it for them.

To reset a password:

1. From your User menu, select Setup:

2. In the left panel go to Administration Setup and select Manage Users > Users:

   Sage People displays the Users page.

3. Select a view that shows the users you want, for example Active Users.

4. Select the name of the user whose password you want to reset:

   Sage People displays the User Detail page.

5. Select Reset Password:

   Sage People sends an email to the user with instructions on how to reset their password.
Updating User Data

You can update:

- General information, including:
  - Name
  - Email
  - Role
  - Profile
  - Title
  - Company and department name

- Mailing address.

- Locale settings, including:
  - Time zone
  - Locale
  - Language

- Approver and manager.

To update user information:

1. From your User menu, select **Setup**:

2. In the left panel go to Administration Setup and select **Manage Users > Users**:

   Sage People displays the Users page.

3. Select a view that shows the users you want, for example **Active Users**.

4. Select **Edit** next to the name of the user whose details you want to change:

   Sage People displays the User Edit page.

5. Make the necessary changes.

6. Select **Save**.

If you change the user’s email address, Sage People sends an email to both the old and new email addresses. The new email address does not become active until the user activates it with a link in the email.
Profiles and Permission Sets

User permissions and access settings specify what users can do within an organization. For example:

- Permissions control a user's ability to edit an object record, view the Setup menu, empty the organizational recycle bin, or reset a user's password.
- Access settings control access to Apex classes, app visibility, and the hours when users can log in.

Permissions and access settings are specified in user Profiles and Permission Sets. Every user is assigned only one Profile, but can also have multiple Permission Sets.

When determining access for your users:

- Use Profiles to assign the minimum permissions and access settings for specific groups of users. Permissions and access settings defined in Profiles can be edited after installation in an org.
- Use Permission Sets to grant additional permissions, or to restrict permissions. Permissions and access settings defined in Permission Sets cannot be edited after installation in an org, contributing to the overall security of a configuration.
- Use sharing settings to further enhance system security if you need to do so.

Because you can assign many Permission Sets to users and Permission Sets are reusable, you can distribute access among logical groupings of users, regardless of their primary job function or their Profiles. For example, you could:

- Create a Permission Set that gives read access to a custom object and assign it to a large group of users.
- Create another Permission Set that gives edit access to the object and assign it to a small subset of those users.

Sage People is supplied with a range of Profiles and Permission Sets. You can use these as supplied. Alternatively, copying the Profiles or Permission Sets and then modifying them enables you to tailor permissions and access settings to more closely match the requirements of your organization.

Site Guest User Permission Sets

New in the Sage People Serenity release, the Site Guest User Permission Sets simplify the management of access permissions of Agency Portal and Candidate Portal users. Two new Permission Sets are provided:

- Sage People Agency Portal
- Sage People Candidate Portal

These Permissions Sets can be assigned to the Site Guest User, which enables Agency Portal and Candidate Portal users to access the Portals. The Permission Sets grant access to the appropriate Objects, Visualforce Pages and Apex classes for the Portals. You no longer need to add them to the Guest User profile manually.

To configure a new Site with Site Guest User Permission Sets (see page 166)

Updating a Force.com Site to use Permissions Sets

If your Org already has a Force.com Site for Agency Portals and Candidate Portals, you can update it to use the Site Guest User Permission Sets introduced in the Sage People Serenity release. When you have assigned the new permissions, you can remove the user profile's direct access to Recruit Visualforce Pages, Apex classes and Custom Objects.
To update a Site in your organization to use Permission Sets:

1. Go to Setup > App Setup > Develop > Sites.
2. On the Sites page, select the Site Label of the Site you want to update.
   Sage People displays the Site Details page for the Site.
3. Select Public Access Settings:

   Sage People displays the User Profile created for your site.
4. Select View Users.

   Sage People displays the Site Profile page.
5. Select the name of the Site Guest User.
   Sage People displays the Site Guest User Detail page.
6. Scroll down to the Permission Set Assignment Related List and select Edit Assignments.

   Sage People displays the Permission Set Assignments page for the Site Guest User.
7. Select the Permission Sets you want to assign to the Site Guest User in the Available Permission Sets panel and select **Add** to move them to the Enabled Permission Sets panel and then **Save**. Select:
   - **Sage People Agency Portal** if this Site is used for Agency Portals
   - **Sage People Candidate Portal** if this Site is used for Candidate Portal
   - **Both Permission Sets** if the Site is used for Agency Portals and Candidate Portal

Sage People displays the Site Guest User Detail page.

To remove Visualforce Pages, Custom Objects and Apex classes from the Site and the Guest User profile:

1. Go to **Setup > App Setup > Develop > Sites**.
   - Sage People displays the Sites page.
2. Select the Site Label of the Site you want to update.
   - Sage People displays the Site Details page for the Site.
3. Scroll down to the **Site Visualforce Pages** Related List and select **Edit**.
Sage People displays the Enable Visualforce Page Access page.

Enable Visualforce Page Access

Select the Visualforce pages that you want to make accessible at this Force.com site.

The Enabled Visualforce Pages panel lists all the Visualforce Pages that have been assigned to the Site, either manually or automatically by the system. When you use the Site Guest User Permission Sets, access to the Visualforce Pages is managed by the system so you can remove the manually added Recruit pages from the list. If there are custom Visualforce Pages for Agency or Candidate Portals in the Enabled Visualforce Pages panel, leave them there.

The default Visualforce Pages required for the site are:

- BandwidthExceeded
- Exception
- FileNotFound
- ForgotPassword
- ForgotPasswordConfirm
- InMaintenance
- SiteLogin
- SiteRegister
- SiteRegisterConfirm
- SiteTemplate
- Unauthorized

4. Select any Recruit pages in the Enabled Visualforce Pages panel, select Remove and then select Save.

Sage People displays the Site Details page.
5. Select **Public Access Settings**:

Sage People displays the Profile page for the Site's User.

6. Select **Edit**.

Sage People displays the Profile Edit page. Scroll down to **Custom Object Permissions** Related List and clear all selected checkboxes, then select **Save**.

Sage People redisplays the User Profile page.

7. Scroll down to **Enabled Apex Class Access** Related List. If there are Apex Class Names related to Recruit on the list, select **Edit**.

Sage People displays the Enable Apex Class Access page.

8. Select Recruit Apex classes in the **Enabled Apex Classes** panel and select **Remove**, then select **Save**.

Sage People redisplays the User Profile page.

9. Scroll down to **Enabled Visualforce Page Access** Related List and review the Enabled Pages. The list should match the Enabled Pages for the Site at the end of step 4. If not, select **Edit**.

Sage People displays the Enable Visualforce Page Access page.
10. Add pages to or remove pages from the Enabled Visualforce Pages panel until the list matches the Site list at step 4, then select Save.

Sage People redisplays the Guest User Profile page.

The Site and the Guest User Profile are now using Permission Sets only to manage Guest User access.

### Upgrading an Existing Recruit Package

1. Use the link to the new package supplied by Sage People and login to the org you want to upgrade.
2. Select Install for Specific Profiles.

Sage People displays a list of available Profiles.
3. Select the picklist for Set access level for all profiles to and choose No Access.
4. Select Set.
5. In the list of Profiles select the picklists in the Access Level column and choose the following mapping:

<table>
<thead>
<tr>
<th>Profile</th>
<th>Access Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fairsail Administrator</td>
<td>Recruit Administrator</td>
</tr>
<tr>
<td></td>
<td>Gives full access to Recruit. Applies the settings in the Recruit Administrator profile supplied with Recruit, to the Fairsail Administrator profile.</td>
</tr>
<tr>
<td>Fairsail HR Manager</td>
<td>Recruit User</td>
</tr>
<tr>
<td></td>
<td>Gives Read, Create, Edit, and Delete access to most Recruit objects. Applies the settings in the Recruit User profile supplied with Recruit, to the Fairsail HR Manager profile.</td>
</tr>
<tr>
<td></td>
<td>If you want to exclude HR Managers from access, choose No Access.</td>
</tr>
<tr>
<td>Fairsail Platform Team Member</td>
<td>Recruit Team Member</td>
</tr>
<tr>
<td></td>
<td>Gives Read access to most Recruit objects and extended access to some objects such as Candidate Search, Interviewer Criteria Assessments, Qualification Responses, and References. Applies the settings in the Recruit Team Member profile supplied with Recruit, to the Fairsail Platform Team Member profile.</td>
</tr>
<tr>
<td>All other Profiles including custom profiles</td>
<td>No Access</td>
</tr>
<tr>
<td></td>
<td>Access levels set for existing custom profiles are preserved with no changes.</td>
</tr>
</tbody>
</table>

6. Select Install.

The package is installed in your org. The installation may take several minutes to complete - if a progress page is displayed, select Done.

When installation is complete, you are sent an email confirming successful installation in your org.
Vacancy Status Values

Vacancy Status indicates the position of the Vacancy in the Vacancy lifecycle. A Recruit Vacancy can have one of a defined set of status values, each of which has a meaning to the Recruit system and helps to define what can happen to the Vacancy. Vacancy Status can be set manually or automatically by system or user defined workflows. Do not change the spelling of any supplied Vacancy Status option by editing picklist values - changed values will not work in Recruit.

Available Vacancy Status values are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Template</td>
<td>A model Vacancy you can use as a base on which to build. Often quicker than building a new Vacancy from scratch. You can force all new vacancies to be based on templates, helping to ensure consistency across the talent acquisition process.</td>
</tr>
<tr>
<td>Draft</td>
<td>In the process of creation, not yet ready to be submitted for approval.</td>
</tr>
<tr>
<td>Pending</td>
<td>A completed Draft, waiting for approval before it can become Active.</td>
</tr>
<tr>
<td>Approved</td>
<td>Recruitment can start against this Vacancy, but has not yet done so. Useful when time to fill Vacancy is measured from the point at which a Vacancy becomes Active and recruitment activity starts. A Vacancy can be held in Approved status until recruiters are ready to activate it.</td>
</tr>
<tr>
<td>Active</td>
<td>Available for recruitment. Commonly used to signal the start of active recruitment.</td>
</tr>
<tr>
<td>On Hold</td>
<td>An Approved or Active Vacancy for which recruitment activity must be paused, typically because of external factors that may affect the requirement.</td>
</tr>
<tr>
<td>Closed</td>
<td>A Vacancy that has been Approved or Active and is no longer required to be filled, typically because of a change of strategy, structural change within the organization, or external review.</td>
</tr>
<tr>
<td>Filled</td>
<td>Recruitment has been successful and the Vacancy has been filled.</td>
</tr>
<tr>
<td>Archived</td>
<td>Stored for possible future use.</td>
</tr>
</tbody>
</table>
Configuring New Vacancies

You can set options controlling the way New Vacancies can be created:

- Enforce the use of templates for all new vacancies.
  Templates help to ensure consistency throughout the talent acquisition process and can include detailed definition of recruitment stages for Vacancies.

- Enable the display of selected vacancies on the New Vacancy page to act as starting points for new vacancies. Choose from:
  - All Vacancies.
  - Your Vacancies.

To configure the New Vacancy process:

1. Go to Setup > App Setup > Installed Packages
2. In the Action column, select Configure for the Sage People Recruit package.
   Sage People displays the Sage People Recruit Configuration page.
3. Select the New Vacancies tab:

   ![Fairsail Recruit Configuration](image)

   - [ ] Require Template On New Vacancy
   - [ ] Templates visible
   - [ ] All Recent Vacancies visible
   - [ ] Manager's Recent Vacancies visible

   Save
4. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Field Set: Assessment Event</strong></td>
<td></td>
</tr>
<tr>
<td><strong>Require Template On New Vacancy</strong></td>
<td>Checkbox. If checked new vacancies must specify an existing vacancy to act as a template for Selection Criteria and Stages – you cannot save a new vacancy that is not based on a template. If checked, you must also check Templates Visible so that templates are available for selection. Use to help impose a level of consistency on the recruitment process and to ease creation of new vacancies. If not checked, new vacancies can be created without basing them on templates.</td>
</tr>
<tr>
<td><strong>Templates visible</strong></td>
<td>Checkbox. If checked, Vacancy Templates are listed for selection in the Copy Criteria and Stages From section on the New Vacancy page. Check if Require Template On New Vacancy is checked to make Templates available for selection.</td>
</tr>
<tr>
<td><strong>All Recent Vacancies Visible</strong></td>
<td>Checkbox. If checked, a maximum of the 997 most recently created Vacancies are listed for selection in the Copy Criteria and Stages From section on the New Vacancy page.</td>
</tr>
<tr>
<td><strong>Manager’s Recent Vacancies visible</strong></td>
<td>Checkbox. If checked, a maximum of the 997 most recent Vacancies created by the User viewing the New Vacancy page are listed for selection in the Copy Criteria and Stages From section.</td>
</tr>
</tbody>
</table>

5. Select Save.

**Field Sets: Assessment Event**

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply My Application</strong></td>
<td>Fields displayed when booking an Assessment Event.</td>
</tr>
</tbody>
</table>

**Field Sets: External Test Result**

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply My Application</strong></td>
<td>Fields displayed in a Candidate Portal in the Test to be Completed section of My Application.</td>
</tr>
</tbody>
</table>
# Field Sets: Vacancies

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Compensation Package</td>
<td>Fields displayed in the Compensation Package section of the Vacancy Details edit page.</td>
</tr>
<tr>
<td>Employment Type</td>
<td>Fields displayed in the Employment Type section of the Vacancy Details edit page.</td>
</tr>
<tr>
<td>Hiring Manager Approval</td>
<td>Fields displayed to the Assigned Approver in the Vacancy approval process - typically the Authorising Manager - when they view an Action from the Actions list to approve a Vacancy.</td>
</tr>
<tr>
<td>Hiring Manager Details</td>
<td>Fields displayed to the Hiring Manager when they view a Vacancy through WX.</td>
</tr>
<tr>
<td>Hiring Manager List</td>
<td>Fields displayed to the Hiring Manager in the list of their Vacancies.</td>
</tr>
<tr>
<td>Internal Job Apply</td>
<td>Fields visible to an internal candidate viewing a vacancy through the Internal Portal. These fields are read only.</td>
</tr>
<tr>
<td></td>
<td>In Sage People WX: fields visible to an internal applicant on the View Details view for a Vacancy. If Internal Job List is empty, WX defaults to display the fields in the Job List Field Set</td>
</tr>
<tr>
<td>Internal Job List</td>
<td>Fields visible to an internal candidate on the list of jobs displayed on the Internal Portal. These fields are read only.</td>
</tr>
<tr>
<td></td>
<td>In Sage People WX: fields visible to an internal applicant on the View Details view for a Vacancy. If Internal Job List Field Set is empty, WX defaults to display the fields in the Job List Field Set</td>
</tr>
<tr>
<td>Job Apply</td>
<td>Fields visible to a candidate viewing a vacancy in a Candidate Portal. These fields are read only.</td>
</tr>
<tr>
<td>Job Description</td>
<td>Fields displayed in the Job Description section of the Vacancy Details edit page.</td>
</tr>
<tr>
<td>Job List</td>
<td>Fields visible in the Job List section of a Candidate Portal. These fields are read only.</td>
</tr>
<tr>
<td></td>
<td>In Sage People WX: if the Internal Job List Field Set is empty, fields visible to an internal applicant on the View Details view for a Vacancy.</td>
</tr>
<tr>
<td>Key People</td>
<td>Fields displayed in the Key People section of the Vacancy Details edit page.</td>
</tr>
<tr>
<td>Requisition Details</td>
<td>Fields displayed for vacancy approval when using job requisition.</td>
</tr>
<tr>
<td>Requisition Edit</td>
<td>Fields visible on the vacancy edit page before vacancy approval when using job requisition.</td>
</tr>
<tr>
<td>Share As Edit</td>
<td>Available through Sage People Recruit Enterprise. Users granted Edit level access to this Vacancy.</td>
</tr>
<tr>
<td>Share As Read</td>
<td>Available through Sage People Recruit Enterprise. Users granted Read level access to this Vacancy.</td>
</tr>
<tr>
<td>Vacancy Details</td>
<td>The details visible on a vacancy page.</td>
</tr>
<tr>
<td>Vacancy Edit</td>
<td>Additional fields visible on the vacancy edit page.</td>
</tr>
</tbody>
</table>
## Translation Workbench: Vacancies

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Advertise Internally</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Advertise On Candidate Portal</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Advertise On Jobing</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Advertise to Agencies</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Applications Close Date</td>
<td></td>
<td>Date</td>
</tr>
<tr>
<td>Approved Date</td>
<td></td>
<td>Date</td>
</tr>
<tr>
<td>Authorising Manager</td>
<td></td>
<td>Lookup (User)</td>
</tr>
<tr>
<td>Benefits</td>
<td></td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Broadbean Candidate Profile</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>Broadbean Client Details</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>Broadbean Job Offer</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>Broadbean Post Date</td>
<td></td>
<td>Date/Time</td>
</tr>
<tr>
<td>Broadbean Summary</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>Candidate Portal</td>
<td></td>
<td>Lookup (Candidate Portal)</td>
</tr>
<tr>
<td>Candidate Portal URL</td>
<td></td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>CareerBuilder Post Date</td>
<td></td>
<td>Date/Time</td>
</tr>
<tr>
<td>Company</td>
<td></td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Currency Code</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Description</td>
<td></td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Details URL</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>Duration</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Education Level</td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Employment Type</td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Experience Level</td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>From Email Address</td>
<td></td>
<td>Text (20)</td>
</tr>
<tr>
<td>Hide Salary?</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Hiring Manager</td>
<td></td>
<td>Lookup (User)</td>
</tr>
<tr>
<td>Includes Benefits?</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Industry</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Job Board URL</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>Job Sector</td>
<td></td>
<td>Text (128)</td>
</tr>
</tbody>
</table>
### Vacancy Object

**Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields**

<table>
<thead>
<tr>
<th>Field</th>
<th>Type/Format</th>
</tr>
</thead>
<tbody>
<tr>
<td>Key Responsibilities</td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Latitude</td>
<td>Number (3,6)</td>
</tr>
<tr>
<td>LinkedIn Post Date</td>
<td>Date/Time</td>
</tr>
<tr>
<td>Location</td>
<td>Text (255)</td>
</tr>
<tr>
<td>Location City</td>
<td>Text (255)</td>
</tr>
<tr>
<td>Location Country</td>
<td>Picklist</td>
</tr>
<tr>
<td>Location Map</td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Location Postal Code</td>
<td>Text (20)</td>
</tr>
<tr>
<td>Location Region</td>
<td>Picklist</td>
</tr>
<tr>
<td>Longitude</td>
<td>Number (3,6)</td>
</tr>
<tr>
<td>Monster Post Date</td>
<td>Date/Time</td>
</tr>
<tr>
<td>Monster2 Post Date to Monster10 Post Date</td>
<td>Date/Time</td>
</tr>
<tr>
<td>Offer Template</td>
<td>Lookup (Offer Template)</td>
</tr>
<tr>
<td>Package Notes</td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Post To Broadbean</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Post To CareerBuilder</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Post To LinkedIn</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Post To Monster</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Post To Monster2 to Monster10</td>
<td>Checkboxes</td>
</tr>
<tr>
<td>Recent Graduate</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Recruiter</td>
<td>Lookup (User)</td>
</tr>
<tr>
<td>Reference Form Definition</td>
<td>Lookup (Form Definition)</td>
</tr>
<tr>
<td>Salary</td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Salary Maximum</td>
<td>Currency (15,2)</td>
</tr>
<tr>
<td>Salary Minimum</td>
<td>Currency (15,2)</td>
</tr>
<tr>
<td>Salary Negotiable?</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Salary OTE?</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Salary Period</td>
<td>Picklist</td>
</tr>
<tr>
<td>Salary ProRata?</td>
<td>Checkbox</td>
</tr>
<tr>
<td>Status</td>
<td>Picklist</td>
</tr>
<tr>
<td>Submitted Date</td>
<td>Date</td>
</tr>
<tr>
<td>Vacancy No</td>
<td>Auto Number</td>
</tr>
<tr>
<td>Workplace</td>
<td>Lookup (Workplace)</td>
</tr>
</tbody>
</table>
**Vacancy Code Object**

Use **Setup > Administration Setup > Translation Workbench > Override** to rename these custom fields.

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareerBuilder</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Code Type</td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Jobing</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>LinkedIn</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Monster</td>
<td></td>
<td>Text (80)</td>
</tr>
</tbody>
</table>
Configuring Candidates

Candidate Status Values

Candidate Status indicates the position of the Candidate in the Candidate lifecycle. A Recruit Candidate can have one of a defined set of status values, each of which has a meaning to the Recruit system and helps to define what can happen to the Candidate. Candidate Status can be set manually or automatically by system or user defined workflows. Do not change the spelling of any supplied Candidate Status option by editing picklist values - changed values will not work in Recruit.

Available Candidate Status values are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Candidate details newly received and entered on the system. New Candidates have not yet started the assessment process for a Vacancy.</td>
</tr>
<tr>
<td>Active</td>
<td>Candidate assigned to a Vacancy to create an Application. Candidates remain Active through the assessment process until status is changed by workflow or manually.</td>
</tr>
<tr>
<td>Onboarding</td>
<td>Candidate has entered the Onboarding stage of the selection process. A Candidate record entering Onboarding status can be used as a trigger for creating a Team Member in Sage People HCM.</td>
</tr>
<tr>
<td>Hired</td>
<td>Candidate has been successful and has entered the Hired stage on the selection process. A Candidate record entering Hired status can be used as a trigger for creating a Team Member in Sage People HCM.</td>
</tr>
<tr>
<td>Talent Pool</td>
<td>Candidates whose last application had the outcome Not This Vacancy. Candidate records with Talent Pool status are retained for consideration against other Vacancies.</td>
</tr>
<tr>
<td>Archived</td>
<td>Candidates whose applications have been rejected or withdrawn. You can delete Archived Candidate records if you do not need to retain them for audit or equal opportunities monitoring. Archived Candidates who apply for another role have their status reset to Active if the Candidate Portal Configure page setting Permit Archived To Apply is checked. This Candidate Portal setting applies equally to the internal Portal.</td>
</tr>
<tr>
<td>Withdrawn</td>
<td>Candidates who no longer want to be considered for a Vacancy.</td>
</tr>
</tbody>
</table>
Field Sets: Candidate

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Submission</td>
<td>Candidate details entered when submitted by an agency for a vacancy.</td>
</tr>
<tr>
<td>Apply My Details</td>
<td>Fields displayed in the Candidate Portal My Details page for a registered candidate to change their personal details.</td>
</tr>
<tr>
<td>Apply Registration</td>
<td>Fields to be completed by a candidate when first registering.</td>
</tr>
<tr>
<td>Apply Registration Info</td>
<td>Fields to be completed by a candidate on the Candidate Portal, Additional Information page. The Additional Information page must be switched on in the Candidate Portal configuration page (see page 188).</td>
</tr>
<tr>
<td>Apply Registration Info 2</td>
<td>Fields in the second section of the extra registration information page.</td>
</tr>
<tr>
<td>Apply Registration Info 3</td>
<td>Fields in the third section of the extra registration information page.</td>
</tr>
<tr>
<td>Candidate Details Bottom</td>
<td>Additional details fields displayed in a separate Additional Details section towards the bottom of the Candidate page:</td>
</tr>
</tbody>
</table>
### Configuring Candidates

#### Field Sets: Candidate

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate Details Top</td>
<td>Additional fields displayed in the Additional Details section at the bottom of the Candidate panel:</td>
</tr>
<tr>
<td></td>
<td><img src="image" alt="Candidate: Candidate Details Top" /></td>
</tr>
<tr>
<td>Candidate Edit</td>
<td>Additional fields displayed in an Additional Details section at the bottom of the Candidate Details Edit page.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Fields displayed in the Contact Information section of the Candidate Details Edit page.</td>
</tr>
<tr>
<td>Current Position</td>
<td>Fields displayed in the Current Position section of the Candidate Details Edit page.</td>
</tr>
<tr>
<td>Information</td>
<td>Fields displayed in the Information section of the Candidate Details Edit page.</td>
</tr>
</tbody>
</table>
Configuring Candidates
Field Sets: Candidate

Field Set | Purpose
--- | ---
Initial Details | Fields displayed in the Initial Details section of the Candidate Details Edit page.

### Candidate: Initial Details
- **Candidate Details**
  - `First Name`:
  - `Surname`:
  - `Title`:
  - `Status`:

### Candidate: Contact Information
- **Contact Information**
  - `Email`:
  - `Phone`:
  - `Home Street 1`:
  - `Home Street 2`:
  - `Home City`:
  - `Home Region`:
  - `Home Post Code`:
  - `Home Country`:

### Candidate: Current Position
- **Current Position**
  - `Resume`:
  - `Current Location`:
  - `Current Employer`:
  - `Current Job`:
  - `Current Salary`:
  - `Visa Status`:

### Candidate: Additional Details
- **Additional Details**
  - `Current Application`:
  - `Have Registration Info`:
# Translation Workbench:Candidates

<table>
<thead>
<tr>
<th>Candidate Object</th>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Agency</td>
<td>Lookup (Agency)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Contact Name</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Portal</td>
<td>Lookup (Candidate Portal)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Portal URL</td>
<td>Formula (Text)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact</td>
<td>Lookup (Contact)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Application</td>
<td>Lookup (Application)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Employer</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Job</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Location</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Nomination</td>
<td>Lookup (Nomination)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Post Code</td>
<td>Text (16)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Current Salary</td>
<td>Currency (10,0)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Date of Birth</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>First Name</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Have Registration Info</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home City</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home Country</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home Post Code</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home Region</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home Street 1</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Home Street 2</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Is Resume Parsed</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Language Locale</td>
<td>Picklist</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Latitude</td>
<td>Number (3,6)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>LinkedIn Profile</td>
<td>URL (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Location Preference</td>
<td>Picklist</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Longitude</td>
<td>Number (3,6)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Meets Preconditions</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Phone</td>
<td>Text (64)</td>
<td></td>
</tr>
</tbody>
</table>
## Candidate Object

<table>
<thead>
<tr>
<th>Field</th>
<th>Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Refer ID</td>
<td>Text (64)</td>
</tr>
<tr>
<td>Reference Number</td>
<td>Text (64)</td>
</tr>
<tr>
<td>Resume</td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Resume Skills</td>
<td>Long Text Area (32768)</td>
</tr>
<tr>
<td>Resume Summary</td>
<td>Long Text Area (32768)</td>
</tr>
<tr>
<td>Resumeld</td>
<td>Text (16)</td>
</tr>
<tr>
<td>ResumeIndexId</td>
<td>Text (16)</td>
</tr>
<tr>
<td>ResumeUrl</td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Salutation</td>
<td>Text (255)</td>
</tr>
<tr>
<td>Skype Call</td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Skype Name</td>
<td>Text (80)</td>
</tr>
<tr>
<td>Source</td>
<td>Picklist</td>
</tr>
<tr>
<td>Start Preference</td>
<td>Picklist</td>
</tr>
<tr>
<td>Status</td>
<td>Picklist</td>
</tr>
<tr>
<td>Surname</td>
<td>Text (128)</td>
</tr>
<tr>
<td>Title</td>
<td>Text (32)</td>
</tr>
<tr>
<td>Trigger New Application</td>
<td>Text (80)</td>
</tr>
<tr>
<td>Visa Status</td>
<td>Picklist</td>
</tr>
</tbody>
</table>

**Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields**

## Candidate Object (Resource Manager)

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Team Member Link</td>
<td></td>
<td>Lookup (Team Member)</td>
</tr>
</tbody>
</table>

**Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields**
### Candidate Email Object

Use **Setup > Administration Setup > Translation Workbench > Override** to rename these custom fields

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attachment Count</td>
<td></td>
<td>Number (2,0)</td>
</tr>
<tr>
<td>Candidate</td>
<td></td>
<td>Master-Detail (Candidate)</td>
</tr>
<tr>
<td>Content</td>
<td></td>
<td>Long Text Area (32000)</td>
</tr>
<tr>
<td>Email</td>
<td></td>
<td>Email</td>
</tr>
<tr>
<td>Has Application</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Has Attachment</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Is HTML</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Is Outgoing</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>To</td>
<td></td>
<td>Email</td>
</tr>
</tbody>
</table>

### Candidate Interest Object

Use **Setup > Administration Setup > Translation Workbench > Override** to rename these custom fields

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidate</td>
<td></td>
<td>Master-Detail (Candidate)</td>
</tr>
<tr>
<td>Distance Unit</td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Latitude</td>
<td></td>
<td>Number (3,6)</td>
</tr>
<tr>
<td>Longitude</td>
<td></td>
<td>Number (3,6)</td>
</tr>
<tr>
<td>Maximum Distance</td>
<td></td>
<td>Number (5,0)</td>
</tr>
<tr>
<td>Minimum Salary</td>
<td></td>
<td>Currency (10,0)</td>
</tr>
<tr>
<td>Search City</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Search Country</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Search Location</td>
<td></td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Search Map</td>
<td></td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Search Postal Code</td>
<td></td>
<td>Text (32)</td>
</tr>
<tr>
<td>Search Region</td>
<td></td>
<td>Text (128)</td>
</tr>
<tr>
<td>Search Text</td>
<td></td>
<td>Text (255)</td>
</tr>
</tbody>
</table>
### Reference Object

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Accepted</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Application</td>
<td>Lookup (Application)</td>
<td></td>
</tr>
<tr>
<td>Awaiting Form</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Candidate</td>
<td>Master-Detail (Candidate)</td>
<td></td>
</tr>
<tr>
<td>Completed Date</td>
<td>Formula (Date)</td>
<td></td>
</tr>
<tr>
<td>Contact After Offer</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Date Last Reminded</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Date Requested</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td>Form</td>
<td>Lookup (Form)</td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td>Last Contact</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Phone</td>
<td>Text (80)</td>
<td></td>
</tr>
<tr>
<td>Reminder Date</td>
<td>Formula (Date)</td>
<td></td>
</tr>
<tr>
<td>Salutation</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td>Send Email</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Special Query</td>
<td>Long Text Area (16000)</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>Formula (Date)</td>
<td></td>
</tr>
<tr>
<td>Type</td>
<td>Picklist</td>
<td></td>
</tr>
<tr>
<td>Use Form</td>
<td>Checkbox</td>
<td></td>
</tr>
</tbody>
</table>

### Resume Education Object

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activities and Societies</td>
<td>Long Text Area (32768)</td>
<td></td>
</tr>
<tr>
<td>Additional Notes</td>
<td>Long Text Area (32768)</td>
<td></td>
</tr>
<tr>
<td>Candidate</td>
<td>Master-Detail (Candidate)</td>
<td></td>
</tr>
<tr>
<td>End Date</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td>Field(s) of Study</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td>Institution Name</td>
<td>Text (80)</td>
<td></td>
</tr>
<tr>
<td>Qualification</td>
<td>Text (80)</td>
<td></td>
</tr>
<tr>
<td>Start Date</td>
<td>Date</td>
<td></td>
</tr>
</tbody>
</table>
## Sending Resumes as File Links

Using the Email Resumes button on Application or Vacancy pages sends resumes by email to defined recipients. By default, resumes are sent as file attachments to the emails. Alternatively, you can choose to send resumes as embedded links, increasing security by forcing the recipient to login to Sage People before viewing the resumes.

Two settings on the Recruit Configuration page (see page 57) enable you to use links for resumes instead of sending them as attachments, and to nominate a File Owner for all resumes received from Candidates. When implemented, the changes:

- Make resumes available through links on emails, on Chatter posts, and through WX Actions and the Hiring Manager pages.
- Ensure resumes can be viewed only when logged in to Sage People.
- Store resumes received for new Candidates as files.
- Convert resumes held for existing Candidates from attachments to files when each resume is selected.
- Enable resumes to be previewed with the standard Salesforce File Previewer.
- Enable all associated files and attachments to be deleted when an Application is deleted.
- Modify the Email Resumes page to remove the Include all attachments field.
- Ensure all resume files have a common File Owner.

## Setting up to Send Resumes as File Links

1. Go to Setup > App Setup > Installed Packages.
2. Find Recruit and select Configure.
3. On the Configure page for Recruit, select the Overall tab.
4. Scroll down to the bottom of the page and check Send Resumes As Links.
   - When Send Resumes As Links is checked, the File Owner User Name field is displayed.
5. In **File Owner User Name** enter the name of the Sage People User you want to take ownership of all Resume files.

**File Owner User Name** remains hidden until **Send Resumes As Links** is checked.

The File Owner is typically a dedicated Service Account set up for the role, or a System Administrator, HR Administrator, or Recruit Administrator with an understanding of the security, storage, and archiving requirements your organization has for Candidate Resumes. Nominating a dedicated Service Account helps avoid unauthorized access to, or deletion of resumes.

New resumes added to the system and existing resumes converted from attachments to files are automatically assigned to the File Owner.

Only the File Owner can delete resumes.

If the File Owner is changed, existing resumes are not re-assigned but all newly created resumes are assigned to the new File Owner.

If you do not specify a File Owner, the User loading the resume becomes the File Owner for that resume.

6. Select **Save**.

---

**Resume Parsing**

Resume Parsing enables details to be extracted from a resume to add to a Candidate’s record. Resume Parsing uses the Sovren Resume Parsing engine; see [www.sovren.com](http://www.sovren.com) for more.

Key features are:

- Full parsing support for multiple languages including:
  - Chinese (simplified)
  - Czech
  - Dutch
  - English (all markets)
  - French (all markets including Canada)
  - German (all markets including Switzerland, Lichtenstein, and Austria)
  - Greek
  - Hungarian
  - Italian
  - Norwegian
  - Portuguese
  - Russian
  - Spanish (also Catalan, Galician, Basque)
  - Swedish

  Support for additional languages is under development.

- Support for multiple regions to ensure that local formats - for names, addresses, phone numbers, and so on - are recognized. See [https://www.sovren.com/resources/tech-specs/parser](https://www.sovren.com/resources/tech-specs/parser) for a complete list of supported regions.

- Full parsing for most file formats used for resumes, including:
  - Microsoft Word
  - Adobe PDF
  - Corel WordPerfect
  - HTML
  - Open Office
  - Rich Text Format

- An associated email service, enabling you to parse multiple resumes attached to an email (see page 60).

- A batch processing option enabling you to parse all non-parsed resumes held in your org for all candidates except those flagged with status **Archived** (see page 60).

- Enhanced searching for candidates using the text content of all parsed resumes.

Extracted details do not overwrite details that already exist - pre-existing information is always preserved. Bear in mind that the variable nature of resumes means that extracted details are not always consistent across multiple candidates.
Resume Parsing is available within Recruit when:

- Manually adding a new candidate through the Candidates tab.
- Applying through a Candidate Portal.
- Submitting a resume by email using a Vacancy number, from an agency or direct from a candidate.

Candidate records are automatically created, using details extracted from the resume (see page 59).

Sovren automatically rejects CVs and resumes that include test or fake data - if you want to get representative results when testing the system, use documents with realistic names and actual companies and real addresses.

## Candidate Information Extracted by Resume Parsing

<table>
<thead>
<tr>
<th>Information from...</th>
<th>Is copied to...</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resume</td>
<td>Recruit</td>
</tr>
<tr>
<td>Candidate Details</td>
<td>Candidate Object Fields</td>
</tr>
<tr>
<td>Name</td>
<td>First Name</td>
</tr>
<tr>
<td></td>
<td>Surname</td>
</tr>
<tr>
<td>Email</td>
<td>Email</td>
</tr>
<tr>
<td>Mobile/Cell/Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Home Address</td>
<td>Home Street 1</td>
</tr>
<tr>
<td></td>
<td>Home Street 2</td>
</tr>
<tr>
<td></td>
<td>Home City</td>
</tr>
<tr>
<td></td>
<td>Home Region</td>
</tr>
<tr>
<td></td>
<td>Home Country</td>
</tr>
<tr>
<td></td>
<td>Home Post Code</td>
</tr>
<tr>
<td>Resume Summary</td>
<td>Resume Summary</td>
</tr>
<tr>
<td>Resume Skills</td>
<td>Resume Skills</td>
</tr>
</tbody>
</table>

## Education

<table>
<thead>
<tr>
<th>School</th>
<th>Institution Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>Degree</td>
<td>Qualification</td>
</tr>
<tr>
<td>Start Date</td>
<td>Start Date</td>
</tr>
<tr>
<td>Degree Date</td>
<td>End Date</td>
</tr>
<tr>
<td>Field of Study</td>
<td>Field(s) of Study</td>
</tr>
<tr>
<td>Comments</td>
<td>Additional Notes</td>
</tr>
</tbody>
</table>
Resume Parsing Email Service

Resume Parsing includes an Email handler that can be used to process resumes attached to incoming emails. The email service must be created (see page 61).

Once created, you can use one or more receiving email addresses to accept attached resumes. Incoming resumes are automatically parsed and the extracted details used to create or extend candidate records whenever clear contact details can be identified.

- Each email can include up to 10 attached resumes. If an incoming email has more than 10 resumes attached, the first 10 are parsed and the remaining resumes are ignored.
- Each attachment can be up to 5MB, subject to a maximum of 25MB for each email with attachments. Larger emails are ignored and no processing takes place.
- Sending email addresses are ignored and not used in the created candidate records.
- By including a Vacancy Number in the subject line you can ensure that candidate records created or extended by the parsed resumes are linked to the Vacancy, and Application records created.

Use the email service to load multiple resumes received by your organization for one or more vacancies, or single resumes received directly from candidates. Each resume must contain a readily identifiable name or email address so that the email service can identify the correct, existing candidate record to extend, or create a new record.

Batch Resume Parsing

The Sage People Resume Parsing service includes an option to process all unparsed resumes held in your org. The batch parses all currently unparsed resumes for candidates with status:

- New
- Active
- Onboarding
- Hired
- Talent Pool
- Withdrew

The batch excludes:

- Resumes for candidates with status Archived.
- Newly attached resumes for candidates with a resume that has already been parsed.

Before using the option, check the number of resumes that are likely to be processed. If this number takes your total of resumes parsed during the current 12 month contractual period over the number permitted in your Sage People contract, you may incur additional costs; if in doubt, contact Sage People.
To start batch processing:

1. Go to **Setup > App Setup > Installed Packages**.
2. Select **Configure** next to Sage People Recruit. Sage People displays the Recruit Configuration page.
3. Select the **External APIs** tab.
4. Select **Start Batch to Parse All Resumes**. The batch starts immediately.
5. Select **Save**.

### Setting Up Resume Parsing

To set up Resume Parsing:

- Check Use Resume Parsing on the Sage People Recruit Configuration **External APIs** tab (see page 237).
- If you are asked to supply the **Resume Parsing Lock** code to enable Resume Parsing, contact Sage People. Enter the code in the Resume Parsing Lock field on the External APIs tab; this field is only displayed if the code has not been entered.

### Creating the Resume Parsing Email Service

The Resume Parsing Email Service uses the **ResumeEmailHandler** Apex Class, supplied with Sage People Recruit. To create the email service:

1. Go to **Setup > App Setup > Develop > Email Services** Sage People displays the Email Services page.
2. Select **New Email Service**. Sage People displays the Email Service page.
3. In **Email Service Name**, enter a name for the service. By default, **Email Service Name** also forms the local part of the receiving email address: the part of the email address before the @ symbol. Sage People automatically creates the rest of the address.
   - You can create additional receiving addresses once the Email Service has been set up.
4. In **Apex Class**, select **Apex Class Lookup**, find and select **ResumeEmailHandler**.
5. In **Accept Attachments**, select the picklist and choose **All**.
6. In **Accept Email From** enter addresses separated by commas if you want to restrict the service to receiving emails from those addresses.
   - If you want the service to receive emails from any address, leave **Accept Email From** blank.
7. Check **Active** to activate the service.
8. In the **Failure Response Settings** section use the picklists to select failure actions. By default these are all set to discard messages.
   - You can also specify an email address to receive error emails:
     - **Enable Error Routing**.
     - Enter a receiving email address for error emails in **Route Error Emails To This Address**.
9. Select **Save**.

   Sage People displays the Email Service page for the service you have just created.

   You must now generate the full email address that Sage People uses to listen for incoming emails.

10. At the bottom of the page select **New Email Address**.

    Sage People displays the **Email Service Address** page.

11. In **Email address** Sage People enters the Email Service Name.

    You can leave this as entered or change it to something more meaningful for the users of the service.

    You can specify additional receiving email addresses when you have defined this one.

12. Check **Active**.

13. **Context User** defaults to the current user. If you wish, change this to another User in your organization.

14. In **Accept Emails From** enter addresses separated by commas if you want to restrict this address to receiving emails from those addresses.

    If you want the address to receive emails from any address, leave **Accept Email From** blank.

15. Select **Save**.

    Sage People displays the Email Service page with the newly generated receiving email address displayed at the bottom of the page.

    To add additional receiving email addresses, select **New Email Address** and repeat steps 10 to 15.

### Testing Resume Parsing

To ensure that resume parsing is working as required run some tests before full implementation. Sovren suggests a number of rules for successfully testing resume parsing including:

1. Do not use fake or disguised resumes.
   - The engine is designed to recognize and reject resumes containing:
     - **Test** or a similar string as part or all of the candidate name.
     - **Employer 1** or similar in a career history.
     - Text translated by an online translation engine for the purposes of testing.

2. Do not use resumes supplied by a parsing engine vendor.
   - They are typically selected to perform well with the vendor’s own engine and poorly with others.

3. When testing resumes in more than one language, test a number of resumes per language or locale.

4. Test resumes from more than one source and that apply to a representative range of industries and classes, relevant to the needs of your organization.

5. Validate parsed resumes manually, checking the parsed results against the originals.

6. Test for completeness and accuracy.
Configuring Applications

Application Status Values

Application Status indicates the position of the Application in the Application lifecycle. A Recruit Application can have one of a defined set of status values, each of which has a meaning to the Recruit system and helps to define what can happen to the Application. Application Status can be set manually or automatically by system or user defined workflows. Do not change the spelling of any supplied Application Status option by editing picklist values - changed values will not work in Recruit.

If your organization uses Sage People Candidate Portal, Application Status is updated on the Portal immediately - a change to the status by the Recruiter or Hiring Manager is reflected on the Candidate Portal the next time the candidate connects to the Portal or refreshes their browser.

Available Application Status values are:

<table>
<thead>
<tr>
<th>Status</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New</td>
<td>Newly created and not yet completed the first stage of the assessment process.</td>
</tr>
<tr>
<td>On Hold</td>
<td>Temporarily paused while the outcome of an assessment stage is finalized.</td>
</tr>
<tr>
<td>Passive</td>
<td>A Candidate exists and has been identified as suspect or prospect for a specific Vacancy, but they have not yet expressed a formal interest.</td>
</tr>
<tr>
<td>Ongoing</td>
<td>Part of a current, active recruitment process.</td>
</tr>
<tr>
<td>Onboarding</td>
<td>Application has entered the Onboarding stage of the selection process.</td>
</tr>
<tr>
<td>Hired</td>
<td>Application has entered the Hired stage of the recruitment process.</td>
</tr>
<tr>
<td>Not This Vacancy</td>
<td>Selection process has concluded for this Application and the Candidate deemed not suitable for this Vacancy. Candidates status is changed to Talent Pool so that they can be considered for other Vacancies.</td>
</tr>
<tr>
<td>Withdrew</td>
<td>Application concluded by the Candidate, who decided not to pursue the Vacancy further.</td>
</tr>
<tr>
<td>Pending</td>
<td>An offer is in preparation or awaiting approval for this Application. Pending applications can move to status:</td>
</tr>
<tr>
<td></td>
<td>• Approved when the offer has been agreed and is ready to issue to the Candidate.</td>
</tr>
<tr>
<td></td>
<td>• Ongoing when the offer details have not been agreed and need further work or the Candidate needs further assessment.</td>
</tr>
<tr>
<td>Approved</td>
<td>An offer has been approved for this Application and can be passed to the Candidate for agreement or rejection.</td>
</tr>
</tbody>
</table>
## Field Sets: Application

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Submit Job</td>
<td>Fields entered by an agency when submitting a candidate for a vacancy.</td>
</tr>
<tr>
<td>Application Details</td>
<td>Fields displayed in the Details section near the top of the Application page.</td>
</tr>
<tr>
<td>Application Details Bottom</td>
<td>Additional details fields displayed in a separate section near the bottom of the Application page.</td>
</tr>
<tr>
<td>Application Details Top</td>
<td>Additional details fields displayed immediately below the Details section near the top of the Application page.</td>
</tr>
<tr>
<td>Application Edit</td>
<td>Additional fields displayed for editing in a separate Additional Details section at the bottom of the Application Edit page.</td>
</tr>
<tr>
<td>Applications Vacancy</td>
<td>Additional columns displayed on the Vacancy Details page, Applications tab for Active Applications for a Vacancy. Selected fields are displayed as columns to the right of the default column display.</td>
</tr>
<tr>
<td>Apply Job</td>
<td>Fields requested from a candidate when applying for a job through the Candidate Portal.</td>
</tr>
<tr>
<td>Apply My Application</td>
<td>Candidate Portal fields displayed when a candidate views their application. Apply to active and historical applications in the My Application and My History pages.</td>
</tr>
<tr>
<td>Apply Withdraw</td>
<td>Candidate Portal fields for completion when withdrawing an application.</td>
</tr>
<tr>
<td>Current Status</td>
<td>Fields displayed for editing in the Current Status section of the Application Edit page.</td>
</tr>
<tr>
<td>HCM Copy</td>
<td>Fields copied to Sage People HCM when the Application Candidate status changes to Hired or Onboarding. For the copy to work, fields included in this field set must have matching fields in the HCM Employment Record object <strong>Recruit Copy</strong> field set. &quot;Matching&quot; means fields of the same type, presented one for one in the same order in both field sets.</td>
</tr>
<tr>
<td>Hiring Manager Assessment Edit</td>
<td>Fields entered during a Hiring Manager assessment of a Candidate if the assessment stage has the <strong>Enter Start Details</strong> checkbox checked.</td>
</tr>
<tr>
<td>Hiring Manager Vacancy Active List</td>
<td>Fields in the list of active Applications on the Vacancy page for the Hiring Manager.</td>
</tr>
<tr>
<td>Start Details</td>
<td>Fields entered during an assessment if the stage has the <strong>Enter Start Details</strong> checkbox checked.</td>
</tr>
</tbody>
</table>

## Field Sets: Assessment

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Hiring Manager Assessment Edit</td>
<td>Fields displayed to a Hiring Manager on the Assessment page.</td>
</tr>
<tr>
<td>Overall Assessment Edit</td>
<td>Fields displayed for edit on the Assessment page in the Overall assessment of this stage section.</td>
</tr>
<tr>
<td>Quality Check</td>
<td>Fields displayed on a completed assessment when returning to it to perform a quality check.</td>
</tr>
</tbody>
</table>
# Field Sets: Interviewer Assessment

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Interviewer Fields</td>
<td>Fields entered by an interviewer as overall comments when completing an interview assessment form. The assessment form is produced when an interviewer assignment is made.</td>
</tr>
<tr>
<td>Interview List</td>
<td>Fields displayed on the list of interviews for an interviewer. The list is produced when an interviewer assignment is made.</td>
</tr>
</tbody>
</table>

## Translation Workbench: Applications

*Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields*

<table>
<thead>
<tr>
<th>Application Object</th>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Active</td>
<td>Formula (Text)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Contact Name</td>
<td>Text (128)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Agency Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Approved Date</td>
<td>Date</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Assessment Event</td>
<td>Lookup (Assessment Event)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Authorising Manager</td>
<td>Lookup (User)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Average Score</td>
<td>Formula (Number)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate</td>
<td>Lookup (Candidate)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Email</td>
<td>Email</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Name</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Portal URL</td>
<td>Formula (Text)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Resume</td>
<td>Formula (Text)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Resumeld</td>
<td>Text (24)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate ResumeUrl</td>
<td>Formula (Text)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Candidate Salutation</td>
<td>Text (255)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Contact Via Agency</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Count Accepted Placements</td>
<td>Roll-Up Summary (COUNT Placement)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Count Active Placements</td>
<td>Roll-Up Summary (COUNT Placement)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Count Assessed Criteria</td>
<td>Roll-Up Summary (SUM Assessment)</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Count Awaiting Form</td>
<td>Roll-Up Summary (COUNT Assessment)</td>
<td></td>
</tr>
<tr>
<td>Application Object</td>
<td>Description</td>
<td></td>
<td></td>
</tr>
<tr>
<td>----------------------------------------</td>
<td>--------------------------------------------------</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Count Below Needs</td>
<td>Roll-Up Summary (SUM Assessment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Count Required Below Needs</td>
<td>Roll-Up Summary (SUM Assessment)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assessment</td>
<td>Formula (Text)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assessor</td>
<td>Lookup (User)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Assessor Name</td>
<td>Formula (Text)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current External Test Result</td>
<td>Lookup (External Test Result)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Stage</td>
<td>Lookup (Selection Stage)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Current Stage Name</td>
<td>Text (80)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days Since Modification</td>
<td>Formula (Number)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days To Hired</td>
<td>Formula (Number)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days To Make Offer</td>
<td>Formula (Number)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Days to Onboarding</td>
<td>Formula (Number)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delayed Outcome Email</td>
<td>Text (20)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>External Interviewer</td>
<td>Lookup (Contact)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hire Notes</td>
<td>Long Text Area (32768)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Hiring Manager</td>
<td>Lookup (User)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Date</td>
<td>Date/Time</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Duration Minutes</td>
<td>Number (4,0)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Encodeld</td>
<td>Text (255)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Instructions</td>
<td>Long Text Area (32768)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Location</td>
<td>Text (255)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interview Status</td>
<td>Picklist</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviewer</td>
<td>Lookup (User)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Interviewer Name</td>
<td>Formula (Text)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Is Internal</td>
<td>Checkbox</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Make Offer Date</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Signed Date</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Offer Template</td>
<td>Lookup (Offer Template)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>OfferId</td>
<td>Text (18)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Onboarding Date</td>
<td>Date</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Ranking Score</td>
<td>Formula (Text)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rating Indicator</td>
<td>Formula (Text)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Recruiter</td>
<td>Lookup (User)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Referer</td>
<td>Lookup (Candidate)</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rejection Reason</td>
<td>Picklist</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
DocuSign for Offer Letter

You can use DocuSign to ease the process of offer letter issue and return. DocuSign acts as a host for the letter and manages the e-signature process safely and securely. You must have an existing DocuSign account - or create one - to use this process.

The outline process is:

1. Connect your existing DocuSign account with your Salesforce account (see page 68).
2. Configure Recruit External APIs to enable DocuSign use (see page 160).
3. Use the Email Offer with DocuSign link to send the Offer Letter to Candidate.
4. The Candidate receives a link to the offer letter in DocuSign.
5. The Candidate signs the Offer Letter through DocuSign and selects Finish.

The signed Offer is added as an attachment to Sage People and the Offer Signed Date field is populated.
Connect DocuSign to Your Salesforce Account

1. Login to your existing DocuSign account.
2. Go to Preferences and select Account Administration > Connect from the left menu.
3. Select Add Configuration > Salesforce
4. Follow the prompts to add your Salesforce login credentials.
5. Select Add Object, select the Application object, then:
   - In the Select Where section map the following fields:
     - Candidate Email to the DocuSign Field Recipient Email
     - Candidate Name to the DocuSign Field Recipient Name
   - In the Update Fields section map:
     - Offer Signed Date to the DocuSign Field Recipient Signed Date
   - In the Attachments section:
     - Check Attach DocuSign Documents
       - Select Filename: Document Name + Envelope Status + .pdf
       - Select Contents: Document - one PDF per document
     - Check Completed envelope only
6. Select Save.
7. On the left menu select Account Administration > API
8. Request an Integrator Key if you do not already have one. You will need the Integrator Key when configuring Recruit.
Setting Up External Testing

Sage People supports integration with external tests provided and administered by:

- Wonderlic

In each case you must subscribe directly with the external test provider and complete the provider's registration and setup steps before attempting to integrate them with Sage People. Setting up Sage People to work with the external test provider then enables you to provide links to tests from the Candidate Portal. Candidates are invited to follow the links and complete the tests making up the assessment. Results are returned to Sage People and integrated in the Candidate record.

Setting Up External Test Providers

To add an External Test Provider to Sage People:

1. Select the External Test Providers tab.

   Sage People displays the External Test Providers Home page.

2. Select New.

   Sage People displays the New External Test Provider page:

   ![New External Test Provider Page](image)

   ```
   Information
   
   External Test Provider Name
   Type
   Client ID
   Test Completed URL
   Provider ID
   Endpoint URL
   ```

   ![External Test Provider Edit Page](image)
3. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External Test Provider Name</strong></td>
<td>The name you want to use for the test provider in your organization. This can be the name of the test organization, such as Wonderlic, or an internal alias you want your recruiters to recognize.</td>
</tr>
<tr>
<td><strong>Type</strong></td>
<td>Picklist. Select from:</td>
</tr>
<tr>
<td></td>
<td>• Wonderlic</td>
</tr>
<tr>
<td><strong>Client ID</strong></td>
<td>For Wonderlic: the client token as supplied by Wonderlic.</td>
</tr>
<tr>
<td><strong>Test Completed URL</strong></td>
<td>The URL of the page displayed to the Candidate when they have completed the test. You can use the Visualforce page: fRecruit__ExternalTestCompleted as supplied, or as a base for customization. Make this page available to your sites.</td>
</tr>
<tr>
<td><strong>Provider ID</strong></td>
<td>Used for HR XML-compliant External Test Provider integrations. Not used for Wonderlic.</td>
</tr>
<tr>
<td><strong>Endpoint URL</strong></td>
<td>The URL hosting the test(s) from this Test Provider. Provided by the Test Provider.</td>
</tr>
</tbody>
</table>

4. Select:
   - Save to save the details you have entered and display the External Test Provider Detail page.
   - Save & New to save the details you have entered and display another New External Test Provider page.
   - Cancel to ignore the details you have entered and display the External Test Providers Home page.

You are now ready to set up the tests to be run by the External Test Provider.
Setting Up An External Test

When you have set up an External Test Provider you must add the individual tests supplied by the Provider that you want to use as part of your Candidate assessment process.

To add an External Test:

1. Select the External Test Providers tab.
   Sage People displays the External Test Providers Home page.

2. Select the External Test Provider.
   Sage People displays the External Test Provider Detail page.

3. In the External Tests Related List, select New External Test:

   Sage People displays the New External Test page:

4. Complete the fields as follows:

   **External Test Name**
   The name you want to use for the test in your organization. Use a unique name that helps the Recruiter identify the test, such as the External Test Provider Name followed by the name of the test. For example:
   Wonderlic: Cognitive Ability
   External Test Name is displayed in the External Test picklist field when you are defining a Selection Stage for a Vacancy.

   **External Test Provider**
   The name of the Test Provider. Automatically completed with the name of the Test Provider you selected.
   To change Test Provider, select External Test Provider Lookup, find and select the Provider you want.

   **Test URL Template**
   The URL for the test, as supplied by the Test Provider. You can use merge fields to add the User ID {!UserID} and password {!Password} from the token credentials.
   Not used for Wonderlic.

   **Package ID**
   The ID provided by the External Test Provider to identify a suite of tests.
5. Select:
   - **Save** to save the details you have entered and display the External Test Detail page.
   - **Save & New** to save the details you have entered and display another New External Test page.
   - **Cancel** to ignore the details you have entered and display the External Test Provider Detail page.

Now set up the parameters for measuring test performance.

### Setting Up Measurements for External Tests

Each External Test you want to use must have parameters defined to assess Candidate performance. Each Test can have one or more External Test Measurements; for example, a test to measure numerical, verbal, and logical reasoning may have three Test Measurements, one for numerical reasoning, one for verbal reasoning, one for logical reasoning.

Measurements can be associated with specific selection criteria, as stored in your Criteria Library.

To set up External Test Measurement:

1. Select the **External Test Providers** tab.
   - Sage People displays the **External Test Providers Home** page.
2. Select the External Test Provider.
   - Sage People displays the External Test Provider Detail page.
3. In the External Tests Related List, select the External Test Name:

   ![External Test Table]

   Sage People displays the External Test Detail page.
4. In the External Test Measurements Related List, select **New External Test Measurement**:

Sage People displays the **New External Test Measurement** page:
5. Complete the fields as follows:

<table>
<thead>
<tr>
<th><strong>External Test</strong></th>
<th>The name of the test. Automatically completed with the name of the Test you selected. To change Test, select External Test Lookup, find and select the Test you want.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>External Test Measurement</strong></td>
<td>The name you want to use for this Measurement. For Wonderlic, use the External Assessment name to help when reviewing the test results. Alternatively, use a name that can be easily linked to the External Assessment.</td>
</tr>
<tr>
<td><strong>Criteria Library Item</strong></td>
<td>If you want to link this Test Measurement to a specific item in the Criteria Library (competency, skill, knowledge, qualification and so on), the Item this Test Measurement seeks to assess. Enter the first few characters of the Criteria name and select Criteria Library Item Lookup, or with a blank field select Lookup to find and select the Item you want.</td>
</tr>
<tr>
<td><strong>Parameter</strong></td>
<td>For Wonderlic, the name of the parameter associated with this Test Measurement, as used in the results returned to Sage People. For Wonderlic, the name of the Result - the individual test components for which values are awarded. For example, the Wonderlic PCI test generates Results named: - Conscientiousness - Stability - Agreeableness - Extraversion - Openness - Clerical Score Create Parameters for each Result. The Result must return a value of Strong, Moderate, or Weak to be saved into Recruit. To enable mapping of results to the Application Stage for the External Test, ensure that each Parameter has an equivalent criteria assessed by the stage.</td>
</tr>
<tr>
<td><strong>Top Score</strong></td>
<td>The highest possible score for this Test Measurement. Not used for Wonderlic.</td>
</tr>
<tr>
<td><strong>Minimum Score</strong></td>
<td>The lowest acceptable score for this Test Measurement. Not used for Wonderlic.</td>
</tr>
<tr>
<td><strong>External Assessment ID</strong></td>
<td>The ID used by the External Test Provider for the assessment associated with this Test Measurement. Mandatory for Wonderlic.</td>
</tr>
<tr>
<td><strong>External Assessment Name</strong></td>
<td>The name of the assessment associated with this Test Measurement, as used by the Test Provider.</td>
</tr>
</tbody>
</table>

6. Select:
- **Save** to save the details you have entered and display the External Test Measurement Detail page.
- **Save & New** to save the details you have entered and display another New External Test Measurement page.
- **Cancel** to ignore the details you have entered and display the External Test Detail page.
Defining Who Can See Recruit Records

To take advantage of Sage People Recruit's object sharing model, ensure Sage People Recruit Enterprise is installed in addition to Sage People Recruit. Enterprise adds more complex sharing options, for example:

- Authorizing and Hiring Managers can have full edit access to vacancies for which they are responsible, while recruiters have read only access, and just to their own vacancies.

- Individual Recruitment Managers or recruitment teams can have access only to those Vacancies, Candidates, and Applications for which they are responsible.

- Interviewers who may not have access to Sage People Recruit can have access to the resume and other candidate records for the person they are interviewing along with the Application and Vacancy, but without access to other Candidates or Applications for the same Vacancy.

Access to Vacancies is controlled at the object level by two field sets:

- Share As Edit
  Members of the field set can edit Vacancy records.

- Share As Read
  Members of the field set have read-only access to Vacancies.

By adding roles such as Authorizing Manager, Hiring Manager, or Recruiter to one of the field sets, you define the default level of access granted to that role for all Vacancies.

By default, Applications, Candidates, and Vacancies are set Private: they can be viewed by the user owning each record and by no one else. A Private setting means that each application, candidate, and vacancy record must be specifically set up for sharing by other users. This is particularly important for records submitted through the Candidate Portal, and for vacancy templates supplied by Sage People - without changing the sharing settings these records remain invisible to the recruiting team. Setting up sharing for Application, Candidate, and Vacancy records is a two step process:

1. Set up one or more Public Groups to hold the users who need to see the records (see page 76). For example, if you have recruitment teams working for different areas of your organization with no need to share access to vacancy, candidate or application records, you can set up one Public Group for each team.

2. Add the relevant Public Group(s) to the sharing settings for each Vacancy record (see page 79). Defining the sharing settings for a Vacancy can automatically apply those settings to Candidate and Application records associated with the Vacancy (Automatic Sharing (see page 81)).
Manual Sharing

You can share a Vacancy manually with a user, public group or a role. Sharing a Vacancy manually does not automatically grant access to related records, such as Candidate, Application or Interview Assessment records.

When you share a Vacancy, the values in the Reason picklist affect access as follows:

- "Manual Sharing" reason only grants access to the specific Vacancy. Sharing rules are not inherited by related records.
- "Fairsail" and "Fairsail Interviewer" reasons are added by the Recruit Enterprise package and are used in automatically triggered record sharing (Automatic Sharing (see page 81)). You can select one of these reasons when manually sharing a Vacancy if you want to grant access to the related records, but access to related records is inherited only when a triggered update to sharing occurs.

If you share a Vacancy record with a Group or a User with the "Fairsail" sharing reason and later update the Key People in the Vacancy details (Authorising Manager, Hiring Manager or Recruiter), the Group or User is removed from sharing.

Setting Up a Public Group

Each Public Group defines a list of contacts. By assigning a Public Group to the sharing settings for specific Application, Candidate and Vacancy records, you enable the contacts in the Group to access those records.

1. From your User menu select Setup.
2. Go to Administration Setup > Manage Users > Public Groups.

Sage People displays the Group Membership New Group page:
4. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Label</strong></td>
<td>The name for the Public Group you want to display on the user interface.</td>
</tr>
<tr>
<td><strong>Group Name</strong></td>
<td>The unique API name for the Public Group to be used internally by Sage People. Group Name is automatically created from <strong>Label</strong> and you do not usually need to edit it.</td>
</tr>
<tr>
<td><strong>Grant Access Using Hierarchies</strong></td>
<td>Checkbox. If checked, records shared using this Public Group are also made available to users higher in the role hierarchy; typically the user's manager and above. If unchecked, records shared using this Public Group are visible only to users named by the Group.</td>
</tr>
<tr>
<td><strong>Search</strong></td>
<td>Select the picklist and choose from:</td>
</tr>
<tr>
<td></td>
<td>• Public Groups</td>
</tr>
<tr>
<td></td>
<td>• Roles</td>
</tr>
<tr>
<td></td>
<td>• Roles and Subordinates</td>
</tr>
<tr>
<td></td>
<td>• Users</td>
</tr>
</tbody>
</table>

The content of the **Available Members** box changes to show the content of your selection. Complete the **for:** field if you need to further refine the displayed list.

5. Select the **Available Members** you want to add to the Group and select Add to move them to the **Selected Members** box.

Selected Members must include:
- The **Sage People Support** User Profile, to enable Support access to the records.
- The **Guest User** Profile.
- The names of the Recruitment team you want to have access to records through this Public Group.

6. Select **Save**.

Sage People adds the new group to the list of available Public Groups. You can now use the Group to share access to Vacancies, Applications, and Candidates by changing the Sharing Settings on a record.
Adding a Public Group to Record Sharing Settings

Sharing Settings control who has access to Vacancy, Candidate, and Application records. By default these are set Private and can be viewed by the record owner and by no one else. By changing the sharing settings for a Vacancy the same settings can be automatically applied to Application and Candidate records associated with that Vacancy.

To change Sharing for a Vacancy:

1. Select the Vacancies tab.
2. In the list of Vacancies select the Vacancy Name.
   Sage People displays the detail page for the Vacancy.
   Sage People displays the Configure page for the Vacancy.
4. Select Sharing:

   Sage People displays the Sharing Detail page for the Vacancy.
5. In the User and Group Sharing section select Add:

   Sage People displays the New Sharing page for the Vacancy:
6. Use the **Search** picklist and **for** box to display the Public Group you want to share this record.

7. Select the Group and select **Add** to move it to the **Share With** box.

8. In **Access Level** select the picklist and choose **Read Only** or **Read/Write**.

9. In **Reason** select the picklist and choose **Fairsail**.

   If you share a Vacancy record with a Group or a User with the "Fairsail" sharing reason and later update the Key People in the Vacancy details (Authorising Manager, Hiring Manager or Recruiter), the Group or User is removed from sharing.

10. Select **Save**.

    Sage People displays the Sharing Detail page with the Group added to the User and Group Sharing section. This Vacancy is now visible to the members of the Public Group you have added. Using the Fairsail reason enables the sharing to extend to the related Candidate and Application records when Automatic Sharing (see page 81) is triggered.

---

**Defining Sharing Settings for Interviewers**

Assigned interviewers must be Sage People Users with at least a Sage People Platform Team Member profile. If an interviewer does not have access to Sage People Recruit, you must amend their profile settings to give Read access to the **Interviewer Assessments** and **Interviewer Criteria Assessments** objects:

![Permissions Table]

Alternatively, you can assign the Sage People Recruit Team Member Permission Set to all interviewers.

For users of Sage People Recruit Enterprise, interviewers are granted read only access to the Candidate and Vacancy records associated with the application for which they are acting as interviewer.
Automatic Sharing

The Recruit Enterprise package enables automatic record sharing based on triggers and default sharing rules. Automatic sharing applies to users and groups who have been granted access with the sharing reasons "Fairsail" or "Fairsail Interviewer".

When automatic sharing is triggered, existing sharing details are removed and new details created according to the sharing rules.

The table below describes the events that trigger sharing updates and the resulting access changes.

<table>
<thead>
<tr>
<th>Triggering event</th>
<th>Sharing changes</th>
<th>Additional information</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Vacancy is created</td>
<td>Access is granted as follows:</td>
<td>The Key People roles in the Vacancy details can be added to Share as Edit or Share as Read field sets.</td>
</tr>
<tr>
<td></td>
<td>• Creator of the Vacancy (Owner): Full access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roles in Share as Edit field set:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Read/Write access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roles in Share as Read field set:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Read Only access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The Key People roles in the Vacancy details can be added to Share as Edit or Share as Read field sets.</td>
<td></td>
</tr>
<tr>
<td>Vacancy is approved</td>
<td>Access is granted as follows:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Guest Site Public Group: Read/Write access</td>
<td>Guest Site Public Group is used for Site Guest User to enable access to Agency and Candidate Portals.</td>
</tr>
<tr>
<td>Triggering event</td>
<td>Sharing changes</td>
<td>Additional information</td>
</tr>
<tr>
<td>--------------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Vacancy is updated with one of the following changes:</td>
<td>Updates to sharing are made on the basis of the changes:</td>
<td>If the Vacancy has Candidates, Applications or Interview Assessments associated with Applications, access is granted or removed according to the same rules.</td>
</tr>
<tr>
<td>• Change to Owner</td>
<td>• New Owner is granted full access</td>
<td></td>
</tr>
<tr>
<td>• Change in the Share As Edit field set</td>
<td>• Previous Owner’s full access is removed</td>
<td></td>
</tr>
<tr>
<td>• Change in the Share As Read field set</td>
<td>• Read/Write access is granted to users assigned to roles added to Share As Edit field set</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Read/Write access is removed from any users whose roles have been removed from the Share As Edit field set</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Read Only access is granted to users assigned to roles added to Share As Read field set</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Read Only access is removed from users whose roles have been removed from the Share As Read field set</td>
<td></td>
</tr>
<tr>
<td>Changes to Selection Stages of a Vacancy (new stages, updated stages or deleted Stages) trigger sharing updates when:</td>
<td>Access is granted using the same flow as changes to Vacancy</td>
<td></td>
</tr>
<tr>
<td>• Stage Assessors are added to a Selection Stage in a Vacancy</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Stage Assessor of a Selection Stage in a Vacancy is updated</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Changes to Selection Criteria of a Vacancy:</td>
<td>• Access to the Vacancy, Application, Candidate and Interview Assessment is updated using the Interview Assessment sharing flow</td>
<td></td>
</tr>
<tr>
<td>• New Selection Criteria are added</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Existing Selection Criteria are changed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>• Selection Criteria are changed</td>
<td></td>
<td></td>
</tr>
<tr>
<td>An Application to added to a Vacancy</td>
<td>Access to the Application and Candidate is granted as follows:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Owner of the Vacancy: Full access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roles in Share as Edit field set: Read/Write access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Roles in Share as Read field set: Read Only access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Guest Site Public Group: Read/Write access</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Groups or users with &quot;Manual Sharing&quot; reason: No access to Application or Candidate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Groups or users with &quot;Fairsail&quot; sharing reason: Same access to the Application and Candidate as to Vacancy</td>
<td></td>
</tr>
<tr>
<td>An Application is removed from a Vacancy</td>
<td>Access is removed from all users and groups.</td>
<td></td>
</tr>
<tr>
<td>Triggering event</td>
<td>Sharing changes</td>
<td>Additional information</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------</td>
<td>------------------------</td>
</tr>
<tr>
<td>Changes to Interviewers:</td>
<td>Access is granted or revoked as follows:</td>
<td>Interviewers only have access to their own Interview Assessments. Users and groups who have access to the Vacancy are granted access to all Interview Assessments.</td>
</tr>
<tr>
<td>• New Interviewer is added</td>
<td>• New Interviewer: Read/Write access to Interview Assessment</td>
<td></td>
</tr>
<tr>
<td>• An Interviewer is removed</td>
<td>• New Interviewer: Read Only access to related Candidate, Application and Vacancy related to the Interview Assessment</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Removed Interview: all access to Interview Assessment, Vacancy, Candidate and Application is removed</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Users/Groups with access to Vacancy: Same access to Interview Assessment as they have to Vacancy</td>
<td></td>
</tr>
</tbody>
</table>
Reports and Dashboards

Sage People Recruit offers daily reports that you can use right out of the box. In addition, you can use the Report Wizard to build your own custom reports to provide a completely tailored suite matching the needs of your organization.

Reports:
- Are available in a range of formats.
- Support multiple objects.
- Can be exported to Excel, as data only, or formatted.
- Use Report Folders to enable sharing.

Dashboards provide a highly visual way to view the content of underlying reports, using a range of graphical components such as pie and donut charts, vertical and horizontal bars, gauges and line charts.

Dashboards:
- Are based on custom reports held in Report Folders.
- Support up to 20 separate components as graphics.
- Use Dashboard Folders to enable sharing.
- Viewers need access to the Report Folders holding the Dashboard component source data.

Pre-defined Reports and Dashboards Supplied with Recruit

Sage People Recruit includes a number of pre-defined reports and dashboards. You can use these as configured, or re-configure them to meet your exact requirements.

Sage People Recruit reports and dashboards are stored in folders:
- Sage People Dashboards (Installed Package: Sage People Recruit) (see page 85)
  Dashboards displaying a range of information from Sage People HCM including:
  - Headcount, leavers and starters.
  - Performance management
  - Vacation and absence.
  ...as well as basic Recruit statistics on applications and vacancies, and Resource Planning data including salary budgets, employee turnover, and resource needs.
- Sage People Recruit (see page 86)
  Information on vacancies, applications, candidates, assessments, interviews, and more.
### Sage People Dashboards (Sage People Recruit)

<table>
<thead>
<tr>
<th>Dashboard</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>HCM - Dashboard</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Current headcount by country and by function.</td>
</tr>
<tr>
<td></td>
<td>• Leavers by location and by function.</td>
</tr>
<tr>
<td></td>
<td>• Year to date starters by team and by function.</td>
</tr>
<tr>
<td></td>
<td>• Total absence days by location and by function.</td>
</tr>
<tr>
<td></td>
<td>• High potential employees with a high risk of leaving.</td>
</tr>
<tr>
<td></td>
<td>• Summaries of employee potential and impact of loss, by country, taken from Talent Plan data.</td>
</tr>
<tr>
<td></td>
<td>• Progress of objectives in total and by team.</td>
</tr>
<tr>
<td><strong>HCM - Performance Management</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Progress against objectives for all departments, and by department.</td>
</tr>
<tr>
<td></td>
<td>• Summaries of employee potential and impact of loss, by country, taken from Talent Plan data.</td>
</tr>
<tr>
<td></td>
<td>• High potential employees with a high risk of leaving.</td>
</tr>
<tr>
<td><strong>HCM - Vacation &amp; Absence Management</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Total absence days by location and by function.</td>
</tr>
<tr>
<td></td>
<td>• Absence as a percentage of year to date time worked.</td>
</tr>
<tr>
<td></td>
<td>• Total vacation days by location and by month.</td>
</tr>
<tr>
<td><strong>HRIS - Headcounts &amp; Leavers</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Total number of employees and annualized turnover rate, by month.</td>
</tr>
<tr>
<td></td>
<td>• Headcount summary by division, broken down by quarter over the last year.</td>
</tr>
<tr>
<td></td>
<td>• Current headcount by country.</td>
</tr>
<tr>
<td></td>
<td>• Leavers summary by division, broken down by quarter over the last year.</td>
</tr>
<tr>
<td></td>
<td>• Leavers by location and by function.</td>
</tr>
<tr>
<td></td>
<td>• Starters by location and by function.</td>
</tr>
<tr>
<td><strong>Recruit Dashboard</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Application status.</td>
</tr>
<tr>
<td></td>
<td>• Total number of active applications.</td>
</tr>
<tr>
<td></td>
<td>• Number of active vacancies by vacancy type.</td>
</tr>
<tr>
<td><strong>Resource Planning</strong></td>
<td>Graphical display including:</td>
</tr>
<tr>
<td></td>
<td>• Budgeted salary against actual salary by team and by job title.</td>
</tr>
<tr>
<td></td>
<td>• Total number of employees and annualized turnover rate, by month.</td>
</tr>
<tr>
<td></td>
<td>• Resource Need status.</td>
</tr>
</tbody>
</table>
## Sage People Recruit

<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
</table>
| Aged Applications   | All current Applications summarized by Assessor and showing the number of days since the application was last modified. For each Application the report displays:  
  - Candidate Name. Select to jump to the candidate record.  
  - Application Number. Select to jump to the application record.  
  - Vacancy applied for. Select to jump to the vacancy record.  
  - Days since modification.  
  - Status of the application: New, ongoing, and so on.  
  - Current Stage. Select to jump to the detail page for the stage.  
For each assessor the report displays maximum, minimum, and average number of days since last modification.  
You can select an assessor and drill down by Application fields.  
The report includes a bar chart showing average days since modification for each assessor. |
| Application Status  | All current Applications summarized by status: new, ongoing, not this vacancy and so on. For each Application the report displays:  
  - Candidate Name. Select to jump to the candidate record.  
  - Application Number. Select to jump to the application record.  
  - Vacancy applied for. Select to jump to the vacancy record.  
  - Total score achieved by the candidate for all selection criteria.  
  - Average score achieved by the candidate for selection criteria.  
  - Rating indicator.  
  - Number of selection criteria assessed at below the level needed for the role.  
For each status the report displays the number of applications.  
You can select a status and drill down by Application fields.  
The report includes a pie chart showing the number of applications by status. |
| Assessed Criteria   | Assessed selection criteria summarized by candidate, and by selection stage within candidate. For each criteria the report displays:  
  - Assessment stage at which the criteria is measured.  
  - Average score achieved by the candidate across all selection stages at which the criteria is measured. Highlighted green if on or above the level needed, highlighted red if below the level needed.  
  - Score for the criteria at each stage.  
  - Number of scores below the desired level (may not result in rejection).  
  - Number of scores below the required level (can result in automatic rejection).  
  - Comments.  
For each candidate the report also displays an overall average score, highlighted green if on or above the level needed, highlighted red if below the level needed.  
The report includes a bar chart showing shortlisted candidates and the average scores they have achieved for assessed criteria. |
<table>
<thead>
<tr>
<th>Report</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria Scores</td>
<td>Selection criteria used by your organization and the average scores achieved by candidates across all applications. You can select criteria and drill down by Application, Criteria Assessment, or Criteria Library Item field. The report includes a bar chart showing selection criteria and the average scores achieved for each.</td>
</tr>
</tbody>
</table>
| Interviews             | Interviews scheduled for all dates up to and including today. For each interview the report displays:  
  - Candidate name. Select to jump to the Candidate record.  
  - Application number. Select to jump to the Application record.  
  - Vacancy name. Select to jump to the Vacancy record.  
  - Interview date.  
  - Interviewer. Select to jump to the interviewer's user record.  
  - Interview location.  
  - Interview duration.                                                                                                                                                                                                 |
| Recruit Total Applicant Funnel | All current applications summarized by current assessment stage. For each application the report displays:  
  - Application Number. Select to jump to the application.  
  - Candidate Name. Select to jump to the candidate.  
  - Candidate email. Select to create an email to the candidate's address in your default email application.  
  - Recruiter. Select to jump to the recruiter's user record.  
  - Status of the application.  
For each stage the report displays the total number of applications at that stage. You can select a stage and drill down by Application or Vacancy fields. |
| Recruit - Vacancy Type by Status | Current vacancies summarized by status, and by role type within status. For each vacancy the report displays:  
  - Candidate Name. Select to jump to the candidate record.  
  - Current assessment stage for each candidate.  
  - Vacancy name. Select to jump to the vacancy record.  
  - Vacancy location.  
  - Vacancy status.  
You can select a status and drill down by Application or Vacancy fields.                                                                                                                                                                                                 |
| Stages Reached         | Candidates summarized by current stage in the assessment process, and by vacancy within stage. For each candidate the report displays:  
  - Current assessor. Select to jump to the assessor's user record.  
  - Candidate name. Select to jump to the candidate record.  
  - Application number. Select to jump to the application record.  
  - Average score achieved by the candidate.  
  - Rating indicator for the candidate.  
  - Total score achieved by the candidate.  
  - Status of the application.  
You can select a stage and drill down by Application or Current Stage fields.                                                                                                                                                                                                 |
### Vacancies by Location

Current vacancies summarized by location city. For each vacancy the report displays:

- Vacancy number. Select to jump to the vacancy record.
- Candidate name.
- Candidate email. Select to create an email to the candidate's address in your default email application.
- Vacancy status.
- Current stage. Select to jump to the Selection Stage Detail page.
- Current assessor. Select to jump to the assessor's user record.
- Interviewer. Select to jump to the interviewer's user record.
- Interview date.
- Created and Last Modified dates for the vacancy.

You can select a location and drill down by Application or Vacancy fields.

### Vacancy

All current applications summarized by vacancy. For each application the report displays:

- Application number. Select to jump to the application record.
- Candidate name.
- Candidate email. Select to create an email to the candidate's address in your default email application.
- Status of the application.
- Current assessment stage. Select to jump to the Selection Stage Detail page.
- Current assessor. Select to jump to the assessor's user record.
- Interviewer. Select to jump to the interviewer's user record.
- Interview date.
- Created and Last Modified dates for the application.

For each vacancy the report displays the total number of applications. You can select a vacancy and drill down by Application or Vacancy fields.
Running a Pre-Defined Report

To run an out of the box report for Sage People Recruit:

1. In Sage People Recruit, select the Reports tab.
2. If you have multiple folders in the left panel, select Sage People Recruit:

Sage People displays the list of available reports.
3. Select the report you want and select the report name:

- When the report has run, you can modify it by selecting different values in the **Report Options** fields:

### Criteria Scores

**Report Generation Status:** Complete

**Report Options:**

- **Summarize information by:**
  - Criteria Library Item: Criteria Name

- **Show:**
  - My applications

---

### Criteria Scores

**Report Generation Status:** Complete

**Report Options:**

- **Summarize information by:**
  - Criteria Library Item: Criteria Name

- **Show:**
  - My applications
  - My team's applications
  - All applications
Then select Run Report to refresh the data using the new values:

Summarize information by:
Criteria Library Item: Criteria Name

Show
My team’s applications

Run Report  Show Details  Customize  Save  Save As  Del

Report Folders

Reports can be stored in folders, enabling you to group reports in a way that makes sense to you. The Reports Home page displays all folders available to you in the left panel:

Reports & Dashboards

Select a folder to open it and display its contents in the main panel.

You can:

• Use the My Personal Custom Reports folder to store your private reports.
• Store your reports in any folder to which you have access.
• Create your own folder by selecting the create new folder picklist and selecting New Report Folder:
Report Buttons

When you run a report the report page displays a number of buttons at the top of the screen:

<table>
<thead>
<tr>
<th>Button</th>
<th>Use</th>
</tr>
</thead>
<tbody>
<tr>
<td>Run Report</td>
<td>When you have changed any Report Options, select Run Report to refresh the report with the new values.</td>
</tr>
<tr>
<td>Hide/Show Details</td>
<td>Collapses (Hide) or expands (Show) the detailed data used to generate the report</td>
</tr>
<tr>
<td>Customize</td>
<td>Enables you to change the criteria used to generate the report by giving you access to the Report Builder.</td>
</tr>
<tr>
<td>Save As</td>
<td>Enables you to save a personal copy of the report to your My Personal Reports folder. The copy includes any changes you have made to the original report.</td>
</tr>
<tr>
<td>Printable View</td>
<td>Exports the report to Excel, retaining all formatting.</td>
</tr>
<tr>
<td>Export Details</td>
<td>Exports the report to Excel in raw data form,</td>
</tr>
</tbody>
</table>

Report Formats

Sage People supports four different report formats:

<table>
<thead>
<tr>
<th>Report Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Tabular reports</td>
<td>The simplest and fastest way to view data. A tabular report is similar to a spreadsheet, with an ordered set of fields in columns and the matching records displayed in rows.</td>
</tr>
<tr>
<td>Summary reports</td>
<td>Similar to tabular reports with the added ability to group rows of data, view subtotals, and create charts from the data. For example, use a summary report to group tasks by week or by team member, or recruitment applications by stage in the recruitment process.</td>
</tr>
<tr>
<td>Matrix reports</td>
<td>A way of summarizing large amounts of data in a grid. For example, use a matrix report to compare values by two different categories of information.</td>
</tr>
<tr>
<td>Joined reports</td>
<td>A way of creating multiple report blocks providing different views of your data. Each block of reports can have its own fields, columns, sorting and filtering. Use a joined report to combine data from different report types. You cannot use joined reports for dashboards, and export to Excel is restricted to Printable View. Joined reports are automatically available in all new or updated orgs. If your existing org has not been upgraded recently you might need to enable the Report Builder Upgrade so that you can use joined reports. To enable the upgrade:</td>
</tr>
<tr>
<td></td>
<td>• From your User menu select Setup and go to App Setup &gt; Customize &gt; Reports &amp; Dashboards &gt; User Interface Settings.</td>
</tr>
<tr>
<td></td>
<td>• Select the checkbox to Enable Report Builder Upgrade.</td>
</tr>
</tbody>
</table>
Custom Reports Overview

With Sage People Recruit, business users can create custom reports that combine information from all areas of the business. You get reports instantly using a reporting wizard that walks you through the required steps. It's also easy to perform calculations and to customize high-impact graphs to depict data visually.

Sage People Recruit Reporting includes:

- **Report Wizard**
  Quickly create the right report with a wizard that provides point-and-select options for creating the exact report you need.

- **Integrated Data**
  Create integrated reports from the many data sources across Sage People Recruit, including candidates, applications, assessments, vacancies and so on.

- **Real-Time Data**
  Improve business decisions with up-to-the-minute reports that contain the latest information. Get an instant snapshot of your business today, not a picture of what it looked like yesterday.

- **Conditional Highlighting**
  Highlight exceptions and out-of-range values to assist in quickly identifying anomalies and spotting trends in large amounts of data.

- **Report Management**
  Create folders and views to organize reports in a way that suits you. Share reports throughout the organization.

Building a Custom Report

To build a custom report:

1. In Sage People Recruit, select the **Reports** tab.
   Sage People displays the Reports & Dashboards Home page.

2. Select **New Report...**:
   ![Reports & Dashboards](image)
   Sage People displays the Create New Report page.
3. In Select Report Type select to expand **Other Reports**:

![Select Report Type](image1)

4. Scroll through the list and select the category you wish to report on.

5. With the report category selected, select **Create**:

![Create New Report](image2)

Sage People displays the Report Preview screen where you can build your report.
6. Select the format picklist and choose the table format you want to use:

---

**Tabular reports**

The simplest and fastest way to view data. A tabular report is similar to a spreadsheet, with an ordered set of fields in columns and the matching records displayed in rows.

**Summary reports**

Similar to tabular reports with the added ability to group rows of data, view subtotals, and create charts from the data. For example, use a summary report to group tasks by week or by team member, or recruitment applications by stage in the recruitment process.

**Matrix reports**

A way of summarizing large amounts of data in a grid. For example, use a matrix report to compare values by two different categories of information.

**Joined reports**

A way of creating multiple report blocks providing different views of your data. Each block of reports can have its own fields, columns, sorting and filtering. Use a joined report to combine data from different report types.

You cannot use joined reports for dashboards, and export to Excel is restricted to Printable View.

Joined reports are automatically available in all new or updated orgs. If your existing org has not been upgraded recently you might need to enable the Report Builder Upgrade so that you can use joined reports. To enable the upgrade:

1. From your User menu select Setup and go to App Setup > Customize > Reports & Dashboards > User Interface Settings.
2. Select the checkbox to Enable Report Builder Upgrade.

The preview changes to show the format you have selected.

The left panel includes the fields available for your report based on the report category you selected:
7. Using the list of available fields displayed in the left panel, select the information you want to include in your report by dragging and dropping fields onto your report preview. Each field adds a new column to your report:
Use the picklist next to the column name to control the way the column is used, or to remove a column if you change your mind:

8. When you have all the columns you want to see in your report, if you want to group the data using one of the columns, select the picklist next to the column name and choose **Group by this Field**:

The preview changes to show the grouping you have selected:

To change the order of the columns, drag and drop a column name to move it left or right.
9. To add filters to enable you to drill down to show matches to a particular criterion, select the Filters Add picklist and choose the type of filter you want to add:

Sage People displays a filter builder for the type of filter you want to add:

Use the picklists to build your filter and select OK.

10. To add a chart to your report select Add Chart:

Sage People displays the Chart Editor for you to specify the chart you want:

Build your chart by selecting a chart type and the data you want it to display.
11. Select **OK**.

The chart is added to your report preview:

12. Select **Run Report**:

The report is created and displayed.

13. To save the report for future use, select **Save As**.

Sage People displays the Save Report page:

14. Complete the fields in the Save Report page:

   - **Report Name**: Text. Your name for the report
   - **Report Description**: Text. A description that will help you identify the report in the future.
   - **Report Unique Name**: Automatically created by Sage People, derived from the Report Name.
   - **Report Folder**: Picklist. Select the picklist and choose the folder where you want to store the report.

15. Select **Save** to save the report and return to the Reports & Dashboards Home page. Select **Save & Return to Report** to save the report and go back to the report you just created.
Running a Pre-Defined Dashboard

Dashboards are used to display the data from custom reports in graphical form:

Recruit Dashboard

- Application Status
- Active Vacancies
- Candidate Locations
- Total Applicant Status by Stage
- Vacancy Type by Current Status
- Average Days To Hire

Displays the total number of applications by current status.

Dashboards are used to display the data from custom reports in graphical form.
To display a pre-defined dashboard:

1. Select the **Dashboards** tab.

2. Select the **Find a dashboard...** picklist and choose the dashboard you want to display:

   ![Recruit Dashboard](image)

   The dashboard is displayed.

3. To ensure that the dashboard is using the latest available data from the underlying reports, select **Refresh**:

   ![Recruit Dashboard](image)

   Sage People retains the values last displayed in your dashboard until you select **Refresh**; values are not automatically updated. The date and time of the last refresh is displayed next to **Refresh**.

   Refreshing the dashboard refreshes the data for all users who can view the dashboard.
Building a Custom Dashboard

It is often quicker and easier to build a new dashboard based on an existing one, making the changes you need to customize the data displayed.

To modify an existing dashboard:

1. Select the Dashboards tab.
2. Select the Find a dashboard... picklist and choose the dashboard you want to modify:

   **Recruit Dashboard**

   ![Dashboard Picklist](image)

   The dashboard is displayed.

3. Select Clone:

   **Recruit Dashboard**

   ![Dashboard Clone](image)

   Sage People opens the Dashboard page.
4. Make the changes you want to the dashboard.

5. Select **Save**.

   Sage People displays the Save Dashboard dialog:

   ![Save Dashboard dialog](image)

   - **Title**: Text. Your name for the Dashboard
   - **Dashboard Unique Name**: Automatically created by Sage People, derived from the Dashboard Title.
   - **Save to**: Picklist. Select the picklist and choose the folder where you want to store the report.

6. Complete the fields as follows:

   - **Title**: Text. Your name for the Dashboard
   - **Dashboard Unique Name**: Automatically created by Sage People, derived from the Dashboard Title.
   - **Save to**: Picklist. Select the picklist and choose the folder where you want to store the report.

7. Select **Save**.

To build a Dashboard from scratch:

1. Select the **Reports** tab.
   Sage People opens the Reports and Dashboards Home page.

2. Select **New Dashboard...**:

   ![Reports & Dashboards](image)

   Sage People opens the Dashboard builder:

You are now going to:

- Add the dashboard components - the charts and tables that make up your Dashboard.
- Specify the report supplying the data for each component.
- Organize the Dashboard layout and the way you want the components to behave.
3. Select a Dashboard component from the left panel, drag and drop it into position in the main panel:

![Dashboard component selection](image)

4. Select the Data Sources tab in the left panel, select Reports, and select the report you want to use to provide the data for the component you just added to the Dashboard. Drag and drop the report onto the component:

![Dashboard with report selection](image)
Sage People produces a preview of the Dashboard component with the data from the source you selected:

5. Repeat the process to add up to 20 components with their data sources to the Dashboard.

6. Select **Save** at intervals through the process to save your work. The first time you select Save, Sage People displays the Save Dashboard dialog:

   **Save Dashboard**

   Complete the fields as follows:

   - **Title**: Text. Your name for the Dashboard
   - **Dashboard Unique Name**: Automatically created by Sage People, derived from the Dashboard Title.
   - **Save to**: Picklist. Select the picklist and choose the folder where you want to store the report.
7. When you have the components and sources in place, you can:
   - Move components by dragging and dropping if you want to change their positions.
   - Delete unwanted components by selecting Delete at the top right of the component:

   ![Component Edit Delete]

   - Enter a title for each component to say what the component is showing. Select in the component **Edit Title** box to enter text:

   ![Component Edit Title]

   - Enter header and footer text for each component. Select in the component **Edit Header** or **Edit Footer** boxes to enter text:

   ![Component Edit Header]

8. You can now edit the behavior of each component. Select **Edit Attributes** on a component:

   ![Component Editor]

Sage People displays the Component Editor:
Component Editor fields depend on the type of chart you are displaying. The tables below show the fields for pie charts and bar charts:

### Component Editor fields for Pie Chart

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Select Type</strong></td>
<td>Select to change the chart type.</td>
</tr>
<tr>
<td>Formatting tab</td>
<td>The preview chart in the Component Editor is updated to show your selections as you make them. Experiment to get the best layout.</td>
</tr>
<tr>
<td><strong>Sort Rows By</strong></td>
<td>Picklist. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Label Ascending/Label Descending</td>
</tr>
<tr>
<td></td>
<td>Data is displayed sorted alphabetically by the name of the row in the source table. Ascending = A to Z. Descending = Z to A. Pie charts and donut charts display the first data category starting at the 12 o'clock position.</td>
</tr>
<tr>
<td></td>
<td>- Value Ascending/Value Descending</td>
</tr>
<tr>
<td></td>
<td>Data is displayed sorted numerically by the value of the row in the source table. Ascending = starting at the lowest value. Descending = starting at the highest value. Pie charts and donut charts display the first data category starting at the 12 o'clock position.</td>
</tr>
<tr>
<td><strong>Maximum Values Displayed</strong></td>
<td>Number. The chart takes the first number of values from the table, determined by Sort Rows By. For example, if you set Maximum Values Displayed to 5 and Sort Rows By is set to Value Descending, the chart displays the top 5 values from your source data table. Leave blank to display all available values.</td>
</tr>
<tr>
<td><strong>Legend Position</strong></td>
<td>Picklist. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Right</td>
</tr>
<tr>
<td></td>
<td>- Bottom</td>
</tr>
<tr>
<td></td>
<td>- On Chart</td>
</tr>
<tr>
<td></td>
<td>The legend overlays the chart. This can aid clarity on some charts, but charts displaying many values can be more confusing.</td>
</tr>
<tr>
<td><strong>Data Labels</strong></td>
<td>Checkboxes:</td>
</tr>
<tr>
<td></td>
<td>- Combine Small Groups into &quot;Others&quot;</td>
</tr>
<tr>
<td></td>
<td>If checked, data values that are too small to display individually on the chart are grouped into an &quot;Other&quot; category.</td>
</tr>
<tr>
<td></td>
<td>- Show Values</td>
</tr>
<tr>
<td></td>
<td>If checked, data values are displayed on the chart.</td>
</tr>
<tr>
<td></td>
<td>- Show %</td>
</tr>
<tr>
<td></td>
<td>If checked, values are displayed as percentages.</td>
</tr>
<tr>
<td></td>
<td>If both Show Values and Show % are checked, actual values are displayed separated from percentage values by a colon.</td>
</tr>
<tr>
<td></td>
<td>- Show Details on Hover</td>
</tr>
<tr>
<td></td>
<td>If checked, a summary of the underlying data is displayed as you hover over the values on the chart.</td>
</tr>
</tbody>
</table>
### Component Data tab

**Values**

Picklist. The values to be used from your data source table to display on the chart. Select from:
- **Auto**
  - Sage People selects the values to use from your data source table.
- **Values determined by the data in the underlying data source table, typically including Record Count.**

**Wedges**

Picklist. The values to be used from your data source table to make up the wedges of the pie chart. Select from:
- **Auto**
  - Sage People selects the values to use from your data source table.
- **Values determined by the data in the underlying data source table.**

**Display Units**

Picklist. The scale of unit to use on the chart. Select from:
- **Auto**
  - Sage People selects the most appropriate scale depending on the range of values in the data source table.
- **Whole Units**
  - Display the units as they are held in the data source table.
- **Hundreds/Thousands/Millions/Billions/Trillions**

**Drill Down to**

Picklist. The behavior when you select on a chart to drill down to the underlying data. Select from:
- **Source Report**
  - Selecting the chart displays the full underlying report.
- **Filtered Source Report**
  - Selecting the chart displays that part of the source report that carries the data for the part of the chart you selected. This gives a more focused drill down than **Source Report**.
- **Record Detail Page**
- **Other URL**
  - Selecting the chart jumps to a URL you specify.
  - Sage People displays an additional field for you to enter the URL you want to display.

### Component Editor fields for Vertical and Horizontal Bar Charts

**Select Type**

Select to change the chart type.
The preview chart in the Component Editor is updated to show your selections as you make them. Experiment to get the best layout.

<table>
<thead>
<tr>
<th><strong>Formatting tab</strong></th>
<th>Sort Rows By</th>
<th>Picklist. Select from:</th>
</tr>
</thead>
</table>
|                    |              | • Label Ascending/Label Descending  
|                    |              |  Data is displayed sorted alphabetically by the name of the row in the source table.  
|                    |              |     Ascending = A to Z. Descending = Z to A.  
|                    |              | • Value Ascending/Value Descending  
|                    |              |  Data is displayed sorted numerically by the value of the row in the source table.  
|                    |              |     Ascending = starting at the lowest value. Descending = starting at the highest value.  

| Maximum Values Displayed | Number. The chart takes the first number of values from the table, determined by Sort Rows By.  
|--------------------------|--------------------------------------------------|
|                          | For example, if you set Maximum Values Displayed to 5 and Sort Rows By is set to Value Descending, the chart displays the top 5 values from your source data table. Leave blank to display all available values.  

<table>
<thead>
<tr>
<th>Axis Range</th>
<th>Picklist. Select from:</th>
</tr>
</thead>
</table>
|            | • Auto  
|            | Sage People selects the range based on the values in your data source table.  
|            | • Manual  
|            | You can specify the From and To values for the axis.  

<table>
<thead>
<tr>
<th>Data Labels</th>
<th>Checkboxes:</th>
</tr>
</thead>
</table>
|             | • Show Values  
|             | If checked, data values are displayed on the chart.  
|             | • Show Details on Hover  
|             | If checked, a summary of the underlying data is displayed as you hover over the values on the chart.  

### Component Data tab

<table>
<thead>
<tr>
<th>Component</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>X-Axis</strong></td>
<td>Picklist. The values to be used from your data source table to use for the axes. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Auto &lt;br&gt;Sage People selects the values to use from your data source table.</td>
</tr>
<tr>
<td></td>
<td>- Values determined by the data in the underlying data source table,</td>
</tr>
<tr>
<td><strong>Y-Axis</strong></td>
<td>Picklist. The values to be used from your data source table to use for the axes. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Auto &lt;br&gt;Sage People selects the values to use from your data source table.</td>
</tr>
<tr>
<td></td>
<td>- Values determined by the data in the underlying data source table,</td>
</tr>
<tr>
<td><strong>Group By</strong></td>
<td>Picklist. The way bars are grouped when grouping is appropriate for the underlying data. Select from:</td>
</tr>
<tr>
<td></td>
<td>- None &lt;br&gt;Appropriate for simple bars representing single values.</td>
</tr>
<tr>
<td></td>
<td>- Auto &lt;br&gt;A range of options for composite bars. You can select from:</td>
</tr>
<tr>
<td></td>
<td>- Side by side</td>
</tr>
<tr>
<td></td>
<td>- Stacked</td>
</tr>
<tr>
<td></td>
<td>- Stacked to 100%</td>
</tr>
<tr>
<td><strong>Display Units</strong></td>
<td>Picklist. The scale of unit to use on the chart. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Auto &lt;br&gt;Sage People selects the most appropriate scale depending on the range of values in the data source table.</td>
</tr>
<tr>
<td></td>
<td>- Whole Units &lt;br&gt;Display the units as they are held in the data source table</td>
</tr>
<tr>
<td></td>
<td>- Hundreds/Thousands/Millions/Billions/Trillions</td>
</tr>
<tr>
<td><strong>Drill Down to</strong></td>
<td>Picklist. The behavior when you select a chart to drill down to the underlying data. Select from:</td>
</tr>
<tr>
<td></td>
<td>- Source Report &lt;br&gt;Selecting the chart displays the full underlying report.</td>
</tr>
<tr>
<td></td>
<td>- Filtered Source Report &lt;br&gt;Selecting the chart displays that part of the source report that carries the data for the part of the chart you selected. This gives a more focused drill down than Source Report.</td>
</tr>
<tr>
<td></td>
<td>- Record Detail Page</td>
</tr>
<tr>
<td></td>
<td>- Other URL &lt;br&gt;Selecting the chart jumps to a URL you specify.</td>
</tr>
<tr>
<td></td>
<td>Sage People displays an additional field for the URL you want to display.</td>
</tr>
</tbody>
</table>

9. When you have edited component attributes, select **Save**.

10. Select **Close**.
    Sage People prompts you to select **Save & Close** to close the Dashboard.

11. Select **Save & Close**.
    Sage People displays the Dashboard you have just created.
Edit Custom Dashboards

To edit an existing Dashboard:

1. Select the Dashboards tab.
2. Select the Find a dashboard... picklist and choose the dashboard you want to modify:

   Talent Management
   Training and Development
   Fairsail Dashboards
     HCM - Dashboard

   Recruit Dashboard
     My Personal Dashboards
     HCM - Team Member analysis 1
     Recruit Criteria Analysis
     Team Member Analysis by team & location

   The dashboard is displayed.

3. Select Edit:

   Recruit Criteria Analysis

   Sage People opens the Dashboard builder for the Dashboard you selected.

4. Follow the guidance given in Building a Custom Dashboard (see page 102) to make the changes you want.
Emails and Workflow

Sage People Recruit includes a powerful workflow engine. This enables you to set up rules to automatically email candidates and assessors at different stages of the selection process. You have full control of the timing and content of the emails.

Email Templates

You can set up email templates incorporating company logos and branding to ensure continuity throughout your business processes. The first time you set up an email template you need to set up a company letterhead on which to base your template.

You can then go on to set up templates using the letterhead. Templates can be used within your workflows or on an ad hoc basis.

Setting up a letterhead

A letterhead is used to apply consistent corporate branding to all email templates you use. If you plan to use more than one email template, it's a good idea to have a letterhead.

To set up a letterhead:

1. From your User menu, select Setup:

2. In the left panel go to Administration Setup and select Communication Templates > Letterheads:

Sage People opens the Letterhead view. If you are creating the first letterhead for your organization, this view is empty.
3. Select New Letterhead:

Sage People displays the Letterhead Properties New Letterhead page:

4. Enter the details of the new letterhead:

- **Available For Use**: Checkbox. If checked the letterhead is marked as available and can be used for email templates. Leave unchecked until you have successfully defined the letterhead properties.
- **Letterhead Label**: Text. The name by which you want the letterhead known.
- **Letterhead Unique Name**: Text. Automatically generated from the Letterhead Label.
- **Description**: Text. A meaningful description of the letterhead to help you identify it in future.

5. Select Save.

Sage People displays the Letterhead Properties page for your new letterhead, enabling you to customize its look and feel.

You can define:

- Background color.
- Header properties, including color and logo.
- Body colors.
- Footer properties, including color and logo.
- Separator lines between header, body, and footer.
- Bottom line.

Set up the letterhead in line with your company standards.
6. Select Preview to check appearance, and return to the Letterhead Properties page to make any changes you need.

7. When you are happy with the preview, select Save.
   Sage People displays the letterhead detail page, complete with a preview.

8. To further edit your work, select Edit Letterhead and make the changes you want:

   ![Letterhead Detail](Image)
   [Letterhead Detail](Image)
   [Edit Properties](Image)
   [Edit Letterhead](Image)
   [Delete](Image)

9. To make your letterhead available for use, select Edit Properties:

   ![Letterhead Detail](Image)
   [Letterhead Detail](Image)
   [Edit Properties](Image)
   [Edit Letterhead](Image)
   [Delete](Image)

   Sage People displays the Letterhead Properties New Letterhead page.

10. Check Available For Use:

    ![Available For Use](Image)

11. Select Save.

12. In the left panel go to Administration Setup and select Communication Templates > Letterheads and check that your letterhead is listed in the Letterhead view, with Available For Use checked.

### Setting up an email template

If you plan to use more than one email template within your organization it’s a good idea to base them all on a letterhead (see page 112). A letterhead ensures consistent corporate branding across all your templates.

To set up company email templates:

1. In the left panel go to Administration Setup and select Communication Templates > Email Templates:

   ![Administration Setup](Image)

   Sage People displays a view of the email templates available to you. You can select a view to show the default templates supplied with your Sage People packages, such as Sage People Recruit or Sage People HCM.
2. To set up a new template, select **New Template**:

   - **New Template**
   - **Action** | **Email Template Name** | **Template Type** | **Available For Use** | **Description** | **Owner** | **Last Modified Date**

Sage People displays the New Template wizard:

### Step 1. Email Template: New Template

Choose the type of email template you would like to create.
- [ ] Text
- [X] HTML (using Letterhead)
- [ ] Custom (without using Letterhead)
- [ ] Visualforce

[Next] [Cancel]

3. To base your template on a corporate letterhead select **HTML (using Letterhead)**.
4. Select **Next**.

Sage People displays step 2 of the New Template wizard.

### Step 2. HTML Email Template: New Template

**Email Template Information**

- **Folder**: Fairsail Recruit
- **Available For Use**: [ ]
- **Email Template Name**: 
- **Template Unique Name**: 
- **Letterhead**: --None--
- **Email Layout**: --None--
- **Encoding**: General US & Western Europe (ISO-8859-1, ISO LATIN-1)
- **Description**: 

[Previous] [Next] [Cancel]
5. Enter the details of the new template:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Folder</td>
<td>Picklist. Select the folder to store the template.</td>
</tr>
<tr>
<td>Available For Use</td>
<td>Checkbox. If checked the email template is marked as available and can be used for emails. Leave unchecked until you have successfully defined the template properties.</td>
</tr>
<tr>
<td>Email Template Name</td>
<td>Text. The name by which you want the template known.</td>
</tr>
<tr>
<td>Template Unique Name</td>
<td>Text. Automatically generated from the Email Template Name.</td>
</tr>
<tr>
<td>Letterhead</td>
<td>Picklist. Select the corporate letterhead you have defined for your email templates.</td>
</tr>
<tr>
<td>Email Layout</td>
<td>Picklist. Select the layout you want to use. If you are not sure, select View Email Layout Options for layout previews.</td>
</tr>
<tr>
<td>Encoding</td>
<td>Picklist. The character set encoding to be used for emails based on this template. General US &amp; Western Europe (ISO-8859-1, ISO-LATIN-1) supports most western European languages.</td>
</tr>
<tr>
<td>Description</td>
<td>Text. A meaningful description of the letterhead to help you identify it in future.</td>
</tr>
</tbody>
</table>

6. Select Next.

Sage People displays step 3 of the New Template wizard complete with formatting controls and picklists of merge fields to enable you to build and customize your email template.

7. Build your template and select Next.

Sage People displays step 4 of the New Template wizard:

8. Enter the text-only version of your email template. The text-only version is available to email recipients if they cannot view HTML emails. You can copy the content of your HTML template by selecting Copy text from HTML version.

If you leave the text-only version blank, Sage People automatically creates text-only content for you, based on the current HTML code.

If you enter text for the text-only email template, any changes you make to the HTML version are not reflected in the text-only version.
9. Select Save.

Sage People displays the Email Template Detail page for your template, complete with a preview.

10. Check the preview. If you need to make changes, select Edit HTML Version or Edit Text Version as necessary.

11. To validate your template, select Send Test and Verify Merge Fields:

12. When you are satisfied that the template works as you want it, on the Email Template Detail page select Edit Properties.

Sage People displays the Email Template Edit page.

13. Check Available For Use:

14. Select Save.

Your email template is added to the list of available templates and can now be used.
Creating a New Workflow

Select the Object for Your Workflow Rule

1. From your User Menu select Setup
2. In the left panel go to App Setup > Create > Workflow & Approvals > Workflow Rules.
3. On the workflow rules list page, select New Rule:

Sage People displays the New Workflow Rule page and Step 1 of the Workflow Rule wizard.

4. Select the picklist for Select object and select the object for this workflow rule:

   - If you have a workflow action that updates a field on a related object, that target object is not the one associated with the workflow rule; select the object that owns the related object.
   - To create workflow rules based on new case comments or incoming email messages that automatically update fields on their associated cases, choose either Case Comment or Email Message.
   - You can’t create email alerts for workflow rules on activities.

5. Select Next.

Sage People displays Step 2 of the Workflow Rule wizard for you to configure the rule.
Configure Rule Settings and Criteria

1. In Step 2 of the Workflow Rule wizard complete the fields as follows:

<table>
<thead>
<tr>
<th>Edit Rule section</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Rule Name</td>
<td>Your name for the rule.</td>
</tr>
<tr>
<td>Description</td>
<td>Optional. Your description of the rule.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Evaluation Criteria section</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Created</td>
<td>Radio button. If selected, the rule triggers when a record for the object type you selected is created and at no other time. Use this option to ignore changes to existing records.</td>
</tr>
</tbody>
</table>
| Created, and every time it’s edited | Radio button. If selected, the rule triggers when:  
• A new record for the object type you selected is created.  
• An existing record for the object type you selected is edited.  
The rule triggers every time an existing record is edited as long as the record still meets the rule criteria. This results in repeated triggering of the rule when multiple edits are made to the record within the rule criteria.  
You cannot add time dependent actions to the rule if you select this option. |
| Created, and any time it’s edited to subsequently meet criteria | Radio button. If selected, the rule triggers when:  
• A new record for the object type you selected is created.  
• An existing record for the object type you selected is edited and the edit changes the record from not meeting the rule criteria to meeting the rule criteria.  
Edits to the record that do not change it to newly meet rule criteria do not trigger the rule. |
Run this rule if the following criteria are met.

- Select Field and Operator, then enter the Value. Fields with constrained values, such as true/false fields, display lookup to help you find the value.
- Repeat to specify all the criteria that must be met for the rule to trigger.

You can add up to 25 criteria and up to 255 characters.

- Formula evaluates to true.
  - Enter a formula that evaluates to True or False. The rule triggers when the formula evaluates True.
  - Sage People displays a text box and tools for you to build the formula:

- Insert Field displays the field picklist. Select a field and select Insert.
- Insert Operator displays the operator picklist. Select an operator to apply to the field.
- Functions displays a category picklist, narrowing the range of functions displayed:

  - Select the category then the function you want, then select Insert Selected Function. Not all functions are available for Workflow Rule formulas.
  - Build the formula and select Check Syntax to validate the formula structure.

Workflow rules respect the user’s locale and do not trigger when user and organization have different language settings.

2. Select Save & Next.

Sage People displays Step 3 of the Workflow Rule wizard for you to configure workflow actions.
Configure Workflow Actions

Step 3 of the Workflow Rule wizard displays sections for Immediate Workflow Actions and Time-Dependent Workflow Actions:

- Immediate actions trigger when evaluation criteria are met.
- Time dependent actions specify when Sage People executes the workflow action. For example, Sage People can automatically send an email reminder to the Payroll team if a Team Member is terminated.

1. Add a workflow action:

To add an immediate workflow action, select **Add Workflow Action** in the Immediate Workflow Actions section and select:

- **New Task** to create a task to associate with the rule.
- **New Email Alert** to create an email alert to associate with the rule.
- **New Field Update** to define a field update to associate with the rule.
- **New Outbound Message** to define an outbound message to associate with the rule.
- **Select Existing Action** to select an existing action to associate with the rule.

To add a time dependent workflow action:

a. Select **Add Time Trigger** in the Time Dependent Workflow Actions section.

b. Specify a number of days or hours before or after a date relevant to the record, such as the date the record was created or modified. If the workflow rule is active when this time occurs, the time trigger fires the workflow action.

c. Select **Save**.

The **Add Time Trigger** button is unavailable if:

- The rule criteria is set to **Created, and every time it's edited**.
- The rule is activated.
- The rule is deactivated but has pending actions in the workflow queue.

2. Repeat to configure any additional immediate or time dependent actions.

3. Select **Done**.

Sage People saves the Workflow Rule and displays the Workflow Rule detail page.

---

For standard objects, workflow rules can only perform field updates on the object related to the rule. The exceptions are that both Case Comments and Email Messages can perform cross-object field updates on Cases.

For all custom objects, you can create workflow actions where a change to a detail record updates a field on the related master record. Cross-object field updates only work for custom-to-custom master-detail relationships. For example, create a workflow rule that sets the status of an Application (the master object) to Closed when a Candidate (the detail object) accepts the job.
Activate the Workflow Rule

You must activate the Workflow rule before Sage People can trigger it.

To activate a workflow rule, select Activate on the Workflow Rule Detail page:

NY Candidate

The Workflow Detail page also has buttons to Edit, Delete, and Clone a workflow rule. You can only delete a deactivated rule.

The Workflow Rule Detail page for an Active rule includes a Deactivate button:

Select Deactivate to prevent a rule from triggering or if you want to edit the time dependent actions and time triggers associated with the rule.
Approval Processes

An approval process enables you to automate procedures for seeking, gaining, and recording approval for creating and editing records held in Sage People. The approval process specifies:

- **Entry criteria** for the process: what must happen for the process to start.
- **Initial submission actions**: what happens when the process starts.
- **Steps** that must be followed and the approvals that must be obtained.
- **Final approval actions**: what happens when approval is gained.
- **Final rejection actions**: what happens if approval is refused.
- **Recall actions**: what happens when a submitted approval request is recalled.

Sage People Recruit is supplied with outline approval processes for:

- **Vacancy authorization**: before a vacancy can be advertised. This is the Approve Vacancies process.
- **Hiring**: before an offer email can be sent. This is the Request to Hire process.

These processes must be enabled and customized to work with the requirements of your organization.

Before editing an approval process, deactivate it to stop it from being used while you are editing.

To deactivate an approval process:

1. From your User menu, select Setup.
2. In the left panel go to **App Setup > Create > Workflow & Approvals > Approval Processes**.
3. In **Manage Approval Processes For**: select the picklist and select the object for which the approval process is defined.
   
   Sage People displays the related lists of Active and Inactive Approval Processes for the object you selected.
4. In the list of Active Approval Processes select **Deactivate** against the process you want to edit:

   ![Active Approval Processes](image)

   Sage People moves the process from the Active list to the Inactive list. You are now clear to edit the process.
Editing an approval process is described in the following sections:

<table>
<thead>
<tr>
<th>Section</th>
<th>What it covers</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit Process Definition Detail (see page 125)</td>
<td>• Process name and description.</td>
</tr>
<tr>
<td></td>
<td>• Process entry criteria.</td>
</tr>
<tr>
<td></td>
<td>• Automated approval routing.</td>
</tr>
<tr>
<td></td>
<td>• Constraints on record editing during the process.</td>
</tr>
<tr>
<td></td>
<td>• Email template to use for all steps in the process.</td>
</tr>
<tr>
<td></td>
<td>• Fields displayed on an approval page.</td>
</tr>
<tr>
<td></td>
<td>• Initial submitters and recall permission.</td>
</tr>
<tr>
<td>Edit Initial Submission Actions (see page 131)</td>
<td>• Adding a new task, email alert, field update, or outbound message.</td>
</tr>
<tr>
<td></td>
<td>• Editing an existing action.</td>
</tr>
<tr>
<td></td>
<td>• Removing an existing action.</td>
</tr>
<tr>
<td>Edit Approval Steps (see page 133)</td>
<td>• Step name and description.</td>
</tr>
<tr>
<td></td>
<td>• Step entry criteria.</td>
</tr>
<tr>
<td></td>
<td>• Assigned step approver.</td>
</tr>
<tr>
<td>Edit Final Approval Actions (see page 139)</td>
<td>• Adding a new task, email alert, field update, or outbound message.</td>
</tr>
<tr>
<td></td>
<td>• Editing an existing action.</td>
</tr>
<tr>
<td></td>
<td>• Removing an existing action.</td>
</tr>
<tr>
<td>Edit Final Rejection Actions (see page 139)</td>
<td>• Adding a new task, email alert, field update, or outbound message.</td>
</tr>
<tr>
<td></td>
<td>• Editing an existing action.</td>
</tr>
<tr>
<td></td>
<td>• Removing an existing action.</td>
</tr>
<tr>
<td>Edit Recall Actions (see page 140)</td>
<td>• Adding a new task, email alert, field update, or outbound message.</td>
</tr>
<tr>
<td></td>
<td>• Editing an existing action.</td>
</tr>
<tr>
<td></td>
<td>• Removing an existing action.</td>
</tr>
</tbody>
</table>

Follow the procedures you need to customize the parts of the approval process you want to change.
Edit Process Definition Detail

1. If the process is active, deactivate it (see page 123).

2. In the Inactive Approval Processes related list select Edit against the process you want to edit:

   Sage People displays Step 1 of the Approval Process Edit wizard:

   **Approve Vacancies**

3. You can rename the process if you need to, and add a description to clarify the role of the process. If you change the Unique Name ensure that it conforms to the standard rules for unique names:

   - Begins with a letter.
   - Includes only alphanumeric characters and underscores.
   - Cannot end with an underscore.
   - Cannot include two consecutive underscores.

   Renaming the process overwrites the original process - it does not preserve the original with the original name.
4. Select Next.

Sage People displays Step 2 of the Approval Process Edit wizard:

Criteria specified here must be met before a record can enter the process; records that do not meet the criteria can still be created but they cannot progress.

5. To add extra entry criteria, complete Field, Operator and Value fields for each new criteria.

To change the process to use a formula to qualify new vacancies, select the picklist for Use this approval process if the following and choose formula evaluates to true. Then enter your formula.
6. Select **Next**.

Sage People displays Step 3 of the Approval Process Edit wizard:

![Approval Process Edit wizard Step 3](image)

7. To automatically route approval requests to the manager of the person creating the record, select the picklist for **Next Automated Approver Determined By** and choose **Manager**.

To define an approval process where each approval is separately determined by the steps in the process, select the picklist for **Next Automated Approver Determined By** and choose **None**.

8. In the **Record Editability Properties** section, select the radio button for the type of constraint you want to place on editing records during the approval process:
   - Administrator-only editing.
   - Administrator and the currently assigned approver can edit.

9. Select **Next**.

Sage People displays Step 4 of the Approval Process Edit wizard:

![Approval Process Edit wizard Step 4](image)

10. To specify an email template to request approval, select **Approval Assignment Email Template** lookup, find and select the template you want to use.

The same template is used for all steps in the process.

If you do not specify a template, Sage People uses the standard Salesforce template.

If you do not have a template and want to create one, select **Create a new email template**.
11. Select **Next**.

Sage People displays Step 5 of the Approval Process Edit wizard:

This step enables you to define the fields visible to the approver.

**Approve Vacancies**
- Vacancy Name
- Owner
- Hiring Manager
- Description
- Key Responsibilities
- Location City
- Employment Type
- Salary Period
- Salary Minimum
- Salary Maximum
- Salary Negotiable?
- Includes Benefits?
- Salary OTE?

If you are using the Sage People Job Requisition process, the fields visible on the Requisition are controlled by the Requisition Details Field Set, not by this step.

**Request to Hire**
- Application Number
- Owner
12. To add a field to the display, select the field in **Available Fields** and select **Add**. To remove a field from the display, select the field in **Selected Fields** and select **Remove**. To change the order in which fields are displayed, select a field in **Selected Fields** and select **Up** or **Down**.

13. Select **Next**.

Sage People displays Step 6 of the Approval Process Edit wizard:

### Step 6. Specify Initial Submitters

#### Using the options below, specify which users are allowed to submit the initial request for approval. For example, expense reports should normally be submitted for approval only by their owners.

**Initial Submitters**

**Submitter Type**

- **Search:** Owner

**Available Submitters**

- **Vacancy Owner**

**Allowed Submitters**

- **Vacancy Owner**

**Submitter Type**

- **Search:** Owner

**Available Submitters**

- **--None--**

**Allowed Submitters**

- **Vacancy Owner**

**Submission Settings**

- **Allow submitters to recall approval requests**

This step enables you to specify which users can submit a record for approval.

**Approve Vacancies**

- **Vacancy Owner**

**Request to Hire**

- **Application Owner**

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14. To add more Allowed Submitters, select the Search picklist and choose a Type:

![Search Picklist]

The list of Available Submitters displays all submitters of the type selected:

![Available Submitters]

Select an Available Submitter and select Add.

15. To permit submitters to recall approval requests they have submitted, in the Submission Settings section check Allow submitters to recall approval requests.

16. Select Save.

Sage People displays the Approval Process Detail page for the process you have just edited.
Edit Initial Submission Actions

Initial submission actions are what happens when a record has passed the entry criteria for an approval process and the process starts.

<table>
<thead>
<tr>
<th>Initial Submission Actions</th>
<th>Approve Vacancies</th>
<th>Request to Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Lock the Vacancy to stop it from being edited.</td>
<td>2. Set the value of the Vacancy Submitted Date to today's date.</td>
<td>1. Lock the Application to stop it from being edited.</td>
</tr>
<tr>
<td>2. Set the value of the Vacancy Submitted Date to today's date.</td>
<td></td>
<td>2. Set the value of the Application Submitted Date to today's date.</td>
</tr>
</tbody>
</table>

To edit initial submission actions for an approval process:

1. If the process is active, deactivate it (see page 123).
2. In the Inactive Approval Processes related list select the Approval Process Name:

<table>
<thead>
<tr>
<th>Inactive Approval Processes</th>
<th>Action</th>
<th>Approval Process Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td></td>
<td>Approve Vacancies</td>
<td></td>
</tr>
</tbody>
</table>

Sage People displays the Approval Processes Detail page for the process you selected.

3. Go to the Initial Submission Actions related list section:

<table>
<thead>
<tr>
<th>Initial Submission Actions</th>
<th>Action</th>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Record Lock</td>
<td></td>
<td></td>
<td>Lock the record from being edited</td>
</tr>
<tr>
<td>Field Update</td>
<td></td>
<td></td>
<td>Set Submitted Date</td>
</tr>
</tbody>
</table>

4. To edit a listed action already assigned as an Initial Submission Action, select Edit:

Sage People opens the edit page for the type of action:
- Task
- Email Alert
- Field Update
- Outbound Message

5. To delete a listed action assigned as an Initial Submission Action, select Remove:
6. To add a previously defined action to this approval process, select Add Existing:

Sage People displays the Select Existing Actions page:

Select Existing Actions

- Select the Choose Action Type picklist and choose the type of action:

Use the for: field and select Find to refine your search if the Action Type alone results in a long list.

- Select an action in the list of Available Actions and select Add to select it. You can select multiple actions if you want.

- Select Save to add the selected actions to the approval process as initial submission actions.
7. To add a new action to the approval process select **Add New** and select the type of action to add:

Sage People displays the appropriate page:

- **New Task** enables you to add a template to be used by approval processes or workflows when automatically assigning an action to a user.
  
  Complete the fields to assign the task to a User, Role, or Owner, specify a due date, and select **Save**.

- **New Email Alert** enables you to add an alert based on an email template for association with an approval process or workflow.
  
  Complete the fields to select a template and recipients and select **Save**.

- **New Field Update** enables you to define an object field to be updated as part of an approval process or workflow rule.
  
  Select the field you want to change, specify the value as blank or define the formula to set the value, and select **Save**.

- **New Outbound Message** enables you to configure an outbound message to an endpoint you define, together with the fields you want to include.
  
  Complete the fields to define the message and select **Save**.

---

## Edit Approval Steps

Approval steps define who gets the approval request and any actions to perform when the request is approved or rejected. Approval steps execute when initial submission actions are complete.

You cannot add new steps to an approval process once it has been activated, even if you deactivate it. Once an approval process has been activated you can edit existing steps by changing the details and adding approval or rejection actions.
To edit approval steps for an approval process:

1. If the process is active, deactivate it (see page 123).

2. In the Inactive Approval Processes related list select the Approval Process Name:

   **Inactive Approval Processes**
   
<table>
<thead>
<tr>
<th>Action</th>
<th>Approval Process Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit</td>
<td>Approve Vacancies</td>
<td></td>
</tr>
</tbody>
</table>

   Sage People displays the Approval Processes Detail page for the process you selected.

3. Go to the Approval Steps related list section:

   **Approval Steps**
   
<table>
<thead>
<tr>
<th>Action</th>
<th>Step Number</th>
<th>Name</th>
<th>Description</th>
<th>Criteria</th>
<th>Assigned Approver</th>
<th>Reject Behavior</th>
</tr>
</thead>
<tbody>
<tr>
<td>Show Actions</td>
<td>Edit</td>
<td>1</td>
<td>Step 1</td>
<td>Related User</td>
<td>Authorising Manager</td>
<td>Final Rejection</td>
</tr>
</tbody>
</table>

4. To edit the details of an existing step, select **Edit** next to the step name:

   **Step 1. Enter Name and Description**
   
   Enter a name, description, and step number for your new approval step.

   **Enter Name and Description**
   
   - **Approval Process Name**: Approve Vacancies
   - **Name**: Step 1
   - **Unique Name**: Step_1
   - **Description**: 

   Sage People displays Step 1 of the Approval Step Edit process:
5. To change the Name and Description enter the new values. Ensure that the Unique Name remains unique.

6. Select **Save** to save your changes and return to the Approval Process Detail page, or select **Next** to edit more details of the step.

If you select Next, Sage People displays step 2 of the Approval Step Edit process:

<table>
<thead>
<tr>
<th>Step 2. Specify Step Criteria</th>
<th>Step 2 of 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Specify whether a record must meet certain criteria before entering this approval step. If these criteria are not met, the approval process can skip to the next step, if one exists.</td>
<td></td>
</tr>
</tbody>
</table>

**Specify Step Criteria**

- All records should enter this step.
- Enter this step if the following **criteria are met**, else **reject record**.

7. To change the criteria which must be met before a record can enter this step, select the radio button **Enter this step if the following**.

Sage People expands the display to add a number of Field, Operator, and Value fields:

<table>
<thead>
<tr>
<th>Field</th>
<th>Operator</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
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<tr>
<td>None</td>
<td>None</td>
<td>None</td>
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<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
<tr>
<td>None</td>
<td>None</td>
<td>None</td>
</tr>
</tbody>
</table>

**Add Filter Logic**

8. To add extra entry criteria, complete Field, Operator and Value fields for each new criteria.

To change the process to use a formula to qualify new vacancies, select the picklist for **Enter this step if the following** and select **formula evaluates to true**. Then enter your formula.

To change the outcome if the step entry criteria are not met, select the picklist for else and select the outcome:

- **reject record**
- **approve record**
- **reject record**
9. Select **Next**.

Sage People displays Step 3 of the Approval Step Edit process:

**Step 3. Select Assigned Approver**

Specify the user who should approve records that enter this step. Optionally, choose whether the approver’s delegate is also allowed to approve these requests.

**Select Approver**

- Let the submitter choose the approver manually
- Automatically assign to queue:
- Automatically assign to approver(s)

**Related User** ▼ **Authorising Manager** ▼

**Add Row** **Remove Row**

**When multiple approvers are selected:**

- Approve or reject based on the FIRST response.
- Require **UNANIMOUS** approval from all selected approvers.

☐ The approver's delegate may also approve this request
10. To change the approver for this step, select the radio button for the option you want:
   - Let submitter choose the approver manually
   - Automatically assign to queue.
     Use lookup to find and select the queue you want to use.
   - Automatically assign to approver(s)
     Select the picklist and choose the type of user:

     ![Radio buttons for approver selection]

     Then select the second picklist and choose the user.

     To add multiple approvers select Add Row for each new approver:

     ![Picklists for additional approvers]

     ...and complete the fields to define the additional approver:

     ![Picklists for additional approvers]

     To allow the first response received to determine the outcome of the step, select Approve or reject based on the FIRST response.

     To specify that all approvers must agree on the outcome before the record can progress, select Require UNANIMOUS approval from all selected approvers.

11. Select Save.

   Your changes are saved and Sage People displays the Approval Process Detail page.
12. To edit the actions associated with an approval process step, in the Approval Steps related list section select **Show Actions** next to the step name:

Sage People displays the approval and rejection actions associated with this step:

13. To add a previously defined action to this step of the approval process, select **Add Existing**.

Sage People displays the Select Existing Actions page:

- **Select Existing Actions**

  a. Select the **Choose Action Type** picklist and choose the type of action:

    Use the **for** field and select **Find** to refine your search if the Action Type alone results in a long list.

  b. Select an action in the list of **Available Actions** and select **Add** to select it. You can select multiple actions if you want.

  c. Select **Save** to add the selected actions to this step of the approval process.
14. To add a new action to this step of the approval process select **Add New** and select the type of action.

Sage People displays the appropriate page:

- **New Task** enables you to add a template to be used by approval processes or workflows when automatically assigning an action to a user.
  
  Complete the fields to assign the task to a User, Role, or Owner, specify a due date, and select **Save**.

- **New Email Alert** enables you to add an alert based on an email template for association with an approval process or workflow.
  
  Complete the fields to select a template and recipients and select **Save**.

- **New Field Update** enables you to define an object field to be updated as part of an approval process or workflow rule.
  
  Select the field to change, specify the value as blank or define a formula to set it, and select **Save**.

- **New Outbound Message** enables you to configure an outbound message to an endpoint you define, together with the fields you want to include.
  
  Complete the fields to define the message and select **Save**.

### Edit Final Approval Actions

Final approval actions are what happens when a record has passed the approval process.

<table>
<thead>
<tr>
<th>Final Approval Actions</th>
<th>Approve Vacancies</th>
<th>Request to Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Unlock the Vacancy so that it can be edited.</td>
<td>1. Lock the Application to stop it from being edited.</td>
</tr>
<tr>
<td></td>
<td>2. Set the value of the Vacancy Advertise On Candidate Portal checkbox to true.</td>
<td>2. Set the value of the Application Approved Date to today's date.</td>
</tr>
<tr>
<td></td>
<td>3. Set the value of the Vacancy Approved Date to today's date.</td>
<td></td>
</tr>
</tbody>
</table>

Final Approval Actions can be edited in the same way as Initial Submission Actions. Go to **Edit Initial Submission Actions** (see page 131) for more information.

### Edit Final Rejection Actions

Final approval actions are what happens when a record is rejected by the approval process.

<table>
<thead>
<tr>
<th>Final Rejection Actions</th>
<th>Approve Vacancies</th>
<th>Request to Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Unlock the Vacancy so that it can be edited.</td>
<td>1. Unlock the Application so that it can be edited.</td>
</tr>
<tr>
<td></td>
<td>2. Clear the value of the Vacancy Submitted Date.</td>
<td>2. Clear the value of the Application Submitted Date.</td>
</tr>
</tbody>
</table>

Final Rejection Actions can be edited in the same way as Initial Submission Actions. Go to **Edit Initial Submission Actions** (see page 131) for more information.
Edit Recall Actions

Recall actions are what happens when a submitted approval request is recalled.

<table>
<thead>
<tr>
<th>Recall Actions</th>
<th>Approve Vacancies</th>
<th>Request to Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1. Unlock the Vacancy so that it can be edited.</td>
<td>1. Unlock the Application so that it can be edited.</td>
</tr>
<tr>
<td></td>
<td>2. Clear the value of the Vacancy Submitted Date.</td>
<td>2. Clear the value of the Application Submitted Date.</td>
</tr>
</tbody>
</table>

Recall Actions Actions can be edited in the same way as Initial Submission Actions. Go to Edit Initial Submission Actions (see page 131) for more information.
Enabling Email Approvals

You can set up Sage People to receive emailed responses to approval requests sent out as part of a Workflow or Approval Process.

- Responses must be sent from the recipients email address, as held on Sage People. Responses from other addresses will be blocked for security reasons.

- Responses must include the one word response in the first line of the email - not in the subject field:
  - APPROVE, YES, or TRUE to approve the request.
  - REJECT, NO, or FALSE to reject the request.

- Responses can include comments in the second line. Comments are extracted from the email and added to the relevant Sage People object record.

To enable emailed approval responses:

1. Go to Setup > App Setup > Create > Workflow & Approvals > Settings.

Sage People displays the Workflow & Approval Settings page:

**Workflow & Approvals Settings**

2. **Default Workflow User** displays the current user. Change this if necessary by selecting Default Workflow User lookup, finding and selecting the user you want.

3. Check **Enable Email Approval Response**.

4. Select **Save**.
Configuring Forms

You can use forms to gather information from any of the participants in the recruitment process. Forms can be sent to candidates, referees, or assessors. The data gathered and the layout used are controlled by the Form Definition.

- Forms can be sent to candidates and can be added to a Candidate Portal by choosing a Form Definition in the selection stage of a vacancy.
- Forms can be sent to referees by choosing a Form Definition in the Reference Form option in the vacancy.

Creating a new form definition follows a four stage process:
1. Create the definition itself (see page 142).
2. Layout the form pages and questions using the visual designer (see page 144).
3. Map the data you gather to fields within the recruitment data, such as candidate, application, and so on. (see page 149)
4. Add email templates for when the form starts, ends, or you need to send a reminder (see page 152).

Form Definition

To start a new form definition:
1. Select the Form Definition tab.
   Sage People displays the Form Definition Home page.
2. Select New Form Definition:
   Sage People displays the Form Definition page.
3. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Definition Name</th>
<th>Text. The name of the form being defined.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Permit New Object</td>
<td>Checkbox. If checked the form creates a new linked object on completion if it is not linked to an object when the form was started. Normally you do not need to check this as forms are created during the recruitment process already linked to the assessment or referee. It needs to be checked if you create special forms, for example application forms.</td>
</tr>
<tr>
<td>Request Prefix</td>
<td>URL. Typically the base URL you have setup for Sites (see page 166). Added at the start of the URL for the questionnaire to provide a complete link that can be followed to open the form. The value must end with a '/' character.</td>
</tr>
<tr>
<td>Link Relationship</td>
<td>Picklist. The database object for which this form gathers information. Select the picklist and choose from:</td>
</tr>
<tr>
<td></td>
<td>- Assessment__c</td>
</tr>
<tr>
<td></td>
<td>Most forms in recruitment are sent to the candidate during a recruitment stage and so need to be linked to the Assessment object. From the assessment you can also pass information back into the candidate and application objects.</td>
</tr>
<tr>
<td></td>
<td>- Candidate__c</td>
</tr>
<tr>
<td></td>
<td>Link to the candidate object only if you are sending a form to a candidate independently of any application, perhaps as a survey.</td>
</tr>
<tr>
<td></td>
<td>- Contact__c</td>
</tr>
<tr>
<td></td>
<td>Link to the contact object if you are sending a form to a contact independently of any application, perhaps as a survey.</td>
</tr>
<tr>
<td></td>
<td>- Reference__c</td>
</tr>
<tr>
<td></td>
<td>Link to the reference object for forms sent to referees.</td>
</tr>
<tr>
<td>VisualForce Page</td>
<td>The name of the VisualForce page to be used to collect form information. The standard built in page is called Form. If you are using this page enter:</td>
</tr>
<tr>
<td></td>
<td>fRecruit__Form</td>
</tr>
<tr>
<td></td>
<td>Specify a different page if you have created a custom VisualForce page to change the form layout. Note that form layout can also be controlled by adding stylesheets to the form definition when you layout your questions.</td>
</tr>
</tbody>
</table>

4. Select **Save**.

Sage People displays the initial Form Definition Home page.

5. Select the name of the Form Definition you have just set up to display the Form Definition page:

6. Select **Visual Edit** to move on to the Visual Designer and layout the form pages and questions (see page 144):
Visual Form Designer

To layout the form pages and questions:

1. On the Form Definitions Details page select Visual Edit:

   ![Visual Design Screen](image)

   Sage People displays the Visual Designer:

2. Build the form using these buttons:

   ![Form Definition Screen](image)

   Add a new page to the form. The new page is added immediately below the currently highlighted page in the left panel tree diagram. You can drag and drop pages and their associated questions to change the order in which they appear on the form.

   In the right panel enter at least an **Id** and a **Title**.
New Question

Add a new question to the page. The new question is added immediately below the last question in the left panel tree diagram. You can drag and drop questions to change the order in which they appear on the form.

You can add questions to any page.

In the right panel enter at least a **Name** and a **Prompt**, and select the **Question type** from the picklist.

New Option

Add an option to the question immediately below the currently highlighted option in the left panel tree diagram. This button is only active on questions that take options, for example Selection or Radio button questions.

You can drag and drop options to change the order in which they appear on the form.

In the right panel enter the **Prompt** for the option, the **Value** you want to present on the form, and any **Help** text.

Save

Save the current form definition and exit the designer.

Advanced Mode / Simple Mode

Toggle the editor between Advanced Mode and Simple Mode. Advanced Mode displays:

- Additional buttons:
  - **New Button**
    - Add a new button to the currently selected page. Buttons can be added to any page. The form automatically contains buttons for: Previous Page, Next Page, Save, Submit.
    - These are not shown in the editor. You can add other buttons to any page for additional navigation, for example to skip a non-relevant section in the form.
  - **New Message**
    - Add a new message to the form.
  - **New Formula**
    - Add a new formula to the currently selected page. Formulas can be added to any page. Formulas are used to calculate data items for use within the form or to save into a Recruit object.
  - **New Parameter**
    - Additional parameters in the right panel for pages, questions and options. When in Advanced Mode the button changes to **Simple Mode**.

Delete

Removes the currently selected element and any child elements from the form. You are prompted to confirm or cancel before returning to the Visual Designer.

Clone

Copies the currently selected element to act as the starting point for a new element of the same type.
As you build the form, Sage People builds a tree diagram in the left panel to show the structure of pages, questions, options, buttons, and formulas within the form:

You can expand and close the form, pages and questions to view the parts of the form you wish to work on. Selecting the plus signs opens a node, selecting the minus sign closes it again. You can also select and drag questions or pages within the tree to reorder them or move questions between pages.

Selecting on the form or any page, question, option, button, or formula shows the parameters for that node in the right panel. Different parameters are available for pages, questions and options, and further parameters are available if you have Advanced Mode switched on:

<table>
<thead>
<tr>
<th>Parameter</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Pages, questions and formulas have names. A name is required and must be entered first as soon as a new page, question or formula is added. A name must not have spaces in it and must start with an alphabetic character. Names of pages must be unique within the form. Names of questions and formulas must be unique within that page. The name of a question or formula is the name of the data to be displayed, collected or calculated by that question.</td>
</tr>
<tr>
<td>ID</td>
<td>A unique identifier used to mark the field in the form. Identifiers are used with linked stylesheets to specify the layout of a particular field. If you do not enter a value it is set automatically. Enter a value if you want to take control of the form layout.</td>
</tr>
<tr>
<td>Title</td>
<td>Text making up the title of a form, page or a question.</td>
</tr>
<tr>
<td></td>
<td>• For a form the title appears at the top of all pages within the form.</td>
</tr>
<tr>
<td></td>
<td>• For a page the title is at the top of that page, immediately below the form title and subtitle, and above text.</td>
</tr>
<tr>
<td></td>
<td>• For a question the title appears in highlighted text immediately before the question. Typically you add a title to the first question in a block of questions. Individual questions often do not have a title.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Sub Title</td>
<td>Text making up a sub title of a form, page or a question. Sub titles normally appear in a less highlighted form than the titles, as controlled by your stylesheet.</td>
</tr>
<tr>
<td></td>
<td>• For a form the sub title appears at the top (below the title) of all pages within that form.</td>
</tr>
<tr>
<td></td>
<td>• For a page the sub title is at the top of that page, immediately below the page title and above text.</td>
</tr>
<tr>
<td></td>
<td>• For a question the sub title appears in highlighted text immediately before the question. Typically you add a sub title to the first question in a group of questions forming part of a larger, titled block. Individual questions often do not have a sub title.</td>
</tr>
<tr>
<td>Before Text</td>
<td>A block of text at the beginning of the form, page or question. Before text is used to add explanatory text for the person completing the form.</td>
</tr>
<tr>
<td></td>
<td>• Form Before Text appears on all pages in the form.</td>
</tr>
<tr>
<td></td>
<td>• Page Before Text appears just on that page.</td>
</tr>
<tr>
<td></td>
<td>• Question Before Text appears immediately before the question, and by default on the same horizontal alignment as the question field.</td>
</tr>
<tr>
<td>After Text</td>
<td>A block of text at the end of the form, page or question. After text is used to add explanatory text for the person completing the form.</td>
</tr>
<tr>
<td></td>
<td>• Form After Text appears on all pages in the form.</td>
</tr>
<tr>
<td></td>
<td>• Page After Text appears just on that page.</td>
</tr>
<tr>
<td></td>
<td>• Question After Text appears immediately after the question, and by default on the same horizontal alignment as the question field.</td>
</tr>
<tr>
<td>Prompt</td>
<td>A short item of text that appears on the left beside a question data entry field. The question prompt is the question to be answered by the person completing the form. Prompts are also used in Option nodes to set the text to appear for the option in the picklist, radio button, checkbox or slider.</td>
</tr>
<tr>
<td>Prefix Text</td>
<td>A short item of text immediately prior to a data entry field in a question. This is used to add items such as currency symbols.</td>
</tr>
<tr>
<td>Postfix Text</td>
<td>A short item of text immediately after a data entry field in a question. This is used to add items such as a percentage sign.</td>
</tr>
<tr>
<td>Button Text</td>
<td>Text that appears to the left of the navigation buttons on a page. For the default layout, buttons and button text appear at both the bottom and top of pages within multipage forms.</td>
</tr>
<tr>
<td>Tab Text</td>
<td>Tab Text appears on any page. Tab Text creates a tab for that page in a tab bar along the top of the form. Selecting a tab takes the person completing the form to the page associated with that tab text. If you use tabs not all pages need tab text, and those without can be reached by selecting previous or next page. If there are no tabs the tab bar is not visible. Note that when you add required questions to a page the tabs in a forwards direction are not usable until all required questions on that page have entries. Consider using check formulas on the last page instead of required fields when using the tab bar.</td>
</tr>
<tr>
<td>Required</td>
<td>Checkbox. If checked, the question must be answered. The person completing the form will not be able to move to the next page (or later tab) unless this question is answered.</td>
</tr>
<tr>
<td>Default</td>
<td>The value displayed in this question response when the question first appears. If an Out data mapping (see page 149) sets this field, the mapped value is the one that appears and the default only appears if the mapped value is null.</td>
</tr>
<tr>
<td>Value</td>
<td>Associated with options in picklists, radio buttons, checkboxes or slider options. The value is the data that is returned when that option is selected when answering that question.</td>
</tr>
<tr>
<td>Max Length</td>
<td>The maximum number of characters permitted in the field.</td>
</tr>
<tr>
<td>Max Words</td>
<td>The maximum number of words permitted in the field. If you specify Max Words a word counter is shown to help the person answering the form.</td>
</tr>
<tr>
<td>Width</td>
<td>The width of the field in pixels. In the normal form layout the full space available across the page for question fields is 600 pixels.</td>
</tr>
<tr>
<td>Parameter</td>
<td>Description</td>
</tr>
<tr>
<td>-----------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Height</td>
<td>For fixed text area questions, the height of the field in pixels.</td>
</tr>
<tr>
<td>Validation</td>
<td>The value entered into the field must pass this validation before the person completing the form can move on to the next page. You can use:</td>
</tr>
<tr>
<td></td>
<td>- The word <strong>email</strong> to constrain the content of the field to an email address.</td>
</tr>
<tr>
<td></td>
<td>- The word <strong>number</strong> to constrain the content of the field to a number.</td>
</tr>
<tr>
<td></td>
<td>- A regular expression. Use Google to find examples of regular expressions for such things as different types of national insurance numbers, postal or zip codes, month and day names, different national phone numbers, and so on.</td>
</tr>
<tr>
<td>Validation Message</td>
<td>The message that appears if the validation fails. If not entered a standard message appears.</td>
</tr>
<tr>
<td>Condition</td>
<td>A Condition controls whether or not a page, question, button or option is shown when completing the form. If the Condition is null, that page, question or option always appears. If the Condition is a boolean expression that evaluates false, that page, question or option is not shown when completing the form. The boolean expression takes the same format as formula fields within Salesforce. The names of any question or formula within the form can be used as variables in the boolean expression. For example: <code>gender=='Male'</code> evaluates to true if there is a question named <code>gender</code> that has the value Male entered in the field. If, for example, this expression is in the condition for a page, this page is only shown if Male has been entered previously in the form. Refer to Salesforce documentation for a list of functions to use within the condition.</td>
</tr>
<tr>
<td>Tab Active Condition</td>
<td>A condition used with a tab on a page. The condition must be met for the tab to be accessible. If an expression evaluates false, the associated tab is shown deactivated and cannot be selected by the person entering the form.</td>
</tr>
<tr>
<td>Action</td>
<td>Sets the action taken when the button with that action is selected by the person completing the form. You can use the Actions:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Goto</strong> to skip to a page.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Submit</strong> to submit the form and keep it available for further entry.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Complete</strong> to submit the form as fully complete and no longer available for entry.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Save</strong> to save the data and stay on the same page.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Previous</strong> to go to the previous page.</td>
</tr>
<tr>
<td></td>
<td>- <strong>Next</strong> to go to the next page.</td>
</tr>
<tr>
<td>Page</td>
<td>Used with a Goto action to set the name of the page to which the form transfers when the action button is selected by the person completing the form.</td>
</tr>
<tr>
<td>Expression</td>
<td>A formula that evaluates to set the value of a formula item on a page. Formula items are automatically evaluated question responses. The expression is of type JavaScript evaluated using the context of the page form field.</td>
</tr>
</tbody>
</table>
When you have built the form, select **Save**. Sage People displays the Form Definition Details page with the Form tab populated with the xml definition of the form you have built:

![Form Definition Details](image)

**Data Mapping**

Form data mapping links your forms with data objects within Sage People Recruit. Data mapping enables the results of the form to be passed back to the application or candidate objects, or if used with Sage People HCM to the Team Member or Employment objects.

A Sage People Recruit form gathers data entered within the Form Data object. Each Form has a number of Form Data objects, one for each question and formula in the form definition. The results from a form that has been completed can be viewed or reported from the Form Data objects, and data mapping is not essential to use forms.

To enter data mapping for a form:
1. Go to the form definition.
2. Open the **Data Links** sub tab.
3. Select **New Rule**: Sage People displays the Form Rule page:

![Form Rule](image)

**Form Rule**

- **Form Field**: --None--
- **Direction**: In
- **Data Field**: --None--
- **Condition**: 
- **Advanced rule**: 

([Help for this Page](#))
4. For each data mapping rule enter the following details:

<table>
<thead>
<tr>
<th><strong>Form Field</strong></th>
<th>Picklist. The names of all the questions and formulas in the form definition. Select the name of the form field to be mapped.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Direction</strong></td>
<td>Picklist. The direction in which data is to pass between Sage People Recruit and the form, with Recruit as the host. One of:</td>
</tr>
<tr>
<td></td>
<td>• In</td>
</tr>
<tr>
<td></td>
<td>Data is passed from a complete form into Sage People Recruit.</td>
</tr>
<tr>
<td></td>
<td>• Out</td>
</tr>
<tr>
<td></td>
<td>Data is passed from Sage People Recruit out to the form, to set the initial value of a question.</td>
</tr>
<tr>
<td></td>
<td>• In/Out</td>
</tr>
<tr>
<td></td>
<td>Data is passed from Sage People Recruit out to the form, to set the initial value of a question, and then the result is passed back from the completed form into Sage People Recruit.</td>
</tr>
<tr>
<td><strong>Data Field</strong></td>
<td>Picklist. The names of all the fields in the Linked Object. Select the data field to supply or receive the data:</td>
</tr>
<tr>
<td></td>
<td>• Out fields supply the data to the form to initiate form field values.</td>
</tr>
<tr>
<td></td>
<td>• In fields receive the data from the form on form completion.</td>
</tr>
<tr>
<td></td>
<td>The picklist displays fields in the immediate data object and fields in related objects. This means that a form linked to Recruit Assessment can also link to the related Application or Candidate. If you have Sage People HCM, you can also link to Team Member and Employment records.</td>
</tr>
<tr>
<td><strong>Condition</strong></td>
<td>Specifies the condition that must be met for this rule to operate. If the Condition is null, the rule always operates.</td>
</tr>
<tr>
<td><strong>Advanced rule</strong></td>
<td>Checkbox. If checked, the picklists for Form Field and Data Field are removed, the field labels change to Form Data Name and Object Field Name and you must complete those fields manually. Use this option only if you are confident that you have the knowledge to do so.</td>
</tr>
</tbody>
</table>

5. Select **Save**.
Form Emails

Form emails are sent when a form starts, ends or requires a reminder. They typically ask a person to complete a form, supplying the web URL giving them access.

To create a form email:
1. Go to the form definition.
2. Open the Form Email sub tab.
3. Select New Email:

Sage People displays the Form Email page:

### Form Email Details

<table>
<thead>
<tr>
<th>Field</th>
<th>Options</th>
</tr>
</thead>
<tbody>
<tr>
<td>Went Sent</td>
<td>- Select one -</td>
</tr>
<tr>
<td>Template</td>
<td>Unfiled Public Email Templates</td>
</tr>
<tr>
<td>Reminder Days</td>
<td></td>
</tr>
<tr>
<td>Conditions</td>
<td></td>
</tr>
<tr>
<td>From</td>
<td>- none -</td>
</tr>
<tr>
<td>Reply To</td>
<td></td>
</tr>
</tbody>
</table>

Save
4. Enter the details for the email:

<table>
<thead>
<tr>
<th>When Sent</th>
<th>Picklist. One of:</th>
</tr>
</thead>
<tbody>
<tr>
<td>• Start</td>
<td>The email is sent when the form is created or reopened.</td>
</tr>
<tr>
<td>• Complete</td>
<td>The email is sent when the form is submitted and finalized.</td>
</tr>
<tr>
<td>• Close</td>
<td>The email is sent whenever the form is submitted but not finalized.</td>
</tr>
<tr>
<td>• First Complete</td>
<td>The email is sent only when first submitted and not finalized.</td>
</tr>
<tr>
<td>• Reminder</td>
<td>The email is sent a given number of days after no activity by the person entering form data. To use reminder emails the form email reminder service must be activated in the Recruit org.</td>
</tr>
</tbody>
</table>

| Template | The email template to be sent. You can specify any active email template. If the template uses merge fields they must reference the Form object. |

| Reminder Days | If When Sent is set to Reminder, use this field to specify the number of days after which the email is to be sent. |

| Conditions | Specifies any further condition(s) that must be met for the email to be sent. If the Condition is null, no condition is applied and the email is always sent in line with the value set in When Sent. |

| From | Picklist. The organization wide email address that the email will be sent from. If not entered, the email will come from the user that triggers the form email to be sent. |

| Reply To | The email address to be used as the reply address. |

5. Select **Save**.
Selection Criteria Library

The Selection Criteria Library holds criteria used to specify the job requirements for vacancies. The library includes suggested interview questions to probe and assess a candidate’s suitability for the job. Criteria added to the library are available when configuring new vacancies. When a selection criteria is used for a Vacancy it cannot be deleted from the library.

Sage People Recruit comes with a set of criteria for sales and marketing roles, including Sales, Sales Management, Account Management and Pre-Sales experience areas. You can easily extend the library with criteria for other jobs, so if your company has an existing competency framework for roles you can add your predefined competencies to the library.

Criteria can be:

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Competencies</td>
<td>Behavioral competencies, or the way that people do their jobs.</td>
</tr>
<tr>
<td>Knowledge</td>
<td>Facts and supporting information acquired in a specific discipline or area of business activity.</td>
</tr>
<tr>
<td>Skills</td>
<td>Learned physical or mental abilities candidates must have developed.</td>
</tr>
<tr>
<td>Experience</td>
<td>Knowledge or skill acquired through successful involvement in or exposure to a target activity.</td>
</tr>
<tr>
<td>Qualifications</td>
<td>Education, service or training that leads to a recognized qualification.</td>
</tr>
<tr>
<td>Other</td>
<td>Anything else, such as security or police checks.</td>
</tr>
</tbody>
</table>

Criteria Library Tab

The Criteria Library gives you access to the Criteria Library Home page.

The Criteria Library Home page shows a set of views of the criteria library items. The default views give you access to each of the standard criteria types (see page 154).

Switch between the views by selecting the View picklist and choosing the view you want:

To add your own views to this list:
1. Select Edit against a selected view.
2. Change or add to the criteria used to select vacancies that appear in the view.
3. Select Save to change the original view, or Save As to create a new view, preserving the original.

To create a completely new view from scratch, select Create New View.
When you have the view you want, you can:

- View Criteria Library Item details. Select the Criteria Name:

- Change the details of the Criteria Library Item. Select **Edit** next to the item you want to change:

  | Edit | Del |
  |      |     |
  | Communication |
  | Competitive Awareness |
  | Influencing and Negotiating |

Sage People displays the Criteria Library Item Details page.

Make the changes you want and select **Save**.

- Create a new Criteria Library Item. Select **New** for the appropriate type of item:

- Delete a Criteria Library item. You need appropriate security rights to do this. Select **Del** next to the item you want to remove.

### Criteria Library Item Details

The Criteria Library Item Details page displays the name and description of a criteria library item along with:

- Any interview questions you have set up to explore the item with a candidate.
- Scoring for assessment.
- Associated qualification questions.

To display the Details page for a Criteria Library Item, on the Criteria Library Home page select the Criteria Name:
Sage People displays the detail page for that item:

To edit the details, select **Edit**.
New Criteria Library Item

To create a new criteria library item:

1. On the Criteria Library Home page select **New...** for the appropriate type of item:

OR

Select **Criteria Library Item** in the **Create New...** picklist in the left sidebar:
Sage People displays the Criteria Library Item Edit page:

2. Enter the details:

Criteria Type
The type of criteria as described in Selection Criteria Library (see page 154).

Criteria Name
The name of the criteria item.

Description
A general description of the criteria item.

Family
An optional grouping for skills and competencies, for example by job family.

Family Level
An optional ranking for skills and competencies.

Interview Questions
Questions included on the Interview Sheet for any assessments containing this criteria library item.

Assessment of qualifying or external test score
These fields are used to score candidate responses to qualifying questions presented through the Candidate or Agency Portals (see page 180). You can leave them blank until you set up the qualifying questions.

For the Description and Interview Questions fields you can enter formatted text, helping you to control the layout of the Interview Sheet. You can cut and paste direct from Microsoft Word and the text retains its format. However, Word tends to create highly complex formatting for web-based text, and it is recommended that you paste in plain text and apply formatting using the controls on this page.

3. Select Save.
Edit Criteria Library Item

To edit a criteria library item:

1. On the Criteria Library Home page, select **Edit** next to the item name:

<table>
<thead>
<tr>
<th>Edit</th>
<th>Del</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   OR

   On the Criteria Library Item Detail page select **Edit**:

   ![Criteria Library Item Detail](image)

   Sage People opens the Criteria Library Item Edit page, giving you access to the fields defined in **New Criteria Library Item**. (see page 157)

2. Make the changes you want.

3. Select **Save**.

You can only delete a Criteria Library Item if it is not used in any Vacancies.
Configuring Sage People Recruit

Recruit configuration is broken down into:

- Overall options (this section)
- Hiring Manager
- New Vacancies (see page 43)
- Job Boards (see page 211)
- BroadBean (see page 213)
- Agency Portal (see page 176)
- Candidate Portal (see page 188)

  The Candidate Portal configuration tab uses the alternative name Applicant Portal.

- External API (see page 237)

To configure Recruit Overall options:

1. From your User menu, select Setup:

2. In the left panel go to App Setup and select Installed Packages:

3. Find Sage People Recruit in your list of installed packages and select Configure in the Action column:

Sage People displays the Recruit Configuration page.
4. Select the Overall tab:

<table>
<thead>
<tr>
<th>Fairsail Recruit Configuration</th>
<th>Save</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Overall</strong></td>
<td></td>
</tr>
<tr>
<td>Hide Name in Queues</td>
<td></td>
</tr>
<tr>
<td>Placement One At A Time</td>
<td></td>
</tr>
<tr>
<td>Shadow Contact Account</td>
<td></td>
</tr>
<tr>
<td>Use Opportunity</td>
<td></td>
</tr>
<tr>
<td>Use Opportunity Placement</td>
<td></td>
</tr>
<tr>
<td>Use Placement</td>
<td></td>
</tr>
<tr>
<td>Use Workplace</td>
<td></td>
</tr>
<tr>
<td>Use Vacancy Geolocation</td>
<td></td>
</tr>
<tr>
<td>Default Geolocation Country</td>
<td></td>
</tr>
<tr>
<td>Require Vacancy Approval</td>
<td></td>
</tr>
<tr>
<td>Use Job Requisition</td>
<td></td>
</tr>
<tr>
<td>Require Offer Approval</td>
<td></td>
</tr>
<tr>
<td>Base URL</td>
<td></td>
</tr>
<tr>
<td><a href="https://frecruit.na12.visual.force.com/apex/">https://frecruit.na12.visual.force.com/apex/</a></td>
<td></td>
</tr>
<tr>
<td>Days For Approval Reminder</td>
<td></td>
</tr>
<tr>
<td>Reminder Email Send Time</td>
<td></td>
</tr>
<tr>
<td>Candidate Status To Create Team Member</td>
<td></td>
</tr>
<tr>
<td>Leave New Hire Date Null</td>
<td></td>
</tr>
<tr>
<td>Document Folder for Resume Search</td>
<td></td>
</tr>
<tr>
<td>Geocodes Search</td>
<td></td>
</tr>
<tr>
<td>Populate Candidate GeoCodes</td>
<td></td>
</tr>
<tr>
<td>Use Opportunity Geolocation</td>
<td></td>
</tr>
<tr>
<td>Default Geolocation Country</td>
<td></td>
</tr>
</tbody>
</table>

5. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Hide Name in Queues</strong></td>
<td>Checkbox. If checked, application numbers are used in place of candidate's names in Assessment Queues.</td>
</tr>
<tr>
<td><strong>Placement One At A Time</strong></td>
<td>Checkbox.</td>
</tr>
<tr>
<td><strong>Shadow Contact Account</strong></td>
<td>Text. The name of the Account you are using to host Contact email details for Candidates.</td>
</tr>
<tr>
<td><strong>Use Opportunity</strong></td>
<td>Checkbox.</td>
</tr>
<tr>
<td><strong>Use Opportunity Placement</strong></td>
<td>Checkbox.</td>
</tr>
<tr>
<td><strong>Use Placement</strong></td>
<td>Checkbox.</td>
</tr>
<tr>
<td><strong>Use Workplace</strong></td>
<td>Checkbox. If checked:</td>
</tr>
<tr>
<td>• Vacancies and applications can be linked to defined Workplaces.</td>
<td></td>
</tr>
<tr>
<td>• Selection stages have the Show To Workplace and Is Workplace Stage options enabled.</td>
<td></td>
</tr>
<tr>
<td>• Applications have the Show To Workplace option enabled.</td>
<td></td>
</tr>
<tr>
<td><strong>Use Vacancy Geolocation</strong></td>
<td>Checkbox. If checked, Recruit uses a geolocation service to locate vacancies by postal or zip code, or by placename. Locations can then be indicated by map. Be aware that the geolocation service is primarily for mapping and is highly accurate when valid country and postal code values are supplied. Location Region and Location City values returned by the service are likely to need modification and can be manually overridden.</td>
</tr>
<tr>
<td><strong>Default Geolocation Country</strong></td>
<td>Text. The country to use by default for geolocation if it cannot be determined by the geolocation service.</td>
</tr>
</tbody>
</table>
### Require Vacancy Approval
Checkbox. If checked, vacancies must follow an approval process before they can be advertised. Approval is indicated by a completed Approval Date field.

### Use Job Requisition
Checkbox. If checked, an abbreviated form of the vacancy can be used as a job requisition before the full vacancy is approved. Typically used in conjunction with **Require Vacancy Approval**.

### Require Offer Approval
Checkbox. If checked, applications must be approved before an offer can be made. Approval is indicated by a completed Approval Date field.

### Base URL
URL. The URL used as the prefix for links providing external access to your Recruit system. In most cases this is the URL configured for your organization by Sage People.

The base URL typically looks like:

https://xxxxxxx.secure.force.com/fRecruit_

where xxxxxxx is the sub domain you set in Sites.

The Base URL is used by Recruit Candidate Portals, in emails and templates.

### Days For Approval Reminder
Number of days. The length of time allowed to elapse before a reminder email is sent to the approver of a Pending Vacancy. Use in conjunction with Reminder Email Send Time.

### Reminder Email Send Time
Picklist. The time of day the Approval Reminder email batch is sent. Use in conjunction with Days for Approval Reminder.

### Candidate Status to Create Team Member
Picklist. For implementations also using Sage People HCM, the status that an candidate must reach before an HCM Team Member is created using details from the Recruit Candidate Record.

### Leave New Hire Date Null
Checkbox. If checked, when creating a Team Member record at the conclusion of the Recruit process, the start date is not set to today's date by default, but left blank for manual entry.

### Document Folder for Resume Search
Picklist. The folder location for resumes. You must specify a folder location if you want Text search to include Resumes when searching for candidates. If you do not want Text search to include Resumes, select **-none-** from the picklist.

If you are using the Resume Parsing service you do not need to specify a document folder to permit text searches across parsed resumes; you can use the text search feature in Candidate Search. If you are using the Resume Parsing service, set Document Folder for Resume Search to **-none-**.

### Geocode UOM
Picklist. The unit of measurement (UOM) to use as the default when specifying a location as a criteria in Candidate Search. Select the picklist and choose Km or Miles.

The default value can be overridden for individual Candidate Searches.

### Populate Candidate GeoCodes
**Run Now** button. Use to generate GeoCode data for existing Candidate Records entered before GeoCode based location functionality was introduced. GeoCodes are used to establish candidate location for Candidate Search.

Candidates must have valid Country and Post Code values.

GeoCodes are automatically generated for new candidates and when entering new, valid, country and post code values for an existing candidate.

### Send Resumes As links
Checkbox. If checked, when using the Email Resumes button on Application or Vacancy pages, the emails contain links to resume files stored on Salesforce and not as attachments to the emails. If not checked, resumes are attached to the emails.

6. **Select Save.**
## Translation Workbench: Apply and Agency Portal

**Apply and Agency Portal Object**

Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields

<table>
<thead>
<tr>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Agency Existing Submission Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Agency Invitation Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Agency New Submission Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Apply Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Base URL</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>DocuSign API Login Url</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>DocuSign Integrator Key</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>DocuSign Username</td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>Email From Address</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Enable DocuSign</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Header Image</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>Help URL</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td><strong>Job Posting Company Name</strong></td>
<td></td>
<td>Text (255)</td>
</tr>
<tr>
<td>LinkedIn API Key</td>
<td></td>
<td>Text (32)</td>
</tr>
<tr>
<td>LinkedIn Company ID</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Maximum Active Applications</td>
<td></td>
<td>Number (3,0)</td>
</tr>
<tr>
<td>Months That References Are Valid</td>
<td></td>
<td>Number (5,0)</td>
</tr>
<tr>
<td>Nominated Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Permit Archived To Apply</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Register Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Reminder Template</td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Require Maximum Age Resume Months</td>
<td></td>
<td>Number (6,0)</td>
</tr>
<tr>
<td>Resume Parsing Count</td>
<td></td>
<td>Number (18,0)</td>
</tr>
<tr>
<td>Resume Parsing Endpoint</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>Resume Parsing Key</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Resume Parsing User Id</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Stylesheet</td>
<td></td>
<td>URL (255)</td>
</tr>
<tr>
<td>Twitter Account</td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>User Agencies</td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td><strong>Apply and Agency Portal Object</strong></td>
<td>Use Setup &gt; Administration Setup &gt; Translation Workbench &gt; Override to rename these custom fields</td>
<td></td>
</tr>
<tr>
<td>----------------------------------</td>
<td>--------------------------------------------------------------------------------------------------</td>
<td></td>
</tr>
<tr>
<td>Use Apply With LinkedIn</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Double Emails</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Event Information</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Express Interest</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Express Interest Geolocation</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use External Test Information</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Form Information</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Internal Nomination</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use My Details</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use My History</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Nomination</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Reference Information</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Register Geolocation</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Registration Info</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On Apply</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On Internal Apply</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On My Details</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On Register</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On Registration Info</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume On Submit</td>
<td>Checkbox</td>
<td></td>
</tr>
<tr>
<td>Use Resume Parsing</td>
<td>Checkbox</td>
<td></td>
</tr>
</tbody>
</table>
Configuring Hiring Manager

To configure Hiring Manager:

1. From your User menu, select Setup.

2. In the left panel select **App Setup > Installed Packages**.

3. Find **Recruit** in your list of installed packages and select **Configure** in the Action column. Sage People displays the Recruit Configuration page.

4. Select the Hiring Manager tab:

5. Complete the fields as follows:

   - **Hiring Manager Show All Applications** checkbox. If checked, the Hiring Manager sees all Applications for all Vacancies where they are the Hiring Manager. If unchecked, you can use the **Show To Hiring Manager** setting when defining a Selection Stage for a Vacancy, to show all Applications reaching that stage and all following stages.

   - **Hiring Manager Assess All Stages** checkbox. If checked the Hiring Manager can act as an assessor for all selection stages for all Vacancies where they are the Hiring Manager. If unchecked, you can use the **Is Hiring Manager Stage** setting when defining a Selection Stage for a Vacancy, to specify that the stage must be assessed by the Hiring Manager.

   - **Hiring Manager Assessment Has Outcome** checkbox. If checked the Hiring Manager assessment form has picklists for Outcome and Next Stage, enabling the Hiring Manager to control the course of Applications.

   - **Hiring Manager Control** checkbox. If checked, Assign Interviewers and Email Resumes buttons are available in WX.

   - **Hiring Manager Move to Next Stage** checkbox. Displayed when Hiring Manager Assessment Outcome is selected. If checked, when Hiring Manager selects the outcome for the Assessment, the Application is moved to the selected stage. If not checked, the Recruiter is alerted of the Assessment outcome and can move it to the next stage.

6. Select **Save**.
Configuring public sites

Sage People Recruit uses Force.com Sites to enable you to host public facing Agency Portals and Candidate Portals for advertising vacancies and accepting agency submissions and candidate applications.

One Force.com Site can serve the Visualforce pages required for both Agency Portals and Candidate Portals or you can set up multiple Sites to serve different Portals.

Force.com Sites

The Agency Portal enables recruitment agencies to enter and submit candidate details for specific vacancies held on your Sage People Talent Acquisition system. Candidates submitted through the Portal are associated with the recruiting agency’s details. The Agency Portal is a web address that holds a form for the agency to complete and submit, enabled by a Force.com Site. You can add formatted text and images to your Agency Portal pages using the Recruit Noticeboard (see page 203).

Sage People Candidate Portals use Force.com Sites to expose the information you want to show to candidates through public websites, so candidates do not have to log in with a username and password. The Candidate Portal typically includes a list of current vacancies and enables candidates to register their interest. Registered candidates receive a secure candidate reference to use when logging in to track an existing application or to apply for another role. Application Status is updated on the Portal immediately - a change to the status by the Recruiter or Hiring Manager is reflected on the Candidate Portal the next time the candidate connects to the Portal or refreshes their browser.

You must supply an internet sub domain name for candidates to use to navigate to your portal. The url for your site is of the form:

http://xxxxxxxxx.force.com/yyyyyyyyy

where xxxxxxxxx is the sub domain and yyyyyyyyyy the suffix you give when you create your Site. The sub domain url must be unique and unused by anyone else, and is typically based on your company name. You cannot change the sub domain after it is configured.

To set up a site for your organization:

1. Go to Setup > App Setup > Develop > Sites
2. On the Sites page, enter your chosen sub domain name and select Check Availability:

Salesforce checks the name for uniqueness, and if successful, displays a confirmation message:

http://bizz.force.com

Success: The Force.com domain name "bizz" is available.

I have read and accepted the Force.com Sites Terms of Use. Register My Force.com Domain
3. Read the Sites Terms of Use, then check I have read...

   You are asked to confirm.

5. Select OK:

   Once you register, you will not be able to modify your Force.com domain name. Are you sure?

   ![Confirmation dialog]

   Your sub domain name is confirmed.

6. On the Sites page, select New:

   Salesforce displays the Site Edit page:
7. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Site Label</td>
<td>The name of the site as you want it to appear to end users.</td>
</tr>
<tr>
<td>Site Name</td>
<td>The API name of the site used for reference by the Force.com API. Automatically created from the Site Label.</td>
</tr>
<tr>
<td>Site Description</td>
<td>A brief description of the purpose of the site, such as: Site enabled for Talent Acquisition through Sage People Candidate Portal.</td>
</tr>
<tr>
<td>Site Contact</td>
<td>The Sage People User responsible for receiving site specific communication from site visitors and from Salesforce. Select Site Contact Lookup to find and select the User.</td>
</tr>
<tr>
<td>Default Web Address</td>
<td>Insert the suffix you want to use to create the unique URL for this site. The first part of the URL is provided, using the sub-domain name you supplied. For example: talent. The complete URL is the one site visitors use to access the site.</td>
</tr>
<tr>
<td>Active</td>
<td>Checkbox. Check to activate the site. The site must be activated before it can be used. When checked, the site is activated immediately you select Save.</td>
</tr>
<tr>
<td>Active Site Home Page</td>
<td>The name of the Visualforce page to act as the site's home page when the site is active. Select Active Site Home Page Lookup to find and select: ApplyJobList for a Candidate Portal and AgencyJobList for an Agency Portal. If you use the same Site for both Candidate and Agency Portals, select ApplyJobList, as Agencies typically access the Site using a link specific to the Agency.</td>
</tr>
<tr>
<td>Inactive Site Home Page</td>
<td>The name of the Visualforce page displayed when the site is inactive. Preset to InMaintenance. Leave unchanged unless you have created a substitute. InMaintenance displays a standard message - select Preview to view the page.</td>
</tr>
<tr>
<td>Site Template</td>
<td>The name of the Visualforce page providing the page layout and stylesheet for your site. Preset to SiteTemplate. Leave unchanged unless you have created a substitute.</td>
</tr>
<tr>
<td>Site Robots.txt</td>
<td>A plain text file, typically prepared as a Visualforce page, controlling which parts of the site web spiders and other web robots can access. Select Help for this Page for example text content. If you have a prepared Visualforce page, select Page Lookup to find and select the page. Leave blank if you do not have a prepared page.</td>
</tr>
<tr>
<td>Site Favorite Icon</td>
<td>An icon appearing in the browser's address field when you visit the site. Specify an icon to set as the favorite for the entire site. If you have a prepared icon loaded as a Static Resource for your org, select Site Favorite Icon Lookup to find and select the file. Leave blank if you do not have a prepared icon.</td>
</tr>
<tr>
<td>Analytics Tracking Code</td>
<td>The tracking code for your site, used by analytics services to track page request data. Leave blank if you do not have an Analytics Tracking Code.</td>
</tr>
<tr>
<td>URL Rewriter Class</td>
<td>The name of an Apex Class used to rewrite URLs for your site, substituting user friendly URLs for Salesforce URLs. If you have an Apex Class to rewrite your URLs, select URL Rewriter Class Lookup to find and select the Class name. Leave blank if you do not have a rewriter class.</td>
</tr>
<tr>
<td>Feature</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td><strong>Enable Feeds</strong></td>
<td>Checkbox. If checked, the Syndication Feeds Related List is displayed, enabling you to create and manage syndication feeds for users on your sites. Leave unchecked if your site does not use syndication feeds.</td>
</tr>
<tr>
<td><strong>Clickjack Protection Level</strong></td>
<td>The level of protection to apply to the content of your site, controlling the ability to hide malicious hyperlinks beneath legitimate selectable content. Defaults to <em>Allow framing by the same origin only</em>. Same origin framing enables the site's pages to be framed by pages on the same domain, using the same protocol security. Leave at the default setting unless you have a good reason to change it.</td>
</tr>
<tr>
<td><strong>Require Secure Connections (HTTPS)</strong></td>
<td>Checkbox. If checked, requests using http are redirected to https. Ensure you are using the same protocol for your organization's main site and for this remote site.</td>
</tr>
<tr>
<td><strong>Upgrade all requests to HTTPS</strong></td>
<td>Checkbox. If checked, all requests are automatically upgraded to https. Can be checked only if <strong>Require Secure Connections (HTTPS)</strong> is also checked. Ensure you are using the same protocol for your organization's main site and for this remote site.</td>
</tr>
<tr>
<td><strong>Enable Content Sniffing Protection</strong></td>
<td>Checkbox. If checked, the browser is forced to use the information supplied in the http header Content-Type field, not the actual content of the response.</td>
</tr>
<tr>
<td><strong>Enable Browser Cross Site Scripting Protection</strong></td>
<td>Checkbox. If checked, <strong>x-xss protection: 1 header</strong> - the cross-site scripting filter built in to the browser - is enabled to stop pages from loading when a cross-site scripting (XSS) attack is detected.</td>
</tr>
<tr>
<td><strong>Referrer URL Protection</strong></td>
<td>Checkbox. If checked, <strong>Referrer-Policy origin-when-cross-origin</strong> and <strong>Content Security Policy referrer origin-when-cross-origin</strong> are set for browsers supporting them.</td>
</tr>
<tr>
<td><strong>Guest Access to the Support API</strong></td>
<td>Checkbox. If checked, the Support API is accessible to guest users.</td>
</tr>
</tbody>
</table>

8. Select **Save**.

Sage People displays the Site Details page for the site you have just created.

9. In the **Site Visualforce Pages** Related List, select **Edit**:

![Site Visualforce Pages](image)

Sage People displays the **Enable Visualforce Page Access** page:

![Enable Visualforce Page Access](image)
A number of Visualforce pages are enabled for you when the site is created - check that these pages are in the list of **Enabled Visualforce Pages**:

- BandwidthExceeded
- Exception
- FileNotFound
- ForgotPassword
- ForgotPasswordConfirm
- InMaintenance
- SiteLogin
- SiteRegister
- SiteRegisterConfirm
- SiteTemplate
- Unauthorized

If any required or your custom Pages are missing, select them in the **Available Visualforce Pages** panel and select **Add** to move all the selected pages to the **Enabled Visualforce Pages** panel, then select **Save**.

Sage People redisplays the Site Details page.

10. Select **Public Access Settings**:

11. Select **View Users**.

12. Select the name of the Site Guest User.

13. Scroll down to the Permission Set Assignment Related List and select **Edit Assignments**.

Sage People displays the Permission Set Assignments page for the Site Guest User.
14. Select the Permission Sets you want to assign to the Site Guest User in the Available Permission Sets panel and select Add to move them to the Enabled Permission Sets panel and then Save. Select:

- **Sage People Agency Portal** if this Site is used for Agency Portals
- **Sage People Candidate Portal** if this Site is used for Candidate Portal
- Both Permission Sets if the Site is used for Agency Portals and Candidate Portal

Sage People displays the Site Guest User Detail page.

Your site setup is now complete and accessible using the URL you defined.

## Configuring a robots.txt File for Candidate Portal

A **robots.txt** file for a website tells search engine crawlers which pages and directories in the site the search engine should index for inclusion in the content it searches when somebody runs a search query. Search engine companies such as Google provide guidance on how to set up the **robots.txt** file to optimize your site’s visibility to the search engine.

A **robots.txt** file can include instructions for crawlers to index specific pages or directories and ignore others. The instructions are not binding, so crawlers can disregard them. By default, Force.com Sites are set to disallow all except Google. If you wish other search engines or crawlers to index Candidate Portal pages, such as public Vacancy pages and the Vacancy list, you can set up a new **robots.txt** file.

Search engine crawlers look in the site’s root directory (for example, `http://mycompany.force.com/`) for the **robots.txt** file. If you have multiple Sites in your Org to host the Candidate Portal, Agency Portal and other features, the URLs usually have a suffix (for example, `http://mycompany.force.com/recruitment` for your Candidate Portal). To place the **robots.txt** file to the root level, create a new Site without a suffix.
To set up a robots.txt file for a Site:

1. Navigate to **Setup > App Setup > Develop > Visualforce Pages** and select **New**.

2. Enter a **Label** and **Name** for the page as **ApplyRobots**.

3. In the **Visualforce Markup** tab, enter details as follows, replacing "CandidatePortalSuffix" with the suffix in your Candidate Portal's Site URL:

   ```xml
   <apex:page contentType="text/plain" showHeader="False">
     User-agent: *
     Allow: /CandidatePortalSuffix/fRecruit__ApplyJobList
     Allow: /CandidatePortalSuffix/fRecruit__ApplyJob
     Disallow: /
   </apex:page>
   ```
For example:

<table>
<thead>
<tr>
<th>Line</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>User-agent: *</td>
<td>The user-agent is the specific crawler you want to target. Entering an asterisk (*) targets all crawlers. A robots.txt file can include multiple sets of instructions targeting different robots.</td>
</tr>
<tr>
<td>Allow: /recruitment/fRecruit_ApplyJobList</td>
<td>Instruction to index the Vacancy list in Candidate Portal where the Site suffix is &quot;recruitment&quot;.</td>
</tr>
<tr>
<td>Allow: /recruitment/fRecruit__Apply</td>
<td>Instruction to index the Vacancy pages in Candidate Portal where the Site suffix is &quot;recruitment&quot;.</td>
</tr>
<tr>
<td>Disallow: /</td>
<td>Instruction to stop crawlers from indexing all pages and directories on the website, including the root directory (/) and its sub directories, apart from the pages or directories included in Allow instructions.</td>
</tr>
</tbody>
</table>

4. Select Save.

You can now point the Site to use ApplyRobots as the source of robots.txt.

5. Navigate to Setup > App Setup > Sites and select Edit next to the Site Label.

Sage People displays the Site Edit page.

6. Select the Lookup icon next to Site Robots.txt, find and choose ApplyRobots, then select Save.

The Site now has a robots.txt file with the content you defined. You can view the file in a web browser by navigating to the Site URL and adding robots.txt at the end (for example, http://mycompany.force.com/robots.txt).
Configuring Agency Portal

Overview

The Sage People Agency Portal is part of Sage People Talent Acquisition. It uses the vacancies and criteria library set up on Recruit and adds applications and candidates in the same way as any other source of recruitment.

The Agency Portal enables recruitment agencies to enter and submit candidate details for specific vacancies held on your Sage People Talent Acquisition system. Candidates submitted through the Portal are associated with the recruiting agency’s details. The Agency Portal is a web address that holds a form for the agency to complete and submit, enabled by a Force.com Site. You can add formatted text and images to your Agency Portal pages using the Recruit Noticeboard (see page 203).

As a Talent Acquisition Administrator for your organization, you decide:

- Which recruitment agencies to invite to submit candidates using the Portal.
- Which vacancies to make available to recruitment agencies.
- What information to make available on the Portal.
- What information to ask the agencies to supply about their candidates.
- How to view candidate information.
The Agency Portal can be customized to conform to your organization’s branding requirements. By default, without branding applied, the Portal looks like this:

- **Vacancy details** come from your Sage People Recruit system.
- The **Current Vacancies** button gives access to all active vacancies you have released to the agency.
- **Candidate details** are entered by the agency on behalf of the candidate. Mandatory fields are marked with a red bar.
- **Additional questions for candidates** are defined as part of the vacancy and assigned to the first stage of the recruitment process. You can configure the questions so that responses are assessed immediately; responses that disqualify a candidate can then result in an immediate rejection message displayed on the Agency Portal.
- The **submit button** validates input and submits validated candidate details to the Sage People Recruit database.
Agency Portal Configuration

You must configure the Agency Portal before first use.

To configure the Agency Portal:

1. From your User menu, select Setup:
   ![Setup Menu]

2. In the left panel go to App Setup and select Installed Packages:
   ![Installed Packages]

3. Find Sage People Recruit in your list of installed packages and select Configure in the Action column:
   ![Recruit Configuration]

   Sage People displays the Recruit Configuration page.

4. Select the Agency Portal tab:
   ![Agency Portal Tab]

   ![Fairsail Recruit Configuration]
5. Complete the fields in line with your planned use of the Portal:

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use Agencies</td>
<td>Checkbox. Check to enable the Recruit Agency Portal.</td>
</tr>
<tr>
<td>Use Resume On Submit</td>
<td>Checkbox. Check to enable agencies to submit resumes when submitting candidate details. If checked, the Agency Portal displays the Attach Resume field with an associated Browse button:</td>
</tr>
<tr>
<td>Invitation Template</td>
<td>Picklist. An email template used to invite an agency to submit candidates for a vacancy. Select the picklist and choose Invitation to Submit Candidates. To edit the template, go to Setup &gt; Email &gt; My Templates. The Invitation to Submit Candidates template is managed, so you can edit only certain attributes.</td>
</tr>
<tr>
<td>New Submission Template</td>
<td>Picklist. An email template used to confirm to an Agency receipt of a new submission from them. Select the picklist and choose Agency Submission. To edit the template, go to Setup &gt; Email &gt; My Templates.</td>
</tr>
<tr>
<td>Existing Submission Template</td>
<td>Picklist. An email template used to reject a duplicate submission. This template enables you to formalize the rejection message displayed on the Portal when a candidate's details are received for a second (or subsequent) time. The email is sent to the agency. This template is not supplied by default.</td>
</tr>
</tbody>
</table>

6. Select Save.
Administration

Adding a New Recruitment Agency

To add a new recruitment agency:

1. In Sage People Recruit, select the Agencies tab:

   ![Image](image.png)

   If the Agencies tab is not displayed in your menu bar:

   Select All Tabs:

   ![Image](image.png)

   Select Agencies in the list of all tabs:

   ![Image](image.png)

   All Tabs

   Use the links below to quickly navigate to a tab.
2. On the Agencies Home page, select **New**:

3. Complete the fields on the Agency Edit New Agency page:

   **Information section**
   - **Agency Name**: Text field. The name by which you want the recruitment agency known on your system. This name appears by default on the Agency Portal.
   - **Contact Name**: Text field. The name of your contact at the agency.
   - **Contact Email**: Text field. The email address of your contact at the agency. Invitations to submit candidates are sent to this email address.
   - **Contact Phone**: Text field. The phone number of your contact at the agency.

   **Status section**
   - **Invitation Status**: Pick list. How will this agency be invited when a vacancy is opened to agencies?
     - **Manual**: you must manually select the agency contact when advertising a vacancy to agencies.
     - **Automatic**: the agency contact is automatically invited to submit candidates when advertising a vacancy to agencies.
     - **None**: the agency contact does not appear on the list of available agencies when advertising a vacancy to agencies.
   - **Submission Status**: Pick list. How will this agency be enabled to submit candidates?
     - **All Open**: the agency can submit candidates for all vacancies that are open to agencies. The **Current Vacancies** button on the Agency Portal gives access to all open vacancies.
     - **Invited Only**: the agency must be invited to submit candidates for each vacancy opened to agencies. The **Current Vacancies** button on the Agency Portal gives access to the vacancies for which the agency has been invited to submit candidates.
     - **None**: the agency will not be able to submit candidates.
   - **Contact Via Agency on Submissions**: Check box.
     - **Checked**: new candidates are set to be contacted via the agency.
     - **Unchecked**: new candidates are not set to be contacted by the agency.

4. Select **Save**, or **Save & New** if you have another agency to add.
Setting Up Questions for Agencies to Ask Candidates

You can set up the Agency Portal to display questions for candidates, based on selection criteria held in your criteria library. You can use existing criteria or define new ones. The questions then form part of the first stage of candidate assessment for a vacancy.

This example uses an existing vacancy for Widget Operatives and sets up:

- A new criterion related to the requirements of the job
- The questions used to assess a candidate against the new criterion
- The responses to the questions from which a candidate can choose

The example then amends the vacancy selection process so that the questions are set as additional questions for candidates, visible on the agency portal.

The Criteria Library stores criteria used to specify job requirements for vacancies. You can use stored criteria when setting up new vacancies.

1. In Sage People Recruit, select the **Criteria Library** tab:

   Sage People displays the Criteria Library Item Home page.

2. Select **New Other**:

   Sage People displays the Criteria Library Item Edit page.
3. Complete the fields on the Edit page:

**Details section**

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Criteria Name</td>
<td>Text field. A name for this criterion.</td>
</tr>
<tr>
<td>Description</td>
<td>Text field. A brief description of the criterion.</td>
</tr>
<tr>
<td>Family</td>
<td>Text field. If the new criterion is part of a group of related criteria, enter the name of the group.</td>
</tr>
<tr>
<td>Family Level</td>
<td>Text field. The level of the skill or competency.</td>
</tr>
<tr>
<td>Interview Questions</td>
<td>Leave blank.</td>
</tr>
</tbody>
</table>

**Assessment of qualifying or external test score section**

**Partly Meets Score to Exceeds Score**

Enter the scores the candidate needs for each of the ratings. These scores are awarded to candidates depending on their responses to the questions they are asked. For example:

**Assessment of qualifying or external test score**

- Partly Meets Score: 0.00
- Just Meets Score: 1.00
- Fully Meets Score: 2.00
- Exceeds Score: 3.00
4. Select **Save**.
Sage People Recruit displays the Criteria Library Item Detail page:

If you have additional criteria to add to the library, repeat steps 1 through 4.

5. At the bottom of the Criteria Library Item Detail page, in the Qualification Questions section, select **New**:

Sage People Recruit displays the Qualification Question Edit page.
6. Complete the fields in the Qualification Question Edit page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Prompt</td>
<td>Text field. The question you want to ask the candidate about this criteria. If you have more than one question about a single criteria, you must enter each question on a separate Qualification Question Edit page.</td>
</tr>
<tr>
<td>Format</td>
<td>Picklist. Choose the format in which you want the possible responses displayed.</td>
</tr>
<tr>
<td>Order</td>
<td>Number. The order in which the questions appear to the candidate. If you have more than one question to ask the candidate, enter a number for the position in which you want this question displayed: 1 for first, 2 for second, and so on. <strong>Order</strong> is used for all questions relating to all criteria; if two or more questions relating to different criteria carry the same order number, those questions appear together. If you leave this field blank, questions appear in criteria order.</td>
</tr>
<tr>
<td>Minimum Score</td>
<td>The lowest score the candidate’s answer must rate to avoid rejection. You do not have to specify a minimum score, but if you do, candidates will fail if they do not meet the value you specify. Failed candidates are shown the questions they have failed on, but they cannot change their responses.</td>
</tr>
</tbody>
</table>

7. Select Save.

Sage People Recruit displays the Qualification Question summary page:

If you have more than one question about a single criterion, repeat steps 5 through 7.
8. At the bottom of the Qualification Question page, in the Qualification Responses section, select **New Qualification Response**:

Sage People Recruit displays the New Qualification Response page:

9. Complete the fields in the Qualification Response Edit page:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Prompt</strong></td>
<td>Text. One possible response to the qualification question. The response is displayed with the question. You must complete a Qualification Response Edit page for each qualification response you wish to present to candidates.</td>
</tr>
<tr>
<td><strong>Score</strong></td>
<td>Number with up to two decimal places. The score you want to apply to the response. This must be one of the possible scores you set up for the criteria on the Criteria Library Item Detail page.</td>
</tr>
<tr>
<td><strong>Order</strong></td>
<td>Number. Responses are displayed by Order number, then by Score. If left blank, responses are displayed in score order. To use Order, enter a number.</td>
</tr>
</tbody>
</table>

10. Select **Save & New** to enter the second possible response to the question.

11. Repeat steps 9 and 10 until you have entered all possible responses to the question, then select **Save**.

   Sage People Recruit displays the detail page for the last Qualification response you entered.
12. Select **Submit for Approval**.

Sage People Recruit asks you to confirm:

> Once you submit this record for approval, you might not be able to edit it or recall it from the approval process depending on your settings. Continue?

13. Select **OK**

14. Return to the vacancy for which you have set up the new criteria and select **Configure Selection Process**:

Sage People displays the Vacancy Configure page.

15. On the Vacancy Configure page, select **New/Edit Criteria**:

Sage People displays the Criteria from Library page.
16. On the Criteria from Library page, select Other to display the list of criteria in this category, including the new criteria you added:

17. Check Assessed for candidates and Required by all candidates for the new criteria.

18. Select Save.

Sage People displays the Vacancy Configure page.

19. On the Vacancy Configure page, check that the new criteria have been added to the list of criteria and select Edit What Assessed When:

Sage People displays a list of available criteria with columns for each selection stage you have defined:
The selection process runs through the defined stages, from left to right. When you are using the Recruit Agency Portal for a vacancy, the first stage of recruitment is completion of a Portal form, regardless of the name of that stage. Criteria checked in the left-most column can be assessed with questions on the Portal.

Criteria with no associated questions will not be visible on the Portal, even if they are checked in the left-most column. Criteria with associated questions but no defined responses still appear on the Portal, with a blank selection box, so make sure you define questions and responses for any criteria assessment you wish to appear on the Recruit Agency Portal.

20. Check the boxes for the new criteria in the Agency Portal column.

21. Select Save.

The questions to test candidates’ compliance with the new criteria are added to the Agency Portal.
Configuring Candidate Portal

Candidate Portal Configuration

When Sites and access setup is complete, configure the default settings for Candidate Portals before first use. Defaults for email templates can be overridden in the settings for specific Candidate Portals, enabling you to customize responses to the portal.

To configure defaults for Candidate Portals:

1. From your User menu, select Setup:

   ![Setup Menu](image)

   - Setup
   - Developer Console
   - Logout

2. In the left panel go to App Setup and select Installed Packages:

   ![App Setup](image)

   - Custom
   - Create
   - Develop
   - Deploy
   - Fairsail Recruit
   - Installed Packages
   - AppExchange Marketplace
   - Critical Updates

3. Find Fairsail Recruit in your list of installed packages and select Configure in the Action column:

   ![Fairsail Recruit Installed Package](image)

   - Uninstall
   - Configure
   - Fairsail Recruit
   - Fairsail 4.26
   - IRRecruit
   - Active
   - Unlimited
   - 0
   - Does not Expire
   - 25/10/2012
   - 10:26

   Description:
   Specify job, attract candidates, take applications, select talent, hire and bring onboard.

   Sage People displays the Recruit Configuration page.
4. Select the **Applicant Portal** tab:

![Fairsail Recruit Configuration](image)
5. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Help URL</td>
<td>A valid web address providing help pages for your applicants. A link to pages on your own website.</td>
</tr>
</tbody>
</table>
| Header Image          | A link to the header image in the banner of all pages in the Candidate Portal. You can:  
  - Upload the image to Static Resources in your org,  
  - Host the image elsewhere. Ensure that access is through https SSL.  
  If you are using the default stylesheet the image is best if 1000 pixels wide. |
| Stylesheet            | A link to a css stylesheet to be used as a default for all pages in the Portal. You can supplement this css with a dedicated stylesheet for each Candidate Portal (see page 207). You can:  
  - Upload the stylesheet to Static Resources in your org,  
    When uploaded:  
    - In the list of Static Resources, select the stylesheet Name.  
    - On the Static Resource Detail page, select View File.  
    - Copy the stylesheet URL displayed in your browser address bar and paste it into Stylesheet.  
  - Host the stylesheet elsewhere. Ensure that access is through https SSL.  
  Fairsail supplies a template css to use as a basis for further customization (see page 210). |
| Twitter Account       | The name of your Twitter account. Used when posting vacancies to Twitter. Fairsail uses the form: @xxxxxxx Enter the xxxxxxx character string here. |
| Email From Address    | The sending email address used by the Portal. Set up as an organization wide email address.  
  To configure an organization wide email address go to Setup > Administration Setup > Email Administration > Organization-Wide Addresses. |
| Register Template     | The email template used by the Portal to send an email to someone first registering for the Portal. Use the picklists to select an existing template.  
  The Register Template is based on the Candidate object. To create and modify a Register Template go to Setup > Administration Setup > Communication Templates > Email Templates |
| Reminder Template     | The email template used by the Portal to send an email to someone asking for a reminder of their candidate reference. Use the picklists to select an existing template.  
  The Reminder Template is based on the Candidate object. To create and modify a Reminder Template go to Setup > Administration Setup > Communication Templates > Email Templates |
| Nominated Template    | The email template used by the Portal to send an email to someone who is nominated by another person through the Candidate Portal. Use the picklists to select an existing template.  
  The Nominated Template is based on the Candidate object. The Nomination object is accessible as the Current Nomination in the Candidate object, so your Nominated Template can combine data from nomination and candidate objects.  
  To create and modify a Nominated Template go to Setup > Administration Setup > Communication Templates > Email Templates |
<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Template</td>
<td>The email template used by the Portal to send an email to someone applying for a vacancy. Use the picklists to select an existing template. The Applied Template is based on the Candidate object. The Application object is accessible as the Current Application in the Candidate object, so your Applied Template can combine data from applications and candidate objects. To create and modify an Applied Template go to Setup &gt; Administration Setup &gt; Communication Templates &gt; Email Templates</td>
</tr>
<tr>
<td>Use Apply With LinkedIn</td>
<td>Not used.</td>
</tr>
<tr>
<td>Use Registration Info</td>
<td>Checkbox. Check to ask new candidates for additional information after registering. Candidates you have pre-registered by entering them as candidates are also asked for this information when they first visit the site.</td>
</tr>
<tr>
<td>Use Nomination</td>
<td>Checkbox. Check to show the Nomination button and page on the Portal.</td>
</tr>
<tr>
<td>Use Internal Nomination</td>
<td></td>
</tr>
<tr>
<td>Use Express Interest</td>
<td>Checkbox. Check to enable candidates to enter the details of the vacancies they are seeking.</td>
</tr>
<tr>
<td>Maximum Active Applications</td>
<td>Number. Restricts the number of applications that a candidate can have active at any one time. For example:</td>
</tr>
<tr>
<td></td>
<td>- <strong>Maximum Active Applications</strong> set to 1 A candidate cannot apply for a second vacancy until the first application has ended.</td>
</tr>
<tr>
<td>Permit Archived To Apply</td>
<td>Checkbox. Check to enable candidates who have been rejected for a vacancy and set to Archived status to apply for another vacancy.</td>
</tr>
<tr>
<td>Use Register Geolocation</td>
<td>Checkbox. Check to enable automatic candidate location based on their address.</td>
</tr>
<tr>
<td>Use Express Interest Geolocation</td>
<td>Checkbox. Check to enable automatic location of vacancy alerts for candidates who express interest.</td>
</tr>
<tr>
<td>Use Resume On Register</td>
<td>Checkbox. Check to invite the candidate to attach a resume to their registration.</td>
</tr>
<tr>
<td>Use Resume On Registration Info</td>
<td>Checkbox. Check to invite the candidate to attach a resume to their additional registration information.</td>
</tr>
<tr>
<td>Use Resume On My Details</td>
<td>Checkbox. Check to invite the candidate to attach, or change, their resume in the My Details section of the portal.</td>
</tr>
<tr>
<td>Use Resume On Apply</td>
<td>Checkbox. Check to invite the candidate to attach their resume to their application.</td>
</tr>
<tr>
<td>Use Resume On Internal Apply</td>
<td>Checkbox. Check to invite internal candidates to attach their resumes to their applications.</td>
</tr>
<tr>
<td>Use Cover Letter On Apply</td>
<td>Checkbox. Check to invite the candidate to attach a separate cover letter to their applications. Cover letters are made accessible in the Notes &amp; Attachments section of the Application record.</td>
</tr>
<tr>
<td>Require Maximum Age Resume Months</td>
<td>Number of months. If the age of a saved candidate resume exceeds the specified number of months, or there is no saved resume, require the candidate to submit a resume with their application. If blank, no resume is requested.</td>
</tr>
<tr>
<td>Use Double Emails</td>
<td>Checkbox. Check to request that email addresses be dual entered for registration and nomination. Both must match to be accepted.</td>
</tr>
<tr>
<td>Use My Details</td>
<td>Checkbox. If checked, display the My Details section of the portal.</td>
</tr>
</tbody>
</table>
## Configuration Setting

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Use Event Information</strong></td>
<td>Checkbox. Check to show event details and permit event booking on the My Application page.</td>
</tr>
<tr>
<td><strong>Use Form Information</strong></td>
<td>Checkbox. Check to show forms that are to be completed on the My Application page.</td>
</tr>
<tr>
<td><strong>Use External Test Information</strong></td>
<td>Checkbox. Check to use external tests in the My Application page.</td>
</tr>
<tr>
<td><strong>Use Reference Information</strong></td>
<td>Checkbox. Check to show the references that have been sent but not yet received on the My Application page.</td>
</tr>
<tr>
<td><strong>Months That References Are Valid</strong></td>
<td>Number of months. If the age of saved references exceeds the specified number of months, repeat references are requested. If blank, references are valid indefinitely.</td>
</tr>
<tr>
<td><strong>Use My History</strong></td>
<td>Checkbox. If checked, display the My History section of the portal.</td>
</tr>
<tr>
<td><strong>Use Responsive Layout</strong></td>
<td>Checkbox. If checked, adapt the Candidate Portal display to the screen size of the device used to view it.</td>
</tr>
<tr>
<td><strong>Retain Email Token</strong></td>
<td>Text, up to 40 characters. The message to display on all internal Candidate emails you want to store on the Candidate record, for example: This email is stored on your record. Retain Email Token is used in a merge field on all email templates you want to store for the candidate. Entering text in this field triggers email filtering, so that emails sent to the candidate from your org and generated from email templates not containing the merge field are filtered out and not stored on the Candidate record. Use the merge field: <code>{!$Setup.fRecruit__Policies__c.fRecruit__Retain_Email_Token__c}</code> If you leave Retain Email Token blank, email filtering is not used, and internal candidates for roles in your organization applying through the Candidate Portal have all emails that are sent to their internal email addresses added to their Candidate records.</td>
</tr>
</tbody>
</table>

### Job Posting Data section

| Job Posting Company Name               | Text, up to 255 characters. Enter the Company Name you want to appear in structured Vacancy data for Job Board crawlers. |

6. Select **Save**.
Structured Data for Vacancies

Triton release introduces structured data for Vacancies in the Candidate Portal to make key information about the Vacancy more accessible to search engines and job board crawlers.

Structured data includes the following information from the Vacancy details and Candidate Portal configuration:

- Vacancy title
- Date when the Vacancy was posted
- Job location
- Vacancy description
- Hiring organization details (using the Job Posting Company Name field in Candidate Portal configuration (see page 188))
- Salary
- Education requirements
- Employment type
- Experience requirements
- Industry
- Benefits
- Responsibilities
- Skills
Data Fields Shown in the Portal

The data fields used on the pages of the Portal are configurable. As installed the Portal uses a default list of fields. To change the fields used by the Portal you must edit the Field Sets in the custom objects that drive the Portal.

Each Field Set contains a list of fields from a custom object. Sage People Recruit uses these to generate the Portal pages. You can add any eligible field from the objects to the Field Set, including fields you have added to any of these objects. Use formula fields to show calculated or variable information tailored to the Candidate.

To change the fields displayed through a Field Set:

1. From your User menu, select Setup:

2. In the left panel go to App Setup > Create > Objects.

   Sage People displays the list of Custom Objects.

   The Portal uses Field Sets in the following objects:
   - Application (see page 64)
   - Candidate (see page 50)
   - Nomination (see page 199)
   - Vacancy (see page 45)

3. Select the Label for one of the objects with Field Sets:

<table>
<thead>
<tr>
<th>Edit</th>
<th>Agency Submission</th>
<th>Fairsail Recruit</th>
<th>Agency Candidate</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Edit</th>
<th>Application</th>
<th>Fairsail Recruit</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Edit</th>
<th>Assessment</th>
<th>Fairsail Human Capital Management</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

   Sage People displays the Custom Object page.
4. Select the Field Sets link at the top of the page to jump to the Field Sets list:

5. To open a Field Set, select Edit in the Action column next to a Field Set name:

Sage People displays the Field Set page:

Drag any of the fields above into the list below.

The order of selected fields in the Field Set panel is the order used on the page. If a field in a Field Set is set to required, information must be entered in that field when saving the page.
6. To add fields to the Field Set, drag and drop available fields onto the Field Set, making sure that the order of fields is as you want it to appear on the page.

   To remove fields from the Field Set, drag and drop them from the Field Set onto the list of available fields.

7. Select **Save**.

Field security settings for the Sites user must also be enabled for fields to be used. If you have a field in the Field Set that is not appearing on the page check the field security settings (see page 166).

The following Field Sets are relevant for a Candidate Portal:

<table>
<thead>
<tr>
<th>Custom Object</th>
<th>Field Set</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application</td>
<td>Apply Job</td>
<td>Fields requested from a candidate when they apply for a job through the Candidate Portal.</td>
</tr>
<tr>
<td>Application</td>
<td>Apply My Application</td>
<td>Candidate Portal fields displayed as read-only fields when a candidate views their application. The fields apply to active and historical applications in the My Application and My History pages. These fields show as much about the status of the application as you wish to reveal. Formula fields are very useful here to show selected information.</td>
</tr>
<tr>
<td>Application</td>
<td>Apply Withdraw</td>
<td>Candidate Portal fields displayed for completion when a candidate withdraws their application.</td>
</tr>
<tr>
<td>Candidate</td>
<td>Apply My Details</td>
<td>Fields displayed in the Candidate Portal My Details page for a registered candidate to change their personal details.</td>
</tr>
<tr>
<td>Candidate</td>
<td>Apply Registration</td>
<td>Fields to be completed by a candidate when first registering</td>
</tr>
<tr>
<td>Candidate</td>
<td>Apply Registration Info</td>
<td>Fields to be completed by a candidate on the Candidate Portal, Additional Information page. The Additional Information page must be switched on in the Candidate Portal configuration page (see page 188).</td>
</tr>
<tr>
<td>Nomination</td>
<td>Apply Nominator</td>
<td>Fields displayed in a Candidate Portal for a nominator to complete about themselves when nominating a candidate.</td>
</tr>
<tr>
<td>Nomination</td>
<td>Apply Nominee</td>
<td>Fields displayed in a Candidate Portal for a nominator to complete about a nominee.</td>
</tr>
<tr>
<td>Nomination</td>
<td>Apply Other</td>
<td>Additional fields displayed in a Candidate Portal for a nominator to complete about a nominee.</td>
</tr>
<tr>
<td>Vacancy</td>
<td>Job Apply</td>
<td>Fields visible to a candidate viewing a vacancy in a Candidate Portal. These fields are read only.</td>
</tr>
<tr>
<td>Vacancy</td>
<td>Job List</td>
<td>Fields visible in the Job List section of a Candidate Portal. These fields are read only.</td>
</tr>
</tbody>
</table>
Setting the Candidate Portal Time Zone

1. Go to Setup > App Setup > Develop > Sites
   Sage People displays the Sites page.

2. In the list of Sites, select the Site Label for the Site for which you want to set the time zone:
   Sage People displays the Site Details page.

3. Select Public Access Settings:
   Sage People displays the Profile Detail page for the Site Guest Profile.

4. Select View Users:
   Sage People displays the Users page for the Profile.
5. Select the **Full Name** for the Site Guest User:

Sage People displays the User Detail page.

6. Select **Edit**:

Sage People displays the User Edit page.

7. Scroll down to the Locale Settings section:

8. Use the **Time Zone** picklist to select the time zone where the Candidate Portal is to be used.

9. Select **Save**.
## Field Sets: Nomination

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Nominator</td>
<td>Fields displayed in a Candidate Portal for a nominator to complete about themselves when nominating a candidate.</td>
</tr>
<tr>
<td>Apply Nominee</td>
<td>Fields displayed in a Candidate Portal for a nominator to complete about a nominee.</td>
</tr>
<tr>
<td>Apply Other</td>
<td>Additional fields displayed in a Candidate Portal for a nominator to complete about a nominee.</td>
</tr>
</tbody>
</table>

## Field Sets: Candidate Interest

<table>
<thead>
<tr>
<th>Field Set</th>
<th>Purpose</th>
</tr>
</thead>
<tbody>
<tr>
<td>Apply Express Interest</td>
<td>Fields displayed to a Candidate wishing to express interest in working for an organization through the Candidate Portal.</td>
</tr>
</tbody>
</table>

## Translation Workbench: Candidate Portal

Use **Setup > Administration Setup > Translation Workbench > Override** to rename these custom fields.

<table>
<thead>
<tr>
<th>Candidate Portal Object</th>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>Applied Template</td>
<td></td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Candidate Portal URL</td>
<td></td>
<td></td>
<td>Formula (Text)</td>
</tr>
<tr>
<td>Default</td>
<td></td>
<td></td>
<td>Checkbox</td>
</tr>
<tr>
<td>Language Locale</td>
<td></td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Nominated Template</td>
<td></td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Register Template</td>
<td></td>
<td></td>
<td>Text (18)</td>
</tr>
<tr>
<td>Reminder Template</td>
<td></td>
<td></td>
<td>Text (18)</td>
</tr>
</tbody>
</table>
Text Displayed in the Portal

All standard text displayed in Candidate Portal pages is taken from Custom Labels. You can amend this text by editing the custom labels.

To edit custom labels:

1. From your User menu, select Setup:

2. In the left panel go to Administration Setup > Translation Workbench > Translation Settings:
3. Ensure that you are aware of the consequences described on the Translation Settings page, and select Enable.

Sage People displays a table of supported languages.

4. Ensure that at least one language is marked as active in the table. If you need to activate a language:
   a. Select Edit next to the language:

   ![Supported Languages Table]

   Sage People displays the Edit Language page.

   b. Select the Active checkbox:

   ![Language Translation Edit]

   c. Select Save.
5. While still in Setup, select **Create > Custom Labels**:

Sage People displays the table of Custom Labels. All Candidate Portal label names start **Apply**.

6. Sort the table of Custom Labels into alphabetical Name order by selecting the **Name** column heading. You can then quickly find the labels you want to change.

7. Select the Name of the Custom Label you want to change:

Sage People displays the Custom Label Detail page.

8. In the **Local Translations / Overrides** section, select **New Local Translations / Overrides**:

Sage People displays the New Translation page:

**New Translation**

```
Translation Edit

Master Label Information

<table>
<thead>
<tr>
<th>Master Label</th>
<th>Master Label Text</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Apply Previous Button</strong></td>
<td><strong>Previous</strong></td>
</tr>
<tr>
<td><strong>Apply Qualification Not Met</strong></td>
<td><strong>Qualification not met</strong></td>
</tr>
</tbody>
</table>

Translation Information

<table>
<thead>
<tr>
<th>Language</th>
<th>Translation Text</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>None</strong></td>
<td></td>
</tr>
</tbody>
</table>

Save Cancel
```
9. Select the Language picklist and choose the language of the text you are going to enter. To override the standard Portal text label, choose English. Use the other languages to localize the display.

10. In Translation Text enter the text you want to be displayed.

11. Select Save.

**Recruit Noticeboard**

The Recruit Noticeboard enables you to add web formatted text and images into the pages appearing in the Candidate or Agency Portals. You can add text in six locations:

<table>
<thead>
<tr>
<th>Location</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Header</td>
<td>Just below the banner image, or instead of the banner image if no banner image is used.</td>
</tr>
<tr>
<td>Footer</td>
<td>At the very bottom of the page.</td>
</tr>
<tr>
<td>Top</td>
<td>Immediately after the section with the name of the page.</td>
</tr>
<tr>
<td>Bottom</td>
<td>Below all other elements at the bottom of the central panel.</td>
</tr>
<tr>
<td>Left</td>
<td>Below the menu in the left column.</td>
</tr>
<tr>
<td>Right</td>
<td>In a right column. This column automatically opens if text is provided for it.</td>
</tr>
</tbody>
</table>

You can also add text to the left menu by completing the Menu field when creating a new notice.
To enter text for the Recruit Noticeboard:

1. Select the **Recruit Noticeboard** tab.

   Sage People displays the Recruit Noticeboard Home page:

   ![Recruit Noticeboard Home](image)

   - View: **All**
   - **Edit** | **Create New View**

   **Recent Recruit Noticeboard**

   - **Recruit Notice Name**
   - **Side**
   - **Header**
   - **Bottom**

2. Select **New** to create a new notice.

   Sage People displays the New Recruit Notice page:

   ![New Recruit Notice](image)
3. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Notice field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Recruit Notice Name</td>
<td>A name for this notice. Enter a name to help you find the page.</td>
</tr>
<tr>
<td>Menu</td>
<td>Text to add to the left menu. Enter up to 128 characters. To make the menu item active - so that selecting the menu item displays another page - include the Visualforce page name in the Page field. You can add a menu item as the only entry on a Notice, or as part of a Notice adding content in another location.</td>
</tr>
<tr>
<td>Candidate Portal</td>
<td>The name of the Candidate Portal or Agency Portal to host this notice. Select Candidate Portal Lookup to find and select the Portal. If you have a single Candidate Portal using the default configuration settings, leave this field blank.</td>
</tr>
<tr>
<td>Locale</td>
<td>Picklist. The range of locales available for your organization. Selecting a locale displays local language field labels defined for that locale. Select the picklist and choose the code for the locale.</td>
</tr>
<tr>
<td>Page</td>
<td>The name of the Visualforce page to host the text. For example: Apply, or ApplyJobList. If left blank the notice is included on all pages in the Portal. This is an easy way to add your own banner layout to the portal beyond that of the banner image and stylesheet. If you are using this Notice to add a menu item, enter the name of the page to display when the menu item is selected.</td>
</tr>
<tr>
<td>Location</td>
<td>Picklist. The location within the page to display the text. Select the picklist and choose from:</td>
</tr>
<tr>
<td></td>
<td>• Header</td>
</tr>
<tr>
<td></td>
<td>Immediately below the banner image. If there is no banner image, instead of a banner image.</td>
</tr>
<tr>
<td></td>
<td>• Footer</td>
</tr>
<tr>
<td></td>
<td>At the bottom of the page.</td>
</tr>
<tr>
<td></td>
<td>• Left</td>
</tr>
<tr>
<td></td>
<td>Below the left menu</td>
</tr>
<tr>
<td></td>
<td>• Right</td>
</tr>
<tr>
<td></td>
<td>In the right column. A column opens automatically if you enter text for it.</td>
</tr>
<tr>
<td></td>
<td>• Top</td>
</tr>
<tr>
<td></td>
<td>Immediately after the section with the name of the page.</td>
</tr>
<tr>
<td></td>
<td>• Bottom</td>
</tr>
<tr>
<td></td>
<td>At the foot of the central panel, below all other elements in that panel.</td>
</tr>
<tr>
<td>Order</td>
<td>Number. If there is more than one notice for a given page and location, they are sorted by this number. Otherwise ignored.</td>
</tr>
<tr>
<td>Text</td>
<td>The text, images and links you wish to add to the page. Enter up to 32768 characters. Complete either Text OR HTML Text. If you complete both fields, HTML Text takes precedence and Text content is not displayed.</td>
</tr>
<tr>
<td>HTML Text</td>
<td>HTML tagged text to display in the selected location on the page. Enter up to 32768 characters. Complete either Text OR HTML Text. If you complete both fields, HTML Text takes precedence and Text content is not displayed.</td>
</tr>
</tbody>
</table>

4. Select:
   - Save to apply the notice and close the edit page.
   - Save & New to save the notice and create another.
   - Cancel to discard your changes and return to the Recruit Notice Home page.
Filtering Internal Candidate Emails

By default, emails for internal candidates applying through the Candidate Portal for roles in your organization are:

- Sent to their internal email addresses.
- Added to their Candidate records.

This includes emails sent from both Sage People Recruit and Sage People HCM. To filter emails so that the Candidate record stores just those mails relating to their applications:

1. Add this merge field to each email template used for emails you want to store on the Candidate record:
   
   `{!$Setup.fRecruit__Policies__c.fRecruit__Retain_Email_Token__c}`

2. Add the text you want to display on the email to the Retain Email Token field on the Applicant Portal Configuration page (see page 188). For example:

   This email is stored on your record.

The filter is triggered when Retain Email Token contains text. If Retain Email Token is blank, email filtering is not used.

Setting Up Multiple Candidate Portals

You can use a single Candidate Portal to carry all vacancies you want to post to a website, or you can set up multiple Candidate Portals and post a subset of your vacancies to each one. For example, you could:

- Define a Candidate Portal for sales vacancies, one for development vacancies, and a third for administrative.
- Define a Candidate Portal for each country in which you have vacancies, enabling you to use local language text, images and links for each.

The Portal used by a candidate is saved to their Candidate record in the Candidate Portal field, and can then be used:

- To identify candidates for Views, Reports, and so on.
- To ensure that the correct language is used for the Candidate.
- To ensure that appropriate jobs are displayed to the Candidate.

To set up multiple Candidate Portals:

1. Follow the guidance to set up Force.com Sites (see page 166) and to configure the default settings for all Candidate Portals (see page 188).
2. Set up any dedicated email templates you need to support each Portal (see page 112).
3. Create the Candidate Portals, including any dedicated supporting cascading stylesheets (see page 207).
4. Create any dedicated Recruit Noticeboards - the text, images and links - you need to support each Candidate Portal (see page 203).
Creating Candidate Portals

1. Select the Candidate Portals tab.
   Sage People displays the Candidate Portals Home page.

2. Select New.
   Sage People displays the Candidate Portal page:

   ![Candidate Portal](image)

   **Candidate Portal**

   **Information**

   - **Candidate Portal Name**
   - **Language Locale**
     - None
   - **Custom CSS**
   - **Default**

   **Email Templates**

   - **Register Template**
     - Unfiled Public Email Templates
   - **Reminder Template**
     - Unfiled Public Email Templates
   - **Nominated Template**
     - Unfiled Public Email Templates
   - **Applied Template**
     - Unfiled Public Email Templates
   - **From Email Address**

   [Help for this Page]
3. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Candidate Portal Name</strong></td>
<td>A name for the Candidate Portal.</td>
</tr>
<tr>
<td><strong>Language Locale</strong></td>
<td>The default language to be used for the Portal. The value you choose here is overridden by the locale defined for the candidate. Select the picklist and select the locale code.</td>
</tr>
</tbody>
</table>
| **Custom CSS**        | A link to a css stylesheet for this Candidate Portal. Custom CSS is loaded last - after the default css specified on the Configuration page (see page 188). You can:  
  - Upload the stylesheet to Static Resources in your org,  
  - Host the stylesheet elsewhere. Ensure that access is through https SSL. Sage People supplies a template css to use as a basis for further customization (see page 210). |
| **Default**           | Checkbox. If checked, this Candidate Portal is used for Vacancies with Advertise On Candidate Portal selected and no Candidate Portal specified. |

**Email Templates section**

<table>
<thead>
<tr>
<th><strong>Register Template</strong></th>
<th>The email template used by the Portal to send an email to someone first registering for the Portal. Use the picklists to select an existing template. The Register Template is based on the Candidate object. To create and modify a Register Template go to Setup &gt; Administration Setup &gt; Communication Templates &gt; Email Templates</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Reminder Template</strong></td>
<td>The email template used by the Portal as a response to a request for a reminder of a candidate reference. Use the picklists to select an existing template. The Reminder Template is based on the Candidate object. To create and modify a Reminder Template go to Setup &gt; Administration Setup &gt; Communication Templates &gt; Email Templates</td>
</tr>
<tr>
<td><strong>Nominated Template</strong></td>
<td>The email template used by the Portal to send an email to someone who is nominated by another person through the Candidate Portal. Use the picklists to select an existing template. The Nominated Template is based on the Candidate object. The Nomination object is accessible as the Current Nomination in the Candidate object, so your Nominated Template can combine data from nomination and candidate objects. To create and modify a Nominated Template go to Setup &gt; Administration Setup &gt; Communication Templates &gt; Email Templates</td>
</tr>
<tr>
<td><strong>Applied Template</strong></td>
<td>The email template used by the Portal to send an email to someone applying for a vacancy. Use the picklists to select an existing template. The Applied Template is based on the Candidate object. The Application object is accessible as the Current Application in the Candidate object, so your Applied Template can combine data from applications and candidate objects. To create and modify an Applied Template go to Setup &gt; Administration Setup &gt; Communication Templates &gt; Email Templates</td>
</tr>
</tbody>
</table>

4. Select:  
  - **Save** to save your changes and display the Candidate Portal Detail page.  
  - **Cancel** to discard your changes and return to the Candidate Portal Home page.
Viewing Candidate Portals

To view a specific Candidate Portal, add the name of the portal to the generic Candidate Portal url (see page 166) in the form:

?portal=[portalname]

For example:


...to display all the vacancies you have assigned to the Candidate Portal called Operations.

Adding a Candidate Portal to a Website

A Candidate Portal can be added to an existing website in one of two ways:

- Embedded iframe
  An embedded iframe works best where the career pages are part of a complex website and need to retain headers, menus and other pages. This is likely to be your preferred option, enabling changes in your main website to automatically flow through to the careers section.

- Standalone pages
  Standalone pages work best where the career pages are added as a distinct sub-site linked from the main site. Standalone pages are simpler to set up and can be a good option if your company website does not change often

Before starting with either method you must first make your Candidate Portal visible to the outside world via Sites. Set up the Candidate Portal first and make sure it is working.

Embedded Iframe

The embedded iframe places the Candidate Portal in the middle of one of the pages on your website. You need to have editing access to the HTML page in which you will place the portal.

To place the Portal in the page:

1. In the header part of your web page place the following HTML:

   `<script language="JavaScript"> var candidatePortalName="xxx";</script>`

   Replace `xxx` with the name of the Candidate Portal for this part of your website. For the default portal or if you are using a single portal, leave blank, or omit this line completely.

   Replace `yoursitesdomain` with your Sites domain name. If you have multiple Sites you may also need to add the path to the Candidate Portal site.

   `http://yoursitesdomain.force.com/` must be your Base URL as set up in Sage People Recruit configuration.

2. In the web page where you want to embed the portal, place the following HTML:

   `<div id="Sage PeopleApplicantPortal" style="width:1002px;"></div>`

   You must set the `width` to 1002px so that the portal can fit into the space unless you have attached a stylesheet to reduce the required width. The height of the portal adjusts automatically.
3. Test the portal works by navigating to the career page on your website.

4. Change the Base URL setting in Sage People Recruit configuration to the new url that reaches the page you have just created. Candidate email links and job board posts will now work via your new career page.

   Note that you can also attach a stylesheet to the embedded portal to make it match your website. Add the link to the stylesheet in Sage People Recruit configure. You can also use the header and extra text and images within the portal iframe.

### Standalone Pages

Setting up a Candidate Portal as standalone pages places the portal as a sub-section of your company website. You need to have editing access to your website or get your web manager to do it for you. Depending on the way your site's navigation works, you need to add a link, button, tab, or menu option to link to the Candidate Portal.

Attach a stylesheet to the portal to make it match your website. Add the link to the stylesheet in Sage People Recruit configure. You can also set a header to match your main company website. You can also construct menu or tabs within that to go back to the rest of the site. Done well this can appear identical to your company website.

### Customizing a Candidate Portal Stylesheet

Sage People enables you to use one or more cascading stylesheets (css) to customize the appearance of Candidate Portals. You can specify:

- A default css for all Candidate Portals you operate as a link on the Recruit Configuration page (see page 188).
- A custom css for each Candidate Portal (see page 207).

Sage People supplies a template stylesheet as a starting point for further customization - you typically want to apply branding compatible with your organization. If you are modifying a stylesheet for use by a Sage People customer, be aware that the responsibility for the style applied to any associated Candidate Portal is the responsibility of the customer.

Before you start:

- You must be familiar with the css stylesheet language.
- The sample cascading stylesheet:
  - Includes a representative set of elements that can be styled - it is not comprehensive. Use the stylesheet as a starting point to build a complete definition of the style you want to apply.
  - Includes a generic color set. Make sure that all color declarations are modified to match your requirements.

The template file is available here:

help.ffairsail.com/Fairsail%20Candidate%20Portal%20CSS/CSS%20Template%2020150904.css

The content of the css file is reproduced as an appendix (see page 251).
Configuring Post to Job Boards

Sage People Recruit will post to:

- Broadbean
- Monster
  - Supports up to 10 Monster accounts.
  - Uses Monster’s Real Time Posting feature.
- CareerBuilder
- Jobing (pull mode)

Job Board posting options are displayed on the Vacancy Sourcing page for selection by recruiters when defining how a vacancy is to be advertised:
Follow these steps to set up posting Vacancies to Job Boards:

<table>
<thead>
<tr>
<th>CareerBuilder</th>
<th>Jobing</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Get a user ID and password for each Job Board account you want to use. If your organization is already registered with a Job Board you will have the necessary credentials.</td>
</tr>
<tr>
<td>2</td>
<td>Enter the necessary details on the Recruit Configuration page (see page 231).</td>
</tr>
<tr>
<td>3</td>
<td>Load the job codes used by the Job Board to classify vacancies (see page 228). These codes are loaded to the Vacancy Code object, and typically include industry, sector and location. The codes populate the Job Board attributes you access through the Vacancy Sourcing option. Each Vacancy can then be linked to a classification and posted to the correct area of the Job Board.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Monster</th>
</tr>
</thead>
<tbody>
<tr>
<td>Single account</td>
</tr>
<tr>
<td>1</td>
</tr>
<tr>
<td>2</td>
</tr>
<tr>
<td>3</td>
</tr>
<tr>
<td>4</td>
</tr>
<tr>
<td>5</td>
</tr>
</tbody>
</table>
Broadbean

Broadbean provides job posting aggregation, automating the distribution of job postings to multiple online job sites. If your organization has a Broadbean account, integration with Sage People is provided at no additional cost. After initial configuration including association of Broadbean with one or more designated Sage People users, Broadbean is added as a Sourcing option for your vacancies.

Once posted, you can track the status and number of responses received for each Broadbean Vacancy Advert through a dedicated section on each Vacancy Sourcing page.

Broadbean uses a fixed set of data fields to post vacancy adverts in a consistent way across the whole range of job boards it serves; these Broadbean fields are mapped to Sage People object fields using Custom Metadata Types. You cannot change the Broadbean fields or the default Sage People mapping, but you can override the Sage People defaults to substitute Custom Fields from your own org.

Configuring Broadbean

When you first install, or upgrade to, a version of Sage People Recruit supporting Broadbean integration you are asked to approve Broadbean access:

![Approve Third-Party Access](image)

Make sure that the website address matches the expected Broadbean value, then check Yes, grant access... and select Continue. Sage People continues with Sage People Recruit installation.

1. Go to Setup > App Setup > Installed Packages.
2. Find Sage People Recruit in your list of installed packages and select Configure in the Action column. Sage People displays the Recruit Configuration page.
3. Select the **Broadbean** tab:
4. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadbean API key</td>
<td>A unique API key supplied by Broadbean to enable connection through Sage People to the Broadbean site. The key is provided through Sage People and is unlikely to change.</td>
</tr>
<tr>
<td>Broadbean CSS</td>
<td>The link to the style sheet used to render your view of Broadbean pages. You can use the standard Broadbean css, or more typically, supply one specific to your organization.</td>
</tr>
<tr>
<td>Broadbean Encryption Token</td>
<td>The unique value supplied by Broadbean to enable secure connection to the Broadbean site.</td>
</tr>
<tr>
<td>Broadbean Target URL</td>
<td>The URL supplied by Broadbean for the Broadbean site used by your organization. The Target URL is unlikely to change. When upgrading for the first time to a version of Sage People Recruit supporting Broadbean, you are asked to approve access to this site.</td>
</tr>
<tr>
<td>Broadbean Team email address</td>
<td>The single email address you want Broadbean to use as the target for all responses to vacancies posted by Broadbean. If you want responses to be sent to individual recruiters leave blank and check Broadbean Use Recruiter as contact.</td>
</tr>
<tr>
<td>Broadbean Use Apply online URL</td>
<td>Checkbox. If checked, the Vacancies posted to Broadbean include the option to apply online through a Candidate Portal defined for your org.</td>
</tr>
<tr>
<td>Broadbean Use Location Query</td>
<td>Checkbox. If checked, you are given the option to change the City location selected for each Broadbean advertised vacancy. City must be accurately specified to enable Broadbean posting. Check.</td>
</tr>
<tr>
<td>Broadbean Use Recruiter as contact</td>
<td>Checkbox. An alternative to Broadbean Team email address. If checked, responses to each Broadbean posted vacancy are sent to individual recruiters instead of to a single email address.</td>
</tr>
</tbody>
</table>
| Broadbean Apply by Email Separator | A RegEx (Regular Expression) used to control the separation of the subject lines of emailed responses to Broadbean posted vacancies. The separator enables Broadbean to identify the different elements included in the subject line such as the Vacancy Number. Elements are allocated sequence numbers, used in Broadbean Apply by Email Vacancy No and Broadbean Apply by Email Source. Enter: 
  
  |  |
  
  to specify a forward slash (/) |
| Broadbean Apply by Email Candidate | By default, responses to Broadbean posted vacancies are sent from a Broadbean email address. To substitute the candidate’s email address enter F. |
| Broadbean Apply by Email Vacancy No | The sequence number of the element representing the Vacancy Number in the subject lines of emailed responses to Broadbean posted vacancies. Enter: 1 |
| Broadbean Apply by Email Source    | The sequence number of the element representing the source system’s label name in the subject lines of emailed responses to Broadbean posted vacancies. Enter: 2 |
| Broadbean Users                    | Access to Broadbean options is granted to permissioned users who are registered with Broadbean. Use this section of the Broadbean Configuration page to map registered Broadbean users to Sage People Users. Do not attempt to add your first Broadbean user before saving the Broadbean Configure page - doing so clears the details you have entered. |

5. Select **Save**.

Sage People saves your Broadbean configuration details and displays the Home page for your org.
6. Return to the Recruit Configure page and reselect the Broadbean tab.

7. In the Broadbean Users section, select New.

Sage People displays the Broadbean User Configuration page:

8. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fairsail User</td>
<td>From the picklist select one of:</td>
</tr>
<tr>
<td></td>
<td>• Profile</td>
</tr>
<tr>
<td></td>
<td>To assign the Broadbean User to all users of a defined Profile.</td>
</tr>
<tr>
<td></td>
<td>• User</td>
</tr>
<tr>
<td></td>
<td>To assign the Broadbean User to a defined user. You can repeat the process</td>
</tr>
<tr>
<td></td>
<td>to assign the Broadbean User to multiple defined users.</td>
</tr>
<tr>
<td></td>
<td>Then select Location Lookup to find and select the Profile or User you</td>
</tr>
<tr>
<td></td>
<td>want.</td>
</tr>
<tr>
<td>Broadbean User</td>
<td>The user name as registered with Broadbean.</td>
</tr>
<tr>
<td>Password</td>
<td>A unique password for this user.</td>
</tr>
<tr>
<td>Use Field Merge</td>
<td>Checkbox. Leave unchecked.</td>
</tr>
</tbody>
</table>

9. Select Save.

Sage People displays the Sage People Recruit Configuration page, Broadbean tab, with the new user added to the Broadbean Users section:

10. Select Save on the Sage People Recruit Configuration page to close the page and return to the home page for your org.
Broadbean to Sage People Data Mapping

Sage People uses Salesforce Custom Metadata Types to provide data mapping from Sage People fields and picklist values to the Broadbean equivalents. The mappings enable Broadbean to extract required information from the correct Sage People Vacancy fields and to apply the right employment type and salary period to advertised vacancies. Broadbean specifies the fields for which values must be supplied, and then follows the mapping to the specified Sage People fields and values.

Three Custom Metadata Types are supplied:

- **Broadbean Field Mapping**
  
  Maps required Broadbean fields to the Sage People fields supplying the data. You cannot change the Broadbean fields or the default Sage People fields, but you can supply an overrides for the Sage People fields. Overrides feed the Broadbean fields from alternative Sage People fields, typically fields created for your org (see page 218).

- **Broadbean Employment Type Mapping**
  
  Maps required Broadbean employment types, such as contract and permanent to the Sage People equivalents. You cannot change the Broadbean values or the default Sage People picklist values, but you can supply additional values for any picklist items not covered by the defaults (see page 220).

- **Broadbean Salary Period Mapping**
  
  Maps required Broadbean salary periods, such as annum or hour to the Sage People equivalents. You cannot change the Broadbean values or the default Sage People picklist values, but you can supply additional values for any picklist items not covered by the defaults (see page 220).

### Broadbean Field Mapping

<table>
<thead>
<tr>
<th>Broadbean Field</th>
<th>Sage People Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>applyonline</td>
<td>fRecruit__Candidate_Portal_URL__c</td>
</tr>
<tr>
<td>ClientDetails</td>
<td>fRecruit__Broadbean_Client_Details__c</td>
</tr>
<tr>
<td>Contact</td>
<td>fRecruit__Recruiter__c</td>
</tr>
<tr>
<td>enddate</td>
<td>fRecruit__Applications_Close_Date__c</td>
</tr>
<tr>
<td>JobDescription</td>
<td>fRecruit__Description__c, fRecruit__Key_Responsibilities__c</td>
</tr>
<tr>
<td>JobOffer</td>
<td>fRecruit__Broadbean_Job_Offer__c</td>
</tr>
<tr>
<td>JobReference</td>
<td>fRecruit__Vacancy_No__c</td>
</tr>
<tr>
<td>JobTitle</td>
<td>Name</td>
</tr>
<tr>
<td>JobType</td>
<td>fRecruit__Employment_Type__c</td>
</tr>
<tr>
<td>Location_Query</td>
<td>fRecruit__Location_City__c</td>
</tr>
<tr>
<td>Profile</td>
<td>fRecruit__Broadbean_Candidate_Profile__c</td>
</tr>
<tr>
<td>SalaryBenefits</td>
<td>fRecruit__Benefits__c</td>
</tr>
<tr>
<td>SalaryCurrency</td>
<td>fRecruit__Currency_Code__c</td>
</tr>
<tr>
<td>SalaryFrom</td>
<td>fRecruit__Salary_Minimum__c</td>
</tr>
<tr>
<td>SalaryPer</td>
<td>fRecruit__Salary_Period__c</td>
</tr>
<tr>
<td>SalaryTo</td>
<td>fRecruit__Salary_Maximum__c</td>
</tr>
<tr>
<td>Summary</td>
<td>fRecruit__Broadbean_Summary__c</td>
</tr>
</tbody>
</table>
### Broadbean Employment Type Mapping

<table>
<thead>
<tr>
<th>Broadbean Value</th>
<th>Master Label</th>
<th>Sage People Default Picklist Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contract</td>
<td>Contract</td>
<td>Contract</td>
</tr>
<tr>
<td>Permanent</td>
<td>Full-Time</td>
<td>Permanent</td>
</tr>
<tr>
<td>Permanent</td>
<td>Part-Time</td>
<td>Part-Time</td>
</tr>
<tr>
<td>Temporary</td>
<td>Temporary</td>
<td>Temporary</td>
</tr>
</tbody>
</table>

### Broadbean Salary Period Mapping

<table>
<thead>
<tr>
<th>Broadbean Value</th>
<th>Master Label</th>
<th>Sage People Default Picklist Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>annum</td>
<td>Per Annum</td>
<td>Per Annum</td>
</tr>
<tr>
<td>day</td>
<td>Per Day</td>
<td>Per Day</td>
</tr>
<tr>
<td>hour</td>
<td>Per Hour</td>
<td>Per Hour</td>
</tr>
<tr>
<td>month</td>
<td>Per Month</td>
<td>Per Month</td>
</tr>
<tr>
<td>week</td>
<td>Per Week</td>
<td>Per Week</td>
</tr>
</tbody>
</table>

### Extending Broadbean to Sage People Data Mapping

You cannot add or remove Broadbean fields or picklist values from the data mapping as supplied by Sage People, and all Broadbean fields and values must map to Sage People fields or values. You can modify the data mapping in two ways:

- Provide a Custom Field Override value for an existing Broadbean field mapping (see page 218).
  
  For example, to map a custom field created for your org in place of the default Sage People field.

- Add a new picklist value mapped to an existing Broadbean value.
  
  For example, to map a customized picklist value in place of the default Sage People field.

### Overriding an Existing Field Mapping

1. Go to **Setup > App Setup > Develop > Custom Metadata Types**.
2. On the All Custom Metadata Types page, select **Manage Records** for the mapping you want to change:

   ![Manage Records](image)

   Sage People displays the list of Master Labels for the Metadata Type.
3. On the list of Master Labels select **Edit** for the Label mapping for which you want to provide an override:

Sage People displays the Edit page for the Master Label you selected:

![Edit page for Master Label](image)

**Master Label**, **Vacancy Field Name**, and **Object Name** are fixed and cannot be edited.

4. In **Custom Field Override** enter the full API name of the Sage People Custom Field you want to use in place of the default field name.

If Custom Field Override is not displayed:

a. Select **Cancel**.

b. Go to **Setup > App Setup > Develop > Custom Metadata Types**.

Sage People displays the list of All Custom Metadata Types for your org.

c. Select the **Label** for the Metadata Type you want to change:

![Selecting Custom Metadata Type](image)

Sage People displays the Detail page for the Metadata Type.

d. Select **Page Layouts** to display the Page Layouts Related List.

e. Select **Edit** for the layout you want to change.

Sage People displays the Layout page.

f. Drag and drop the **Custom Field Override** field onto the page layout sample.

g. Select **Save**.

Sage People redisplays the Detail page for the Metadata Type.

h. Select **Manage**... to display the list of labels available for the Metadata Type.

i. Continue with the main procedure from step 3.

5. Select **Save**.
Adding a New Picklist Value

If your org uses additional or alternative picklist values for Employment Type or Salary Period you can add them to the lists of default mappings. To set Employment Type and Salary Period when posting a Vacancy, Broadbean searches the Vacancy details for the picklist value you specify for each, and maps the matching values to the Broadbean equivalents.

1. Go to Setup > App Setup > Develop > Custom Metadata Types.
2. On the All Custom Metadata Types page, select Manage Records for the mapping you want to change:

Sage People displays the list of Master Labels for the Metadata Type.


Sage People displays the Mapping Edit page:

4. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Master Label</td>
<td>The internal label used to identify this mapping in the list of mappings. For ease of identification, use the value you are creating. For example, if you are adding the picklist value Freelance to map to the Broadbean Employment Type Contract, enter Freelance.</td>
</tr>
<tr>
<td>Object Name</td>
<td>The name of the picklist value you are adding. Automatically completed by Sage People with the value entered in Master Label; change Object Name if necessary. For example, if you are adding the picklist value Freelance to map to the Broadbean Employment Type Contract, enter Freelance.</td>
</tr>
<tr>
<td>Broadbean Employment Type</td>
<td>The default Broadbean value you are mapping to the new picklist value. This must be one of the supplied Broadbean values, exactly as specified. For example, if you are adding the picklist value Freelance to map to the Broadbean Employment Type Contract, enter Contract.</td>
</tr>
<tr>
<td>Protected Component</td>
<td>Checkbox. Leave unchecked.</td>
</tr>
</tbody>
</table>

5. Select Save.

Sage People displays the Detail page for the Mapping you just created

6. Check that the details are correct. Select Edit if you need to change details.

The new picklist value is now available to be mapped to the Broadbean equivalent you specified.
Posting Jobs to Broadbean

You can select Broadbean as a source when defining where to advertise each Vacancy.

1. On the Vacancies Home page select the Vacancy.
2. On the Vacancy Details page select Sourcing:

   Sage People displays the Vacancy Sourcing page.

3. On the Vacancy Sourcing page, scroll down to the Post up to Broadbean section:

   4. Check Post To Broadbean to select this Vacancy for posting.

   5. Select the Industry picklist and choose the industry classification for the Vacancy. Broadbean uses your Industry selection to ensure the vacancy is correctly classified on the target job boards. Industry classifications are automatically supplied and maintained by Broadbean - you do not have to load them separately.

6. Select Post Advert to post to Broadbean.

   Broadbean validates the information you have stored for the vacancy. Any undefined data mapping results in an error message, for example:

   ![Error Message]

   The Vacancy cannot be posted until all supplied data has been successfully mapped.
When successfully validated, Broadbean displays the Job Board selector for you to choose the boards you want to use for this Vacancy:

![Job Board Selector](image)

- **Choose Job Boards**
- **Advert Details**
- **Preview + Send**

Please click the job board logos to post this advert to:

- Broadbean Test Board
- Jobs Cabinet (Test Board)
7. Select the boards you want or check **All Sites Below** to select all, then select **Continue**. Broadbean displays the Advert Details for you to check. All mandatory fields are indicated:

8. Check the details, adding any missing mandatory information, and correcting any errors, then select **Continue**.

Be aware that changes you make to the Advert Details in Broadbean are not copied back to Recruit. When checking the details, bear in mind:

- **Salary and Benefit Information** drawn from the Sage People Vacancy Compensation Package Salary Minimum, Salary Maximum and Benefits fields must not exceed 70 characters.
- **Location** must specify a city recognized by Broadbean; check that the value passed from Recruit is a Broadbean recognized value.
- **Currency** may default to Pounds if you have specified a minor currency that is not held on the Broadbean system.
9. Broadbean displays the advert preview to show how the vacancy will appear. The preview includes:
   - **Posting Time**
     Defaults to today and now. You can select an alternative.
   - **Contact Details**
     Including your Candidate Portal URL if this was selected during configuration.
   - **Destinations and advertising periods.**
   - The option to save this advert as a default template.

You can select:
- **Go Back**
  To make any changes.
- **Send Advert**
  When you are ready to post.

When sent, Broadbean confirms that your advert has been accepted for posting:

*Your advert has been accepted as indicated below*

![Confirmation message]

If you have any questions, please contact support@broadbean.com

Continue
10. Select **Continue** to return to the Sourcing page for the Vacancy.

Sage People updates the Broadbean Vacancy Adverts section:

**Post up to Broadbean**

- **Post To Broadbean**: 
- **Broadbean Post Date**: 1/12/2016 4:23 PM

- **Post Advert**
- **Delete All Adverts**
- **Resend Advert**

**Broadbean Vacancy Adverts**

<table>
<thead>
<tr>
<th>Actions</th>
<th>Board Name</th>
<th>Posted Date</th>
<th>Removal Date</th>
<th>Responses</th>
<th>Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>View</td>
<td>Broadbean Test Board</td>
<td>12/01/2016</td>
<td>19/01/2016</td>
<td>0</td>
<td>Delivered</td>
</tr>
<tr>
<td>Del</td>
<td>Jobs Cabinet (Test Board)</td>
<td>12/01/2016</td>
<td>19/01/2016</td>
<td>0</td>
<td>Delivered</td>
</tr>
</tbody>
</table>

This section is maintained automatically as responses are received.

- **View** displays selected details for the vacancy.
- **Del** deletes the advert from that board.

To delete the advert from all boards posted by Broadbean, select **Delete All Adverts**.

To resend the advert select **Resend Advert**:

- **Post Advert**
- **Delete All Adverts**
- **Resend Advert**

**Do NOT use this feature if your advert is already live on the site you are reposting to. This WILL cost you quota/slots with your paid sites.**

**Be aware that resending a live advert uses additional slots on any paid sites.**
Multiple Monster Accounts: Overview

- Sage People supports links with up to 10 Monster accounts, each with its own unique User ID and password, issued by Monster.

- You can choose your own account name for each Monster account - that name is made visible to recruiters when defining vacancy sourcing.

- Each Monster account is associated with one or more Posting Locations - the locations used by job seekers when searching for positions advertised on the job board. Posting Locations are issued by Monster and loaded on Sage People. You can choose which Posting Locations to link to each named Monster account. Posting Locations are displayed as a set of checkboxes when defining vacancy sourcing.

- You can specify an alias for one or more Posting Locations, so that your choice of name - typically an office or internal company name, a division or department name - is displayed to recruiters when defining vacancy sourcing.

- Existing users of single Monster accounts through Sage People are unaffected. The additional features supporting multiple Monster accounts are available if single account users wish to increase the number of Monster accounts they operate.

Configuring the Code Type field

To enable you to load Posting Locations to the Vacancy Code object, you must add Posting Location as a picklist value to the Code Type field:

1. Go to Setup > App Setup > Create > Objects
2. Scroll down to the Vacancy Code object and select the object Label.
   - Sage People displays the Custom Object Definition Detail page for Vacancy Code.
3. Scroll down to Custom Fields & Relationships and select the Field Label for Code Type.
   - Sage People displays the Custom Field Definition Detail page for Code Type.
4. In the Picklist Values section, select New:

   ![Picklist Values](image)

   Sage People displays the Add Picklist Values page for Code Type.
5. In the panel enter:

Posting Location

Add Picklist Values

Code Type

Add one or more picklist values below. Each value should be on its own line.

6. Select Save.

Sage People adds the new picklist value to the Code Type field and redisplay the Custom Field Definition Detail page.
Loading Vacancy Codes

The Vacancy Code object stores the classifications used by Job Boards to enable you to post vacancies to the right area of the Job Board. Typically, classifications include industry, sector, and location. For posting to multiple Monster accounts you must add a posting location classification (see page 226) and the codes associated with it.

Each Job Board uses its own classification system and you must use the classifications published by a Board to ensure your vacancies are correctly posted:

<table>
<thead>
<tr>
<th>Job Board</th>
<th>Source for Classifications</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareerBuilder</td>
<td><a href="http://dpi.careerbuilder.com/Site/Geography/ListIndustries.aspx">http://dpi.careerbuilder.com/Site/Geography/ListIndustries.aspx</a></td>
</tr>
<tr>
<td>Monster</td>
<td><a href="http://integrations.monster.com/Toolkit/LocationEnumeration/Valid/All">http://integrations.monster.com/Toolkit/LocationEnumeration/Valid/All</a></td>
</tr>
</tbody>
</table>

Sage People can supply prepared, ready to load data files containing:
- Country codes
- State/region codes
- Posting locations

Use these files to load Monster classifications directly to the Vacancy Code object (see page 228).

When you have the latest available codes, use the Custom Object Import Wizard (Setup > Administration Setup > Data Management > Import Custom Objects) to load them to Sage People.

When loaded, the Vacancy Sourcing page enables you to select appropriate values for Job Sector, Industry, Location Country and so on.

Loading Monster Vacancy Codes

This procedure uses the following prepared .csv files to load Vacancy Codes for Monster:

- **CountryCodes.csv**
  - Includes names and codes for four countries:
    - Croatia
    - Neutral Zone
    - South Korea
    - Yugoslavia
  - Load this file if you plan to use any of these countries as posting locations. Each country is loaded with the Code Type *Country*.

- **statesCodes.csv**
  - Includes names and codes for all States recognized by Monster. Each state is loaded with the Code Type *Region*.
• Posting Locations.csv
  Includes composite names and codes for all Posting Locations recognized by Monster. A Posting Location is the location under which the job is searchable by job seekers.

To load Vacancy Codes for Monster:

1. Go to Setup > Administration Setup > Data Management > Import Custom Objects.
   Sage People displays the Custom Object Import Wizard.

2. Select Start the Import Wizard.
   Sage People displays Step 1 of the Import Wizard: Choose Record.

3. Scroll down, or use your browser’s search, to find Vacancy Code, and select it.

4. Select Next.
   Sage People displays Step 2 of the Import Wizard: Prevent Duplicates.

5. Select No - insert all records in my import file.

6. Select Next.
   Sage People displays Step 3 of the Import Wizard: Specify Relationships.

7. Select Name.

8. Select Next.

9. Select Browse..., find and select the .csv file you want to load - one of:
   - CountryCodes.csv
   - statesCodes.csv
   - Posting Locations.csv

10. Specify the character encoding as Unicode (UTF8)
    Leave other settings at their default values.

11. Select Next.
    Sage People displays Step 5 of the Import Wizard: Field Mapping
    Leave all fields at their default values.

12. Select Next.
    Sage People displays Step 6 of the Import Wizard: Verify Import Settings.

13. Ignore the Record Owner error message and select Import Now!
    Sage People displays Step 7 of the Import Wizard: Import Initiated.

    Sage People imports the data and sends an email to confirm that the import has been successful.

15. Check the confirmation email to make sure that the correct number of Vacancy Codes has been created:
   - For CountryCodes.csv, number of Vacancy Codes created = 4
   - For statesCodes.csv, number of Vacancy Codes created = 826
   - For Posting Locations.csv, number of Vacancy Codes created = 2198

16. Repeat the procedure until you have imported all three .csv files.
Setting up Posting Location Aliases for Monster Accounts

Job Board Mapping enables you to link a meaningful location alias to a Monster account and posting location. For example, with a New York Head Office, use Head Office to map to your US Monster account, New York posting location. The alias is then displayed when defining sourcing for a vacancy, making it easier for recruiters to choose the right Posting Location.

In summary:
1. Build a list of the Monster Posting Locations for which you want to set aliases.
2. Construct a comma separated value (csv) file that contains:
   - The Monster Posting Location code.
   - Your Monster Account Name.
   - The alias you want to use for the location. Each alias can have up to 255 characters.
3. Use the Custom Object Import Wizard to load the data to the Job Board Mapping object.

In detail:
1. Open the supplied csv file Posting Locations.csv in a text editor.
2. Search for the Posting Locations for which you want to set aliases and copy each line to a temporary text file.
3. Open the supplied csv file AccountLocationAlias.csv in a text editor:
   - Job Board Location Code,Account Name,Location Alias
   - 434,US,My Alias 1
   - 48150,US,My Alias 2
   - 35,US,My Alias 3

AccountLocationAlias.csv is a template file for you to overwrite with your own data, available from http://help.fairsail.com/JobBoardSupport/AccountLocationAlias.csv.

4. In AccountLocationAlias.csv, and using the temporary text file containing the Posting Locations, copy and paste a Location Code as the first value on a new line.
5. Build each line in the form:
   - [LocationCode],[MonsterAccountName],[Alias]
   - Each Alias can have up to 255 characters.
   - You can have multiple aliases for one Monster Account Name as long as the Location Codes for each Account Name and Alias pair are unique.
6. Repeat steps 4 and 5 until your file contains a line for each Posting Location for which you want an alias.
7. If you have not already done so, delete the sample lines 2,3, and 4 at the start of AccountLocationAlias.csv
   - Leave the header line:
     - Job Board Location Code,Account Name,Location Alias
     - The header line tells Sage People where to load the data and must not be altered or removed.
8. Save the AccountLocationAlias.csv file.
9. Go to Setup > Administration Setup > Data Management > Import Custom Objects.
   - Sage People displays the Custom Object Import Wizard.
10. Select Start the Import Wizard.
    - Sage People displays Step 1 of the Import Wizard: Choose Record.
11. Scroll down, or use your browser's search, to find **Job Board Mapping**, and select it.

12. Select **Next**.
   
   Sage People displays Step 2 of the Import Wizard: **Prevent Duplicates**.

13. Select **No - insert all records in my import file**.

14. Select **Next**.
   
   Sage People displays Step 3 of the Import Wizard: **Specify Relationships**.

15. Select **Name**.

16. Select **Next**.
   
   Sage People displays Step 4 of the Import Wizard: **File Upload**.

17. Select **Browse...**, find and select AccountLocationAlias.csv.

18. Specify the character encoding as **Unicode (UTF8)**
   
   Leave other settings at their default values.

19. Select **Next**.
   
   Sage People displays Step 5 of the Import Wizard: **Field Mapping**
   
   Leave all fields at their default values.

20. Select **Next**.
   
   Sage People displays Step 6 of the Import Wizard: **Verify Import Settings**.

21. Ignore the Record Owner error message and select **Import Now!**
   
   Sage People displays Step 7 of the Import Wizard: **Import Initiated**.

22. Select **Finish**.
   
   Sage People imports the data and sends an email to confirm that the import has been successful.

23. Check the confirmation email - ensure the correct number of Job Board Mappings has been created.

---

**Job Board Configuration**

1. Go to **Setup > App Setup > Installed Packages**:

---
2. Find Sage People Recruit in your list of installed packages and select **Configure** in the Action column:

Sage People displays the Recruit Configuration page.

3. Select the **Job Boards** tab:
4. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareerBuilder User ID</td>
<td>A valid User ID for CareerBuilder. If you are not currently registered with CareerBuilder, registering creates your unique ID. Leave blank if you do not plan to use CareerBuilder.</td>
</tr>
<tr>
<td>CareerBuilder Password</td>
<td>The password associated with your CareerBuilder User ID. Passwords are hidden and this field shows blank once you have entered a password.</td>
</tr>
<tr>
<td>Monster Account Name</td>
<td>The name by which your first Monster account is known. This is your organization's name for the Monster account and enables you to identify multiple accounts. If you have a single Monster account this field is not mandatory. Monster Account Name is not supplied by or known to Monster. If you do not plan to use Monster, leave blank.</td>
</tr>
<tr>
<td>Monster User ID</td>
<td>A valid User ID for your first Monster account. Issued by Monster. If you are not currently registered with Monster, registering creates your unique ID. If you do not plan to use Monster, leave blank.</td>
</tr>
<tr>
<td>Monster Password</td>
<td>The password associated with your first Monster User ID. Issued by Monster. Passwords are obscured and this field shows as dots once you have entered a password. If you do not have a Monster account, leave blank.</td>
</tr>
</tbody>
</table>
| Monster Posting Parameters | Parameters for this Monster Account, separated by commas. You can also use comma + space as a separator. Values are determined by Monster and are supplied to you. You can specify:  
  • The Desired Duration for a Job Posting in days. Enter: JobPostingDesiredDuration=[number] Where [number] is the number of days. For example: JobPostingDesiredDuration=60  
  • For UK and US postings only, the Career Ad Network Duration in days; 7, 14, or 30. Enter: CareerAdNetworkDuration=[number] Where [number] is the number of days. For example: CareerAdNetworkDuration=30  
  • The frequency in days at which a job posting is refreshed so that it moves to the top of search results; 7, 14, 30, or 60. Not available for 7 day job postings. Enter: AutorefreshFrequency=[number] Where [number] is the number of days between refreshes. For example: AutorefreshFrequency=7  
  A complete entry for Monster Posting Parameters looks like: JobPostingDesiredDuration=60, CareerAdNetworkDuration=30, AutorefreshFrequency=7 |
| Monster Locations      | Monster Vacancy Codes must be loaded on to Sage People to activate Monster Locations. One or more Posting Locations associated with Monster Account Name. Enter two or more characters to display a list of matches. Select from the displayed list. Selected locations are displayed in the box below the field. |
| Monster2 Account Name to Monster10 Account Name | The names associated with your second to tenth Monster accounts. These are your organization's names for the Monster accounts, enabling you to identify multiple accounts. Monster Account Names are not supplied by or known to Monster. Complete one Monster Account Name field for each of your Monster accounts. |
## Configuring Post to Job Boards

### Job Board Configuration

### Field | Description
--- | ---
Monster2 User ID to Monster10 User ID | The User IDs for your second to tenth Monster accounts. Complete One Monster User ID field for each of your Monster accounts.

Monster2 Password to Monster10 Password | The passwords for your second to tenth Monster accounts. Complete One Monster Password field for each of your Monster accounts.

Monster2 Posting Parameters to Monster10 Posting Parameters | Parameters for your second to tenth Monster Accounts, separated by commas. You can also use comma + space as a separator. Values are determined by Monster for each account and are supplied to you. You can specify:
- The Desired Duration for a Job Posting in days. Enter: `JobPostingDesiredDuration=[number]` Where `[number]` is the number of days. For example:
  ```
  JobPostingDesiredDuration=60
  ```
- For UK and US postings only, the Career Ad Network Duration in days; 7, 14, or 30. Enter: `CareerAdNetworkDuration=[number]` Where `[number]` is the number of days. For example:
  ```
  CareerAdNetworkDuration=30
  ```
- The frequency in days at which a job posting is refreshed so that it moves to the top of search results; 7, 14, 30, or 60. Not available for 7 day job postings. Enter: `AutorefreshFrequency=[number]` Where `[number]` is the number of days between refreshes. For example:
  ```
  AutorefreshFrequency=7
  ```

A complete entry for Monster Posting Parameters looks like:
```
JobPostingDesiredDuration=60, CareerAdNetworkDuration=30, AutorefreshFrequency=7
```

Monster2 Locations to Monster10 Locations | Monster Vacancy Codes must be loaded on to Sage People (see page 228) to activate Monster Locations. One or more Posting Locations associated with your second to tenth Monster Accounts. Enter two or more characters to display a list of matches. Select from the displayed list. Selected locations are displayed in the box below the field.

Default Country | The values to use by default for all Vacancies. The values you enter here:
- Must be one of the values loaded for the Job Board(s) you plan to use.
- Can be overridden for specific vacancies.

Leave fields blank if you do not want to specify default values.

Jobing Company | Your Company Name as registered with Jobing.com. Leave blank if you do not plan to use Jobing.

Additional field (3 fields) | Picklist. Used exclusively with Jobing to send up to three additional fields with a Vacancy. Select the picklist for each field and select the field(s) you want to send.

5. Select **Save**.
Translation Workbench: Post to Job Boards

<table>
<thead>
<tr>
<th>Job Board Object</th>
<th>Use Setup &gt; Administration Setup &gt; Translation Workbench &gt; Override to rename these custom fields</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Default Field Label</strong></td>
</tr>
<tr>
<td>Additional Field 1, 2, 3</td>
<td></td>
</tr>
<tr>
<td>CareerBuilder Password</td>
<td></td>
</tr>
<tr>
<td>CareerBuilder User ID</td>
<td></td>
</tr>
<tr>
<td>Default Country</td>
<td></td>
</tr>
<tr>
<td>Default Currency Code</td>
<td></td>
</tr>
<tr>
<td>Default Industry</td>
<td></td>
</tr>
<tr>
<td>Default Job Sector</td>
<td></td>
</tr>
<tr>
<td>Default Region</td>
<td></td>
</tr>
<tr>
<td>Jobing Company</td>
<td></td>
</tr>
<tr>
<td>Monster Account Name</td>
<td></td>
</tr>
<tr>
<td>Monster Password</td>
<td></td>
</tr>
<tr>
<td>Monster Posting Parameters</td>
<td></td>
</tr>
<tr>
<td>Monster User Id</td>
<td></td>
</tr>
<tr>
<td>Monster2 Account Name to Monster10 Account Name</td>
<td></td>
</tr>
<tr>
<td>Monster2 Password to Monster10 Password</td>
<td></td>
</tr>
<tr>
<td>Monster2 Posting Parameters to Monster10 Posting Parameters</td>
<td></td>
</tr>
<tr>
<td>Monster2 User Id to Monster10 User Id</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Job Board Mapping Object</th>
<th>Use Setup &gt; Administration Setup &gt; Translation Workbench &gt; Override to rename these custom fields</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td><strong>Default Field Label</strong></td>
</tr>
<tr>
<td></td>
<td>Account Name</td>
</tr>
<tr>
<td></td>
<td>Location Alias</td>
</tr>
</tbody>
</table>
Use Setup > Administration Setup > Translation Workbench > Override to rename these custom fields.

<table>
<thead>
<tr>
<th>Vacancy Code Object</th>
<th>Default Field Label</th>
<th>Field Label Override</th>
<th>Field Type</th>
</tr>
</thead>
<tbody>
<tr>
<td>CareerBuilder</td>
<td></td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Code Type</td>
<td></td>
<td></td>
<td>Picklist</td>
</tr>
<tr>
<td>Jobing</td>
<td></td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>LinkedIn</td>
<td></td>
<td></td>
<td>Text (80)</td>
</tr>
<tr>
<td>Monster</td>
<td></td>
<td></td>
<td>Text (80)</td>
</tr>
</tbody>
</table>
Configuring External APIs

Sage People enables controlled access to external services such as resume parsing through APIs (Application Programming Interfaces). The external services can then be used to supply data directly to the Sage People system without the need for re-keying.

When installing Sage People Recruit you are asked to approve access for third party websites:

1. Select **Yes, grant access to these third-party web sites**.
   Granting permission enables you to set up access to:
   - CareerBuilder Job Board
   - Monster Job Board
   - Sovren, to enable the Resume Parsing service.

2. Select **Continue**.

3. Complete the installation process.

When Recruit is installed, to configure External APIs:

1. From your User menu, select **Setup**:

   ![User menu with Setup selected](image)
2. In the left panel go to **App Setup** and select **Installed Packages**:

3. Find Sage People Recruit in your list of installed packages and select **Configure** in the Action column:

   Sage People displays the Recruit Configuration page.

4. Select the **External APIs** tab:
5. Complete the fields as follows:

<table>
<thead>
<tr>
<th>Configuration Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resume Parsing Endpoint</td>
<td>The url for the Resume Parsing service used by your organization. The endpoint depends on your location; the US and Europe have different endpoints. Supplied for you by Sage People.</td>
</tr>
<tr>
<td>Resume Parsing User Id</td>
<td>The unique user identifier for your org used by the Resume Parsing service. Supplied for you by Sage People.</td>
</tr>
<tr>
<td>Resume Parsing Key</td>
<td>The service key created by the service provider to enable access to the Resume Parsing service. Supplied for you by Sage People.</td>
</tr>
<tr>
<td>Use Resume Parsing</td>
<td>Checkbox. Check to enable the Resume Parsing service. There is typically a charge for this service.</td>
</tr>
<tr>
<td>Resume Parsing Count</td>
<td>Number. The number of resumes parsed by this org during the current 12 month contract period. The number of resumes permitted (typically 1000, subject to fair use) and any associated charges are defined in your Sage People contract. Resume Parsing Count is not editable.</td>
</tr>
<tr>
<td>LinkedIn Company ID</td>
<td>Not used.</td>
</tr>
<tr>
<td>LinkedIn API Key</td>
<td>Not used.</td>
</tr>
<tr>
<td>Enable DocuSign</td>
<td>Checkbox. Check to enable DocuSign for use with Recruit emailed PDF offer letters. You must have an active DocuSign account configured for use with Sage People Recruit.</td>
</tr>
<tr>
<td>DocuSign API Login Url</td>
<td>The url for the DocuSign REST API, supplied by DocuSign, of the form: https://{server}/restapi/{apiVersion}/login_information</td>
</tr>
<tr>
<td>DocuSign Username</td>
<td>The Username for your DocuSign account. Either the email address of the person authorized to use the DocuSign API, or a DocuSign supplied GUID for the email address. Available from your DocuSign Preferences page. You must also complete DocuSign Password and DocuSign Integrator Key before attempting to use DocuSign through Recruit.</td>
</tr>
<tr>
<td>DocuSign Password</td>
<td>The password for DocuSign Username, You must also complete DocuSign Username and DocuSign Integrator Key before attempting to use DocuSign through Recruit.</td>
</tr>
<tr>
<td>DocuSign Account ID</td>
<td>The unique 32 character GUID associated with your DocuSign account. Supplied by DocuSign.</td>
</tr>
<tr>
<td>DocuSign Integrator Key</td>
<td>A unique identifier supplied by DocuSign and used to gain secure access to the DocuSign service by Sage People Recruit. Recorded on your DocuSign Preferences page, from where you can also request an Integrator key for Sage People if you do not have one. You must also complete DocuSign Username and DocuSign Password before attempting to use DocuSign through Recruit.</td>
</tr>
<tr>
<td>Google API Key</td>
<td>An API Key for Google Maps from Google to enable Vacancies to show a map of the job location, based on the Location Postal Code field. If blank, a map cannot be displayed. If you edit the Vacancy, you see a message in the Map field explaining why a map is not displayed.</td>
</tr>
</tbody>
</table>
| Start Batch to Parse All Resumes       | Button. Select to process all unparsed resumes held in your org except:  
  - Resumes held for Candidates who are Archived.  
  - Newly received resumes for Candidates with existing, parsed resumes. Check the number of resumes likely to be processed before selecting so that you do not exceed the number permitted by your contract with Sage People. |

6. Select Save.
Configuring Email Services

Accepting Email Applications

Sage People Recruit accepts incoming emails from candidates and automatically creates the candidate and application records. The process requires a new email address to receive the applications.

To configure Email Services:

1. From your User menu, select **Setup**:

   ![Setup Menu]

2. In the left panel go to App Setup and select **Develop > Email Services**

   ![App Setup]

   Sage People displays the Email Services page.

3. Select the Email Service Name **Applications**.

   Sage People displays the detail page for the Applications Email Service.

   Do not select **Edit** to change any parameters unless instructed to do so by Sage People Support.

4. Select **New Email Address**.

   Sage People displays the New Email Address form.
5. Complete the fields on the New Email Address form:

<table>
<thead>
<tr>
<th>Field</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address</td>
<td>Completed by default with the Email Service Name: Applications. You can change this if you wish. This specifies the first part of the address, before the @. The rest of the address (the domain name) is allocated automatically.</td>
</tr>
<tr>
<td>Active</td>
<td>Leave checked.</td>
</tr>
<tr>
<td>Context User</td>
<td>Must be the system administrator (the default).</td>
</tr>
<tr>
<td>Accept Email From</td>
<td>Must be blank. It defaults to the administrator email address so you must clear the field.</td>
</tr>
</tbody>
</table>

6. Select Save.

Sage People generates a working email address of the form:

```plaintext
applications@k-30o5u3hrh5fk7ab9sytfuzrcx.in.salesforce.com
```

7. Take a note of this address. This is your working email address. You could publish the working address for external use, but it would be hard for people to use.

If you wish to publish an email address, set up a more easily remembered email redirect from your own email domain to the working address. You can then advertise the second, redirected address. Ask your email administrator to:

a. Set up an easily remembered email address of the form:

```plaintext
apply@yourcompany.com
```

b. Redirect all emails received on this address to the working address.

If you are only going to use the working email address for automatic applications from web forms or job boards you need not create the redirection.

The redirection serves a number of purposes:

- Applicants see the address as clearly belonging to your company. They use an address fully controlled by you.
- You can save all application emails in your own mail system. You can forward to recruiters in your company as well as to Sage People Recruit.
- If you wish to stop sending applications to Sage People Recruit you just stop the redirection.

If you do not have an email domain that enables you to set up redirects then contact support@fairsail.com. We will allocate an address for you on the fairsail.com domain.
Onboarding

Creating the Team Member

Sage People customers running Sage People Recruit, Sage People Human Capital Management (HCM), and Sage People Resource Manager can have their HCM Team Member Records created automatically, using details collected during the Talent Acquisition process in the Candidate and Application records.

Alternatively, you can create Team Member records manually (see page 248).

There are four steps to set up automatic Team Member creation:

1. Install Sage People Resource Manager version 22.04 or later.
   
   On installation, Resource Manager creates the Team Member Link field on the Candidate object to enable the link between the Candidate and Team Member records (see page 242).

2. Create a lookup field on the Application object called Manager (see page 244). This enables Sage People to set the value of the new Team Member’s Manager and Department, where the department is the same as the manager’s department.

3. Check the field sets HCM Copy, on the Application object, and Recruit Copy, on the Employment Record object, to make sure they contain all the fields you want to copy from Recruit to HCM, and that the fields match in both type and order (see page 245).

   You can copy:
   - An unlimited number of fields from the Application object to the Employment Record object.
   - A maximum of 25 fields from any of the other objects accessible from the HCM Copy Field Set. For example, a total of up to 25 fields from a combination of the Candidate, Referer, and Vacancy objects.

4. In Sage People Recruit Configuration set Candidate Status To Create Team Member to the status you want to use as a trigger for creating a Team Member, typically Onboarding or Hired (see page 246).

   You can also set assessment stage options to trigger Onboarding or Hired status when that stage is reached (see page 248).

Using the Team Member Link Field

Team Member Link is automatically added to the Candidate object when you install Resource Manager version 22.04 or later in your org. Resource Manager provides a link between HCM and Recruit packages and is typically used for resource planning.

On installing Resource Manager any values stored in a previously created Team Member Custom Field on the Candidate object are automatically copied to the Team Member Link field. The Team Member Custom Field enabled automatic creation of the Team Member record before Team Member Link was available.
The Team Member Link field is not displayed by default but it is available in all Field Sets on the Candidate object. Key field sets covering typical locations for the field are:

- Candidate Details Bottom

Additional details fields displayed in a separate Additional Details section towards the bottom of the Candidate page:
Candidate Details Top

Additional fields displayed in the Additional Details section at the bottom of the Candidate panel:

To add the Team Member Link field to the Candidate page:
1. Go to Setup > App Setup > Create > Objects.
2. In the list of Custom Objects select the Label for the Candidate object.
3. On the Candidate Detail page, go to the Field Sets Related List and select Edit for the Field Set you want to use.
4. Drag and drop the Team Member Link field into the Field Set.
5. Select Save.

Creating a Manager Lookup Field

Creating a Manager lookup field on the Application object enables Sage People to set the value of the new Team Member's Manager and Department, where the department is the same as the manager's department.

1. From your User menu, select Setup:

2. Go to App Setup > Create > Objects.
3. Scroll down and select the Application object label:
4. Go to the Custom Fields & Relationships related list section and select **New**:

<table>
<thead>
<tr>
<th>Action</th>
<th>Field Label</th>
<th>API Name</th>
</tr>
</thead>
</table>

5. Create a new field as follows:

<table>
<thead>
<tr>
<th>Data Type</th>
<th>Lookup Relationship</th>
</tr>
</thead>
<tbody>
<tr>
<td>Related To</td>
<td>Team Member</td>
</tr>
<tr>
<td>Field Label</td>
<td>Manager</td>
</tr>
<tr>
<td>Field Name</td>
<td>Manager</td>
</tr>
<tr>
<td>Child Relationship Name</td>
<td>Applications1</td>
</tr>
<tr>
<td>...if the lookup record is deleted</td>
<td>Clear the value of this field.</td>
</tr>
<tr>
<td>Field-Level Security</td>
<td>Set Visible for all Sage People profiles.</td>
</tr>
</tbody>
</table>

6. Select **Save**.

### Setting Up Copy Field Sets

The HCM Copy field set (on the Recruit Application object) and Recruit Copy field set (on the HCM Employment Record object) contain the fields that you want to copy from Recruit to HCM when a new Team Member is automatically created.

The field sets map to each other and must match, field for field, in both type and order. For example:

<table>
<thead>
<tr>
<th>Recruit Copy Field Set</th>
<th>HCM Copy Field Set</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Team Member object</strong></td>
<td><strong>Candidate object</strong></td>
</tr>
<tr>
<td>First Name</td>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
<td>Surname</td>
</tr>
<tr>
<td><strong>Vacancy object</strong></td>
<td></td>
</tr>
<tr>
<td>Job Title</td>
<td>Vacancy Name</td>
</tr>
<tr>
<td><strong>Candidate object</strong></td>
<td></td>
</tr>
<tr>
<td>Home Phone</td>
<td>Phone</td>
</tr>
<tr>
<td>Home Email</td>
<td>Email</td>
</tr>
<tr>
<td>Home Address 1</td>
<td>Home Street 1</td>
</tr>
<tr>
<td>Home Address 2</td>
<td>Home Street 2</td>
</tr>
<tr>
<td>Home Address City</td>
<td>Home City</td>
</tr>
<tr>
<td>Home Address Region</td>
<td>Home Region</td>
</tr>
<tr>
<td>Home Address Zipcode</td>
<td>Home Post Code</td>
</tr>
<tr>
<td>Home Address Country</td>
<td>Home Country</td>
</tr>
<tr>
<td>Birth Date</td>
<td>Date of Birth</td>
</tr>
<tr>
<td><strong>Current Salary object</strong></td>
<td><strong>Application object</strong></td>
</tr>
<tr>
<td>Amount</td>
<td>Start Salary</td>
</tr>
</tbody>
</table>
To change the fields in a field set:

1. Go to **Setup > App Setup > Create > Objects**
2. Select the object holding the field set you want to change:
   - For **Recruit Copy** select **Employment Record**
   - For **HCM Copy** select **Application**
3. In the links at the top of the Custom Object page, select **Field Sets**.
4. In the list of Field Sets select **Edit** next to the Field Set you want to change.
   Sage People displays the Field Set builder.
5. Ensure that the fields in both field sets match each other.
   When the Team Member record is created, the data is retrieved from the fields included in the HCM Copy field set and copied to the matching fields in the Recruit Copy field set. If the fields do not match, the copy and Team Member creation fails.
6. Add or remove fields from both field sets to create the field set you want to use to automatically create a new Team member record.
7. Select **Save** to save your changes and exit the Field Set builder.

You can copy:
- An unlimited number of fields from the Application object to the Employment Record object.
- A maximum of 25 fields from any of the other objects accessible from the HCM Copy Field Set. For example, a total of up to 25 fields from a combination of the Candidate, Referer, and Vacancy objects.

### Configuration Options

1. Go to **Setup > App Setup > Installed Packages:**

   Sage People displays the Installed Packages page.
2. Scroll down to Sage People Recruit and select **Configure**:

<table>
<thead>
<tr>
<th>Uninstall</th>
<th>Fairl</th>
<th>Payroll</th>
<th>2.56</th>
<th>0</th>
<th>Does not</th>
<th>25/10/2012</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Fairl</td>
<td>Payroll</td>
<td></td>
<td></td>
<td></td>
<td>10.26</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Description</td>
<td>Link Fairl HCM to payroll agencies and benefit providers.</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Uninstall</td>
<td>Fairl</td>
<td>Recruit</td>
<td>4.26</td>
<td>Unlimited</td>
<td>0</td>
<td>Does not</td>
</tr>
<tr>
<td></td>
<td>Recruit</td>
<td></td>
<td></td>
<td>Unlimited</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Description</td>
<td>Specify job, attract candidates, take applications, select talent, hire and bring onboard.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Sage People displays the Sage People Recruit Configuration page:

![Sage People Recruit Configuration](image)

3. In **Candidate Status To Create Team Member** select the picklist and select the status you want to use as the basis for a Team Member record:

![Candidate Status To Create Team Member](image)

4. Select **Save**.

When a candidate record reaches the selected status, Sage People automatically creates a Team Member record in HCM drawing information from Recruit. The information copied across is controlled by the HCM Copy and Recruit Copy Field Sets.
Assessment Stage Options

To help automatically set the candidate status there are two options on a stage:

- **Set Onboarding**
  Sets the application and candidate status to Onboarding when the stage is reached.

- **Set Hired**
  Sets the application and candidate status to Hired when the stage is reached.

Depending on your Recruit configuration settings, assessment stage options can also trigger Team Member creation:

Creating the Team Member Manually

If you do not want the Recruitment process to automatically set status and create the Team Member record, you can manually set the status by editing the Application record or the Candidate record.

To edit status on the Application record:

1. On the Applications Home page select the **Application Number**.
   Sage People displays the Application Detail page.

2. On the Application Detail page select **Edit**.
   Sage People displays the Application Edit page.
3. On the Application Edit page go to the Current status section and select the **Status** field picklist:

4. Select the status required to create the Team Member record.

5. Select **Save**.

The Team Member record is created in Sage People HCM, using the details derived from the Candidate record.

To edit status on the Candidate record:

1. On the Candidates Home page select the **Candidate Name**.

   Sage People displays the Candidate Details page.

2. On the Candidate Details page select **Edit**.

   Sage People displays the Candidate Details Edit page.
3. On the Candidate Details Edit page go to the Information section and select the Status field picklist:

4. Select the status required to create the Team Member record.

5. Select Save.

The Team Member record is created in Sage People HCM, using the details derived from the Candidate record.

**Internal Processes**

After the Recruit process has created the Team Member record you must:

- Add other required fields to the Team Member record, such as Unique ID, Personnel number, and so on.
- Create the user's unique login

You must ensure that your organization's processes provide adequate communication between the Recruitment Team and the Human Resources team to support automatic creation of Team Member records.

Workflow can be set up to inform departments of new hires as they pass from onboarding to induction to full employees.
Candidate Portal CSS

/*GenericCustomerExample Brandcolor = #0D529F*/

body {
  font-size:14px !important;
}

/*remove unwanted elements and styling*/
h1.pageType {
  display: none;
}

.bPageTitle h1 {
  display: none;
}

.searchPanel {
  display:none;
}

.leftColumn {
  position: absolute;
  top: -33px;
  left: -5px;
  float: left;
  width: 100% !important;
  height: 20px;
  line-height: 3em;
}

.menuPanel ul {
  width: 100%;
  background: #0D529F;
  border-radius:0 !important;
  border:none !important;
  padding-left:0 !important;
}

.menuPanel ul li {
  display: inline;
  margin-right: 1em;
  width: 100%;
  font-weight: bold;
  padding-left: 12px;
  color: #fff;
}

.menuPanel ul li a {
  color: #fff;
  padding: 0px 20px;
  height: 100%;
  display: inline-block;
  transition: all 0.5s ease-in-out;
}

.menuPanel ul li:hover {
  background: none;
}

.menuPanel ul li a:hover {
  color: #fff !important;
}
* a:hover {
    color:#0D529F !important;
    text-decoration: underline;
}

/* headings */
.bPageTitle .ptBody .content {
    padding-left: 0 !important;
}

h1, h2, p {
    margin: 0px 0px 12px 0;
    line-height: 1.2em;
}

h2.pageDescription {
    padding: 10px 0 0 0;
} body .bPageTitle {
    padding-top: 50px;
}

.poweredBy {
    padding-right: 50px;
}

.mainPageDivId, td.rich-tabpanel-content {
    background: #FFF !important;
}

/*Styling job details page*/
/*div#pagefRecruitt__ApplyJob tr:nth-last-of-type(3) > td{
position: relative;
border: 3px dotted rgba(255, 0, 0, 0.5);
background: none repeat scroll 0% 0% rgba(255, 0, 0, 0.5);
min-height: 50px;
float: left;
bottom: -270px;
left: auto;
width: 100%;
display: block;
clear: both;
}*/

div#pagefRecruitt__ApplyJob table > tr:first-child {
    display: none;
}
/*div#pagefRecruitt__ApplyJob table > *{
    background: #0D529F;
}*/
/*end Styling job details page*/

/*Styling forms http://genericcustomerexample.force.com/hr/*/
th.labelCol, td.data2Col, div.requiredBlock {
    line-height: 1.8em;
    border: none;
}

.bPageBlock .labelCol, body .print .topics-label {
    font-size: 100% !important;
}

td.rich-tab-header {
    line-height: 1.8em;
    padding: 0.3em;
}

td.rich-tab-active {
background: #fff;
}
div.requiredBlock {
    background: none !important;
}
div.requiredBlock:before {
    content: "*";
    color: inherit;
    font-weight: bold;
    margin: 0px 8px;
    position: relative;
}
input[type="text"] {
    width: 80% !important;
    box-shadow: none;
    border: 1px solid rgba(0, 0, 0, 0.3);
    line-height: 3em;
    margin: 0em 1em 1em 0em;
    padding: .1em 1em;
    font-size: 1.2em;
}
input[type="text"]:focus {
    background: rgba(0, 0, 0, 0.05);
    border: dotted 1px rgba(0, 0, 0, .3);
}
.bEditBlock select {
    max-width: 300px;
    width: 100%;
    box-shadow: none;
    border: 1px solid rgba(0, 0, 0, 0.3);
    line-height: 3em;
    margin: 0em 1em 1em 0em;
    padding: 0.1em 1em;
    font-size: 1.2em;
}
input[type="submit"].btn {
    background: none;
    background-image: none;
    background: #fff;
    border: 1px solid #0D529F !important;
    font-size: 1.5em;
    padding: 0.4em 0.9em;
    border-radius: 20px;
    color: #0D529F;
    font-weight: normal;
    box-shadow: none;
    transition: all 0.4s ease-in-out;
}
input[type="submit"].btn:hover, input[type="submit"].btn:focus {
    background: none;
    background: #0D529F;
    border: 1px solid #0D529F;
    color: #fff;
    box-shadow: 0px 0px 15px 0px #0D529F;
    transition: all 0.4s ease-in-out;
    transition: box-shadow 0.8s ease-in-out;
}
div#pagefRecruit__ApplyRegister input[type="submit"].btn {
    float: right;
}
/*messages*/
  div.message.errorM3 {
    background: #d3d3d3;
    border-bottom: #d3d3d3 5px solid;
  }

  div.message h4, .messageText {
    color: #fff;
  }

  div.message {
    margin-bottom: 12px;
    box-shadow: 1px 1px 10px #fff inset;
    color: #fff;
    border: 1px solid rgba(0, 0, 0, 0);
  }

  div.message.warningM3 {
    background: rgba(13,82,159, 0);
    border-bottom: #cfbb24 5px solid;
  }

  div.message.warningM3 * {
    color: #222;
  }

  div.message img {
    visibility: hidden;
  }

  div.message.infoM3 {
    background: rgba(13,82,159, 0);
    border-bottom: rgba(13,82,159, 0) 5px solid;
  }

  /*end messages*/

  /*end forms*/

  /*Making Responsive*/

  .mainPageDiv {
    width: 100% !important;
    position: static;
  }

  @media screen and (max-width: 550px) {
    h2.pageDescription {
      padding: 50px 0 0 0;
    }

    div#pageRecruit__ApplyJobList table tr td:nth-child(4),
    div#pageRecruit__ApplyJobList table tr th:nth-child(4) {
      display: none;
    }

    input[type="submit"].btn {
      font-size: 1em;
      padding: 0.4em;
      float: left;
    }

    input[type="text"] {
      width: 80%;
      line-height: 2.3em;
      font-size: 1.1em;
    }

    }
@media screen and (max-width: 400px) {
    h2.pageDescription {
        padding: 50px 0 0 0;
    }
}

div#pagefRecruit__ApplyJobList table tr td:nth-child(3),
div#pagefRecruit__ApplyJobList table tr th:nth-child(3) {
    display: none;
}
input[type="submit"].btn {
    font-size: 1em;
    padding: 0.4em;
    float: left;
}
input[type="text"] {
    width: 75%;
    line-height: 2.0em;
    font-size: 0.9em;
}

/*end Responsive*/
**API Name**

A unique reference name for a field in a Sage People object. Every field has an API (Application Programming Interface) Name that is used internally by the software to ensure exact field matching. Unlike the field label, an API field name cannot change.

An example API Name for an HCM field with the label *Unique Id* is `fHCM2__Unique_Id__c`.

**Candidate Portal**

The Sage People Talent Acquisition feature that enables you to advertise vacancies through your organization's websites. You can define multiple Candidate Portals enabling you to group vacancies by type, location or other classification. Each Candidate Portal has its own locale settings and can be displayed in local language.

Also known as Applicant Portal.

**Application**

The record of a Candidate applying for a single Vacancy. Applications can be created manually, or automatically through candidates using Sage People Candidate Portals, Sage People Agency Portals, links from Job Boards, or emails.

**Approval process**

A process that ensures a change is validated or signed off (by an approver) before it is implemented. The Salesforce approval process is used by Sage People HCM for the Performance Review and HR Request processes, and by Sage People Recruit for the Vacancy and Hiring authorization processes.

Also known as approvals process.

**Candidate**

A person who has applied for one or more vacancies. Sage People Candidate records include personal details, current employment information, and their resume; information that is common across all applications they may have made.

**Dashboard**

A group of related information, typically displayed as a set of graphics in your browser. A dashboard is based on one or more custom reports and supports up to 20 components. Access to dashboards can be shared through dashboard folders. To view a complete dashboard, a user must have access to the report folders containing the custom reports holding the source data for the components.

**Email template**

Used widely in Sage People, an email template defines the outline content of an email you want to send more than once. The template typically includes merge fields that are replaced with real values taken from a record when an email based on the template is sent.

**Field**

Each record contains a number of fields, with each field describing an attribute of that record. Each field contains data of a particular kind, such as text, numeric, a picklist, a checkbox.

**Field label**

A text name for a field. Field labels are used on the user interface and in most cases can be changed as part of a localization project, or to conform to an organization's internal or industry specific terminology. Field labels map on to underlying API Names, which cannot be changed.
**Field Set**

A group of fields from which individual fields can be selected, typically for display in one part of Sage People WX or HR Manager Portal. Each Field Set is contained by an object, and field sets from one or more objects can be combined to build a page or part page.

**Formula Field**

A Sage People field for which the value is calculated by a formula. The formula can use the values of other fields, mathematical expressions, fixed values and so on to calculate a value. Formula fields can be used to make the value of a field on one object visible on another object.

Competency Average and Rating Score are examples of formula fields.

**HCM**

Human Capital Management. Sage People HCM includes Sage People WX for the end user, Team Member audience, and the HR Manager Portal for the HR Administrator.

**HR Manager Portal**

The view of Sage People HCM that provides access to Team Member employment details including salary, salary related, and benefits information, as well as induction and termination workflows, reports and dashboards, and consolidated cross-team, multi-location information. Users of the HR Manager Portal typically have administrative access to the employment details for the team members of one or more HR Departments.

**HR XML**

The short form of the name for the HR-XML Consortium, the original name for the HR Open Standards Consortium, Inc. A non-profit organization dedicated to the development of data exchange standards for the HR community. Standards include a Resume specification which defines a resume in XML, easing exchange and machine processing.

**Joined report**

One of the report formats supported by Sage People enabling you to create multiple report blocks providing different views of your data. Each block of reports can have its own fields, columns, sorting and filtering. Use a joined report to combine information from different report types.

**Library**

One of a number of groupings of related information, such as those used by Sage People HCM for skills, competencies, metrics, scales, job profiles, job descriptions, or training, and that used by Sage People Talent Acquisition for selection criteria. The items in each library can be used and reused by multiple parts of Sage People.

**Link**

A hyperlink providing a jump to more information such as another record, a report, or a website.

**Matrix report**

One of the report formats supported by Sage People enabling data to be summarized in a grid. Typically used for summarizing large amounts of data and ideal when comparing values by two different categories of information.

**Merge field**

A field you can add to an email template or formula (for example) to incorporate values from a record. The merge field is replaced with a real value when the email template is used to generate an email, or the formula is evaluated.

An example Sage People merge field is the field for Two-up Manager on the Team Member record: `{!HCM2__Team_Member__c.HCM2__Managers__Manager__c}`

**Merge record**

The record from which data is drawn by a merge field.
Object
A container used by Sage People for storing information of a particular type, such as Team Member, Employment Record, Salary, or Absence. Each object is stored as a table, with columns for fields and rows for records. For example, each Team Member record (Steve Pendleton, John Sheridan, Demi Price) forms a row in the Team Member object with fields for name, job title, location, manager, and so on. Objects can be linked to other objects, so building a composite set of information about the people in your organization.

Onboarding
The process or processes through which a new employee acquires the knowledge, skills and behaviors to become an effective member of your organization. Sage People supports effective onboarding through automated workflows, close integration of underlying information, and general ease of use encouraging effective maintenance of that information. Onboarding can be accelerated by using Sage People to identify Pre Boarders and enable early exposure to selected processes.

Org
Commonly used abbreviation for Salesforce Organization. An org is a Salesforce deployment with a set of user licenses and all of your data and applications. It is separate from all other orgs. Your Sage People org includes all the Sage People applications to which you have subscribed and all of your Sage People data.

Picklist
One way of presenting a browser user with a number of selectable options. Some Sage People picklists can be edited or added to as part of the implementation process; this is one of the ways in which the application can be configured.

Also known as: pull-down menu, drop-down menu.

Record
When you select a tab, the page displays information in rows. The information for each row is held in a record. For example, the Team Members tab groups all team member records together, with each record displayed on a separate row.

Related list
Information that is not part of the selected record, but that is related to it. For example:

- The employment, objectives, and targets records for a Team Member. These are accessible from the Team Member page, with links displayed below the Team Member Detail.
- The employment record detail page has related lists for salary history, benefits, bonuses, absences, and so on.

Report
A generated set of information drawing on one or more objects. Reports can be shared through Report folders and exported to Excel as a set of data values or in formatted form. Sage People supports multiple report formats including tabular, summary, and matrix.

Report Builder
A visual editor that helps you build Sage People reports.

Roll-Up Summary Field
A Sage People field that automatically provides an aggregate value of child records. For example, Competency Assessment Competency Count is a roll-up summary field providing the number of competencies against which a Team Member has been assessed.

Sage People Recruit Enterprise
A package of complementary functionality for Sage People Talent Acquisition - formerly Recruit - enabling more complex object sharing models to be implemented.

Security Profile
A collection of permissions and access settings that specifies the parts of the Sage People system that can be seen and edited by a user. A user can be assigned to a single Security Profile. Typically used to provide a basic level of access control, refined by one or more Permission Sets. Sage People HCM is supplied with three Security Profiles: HR Administrator, HR Manager, and Platform Team Member. Also known as: Profile.
Selection Criteria
When defining a vacancy in Sage People Talent Acquisition, the criteria you want candidates to have. Criteria can be competencies, skills, experience, knowledge, qualifications, or some other measure that helps you to choose between candidates. You can use the degree to which candidates meet selection criteria as a measure of candidate suitability for a role.

Summary report
One of the report formats supported by Sage People. Similar to a tabular report with the additional capacity to group rows of data, view subtotals, and create charts. Typically used for grouping tasks by week or by team member.

Tab
Used to organize information stored in Sage People into groups. By selecting a tab towards the top of the Sage People page, you get access to all the data related to that tab.

Tabular report
One of the report formats supported by Sage People. The simplest and fastest way to view data, comprising fields in columns and records in rows.

Translation Workbench
A setup and configuration tool to help manage and implement natural language translation of customizations, such as picklist values and custom field labels, and to override existing labels and translations. The override function is used during implementation to change labels and prompts on screen.

View
A set of criteria enabling a subset of records to be displayed. Sage People enables you to create your own views in the HR Manager Portal for Sage People HCM, and in Sage People Talent Acquisition. A view can be used with a single tab, such as Team Members, HR Requests, or Candidates. A view can also be cloned and printed to PDF, but cannot be transformed into a report.

Workflow
Generally: a series of connected steps used to complete or contribute to a task. The series of steps flows from one to the next.
Specifically: in Sage People, an automated or semi-automated process using rules triggered by specific criteria, and that result in one or more defined actions.

WX
Sage People WX (Workforce eXperience), the greatly enhanced replacement for the Sage People Collaboration Portal. Using responsive design to enable use on the full range of screen sizes from desktop to mobile, giving access to existing processes, and introducing Internal Communication, Recognition, and Summary processes.

Vacancy Codes
Store the classifications used by Job Boards to categorize vacancies. Code types include industry, job sector, experience level, country, region, and employment type. When loaded, Sage People uses Vacancy Codes to classify vacancies in line with Job Board attributes, ensuring that vacancies are correctly posted.

Vacancy
An opening for one or more people within your company. The Sage People Talent Acquisition process starts with defining a Vacancy. Vacancy definition includes a role definition and the candidate evaluation procedure.
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