



## **Taleo Enterprise**

# Taleo Anywhere for Microsoft Outlook 2010/2007 Configuration Guide

**Feature Pack 12A  
January, 2012**

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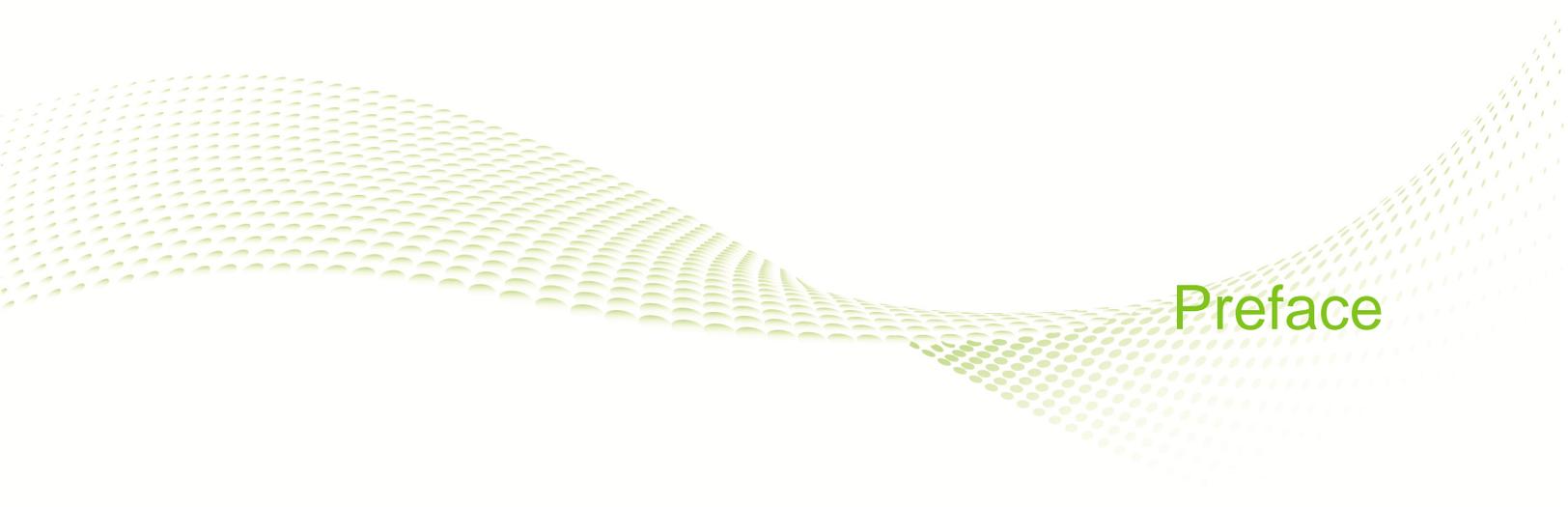
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# Preface

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## Revision History

Date	Version	Modification	Revised Topic
January, 2012	12A	First edition	

# Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.



# Taleo Inbox for Outlook 2010 and 2007

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## Taleo Inbox for Outlook 2010 and 2007

Taleo Inbox is a Web Service-based solution that enables users to take action on various Taleo tasks from within the Microsoft Outlook application without the need to log into Taleo applications directly.

Using Taleo Inbox, you can perform the following tasks:

- Provide feedback in response to a feedback request.
- Comment on and approve or reject feedback approval requests, succession plans, goal plans and development plans.
- Create unsolicited feedback about an employee, create feedback regarding a development activity, a goal, a competency goal, a scenario (succession plan), a job role or a competency and include the feedback in a performance review.
- View your goals and related comments, add comments and update your progress rate.
- View your development activities and related comments, add comments and update your progress rate.
- Forward an email to a Feedback Journal that can be referenced later for a performance review.
- Respond to network invitations.
- Capture candidate information from an email and create a candidate file.
- Match a candidate to a requisition.
- Look up a candidate's contact information.
- View your tasks that have not been completed.
- If you are a manager who has direct reports, via the Manager Dashboard you can view their goals and related comments, add comments and update the progress rate for each goal.
- If you are a manager who has direct reports, via the Manager Dashboard you can view their development activities and related comments, add comments and update the progress rate for each development activity.

### Benefits

- Integration with common productivity tools increases participation rates.
- Fully secure: Taleo Inbox does not use e-mails or SMTP. It is a Web service offering that uses HTTPS, so it is fully secure. Historical transactions are not stored in Outlook or on a Microsoft Exchange server.

## Taleo Inbox User Types

**Table 1: User types that can create a candidate via Taleo Inbox or use the Taleo Inbox Address Book**

Role	Description
Agency	No
Assistant 1	Yes
Assistant 2	Yes
Collaborator 1	Yes
Collaborator 2	Yes
Data Entry Clerk	No
Guest	No
Hiring Manager 1	No
Hiring Manager 2	No
Hiring Manager 3	No
Hiring Manager 4	Yes
Hiring Manager 5	Yes
HR Director	No
Integration Manager	No
Recruiter 1	Yes
Recruiter 2	Yes
Recruiter 3	Yes
Supervisor	No
System Administrator	Yes
System Integration	Yes
Unrestricted User	Yes
User Manager	No

## Installing Taleo Inbox for Outlook - Single Installation

Taleo Inbox can be installed on computers individually.

### **Prerequisite**

Any previous version of Taleo Inbox must be removed before installing a newer version.

Microsoft Outlook must be closed.

Taleo Inbox can be installed in any directory; during the installation, just select the desired directory.

If your organization did not implement SSO, you will need to enter your Taleo user name and password.

### **Steps**

1. From Salesforce, download the Taleo Inbox installer file for a single computer and save the file to the Windows desktop or to a local directory on your computer.
2. Double-click the installer file.
3. If Windows requests permission to run the program, click Yes.
4. Follow the on-screen instructions.

### **Next Step**

Configuring Taleo Inbox.

## Preparing to Install Taleo Inbox on Multiple Installations

Taleo Inbox can be installed on multiple client computers via push technology.

### Prerequisite

Any previous version of Taleo Inbox must be removed from the targeted computers before installing a newer version.

Microsoft Outlook must be closed on the computers.

Taleo Inbox can be installed in any directory; during the installation, just select the directory you want to designate.

If your organization did not implement SSO, you will need to enter your Taleo user name and password.

### Steps

1. From Salesforce, download the Taleo Inbox administrative installer file and save the file to the Windows desktop or to a local directory on your computer.
2. Double-click the installer file.
3. On a domain controller, open Active Directory - Users and Computers.
4. Right-click an organizational unit that contains the computers on which you want to install Taleo Inbox.
5. Click New.
6. Assign a name to the new policy.
7. Highlight the new Group Policy Object Link and click Edit.
8. In the Group Policy Object Editor window, go to Computer Configuration > Window Settings > Scripts (Startup/Shutdown) > Startup.
9. Right-click Startup, click Properties, click Show Files... in the Startup Properties window.
10. Copy the Taleo Inbox plug-in setup files to the location that appears in the new Windows Explorer. The location will be similar to: \\domain.local\SysVol\domain.local\Policies\<GUID>\Machine\Scripts\Startup.
11. In this new directory, create a new batch file called Setup.bat.
12. Edit the following line and then copy and paste it into the batch file:
  - `msiexec /italeo.plugins.msoutlooksetup.msi /quiet taleohostname="http://www.taleo.com"`
13. Replace "http://www.taleo.com/" by your Taleo server hostname.
14. Click Add... in the dialog from the previous step.
15. Click Browse... then choose the Setup.bat files that you copied in the previous step.
16. Click OK twice, close the Group Policy Object Editor and click Close for the organizational unit's properties.

### Result

Your Group Policy is now ready to automatically distribute the client via a Machine Startup script.

### Next Step

Taleo Inbox is now ready to be installed on workstations.

If a previous version of Taleo Inbox is installed, you can create an Uninstall.bat file and follow the same procedure to uninstall the old Taleo Inbox version before installing the new one. Use the following command line in the batch file: `msiexec /uninstall taleo.plugins.msoutlooksetup.msi /quiet`.

## Configuration

A variety of configuration options can be set to customize Taleo Inbox for Outlook in the organization.

The other settings menu provides the user with the ability to custom configure a few different items that were not available in previous builds of Taleo Inbox.

- **Web Service Parameter:** This setting is used to adjust the amount of time is given to each web service call before a time out error message is displayed. We added this for some locations that have a slower response from the Taleo Servers. A time out can sometimes be produced.
- **Dashboard**
  - **Skip 'Direct Report Summary':** This flag will disable the Direct reports summary so that it isn't shown when the Dashboard loads.
  - **Immediately query direct-report summary data when form opens:** This flag will have the 1st level of Direct Reports Goals and Development activities progress to load when the Dashboard opens. We provide this option as sometimes if the user has many direct reports in the 1st level it can sometimes take more time for the Dashboard to Load.
  - **Display this window on top of all other windows when open:** This will keep the dashboard on top when it is open
- **Create Feedback:** This flag will keep this window on top of all others.
- **Create Candidate:** This flag will keep this window on top of all others.
- **Address Book :**This flag will keep this window on top of all others.
- **Options Toolbar:** We added the options menu to be selected from a Tool Bar not just the Menu bar. This flag will disable enable its view to the user.

## Proxy

Taleo Inbox for Outlook can be configured to work with a proxy used by the organization.

Users can enter proxy information and perform certain actions related to proxies on their workstation:

- specify that the organization uses a proxy
- direct the application to detect the proxy
- enter the proxy server name or address and the port
- enter the user name and password required to access the proxy server
- specify that if Outlook is closed and later reopened, the user will have to provide the proxy user name and password again before gaining access to Taleo Inbox

Or the Users can let the system determine what is needed for the configuration. Most of the proxy information will be pulled from the IE settings.

The system administrator can enter much of the proxy information in the configuration file for Taleo Inbox for Outlook and then place the file on a network server.

## Configuring Taleo Inbox for Outlook 2010

### Prerequisite

Taleo Inbox must be installed on your computer.

If Outlook was open while you were installing Taleo Inbox, close Outlook after the installation procedure is completed and then perform step 1.

### Steps

1. Open Microsoft Outlook 2010.
2. When the Taleo – Welcome window appears, click Scan for Products... The system detects automatically the Taleo products installed by your organization.  
If you do not want this window to be displayed in future, click the check box next to "Do not ask me this information again" before clicking Scan for Products...
3. In the Taleo – Server Address window, provide the Taleo server address used by your organization and proxy server information if your organization uses a proxy.
4. Click OK.
5. In the First Time Sign In window
  - Click Create Taleo Password if your organization implemented SSO.
  - Click Continue if your organization did not implement SSO and you know your user name and Taleo password.
6. If you clicked Continue, enter your user name and password in the corresponding fields.
7. Click Sign In.  
If you do not want this window to be displayed in future, click the check box next to Remember Me before clicking Sign In.

### Result

On the Add-Ins tab of the Outlook main menu, Taleo Inbox icons are displayed.

## Dashboard

The Taleo Inbox Dashboard enables a user to take action on talent management tasks from within Microsoft Outlook.

### Detailed Description

You can perform the following tasks with the Taleo Inbox Dashboard:

- View and respond to feedback requests
- View, approve, and reject tasks such as employee reviews, development plans, goal plans and succession plans
- Verify if you have tasks that have not been completed
- View your goals and related comments, add comments and update progress
- View, accept, and reject invitations from people who want you to be part of their network in the organization
- View and update development activity progress.
- Access Taleo Performance (via the Employee Center link)

### Colors

The user has the ability to change the color schemes for each of the different Widgets contained in the Dashboard. A Right Click on an individual widget displays the Edit Gradient Color option that opens the GradientColorEditor window.

From this window the user can Change the Starting Color, the Ending Color, the Gradient direction (Angle), as well as the degree of the angle. The Restore Default option cancels the changes that were made.

The user also has the ability to change the background color of the Dashboard. Collapsing the Widgets makes the background accessible. A Right Click on the background displays the Edit Back Color option that opens the SingleColorEditor window.

From this window the user can Change the background color. The Restore Default option cancels the changes that were made.

## Manager Dashboard

The Manager Dashboard provides Taleo Performance managers with extended functionality over the standard Dashboard.

Typically a manager in Taleo Performance is someone who has access to the Manager Center and who is responsible for a number of employees (direct reports). The Manager Dashboard enables such people to perform the following actions in addition to those found in the standard Dashboard (see also [Dashboard](#) on page 12):

- Double-click their own name in the left panel to alternately display/hide a list of their direct reports.
- View their direct reports' goals and related comments, add comments and update the progress rate for each goal.
- View their direct reports' development activities and related comments, add comments and update the progress rate for each development activity.
- Double-click the name of a direct report to "drill down" to that person's direct reports and ultimately access associated goals and development activities.

### Direct Reports Summary

The Direct Reports Summary is a simple report that can be used by Managers with direct reports to view his/her progress on Goals and Development Activities from within the Dashboard.

This report allows the Manager of his/her Direct reports, to drill down into all users underneath his/her Direct Reports. A director can go into all his managers and if his managers have direct reports he can get details of their goals and Development activities progressions all the way to an employee with no direct reports.

## Configuration File

The Taleo Inbox for Outlook configuration file contains a host of parameters that can be modified to customize use of Taleo Inbox in the organization.

The configuration file typically accompanies the Taleo Inbox installation file. The file is used when the organization wants to apply the same Taleo Inbox configuration parameters throughout the organization.

Though a brief explanation of most parameters is provided within the configuration file, a few of them are discussed in this section in more detail.

**File location = C:\Program Files\Taleo\Taleo Inbox**

### **A2) PROXY CONFIGURATION**

The parameters in this section can be modified to configure Taleo Inbox for Outlook for use in your organization. The section contains a larger number of parameters than the proxy options in the Taleo Inbox application.

### **A3) LANGUAGE**

In this section, the system administrator can set the locale and the default language usage.

### **A4) Menu and Toolbar**

Allows Users to determine the behavior of the menu Icons and the Toolbar Icons for the different features of the Inbox Plug in: Dashboard, Address Book, Create Candidate, and Create Feedback.

### **A5) Windows (Forms) Control**

Allows Users to make the windows that are opened by the Inbox plug in stay on top of all other active applications.

### **A6) Dashboard Tab Controls Linear Gradient Coloring**

Allows Users to configure the dashboard colors.

### **A7) Dashboard Direct Report Summary**

Allows Users to set: Skip the Direct Report Summary and Perform an Immediate\_Query\_Directreport\_Summary (This allows the user to determine if the query happens as the Dashboard loads).

### **B1) Web Service Host and Client Settings**

This setting allows the IT group to lock Host Name area so that only the clients zone information can be entered via the Configuration file.

### **B2) Gateway Proxy**

TRANSPORT\_ENCODING\_CHUNKED: When the value is true, the plugin will include the "Transfer-Encoding: chunked" within the SOAP header.

MUST\_AUTHENTICATE\_WHEN\_USE\_PROXY: set the value to true if web services must go through a proxy server

Added the ability for the IT group to customize the labels for the Authentication windows.

### **B3) Widgets and Utilities**

This section gives Users the ability to Disable certain features that are not available on the front end.



# Taleo Sidebar

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## Taleo Sidebar

Taleo Sidebar is a component that plugs into Microsoft Internet Explorer browser (provided Taleo supports the version of Internet Explorer you use). It enables users to capture candidates directly into Taleo Recruiting without having to quit the active browser window.

### Detailed Description

Taleo Sidebar provides users the ability to execute tasks such as:

- copy a candidate's resume to the Taleo Sidebar to create a candidate file
- match a candidate to a requisition

### Benefits

- Enables users to capture candidates directly while browsing job boards or other online resources using Internet Explorer.
- Enables users to copy and paste a candidate's resume displayed on a Web page into Taleo Sidebar.
- Enables users to be productive even when they have not opened a Taleo application.

## Installing Taleo Sidebar - Single Installation

Taleo Sidebar can be installed on computers individually.

### Prerequisite

Any previous version of Taleo Sidebar must be removed before installing a newer version.

Internet Explorer must be closed.

Taleo Sidebar can be installed in any directory; during the installation, just select the directory you want to designate.

If your organization did not implement SSO, you will need to enter your Taleo user name and password.

### Steps

1. From Salesforce, download the Taleo Sidebar installer file for a single computer and save the file to the Windows desktop or to a local directory on your computer.
2. Double-click the installer file.
3. Follow the on-screen instructions.

### Next Step

Configuring Taleo Sidebar (See: *Taleo Anywhere for Outlook 2010 and 2007 (Windows) User Guide*).

## Preparing to Install Taleo Sidebar on Multiple Installations

Taleo Sidebar can be installed on multiple client computers via push technology.

### Prerequisite

Any previous version of Taleo Sidebar must be removed from the targeted computers before installing a newer version.

Internet Explorer must be closed.

Taleo Sidebar can be installed in any directory; during installation, just select the directory you want to designate. during the installation.

If your organization did not implement SSO, you will need to enter your Taleo user name and password.

### Steps

1. From Salesforce, download the Taleo Sidebar administrative installer file and save the file to the Windows desktop or to a local directory on your computer.
2. Double-click the installer file.
3. On a domain controller, open Active Directory - Users and Computers.
4. Right-click an organizational unit that contains the computers on which you want to install Taleo Inbox.
5. Click New.
6. Assign a name to the new policy.
7. Highlight the new Group Policy Object Link and click Edit.
8. In the Group Policy Object Editor window, go to Computer Configuration > Window Settings > Scripts (Startup/Shutdown) > Startup.
9. Right-click Startup, click Properties, click Show Files... in the Startup Properties window.
10. Copy the Taleo Sidebar plug-in setup files to the location that appears in the new Windows Explorer. The location will be similar to: \\domain.local\SysVol\domain.local\Policies\<GUID>\Machine\Scripts\Startup.
11. In this new directory, create a new batch file called Setup.bat.
12. Edit the following line and then copy and paste it into the batch file:
  - `msiexec /italeo.plugins.msoutlooksetup.msi /quiet taleohostname="http://www.taleo.com"`
13. Replace "http://www.taleo.com/" by your Taleo server hostname.
14. Click Add... in the dialog from the previous step.
15. Click Browse... then choose the Setup.bat files that you copied in the previous step.
16. Click OK twice, close the Group Policy Object Editor and click Close for the organizational unit's properties.

### Result

Your Group Policy is now ready to automatically distribute the client via a Machine Startup script.

### Next Step

Taleo Sidebar is now ready to be installed on workstations.

If a previous version of Taleo Sidebar is installed, you can create an Uninstall.bat file and follow the same procedure to uninstall the old Taleo Inbox version before installing the new one. Use the following command line in the batch file: `msiexec /uninstall taleo.plugins.msoutlooksetup.msi /quiet`.