

# PeopleSoft 8.9 Recruiting Solutions Implementation Tips

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## Introduction

Release 8.9 of PeopleSoft's (Oracle) Recruiting Solutions provides significant enhancements to the overall user experience, applicant data management, recruiting team coordination, candidate self-service, process approval (workflow), and HR metrics reporting.

A detailed implementation plan is necessary in order to prioritize deployment of functionality and to ensure your efforts result in a highly effective talent management tool for the entire enterprise. Building a roadmap to align your "recruitment" business processes with Recruiting Solutions and its superior technology – workflow, self-service, and integration with the HRMS application – will reduce implementation effort and deployment bottlenecks.

WorkStrategy has developed this PeopleSoft implementation "tips" document to provide project team members a guide for building a comprehensive implementation, configuration, and deployment plan.

The PeopleSoft Recruiting Solutions application is available to customers migrating to the HRMS 8.9 platform. There are significant changes in the PeopleTools 8.46 architecture. While this document does not address these technical changes specifically, many of the inherent user interface and navigation improvements are delivered through PeopleTools enhancements.

## Recruiting Solutions 8.9

- Application Suite
  - Candidate Gateway (formerly eRecruit)
  - Talent Acquisition Manager (formerly eRecruit Manager Desktop)
  - Resume Processing
  - Integration Broker (job boards, background checking)
- Functional Improvements
  - User experience
  - Contact management and notes
  - Applicant list management
  - Improved approval management
  - 360° view of applicant info
  - Improved search capabilities (Verity)
  - Improved contractor hiring (contingent worker)
  - Data Privacy Acknowledgement
  - Multiple job application support
  - Document attachment (cover letters, resumes)
- Application Components
  - Configuration Templates
  - Workflow rules (notifications, agents, approvals)
  - Integration tools
  - Self-Service
  - Text Catalog
  - Recruiting Analysis Reports

## PeopleSoft Recruiting Solutions 8.9 Implementation Roadmap

Implementing PeopleSoft’s Recruiting Solutions application is a three-step initiative:

1. **Strategy & Process Improvement** – analysis of HR’s strategic vision for workforce recruiting and review of the existing business processes
2. **Process Mapping & Table Configuration** – mapping each existing, or improved business process, to Recruiting Solutions and configuring templates, tables, and integration points for your specific enterprise recruiting needs
3. **Training & Change Management** – workforce preparation through training and change management support for human resources staff, management, and employees

Because PeopleSoft Recruiting Solutions has been designed to support a wide range of recruiting strategies, it can be challenging to build a straightforward implementation approach. Additionally, PeopleSoft Recruiting Solutions has been designed to accommodate recruiting process-specific rules by business unit, by department, or by functional work team.

Following is a step-by-step guide for getting started with your Recruiting Solutions project.

### PeopleSoft Recruiting Solutions Implementation Roadmap

<b>Recruiting Solutions Planning &amp; Process Analysis</b>	1. Assess functional project objectives
	2. Identify stakeholder and issue escalation resources
	3. Build project case study/cost justification
	4. Assemble HR, field, and IT resource representatives
	5. Review recruiting strategy, HR metrics
	6. Build implementation schedule and milestones
	7. Establish power user, end-user, and candidate communities
	8. Define training and roll-out programs
	9. Identify any necessary workforce “change management” needs
<b>Recruiting Solutions Fit/Gap Analysis</b>	10. Perform comprehensive application fit/gap analysis
	11. Recruiting process design (current and future)
	a. Candidate/applicant management approach
	b. Process configuration templates
	c. Recruiting process step approvals
	d. Recruiting teams and metrics
	e. Job requisitions and budgeting
	12. Communication strategy
	13. User roles, responsibilities
14. PeopleSoft function integration: job boards, background	
15. Compliance and executive decision support	
16. Reporting and analysis	

<b>Recruiting Solutions Table Configuration &amp; Customization</b>	17. Define application configuration requirements
	a. Resume template
	b. Job opening template
	c. Screening template
	d. Interview evaluation template
	e. Recruitment template
	18. Complete Recruiting Solutions application configuration and integration
	19. Test recruiting process workstreams
	a. By group (business unit, department, recruiting team)
	b. By event (offer, hire, interview)
c. By role (hiring manager, HR, recruiter, candidate)	
<b>Recruiting Solutions Training &amp; Change Management</b>	20. Establish user acceptance test criteria/teams
	21. Build end-user training modules

### Recruiting Solutions - Planning & Process Analysis

Conducting an in depth process and plan analysis up front will ease the strain on the project team – and the budget. In fact, many implementation techniques stress the benefits of using “conference room” sessions with functional users and stakeholders. This is especially true for customers contemplating Recruiting Solutions. While Recruiting Solutions delivers extensive flexibility to administrators and the human resources team, your culture and its unique aspects will drive direction, scope, and schedule your recruiting solution.

Most organizations share the following goals when considering implementing PeopleSoft’s Recruiting Solutions:

- Improve organizational communication
- Increase evaluation efficiency (speed, accuracy, and process enablers)
- Track job opening fulfillment, time to hire, and related expenses
- Transfer knowledge gained to other HR functions (recruiting and training)
- Generate executive level data analysis (workforce recruitment analytics)
- Analyze gathered data against industry averages or expert benchmarks
- Track competencies throughout the organization and compare to future business demands
- Create an inventory of skills and design succession plans

Prior to launching the project, organizations should invest time assessing their existing “recruiting” processes, and documenting any future requirements. This pre-implementation process analysis will enable the team to properly define and organize the process, maximize the application’s functionality and streamline the flow of information.

A representative sampling of “recruiting” business processes reviewed during the fit gap:

- Hiring Contingent Workers
- Posting Jobs
- Interview Scheduling
- Candidate Evaluation
- Assessing Skills
- Making Job Offers
- Negotiating Employment Terms
- Building Tailored Applicant Lists
- Managing Referral Bonuses
- Maintaining Applicant Communication
- Tracking Compliance Metrics
- Linking to Job Boards
- Managing Job Requisitions
- Screening and Ranking Applicants
- Testing Applicants
- Conducting Background Checks
- Hiring the Applicant
- Building Recruiting Teams
- Tracking Recruiting Costs
- Managing Process Approvals
- Managing Candidate Experience
- Monitoring Recruiting Program Effectiveness

### PeopleSoft Recruiting Solutions – Workflow and Reporting

Delivered Workflows						
Job Offer Approval	Job Offer Approved	Job Offer Deny	Job Offer Error	Job Offer Escalation	Job Offer Review	Job Offer Termination
Job Opening Approval	Job Opening Approved	Job Opening Deny	Job Opening Error	Job Opening Escalation	Job Opening Review	Job Opening Termination
Delivered Notification Templates						
Applicant Status Change	Recruiter Job Opening Notify	Congratulatory Email	Applicant Password/User Ids	Applicants Route Notification	Submit Resume Notification	Email a friend
Forward Applicant	Notify on Draft Status	Notify on Reject	Notify on Success	Notification Sent on Unresolved	Notify Interview Applicant	Interview Evaluation Reminder
Notify Interview Team	Interview Evaluation Submit	Applicant References	Hire Error Notification Template	Hire Notification Template	Applicant Job Agent Notify	Job Offer Approval Routing
Job Offer Has Been Approved	Job Offer Has Been Denied	Job Offer Error	Job Offer Escalation	Job Offer Review	Job Offer Termination	Job Opening Approval Routing
Job Opening Has Been Approved	Job Opening Has Been Denied	Job Opening Error	Job Opening Escalation	Job Opening Review	Job Opening Status Change	Job Opening Termination
PeopleSoft Talent Acquisition Manager Reports						
Adverse Impact Analysis (USA)	Applicant Summary by Job	Applicant Summary by Source	Candidate Evaluations List	Candidate Listing	Certificate of Eligibles	Full Text Vacancy Report
Job Code and Position Audit	Job Group Movement Analysis	Job Posting	Priority Placement Table	Job Opening Cost Analysis	Job Opening Status Listing	Salary Package Model

## PeopleSoft Recruiting Solutions – Configuration Steps

The following chart illustrates which Recruiting Solutions tables will be configured for each business process. These processes are typical of Talent Acquisition Manager functionality.

	Create Job Openings	Post Jobs	Screen Applicant	Interview Applicant	Make Offer	Hire Applicant	Reward Referrals
<b>Business Processes</b>							
<b>Configuration Steps</b>	Job Opening Template	Job Opening Posting Template	Screening Template	Interview Evaluation Template	Offer Component Type	Manage Hire Setup	Employee Referral Program (optional)
	Recruiting Locations	Posting Description Type	Screening Definition	Interview Evaluation Reminder	Offer Component		Employee Eligibility Rules
	Recruitment Contacts	Posting Description Library	Status/Reason Definition	Interview Calendar	Contact Methods		Award Category Rules
	Recruiter Roles		Recruitment Area Rules	Interview Evaluation Categories	Correspondence Tokens		Process Referral Programs
	Teams		Question Definition	Interview Evaluation Ratings	Letter Template Details		Administer Referrals
			Answer Definition	Interview Types			Approve Employee Awards

## PeopleSoft Recruiting Solutions Webshots

PeopleSoft. Home

Careers Home [Job Search](#) [My Saved Jobs](#) [My Saved Searches](#) [My Career Tools](#)

Careers Home  
**Welcome Betty**

**Basic Job Search**

Keywords:

Posted:

[Advanced Search](#) [Search Tips](#)

**My Career Tools**

- [0 Applications](#)
- [0 Cover Letters and Attachments](#)
- [0 Saved Resumes](#)
- [My Profile](#)

**Notifications**

You do not have any notifications.

**Latest Job Postings**

First Previous | Next Last

Date	Job Title	Job ID	Location
<input type="checkbox"/> 11/09/2005	<a href="#">Payroll Clerk</a>	10116	
<input type="checkbox"/> 02/01/2005	<a href="#">Human Resource Analyst</a>	30013	Corporation Headquarters

[Select All](#) [Deselect All](#)

[Apply now without adding a job](#)

Figure 1. Candidate Careers Page

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## Manage Applicant: Stephen Kong

**Name:** Stephen Kong      **Applicant Type:** External Applicant  
**Applicant ID:** 1013      **Status:** 010 Active  
**Contact:** Email      **Address:** 1325 Robinson Road  
**Phone:** 707/234-9809      Sonoma, CA 95476  
**Email:** [skong@fdq.com](mailto:skong@fdq.com)

**\*Take Action:**   Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

Applicant Activity    [Contact Notes](#)    [Applicant Data](#)

Current Status    [Interview Schedule/Evaluation](#)    [Expenses](#)

Job Opening	Disposition	Last Updated	Resume	*Take Action
<a href="#">HRMS Analyst - 35000</a>	<a href="#">015 Linked</a>	11/16/2005 9:21 AM		<input type="text" value="Select Action..."/>

[+ Add New Disposition](#)    [▶ View Activity History](#)

Applicant Activity    [Contact Notes](#)    [Applicant Data](#)

Current Status    [Interview Schedule/Evaluation](#)    [Expenses](#)

**\*Take Action:**   Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

**Figure 2. Applicant Data – View of Applicant’s Job Interest**

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Manage Applicant: Stephen Kong

**Name:** Stephen Kong      **Applicant Type:** External Applicant  
**Applicant ID:** 1013      **Status:** 010 Active  
**Contact:** Email      **Address:** 1325 Robinson Road  
**Phone:** 707/234-9809      Sonoma, CA 95476  
**Email:** [skong@fdg.com](mailto:skong@fdg.com)

\*Take Action:   Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

Applicant Activity    [Contact Notes](#)    [Applicant Data](#)

[Current Status](#)    Interview Schedule/Evaluation    [Expenses](#)

**Interview Schedule**      Find | View All      First ◀ 1-2 of 2 ▶ Last

Date	Start Time	End Time	Interviewer	Location	Job
<a href="#">2005-09-16</a>	11:00AM	12:00PM	Betty Locherty	HQ	<a href="#">HRIS Specialist</a>
<a href="#">2005-09-16</a>	12:00PM	1:00PM	Charles Koberg	HQ	<a href="#">HRIS Specialist</a>

[Manage Interviews](#)

**Interview Evaluations**      View All      First ◀ 1-2 of 2 ▶ Last

Interviewer	Job	Interview Rating	Interview Type	Recommendation	Score	Evaluate Applicant
Charles Koberg	HRIS Specialist		Inhouse1		0.000	Evaluate Applicant
Betty Locherty	HRIS Specialist	Average	Inhouse1	020 Make Offer	7.000	<a href="#">Complete Evaluation</a>

[Create New Evaluation](#)

Figure 3. Applicant Data – View of Interview Schedule

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**Manage Applicant: Stephen Kong**

**Name:** Stephen Kong      **Applicant Type:** External Applicant  
**Applicant ID:** 1013      **Status:** 010 Active  
**Contact:** EMail      **Address:** 1325 Robinson Road  
**Phone:** 707/234-9809      Sonoma, CA 95476  
**Email:** [skong@fdg.com](mailto:skong@fdg.com)

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**\*Take Action:**        Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

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[Applicant Activity](#)    Contact Notes    [Applicant Data](#)

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**Contact History**      [Customize](#) | [Find](#) | [View All](#) |  1-4 of 4

Owner ID	Recruiter Name	Contact Date	Subject
KU0007	Betty Locherty	10/04/2005	<a href="#">Steve Called Today</a>
KU0007	Betty Locherty	09/19/2005	<a href="#">He is available Thursday - assign to full interviewing team!</a>
KU0007	Betty Locherty	09/19/2005	<a href="#">Let's schedule an interview!</a>
KU0007	Betty Locherty	09/13/2005	<a href="#">liked Stephen's skills!</a>

[Add Contact Note](#)

**Interested Party**  
No interested party have been added to this applicant's profile

[Add Interested Parties](#)

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[Applicant Activity](#)    Contact Notes    [Applicant Data](#)

**Figure 4. Applicant Data – View of Contact History**

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## Manage Applicant: Stephen Kong

**Name:** Stephen Kong      **Applicant Type:** External Applicant  
**Applicant ID:** 1013      **Status:** 010 Active  
**Contact:** Email      **Address:** 1325 Robinson Road  
**Phone:** 707/234-9809      Sonoma, CA 95476  
**Email:** [skong@fdg.com](mailto:skong@fdg.com)

**\*Take Action:** Select Action...  Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

- Add Applicant to Saved List
- Add Person of Interest
- Change Applicant Status
- Forward Applicant
- Link Applicant to Job
- Manage Applicant Contracts
- Merge As Source
- Merge As Target
- Pre-Employment Check
- Select Action...
- Send Correspondence

Job Opening	Disposition	Time	*Take Action
<a href="#">HRMS Analyst - 35000</a>	<a href="#">015 Linked</a>	11/16/2005 9:21AM	Select Action...

[Add New Disposition](#)     [View Activity History](#)

Applicant Activity    [Contact Notes](#)    [Applicant Data](#)

Current Status    [Interview Schedule/Evaluation](#)    [Expenses](#)

**\*Take Action:** Select Action...  Previous | Next | [Applicant](#)  
Applicant Applicant [List](#)

Figure 5. Applicant Data – Changing Applicant Disposition

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Applicant List: Excellent Applicants

List Name: Excellent Applicants      Access: Public  
Owner: Betty Locherty      Created On: 2004-09-12

Add Applicants   Delete List   Edit Primary List Data   Previous | Next | Back to List

Applicant List: Excellent Applicants

Find Applicant:  Go    <<First < Previous | Next > Last >>

Applicants						
<input type="checkbox"/>	Name	Applicant ID	Preferred Contact	Last Contacted	Contacted By	
<input type="checkbox"/>	<a href="#">Stephen Kong</a>	1013	skong@fdg.com	10/04/2005	Betty Locherty	
<input type="checkbox"/>	<a href="#">Claire Eastman</a>	1014	510/635-8835	--		
<input type="checkbox"/>	<a href="#">Christopher Pierce</a>	1015	510/345-8798	--		
<input type="checkbox"/>	<a href="#">Cindy Lee</a>	1016	cindylee@email.com	--		
<input type="checkbox"/>	<a href="#">Gregory Wu</a>	1017	404/289-6754	--		
<input type="checkbox"/>	<a href="#">Corey Williams</a>	1018	coreyw@email.com	--		
<input type="checkbox"/>	<a href="#">Cassandra Jacobson</a>	1021	cjacobson@yahoo.com	--		
<input type="checkbox"/>	<a href="#">Jose Campos</a>	1022	jcampos@email.com	--		
<input type="checkbox"/>	<a href="#">Deborah Diba</a>	1023	925/938-1885	--		
<input type="checkbox"/>	<a href="#">Fred Jones</a>	100091	Fred_E_Jones@yahoo.com	11/02/2005	Betty Locherty	

Select All   Deselect All   Select Action... Go

Add Applicants   Delete List   Previous | Next | Back to List

Figure 6. Applicant List – Building your own “special” candidate pool

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### Approval Process Definition

SetID: SHARE      Approval Process ID: JobOffer  
 Effective Date: 01/01/1900      Status: Active  
 Admin Role: RS Approval Administrator      [Alert Criteria](#)

User Auto Approval      [Save As](#)

**Stages** 1 of 1

Stage Number: 1      Description: Supervisor/Recruiter Grp Aprv

**Paths**

Approval Path: Supervisor\_Recruiter      Step Source: Static  
 Description: Route to Supervisor/Recruiter      [Path Details](#)      [Criteria](#)

**Steps** First 1-4 of 4 Last

Step	Approver User List	Description	Step Details	Criteria
1	Hiring Manager Posn	Hiring Manager Posn Supe	<a href="#">Step Details</a>	<a href="#">Criteria</a>
2	OfferRecruiterGroup	Offer Recruiter Group	<a href="#">Step Details</a>	<a href="#">Criteria</a>
3	RecruiterOnOffer	Recruiter on Offer	<a href="#">Step Details</a>	<a href="#">Criteria</a>
4	WCSpokesperson	Works Council Spokespers	<a href="#">Step Details</a>	<a href="#">Criteria</a>

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Approval Process: JobOffer      SetID: SHARE  
 Person ID: 2      Recruitment ID: 1804  
 Offer ID: 1022  
 Approver's Oper ID:

**Reassign Pending Tasks**

The selected approver does not currently have an alternate approver selected in their user profile. You must manually select an alternate approver to reassign pending tasks.

Reassign To:       [Reassign](#)

Allow Auto Approval       Allow Self-Approval

**Administrative Approve/Deny**

Act on behalf of the approver selected above by clicking the Approve/Deny buttons below. These actions will apply to all tasks pending for the approve selected above within the context of this transaction.

Comments:

[Approve](#)      [Deny](#)

Supervisor/Recruiter Grp Aprv

**Offer: Pending** [Start New](#)

Supervisor\_Recruiter

```

    graph LR
      A["Pending  
[PS] HRMS United States - User  
Hiring Manager Posn Supervisor"] --> B["Not Routed  
No Approvers Found  
Offer Recruiter Group"]
      B --> C["Not Routed  
[PS] Betty Locherty - MGR  
Inserted Approver"]
      C --> D["Not Routed  
No Approvers Found  
Works Council Spokesperson"]
    
```

Figure 7 and 8. Building the Recruiting Process Workflow

## About WorkStrategy

WorkStrategy is an HR technology management firm providing strategic planning, project management, investment analysis, process improvement, and PeopleSoft HCM implementation services.

Our consultants are human resource management domain experts and have extensive experience implementing Oracle's PeopleSoft HRMS suite of applications and tools. We assist organizations with functional analysis, change management, upgrade planning, project team training, and business case development.

### *Relevant PeopleSoft Experience*

Representative customers engagements include 8.9 HRMS Upgrades, Implementation Fit/Gap Analyses, Payroll, Benefits Administration, eBenefits, eProfile, eCompensation, Recruiting Solutions, eRecruit/Talent Acquisition Management, Time & Labor, Learning Management, and complete self-service deployments.

We also offer remote "fixed fee" upgrade labs through our Technology Solutions Center based in Columbia, Maryland.

### *Oracle Partnership*

As Oracle Partners, WorkStrategy is committed to providing superior consulting services to our mutual customer base. We understand the importance of practical implementation experience and invest heavily in developing methodologies and tools resulting in more streamlined and results-oriented engagements.

WorkStrategy also recognizes the importance of building long-term relationships with our customers through industry, HR professional, and Oracle-sponsored users' meetings. Our consultants are frequent speakers on topics such as HR technology trends and implementation best practices.

For more information about our services, visit [www.workstrategy.com](http://www.workstrategy.com), email [info@workstrategy.com](mailto:info@workstrategy.com), or call one of our Account Executives at **410.715.1020**.

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