



Taleo Enterprise Edition 7.5

Taleo Recruiting Automated Tasks User Guide

July 2009

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Revision History

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The following table provides information on changes that have been made to this document since it was first published.

Date	Modifications	Chapter and Page Number
January 20, 2009	Removed references to "exporting".	
	Added OFCCP section.	"OFCCP and Automated Tasks" on page 1-23
July 29, 2009	All references to archiving were removed from pages 1 and 4 of the previous version of this document.	

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Deleting Using Automated Tasks

Development of the Automated Tasks Module - Motivating Factors

Taleo developed the Automated Tasks module in response to a number of issues expressed by Taleo clients.

- Clients want to be able to “delete” candidate files so they no longer appear in the Staffing WebTop and Manager WebTop but they also want to be able to restore the deleted files should the need arise.

Taleo clients can create tasks in the Administrator WebTop that will “delete” candidate files automatically. If system administrators select **Delete candidate files (all data can later be restored)** when creating an automated task, the files deleted by such a task no longer appear in the Staffing WebTop or Manager WebTop but they are not actually purged from the database. The system administrator can restore a particular candidate file, several files, or even all the files “deleted” by an iteration of the task if necessary. System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis.

- Some clients want to be able to delete candidate files but they also want nonidentifying information to be retained for reporting purposes.

If system administrators choose **Delete candidate files (nonidentifying data can later be used for reporting purposes)** when creating an automated task, nonidentifying data will not be deleted and can be included in reports. Candidate files deleted in this manner cannot be restored afterward.

- Clients want to be able to delete permanently from their (Taleo) databases candidate files they consider are too old to be useful. They also want to be able to delete requisitions, templates, and questions that are no longer required.

The “**Permanently delete...**” function in the Automated Tasks module enables Taleo clients to create tasks that will perform these actions automatically. Although this function is extremely useful, care should always be exercised when creating automated tasks that include it: the candidate files, requisitions, templates, and questions targeted by this function cannot be restored afterward.

System administrators, when creating a task, can limit the task's scope to files that meet specific criteria. They can also specify when the task is to start and indicate whether the task is to be run on a recurring basis.

- As the number of candidate files, requisitions, templates, and questions has increased, the size of Taleo clients’ databases has grown proportionally. The resulting impact on system performance has resulted in clients requesting ways to improve the latter.

The **Permanently delete candidate files** function provides Taleo clients with a highly configurable tool that can result in significantly improved system performance: faster candidate searches, quicker report generation, pages and lists that are displayed more rapidly. All of these performance improvements will result in greater productivity with respect to recruiters and hiring managers.

- Some countries (European for the most part) have strict laws governing the length of time that personal information can be held in databases. Taleo clients who do business in such countries need to be able to delete candidate information in a manner that complies with such legislation.

Taleo clients can use the three new “Delete” functions and the **Permanently delete candidate files** function in particular to ensure that the personal information they have stored in Taleo’s databases conforms to the legislation in the countries in which they do business.

Automated Tasks in the Administrator WebTop

IMPORTANT: The types of tasks that system administrators can create vary from one organization to another. For example, some clients might have an agreement with Taleo that enables them to create tasks to export candidate file data while other clients might be unable to do so.

The Automated Tasks Page

The Automated Tasks page lists all automated tasks the system administrators have created for their organization.

From the Automated Tasks list, system administrators can perform a number of tasks.

- View the list of existing automated tasks and several of their characteristics.
- Create new tasks.
- Edit existing tasks.
- Delete existing tasks.

Viewing the Automated Tasks List

To view the list of automated tasks, perform the following steps.

1. In the Administrator WebTop, click the Automated Tasks icon at the top of the window.
2. The system displays the list of existing automated tasks. The following information regarding each task is displayed along with the task name: the task’s type, status, frequency (recurrence), the most recent date on which the task was started; the next date on which the task will be started (automatically), the processing status of the task, and an action that can be performed with respect to the task.

The task list is typically sorted by alphabetical order of task name. To use a different sorting criterion, click the small triangle next to the column header you want to use as the sorting criterion.

The list of automated tasks includes two “system” tasks, that is, tasks created by Taleo.

- Items deleted from the candidate search results (system task)**
- Restored items not permanently deleted (system task)**

If users of the Staffing WebTop and Manager WebTop perform candidate searches and then delete candidate files, this action triggers the **Items deleted from the candidate search results (system task)** task. The task deletes the candidate files but the latter can later be restored if necessary (provided the files have not been deleted permanently in the interim by another task). To view and restore some or all of the can-

candidate files deleted in the WebTops, system administrators can click the name of the task list and then click **View History**.

System administrators can also use the **Restored items not permanently deleted (system task)** task when they want to restore some or all of the items deleted by a task of type "Delete candidate files (all data can later be restored)" (provided the files have not been deleted permanently in the interim by another task). To do so, the systems administrators click the name of the task in the task list. All items that have been deleted (as opposed to those that have been permanently deleted) are displayed.

Creating an Automated Task

Creating an Automated Task to Delete Candidate Files

To create an automated task to permanently delete candidate files, perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. Click **New Task...** The Automated Task wizard displays the "Type of data" page. While you use the wizard to create an automated task, the current step is displayed in bold characters at the left side of the page.
3. Select the radio button next to **Candidates** and then click **Next**. The system displays the "Actions" step.
4. Select the radio button that corresponds to the type of deletion you want the task to perform.

•Delete candidate files (all data can later be restored)

Select this type of deletion if you want the task to remove candidate files from the Staffing WebTop and the Manager WebTop but you want to be able to restore the files if necessary afterward. Reports can include candidate files deleted in this manner.

If the candidates referred other candidates, such references are deleted and cannot be restored afterward even if the candidate files are later restored.

•Delete candidate files (nonidentifying data can later be used for reporting purposes)

Select this type of deletion if you want the task to delete candidate files but you want the system to retain nonidentifying data for reporting purposes.

IMPORTANT: Candidate files deleted in this manner cannot be restored afterward. It is important, therefore, to select the task criteria with care to ensure that the correct files will be deleted. Before selecting a criterion, be sure to study both the criteria's description and the accompanying example, if one is provided, in the online help. When in doubt, contact Taleo Technical Support.

To view the "identifying" information that is deleted and cannot be restored with respect to candidate files that are deleted by a task whose "action" is **Delete candidate files (nonidentifying data can later be used for reporting purposes)**, see the "[OFCCP and Automated Tasks](#)" section.

If the candidates referred other candidates, such references are deleted and cannot be restored afterward.

•Permanently delete candidate files

Select this type of deletion if you want the task to delete candidate files permanently.

IMPORTANT: An automated task created to permanently delete candidate files deletes the latter permanently, leaving no trace of their existence in the Taleo database apart from each candidate's name, email address, and place of residence, which are displayed on the history page of each iteration of the task (see the [“Viewing the “History” of an Automated Task”](#) section). Because such files cannot be restored afterward, it is important to select the task criteria with care, thereby ensuring that the correct files will be deleted permanently. Before selecting a criterion, be sure to study both the criteria's description and the accompanying example, if one is provided, in the online help. When in doubt, contact Taleo Technical Support.

Note: If the candidates referred other candidates, such references are deleted and cannot be restored afterward.

5. Click **Next** to proceed to the next step. The system displays the “Criteria” step.
6. The action you selected earlier will be performed on some candidate files and not on others based on the criteria you select. You must select at least one of the criteria and provide a value.

Note: Selecting a criterion that includes a date usually provides greater precision.

Note: The task will process only candidate files that satisfy **all** of the criteria you select.

Include candidate files whose “Creation Date” is older than:

Select the check box next to this criterion if you want the task to process candidate files that were created earlier than a specific period immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process candidate files whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.

Include candidate files whose “Candidate File Last Update” has not changed in the last:

Select the check box next to this criterion if you want the task to process candidate files that were not modified during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process candidate files whose “Candidate File Last Update” date was earlier than March 1st, and satisfied all the other criteria you might have selected.

To consult the list of changes that trigger an update to the “Candidate File Last Update”, see the [“Events that Trigger Updates to “Candidate File Last Update” and “Last Activity Date””](#) section.

Include candidate files whose “Last Activity Date” has not changed in the last:

Select the check box next to this criterion if you want the task to process candidate files whose “Last Activity Date” has not changed during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process candidate files whose “Last Activity Update” date was earlier than March 1st, and satisfied all the other criteria you might have selected.

To consult the list of changes that trigger an update to the “Last Activity Date”, see the [“Events that Trigger Updates to “Candidate File Last Update” and “Last Activity Date””](#) section.

Include candidate files that were deleted X days ago or before:

Select the check box next to this criterion if you want the task to process candidate files that were deleted on a specific day (relative to the day the task will be executed) or earlier but are restorable (i.e., were not deleted permanently). If you select this criterion, you must also enter the number of days.

Suppose, for example, that you selected this criterion and then entered **7**. If the task was executed on the 21st of the month the task would process candidate files that were deleted – but are restorable – on the 14th of the month or earlier, and satisfied all the other criteria you might have selected.

Exclude internal candidates.

Select the check box next to this criterion if you do not want the task to process candidate files of internal candidates.

Exclude candidate files whose status is “Hired” on a requisition.

Select the check box next to this criterion if you want to exclude from the task candidate files of candidates whose status is “Hired” on at least one requisition. In other words, they are currently employed by the organization. To avoid deleting permanently employees who have been hired outside of the system (and who consequently do not have the “Hired” status), it is recommended that you also select the **Exclude internal candidates** criterion.

Include candidates who have no completed profile or application.

Select the check box next to this criterion if you want the task to process candidate files of candidates who have not completed any career section flow (profiler or job-specific application), and satisfy all the other criteria you might have selected.

The following candidates, even if they have not completed any career section flow as such, are considered to have “completed applications” and thus will not be deleted permanently by the task.

- Candidates who are matched to a requisition.
- Candidates who are entered in the system by way of the Capture Resume or the import toolkit
- Candidates who are hired.

Include candidate files marked as “Identification Missing”.

Select the check box next to this criterion if you want the task to process candidate files that have been identified as “Identification Missing”, and satisfy all the other criteria you might have selected. Candidates provided no identification (first name, last name, initial), and did not indicate that they wished to be anonymous.

Include candidates who are not currently active in a selection process.

Select the check box next to this criterion if you want the task to process candidate files of candidates who are not currently part of a selection process on an “active” requisition, and satisfy all the other criteria you might have selected. An “active” requisition is one that has not been rejected, marked as “has declined”, deleted, cancelled, or filled.

For example, the task would not delete permanently a candidate who was at the Background Check step in a selection process on an “active” requisition.

Include candidates who have not applied on any requisition in the last:

Select the check box next to this criterion if you want the task to process candidate files of candidates who have not applied on any requisition during a specific period of time prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process candidate files of candidates who had not applied on any requisition from March 1st to August 31st.

Include candidates who were referred by an agent X ago or earlier:

Select the check box next to this criterion if you want the task to process candidate files of candidates who were referred by an agent at a point in time or earlier, and satisfy all the other criteria you might have selected. The task will delete candidates whose first General Profile has an agent in the Source field.

Note that the Source field can be updated in the Staffing WebTop. This criterion uses the current value of the field to determine whether a candidate is to be deleted.

Include candidates whose “Place of Residence” is one of the following locations:

Select the check box next to this criterion if you want the task to process candidate files of candidates who have a particular place of residence, and satisfy all the other criteria you might have selected.

Click **Add...** to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click **Remove All**.

Include candidates who have applied on a requisition whose “Primary Location” is one of the following:

Select the check box next to this criterion if you want the task to process candidate files of candidates who submitted a job-specific application for a requisition that specifies a particular primary location, and that satisfy all the other criteria you might have selected. You could use this criterion, for example, to delete permanently candidate files of candidates who indicated they wanted to work in a particular country but lived in another country.

Click **Add...** to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click **Remove All**.

Exclude candidates who have applied on a requisition whose “Primary Location” is one of the following:

Select the check box next to this criterion if you want to exclude from the task candidate files of candidates who submitted a job-specific application for a requisition that specifies a particular primary location, and that satisfy all the other criteria you might have selected. You could use this criterion, for example, to prevent candidate files of candidates who indicated they wanted to work in a particular country but lived in another country from being deleted.

This criterion can be used in conjunction with the two previous criteria to gain greater control when deleting candidates in keeping with a specific country's regulations.

Click **Add...** to add locations. If you add a location and then wish to remove it from the list, click the Remove icon that corresponds to the location. If you wish to remove all the locations you added, click **Remove All**.

7. Click **Next** to proceed to the next step. The system displays the "Task properties" step.
 8. Type the name and code of the task you want to create in the corresponding fields.
 9. Perform one of the following steps.
 - If you want the task to be activated when it is created, select the radio button that corresponds to **Active** in the Status section.
 - Select the radio button that corresponds to **Inactive** in the Status section if you do not want the task to run. A task whose status is **Inactive** will not run regardless of its execution date or recurrence.
- You can change a task's status at any time except while the task is processing items.
10. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.
 11. If you do not want the task to be run on a regular basis, select the check box next to **No** in the Recurrence section. If you want the task to be run regularly, select the check box next to **Yes** and then select a frequency from the list.
 12. Click **Next** to proceed to the next step. The system displays the "Summary" step.
 13. The "Summary" step displays the various elements of the task based on the selections you made at each of the previous steps.
 - If you want to modify the information that is displayed on the summary page, click **Previous** to review previous pages and modify your selections. (You can also edit a task after it is created except while it is processing items.)
 - If the information is correct, click **Finish**.

IMPORTANT: The "Summary" step contains a section generated by the system: Count. This section indicates the number of candidate files that would be deleted if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. **It is recommended that you click the link in the Count section to view the list of candidate files that would be deleted. By studying the list of candidate files, you can determine whether the task targets the ones you want it to delete.**

Creating an Automated Task to Delete Requisitions

IMPORTANT: An automated task created to permanently delete requisitions deletes the latter permanently, leaving no trace of their existence in the Taleo database apart from the database ID, req-

quisition number, requisition title, and creation date of each requisition, which are displayed on the history page of each iteration of the task (see the [“Viewing the “History” of an Automated Task”](#) section). Because such requisitions cannot be restored afterward, it is important to select the task criteria with care, thereby ensuring that the correct requisitions will be deleted permanently. Before selecting a criterion, be sure to study both the criteria's description and the accompanying example, if one is provided, in the online help. When in doubt, contact Taleo Technical Support.

To create an automated task to permanently delete requisitions, perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. Click **New Task...** The Automated Task wizard displays the “Type of data” page. While you use the wizard to create an automated task, the current step is displayed in bold characters at the left side of the page.
3. Select the radio button next to **Requisitions** and then click **Next**. The system displays the “Actions” step.
4. Select the radio button next to **Permanently delete requisitions**. The automated task, once created and activated, can be run to permanently delete requisitions from the database. You will be unable to restore the deleted requisitions at a later time.
5. Click **Next** to proceed to the next step. The system displays the “Criteria” step.
6. The action you selected earlier will be performed on some requisitions and not on others based on the criteria you select. You must select at least one of the criteria and provide a value.

Note: Selecting a criterion that includes a date usually provides greater precision.

Note: The task will process only requisitions that satisfy **all** of the criteria you select.

Include requisitions whose “Requisition Number” starts with:

Select the check box next to this criterion if you want the task to process requisitions whose requisition number starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the requisition number(s) in the field.

For example, if you wanted to delete permanently all requisitions whose requisition number started with “REQ-Finance-001-”, you would enter **REQ-Finance-001-** in the field.

Include requisitions whose “Title” starts with:

Select the check box next to this criterion if you want the task to process requisitions whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field.

For example, if you wanted to delete permanently all requisitions whose title started with “FE-class II”, you would enter **FE-class II** in the field.

Include requisitions whose “Creation Date” is older than:

Select the check box next to this criterion if you want the task to process requisitions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process requisitions whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.

Include requisitions whose “Last Modification Date” is older than:

Select the check box next to this criterion if you want the task to process requisitions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process requisitions whose “Last Modification Date” was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.

Include requisitions whose “Status” is:

Select the check box next to this criterion if you want the task to process requisitions that have a particular Status, and satisfy all the other criteria you might have selected. It is recommended that you select from the list **Filled**, **Canceled**, or **Deleted** (though it is possible to select one of the other statuses).

Include requisitions whose “Primary Location” is one of the following:

Select the check box next to this criterion if you want the task to process requisitions that specify a particular Primary Location, and satisfy all the other criteria you might have selected.

Click **Add...** to add locations. If you add a location and then wish to remove it from the list, click the **Remove** icon that corresponds to the location. If you wish to remove all the locations you added, click **Remove All**.

Include requisitions whose “Organization” is one of the following:

Select the check box next to this criterion if you want the task to process requisitions that specify a particular Organization, and satisfy all the other criteria you might have selected.

Click **Add...** to add organizations. If you add an organization and then wish to remove it from the list, click the **Remove** icon that corresponds to the organization. If you wish to remove all the organizations you added, click **Remove All**.

Include requisitions whose “Job” is one of the following:

Select the check box next to this criterion if you want the task to process requisitions that specify a particular Job, and satisfy all the other criteria you might have selected.

Click **Add...** to add jobs. If you add a job and then wish to remove it from the list, click the **Remove** icon that corresponds to the job. If you wish to remove all the jobs you added, click **Remove All**.

7. Click **Next** to proceed to the next step. The system displays the “Task properties” step.
8. Type the name and code of the task you want to create in the corresponding fields.
9. Perform one of the following steps.

- If you want the task to be activated when it is created, select the radio button that corresponds to **Active** in the Status section. A task's status should not be confused with its execution date or recurrence.
- Select the radio button that corresponds to **Inactive** in the Status section if you do not want the task to run. A task whose status is **Inactive** will not run regardless of its execution date or recurrence.

You can change a task's status at any time.

10. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.
11. If you do not want the task to be run on a regular basis, select the check box next to **No** in the Recurrence section. If you want the task to be run regularly, select the check box next to **Yes** and then select a frequency from the list.
12. Click **Next** to proceed to the next step. The system displays the "Summary" step.
13. The "Summary" step displays the various elements of the task based on the selections you made at each of the previous steps.
 - If you want to modify the following information, click **Previous** to review previous pages and modify your selections.
 - If the following information is correct, click **Finish**.

The "Summary" step also contains a new section generated by the system: Count. This section indicates the number of requisitions that would be deleted permanently if the task's status was Active and the task was run immediately. How is this feature useful? Suppose you created a new task, which included a number of criteria, to delete certain requisitions permanently. The information contained in the Count section of the "Summary" step provides you with an estimate of the number of requisitions that will be deleted whenever the task will be run. This information can be useful when evaluating the load that the system will incur while the task is running.

IMPORTANT: The "Summary" step contains a section generated by the system: Count. This section indicates the number of requisitions that would be deleted permanently if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. **It is recommended that you click the link in the Count section to view the list of requisitions that would be deleted. By studying the list of requisitions, you can determine whether the task targets the requisitions you want it to delete permanently.**

Creating an Automated Task to Permanently Delete Templates

IMPORTANT: An automated task created to permanently delete templates deletes the latter permanently, leaving no trace of their existence in the Taleo database apart from each template's database ID, job code, template title, and creation date, which are displayed on the history page of each iteration of the task (see the "[Viewing the "History" of an Automated Task](#)" section). Because such templates cannot be restored afterward, it is important to select the task criteria with care, thereby ensuring that the correct templates will be deleted permanently. Before selecting a criterion, be sure to study both the criteria's description and the accompanying example, if one is provided, in the online help. When in doubt, contact Taleo Technical Support.

To create an automated task to permanently delete templates, perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. Click **New Task...** The Automated Task wizard displays the "Type of data" page. While you use the wizard to create an automated task, the current step is displayed in bold characters at the left side of the page.
3. Select the radio button next to **Templates** and then click **Next**. The system displays the "Actions" step.
4. Select the radio button next to **Permanently delete templates**. The automated task, once created and activated, can be run to permanently delete templates from the database. You will be unable to restore the deleted templates at a later time.
5. Click **Next** to proceed to the next step. The system displays the "Criteria" step.
6. The action you selected earlier will be performed on some templates and not on others based on the criteria you select. You must select at least one of the criteria and provide a value.

Note: Selecting a criterion that includes a date usually provides greater precision.

Note: The task will process only templates that satisfy **all** of the criteria you select.

Include templates whose "Job Code" starts with:

Select the check box next to this criterion if you want the task to process templates whose job code starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the job code(s) in the field.

For example, if you wanted to delete permanently all templates whose job code started with "Templ-Finance-001-", you would enter **Templ-Finance-001-** in the field.

Include templates whose "Title" starts with:

Select the check box next to this criterion if you want the task to process templates whose title starts with a particular series of characters and/or numbers, and satisfy all the other criteria you might have selected. Enter the beginning of the title(s) in the field.

For example, if you wanted to delete permanently all templates whose title started with "FE-class II", you would enter **FE-class II** in the field.

Include templates whose "Creation Date" is older than:

Select the check box next to this criterion if you want the task to process templates that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process templates whose "Creation Date" was March 1st or earlier, and satisfied all the other criteria you might have selected.

Include templates whose "Last Modification Date" is older than:

Select the check box next to this criterion if you want the task to process templates that were not modified during a specific period of time immediately prior to the moment the task is executed. If

you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process templates whose “Last Modification Date” was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.

Include templates whose “Status” is:

Select the check box next to this criterion if you want the task to process templates that have a particular Status, and satisfy all the other criteria you might have selected.

Include templates whose “Primary Location” is one of the following:

Select the check box next to this criterion if you want the task to process templates that specify a particular Primary Location, and satisfy all the other criteria you might have selected.

Click **Add...** to add locations. If you add a location and then wish to remove it from the list, click the **Remove** icon that corresponds to the location. If you wish to remove all the locations you added, click **Remove All**.

Include templates whose “Organization” is one of the following:

Select the check box next to this criterion if you want the task to process templates that specify a particular Organization, and satisfy all the other criteria you might have selected.

Click **Add...** to add organizations. If you add an organization and then wish to remove it from the list, click the **Remove** icon that corresponds to the organization. If you wish to remove all the organizations you added, click **Remove All**.

Include templates whose “Job” is one of the following:

Select the check box next to this criterion if you want the task to process templates that specify a particular Job, and satisfy all the other criteria you might have selected.

Click **Add...** to add jobs. If you add a job and then wish to remove it from the list, click the **Remove** icon that corresponds to the job. If you wish to remove all the jobs you added, click **Remove All**.

7. Click **Next** to proceed to the next step. The system displays the “Task properties” step.
8. Type the name and code of the task you want to create in the corresponding fields.
9. Perform one of the following steps.
 - If you want the task to be activated when it is created, select the radio button that corresponds to **Active** in the Status section. A task's status should not be confused with its execution date or recurrence.
 - Select the radio button that corresponds to **Inactive** in the Status section if you do not want the task to run. A task whose status is **Inactive** will not run regardless of its execution date or recurrence.

You can change a task's status at any time.

10. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.

11. If you do not want the task to be run on a regular basis, select the check box next to **No** in the Recurrence section. If you want the task to be run regularly, select the check box next to **Yes** and then select a frequency from the list.
12. Click **Next** to proceed to the next step. The system displays the “Summary” step.
13. The “Summary” step displays the various elements of the task based on the selections you made at each of the previous steps.
 - If you want to modify the following information, click **Previous** to review previous pages and modify your selections.
 - If the following information is correct, click **Finish**.

IMPORTANT: The “Summary” step contains a section generated by the system: Count. This section indicates the number of templates that would be deleted permanently if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. **It is recommended that you click the link in the Count section to view the list of templates that would be deleted. By studying the list of templates, you can determine whether the task targets the ones you want it to delete permanently.**

Creating an Automated Task to Permanently Delete Questions

IMPORTANT: An automated task created to permanently delete requisitions deletes the latter permanently, leaving no trace of their existence in the Taleo database apart from each question's database ID, question, and creation date, which are displayed on the history page of each iteration of the task. Because such questions cannot be restored afterward, it is important to select the task criteria with care, thereby ensuring that the correct questions will be deleted permanently. Before selecting a criterion, be sure to study both the criteria's description and the accompanying example, if one is provided, in the online help. When in doubt, contact Taleo Technical Support.

To create an automated task to permanently delete questions, perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. Click **New Task...** The Automated Task wizard displays the “Type of data” page. While you use the wizard to create an automated task, the current step is displayed in bold characters at the left side of the page.
3. Select the radio button next to **Questions** and then click **Next**. The system displays the “Actions” step.
4. Select the radio button next to **Permanently delete questions**. The automated task, once created and activated, can be run to permanently delete questions from the database. You will be unable to restore the deleted questions at a later time.
5. Click **Next** to proceed to the next step. The system displays the “Criteria” step.
6. The action you selected earlier will be performed on some questions and not on others based on the criteria you select. You must select at least one of the criteria and provide a value.

Note: Selecting a criterion that includes a date usually provides greater precision.

Note: The task will process only questions that satisfy **all** of the criteria you select.

Include questions whose “Creation Date” is older than:

Select the check box next to this criterion if you want the task to process questions that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process questions whose “Creation Date” was March 1st or earlier, and satisfied all the other criteria you might have selected.

Include questions whose “Last Modification Date” is older than:

Select the check box next to this criterion if you want the task to process questions that were not modified during a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also select the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process questions whose “Last Modification Date” was unchanged from March 1st to August 31st, and satisfied all the other criteria you might have selected.

Include questions whose “Type” is:

Select the check box next to this criterion if you want the task to process questions of a particular type, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the type of question (**Prescreening** or **Disqualification**) by making a selection from the corresponding list.

Include questions whose “Status” is:

Select the check box next to this criterion if you want the task to process questions that have a particular Status, and satisfy all the other criteria you might have selected. If you select this criterion, you must also specify the Status (**Active**, **Inactive**, or **Obsolete**) by making a selection from the corresponding list.

7. Click **Next** to proceed to the next step. The system displays the “Task properties” step.
8. Type the name and code of the task you want to create in the corresponding fields.
9. Perform one of the following steps.
 - If you want the task to be activated when it is created, select the radio button that corresponds to **Active** in the Status section. A task's status should not be confused with its execution date or recurrence.
 - Select the radio button that corresponds to **Inactive** in the Status section if you do not want the task to run. A task whose status is **Inactive** will not run regardless of its execution date or recurrence.

You can change a task's status at any time.
10. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.

11. If you do not want the task to be run on a regular basis, select the check box next to **No** in the Recurrence section. If you want the task to be run regularly, select the check box next to **Yes** and then select a frequency from the list.
12. Click **Next** to proceed to the next step. The system displays the “Summary” step.
13. The “Summary” step displays the various elements of the task based on the selections you made at each of the previous steps.
 - If you want to modify the following information, click **Previous** to review previous pages and modify your selections.
 - If the following information is correct, click **Finish**.

The “Summary” step also contains a new section generated by the system: Count. This section indicates the number of questions that would be deleted permanently if the task's status was Active and the task was run immediately. How is this feature useful? Suppose you created a new task, which included a number of criteria, to delete certain questions permanently. The information contained in the Count section of the “Summary” step provides you with an estimate of the number of questions that will be deleted whenever the task will be run. This information can be useful when evaluating the load that the system will incur while the task is running.

IMPORTANT: The “Summary” step contains a section generated by the system: Count. This section indicates the number of questions that would be deleted permanently if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. **It is recommended that you click the link in the Count section to view the list of questions that would be deleted. By studying the list of questions, you can determine whether the task targets the ones you want it to delete permanently.**

Creating an Automated Task to Permanently Delete “History of:”

An automated task created to permanently delete history data completely destroys the latter, leaving no trace of their existence in the database. Because such files cannot be restored afterward, it is important to select the task criteria with care, thereby ensuring that the correct history data will be deleted permanently. To create an automated task to permanently delete History of:, perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. Click **New Task...** The Automated Task wizard displays the “Type of data” page. While you use the wizard to create an automated task, the current step is displayed in bold characters at the left side of the page.
3. Select the radio button next to **History of:** and then select the entity (**Users, Groups, User type**) whose history data you want delete permanently and finally, click **Next**. The system displays the “Actions” step.
4. Select the radio button next to **Permanently delete history**. The automated task, once created and activated, can be run to permanently delete the history data (you selected) from the database. You will be unable to restore the deleted history data at a later time.
5. Click **Next** to proceed to the next step. The system displays the “Criteria” step.
6. The action you selected earlier will be performed on some History and not on others based on the criteria you select.

Include history data whose “Event Date” is older than:

Select the check box next to this criterion if you want the task to process task history data that were created earlier than a specific period of time immediately prior to the moment the task is executed. If you select this criterion, you must also specify the time period by making a selection from the corresponding list.

Suppose, for example, that you selected **6 months** and that the task was executed on August 31st. The task would process history data whose “Event Date” was March 1st or earlier.

7. Click **Next** to proceed to the next step. The system displays the “Task properties” step.
 8. Type the name and code of the task you want to create in the corresponding fields.
 9. Perform one of the following steps.
 - If you want the task to be activated when it is created, select the radio button that corresponds to **Active** in the Status section. A task's status should not be confused with its execution date or recurrence.
 - Select the radio button that corresponds to **Inactive** in the Status section if you do not want the task to run. A task whose status is **Inactive** will not run regardless of its execution date or recurrence.
- You can change a task's status at any time.
10. To indicate the day on which you want the task to start running, make a selection using the calendar icon in the **Task Execution Date** section.
 11. If you do not want the task to be run on a regular basis, select the check box next to **No** in the Recurrence section. If you want the task to be run regularly, select the check box next to **Yes** and then select a frequency from the list.
 12. Click **Next** to proceed to the next step. The system displays the “Summary” step.
 13. The “Summary” step displays the various elements of the task based on the selections you made at each of the previous steps.
 - If you want to modify the following information, click **Previous** to review previous pages and modify your selections.
 - If the following information is correct, click **Finish**.

The “Summary” step also contains a new section generated by the system: Count. This section indicates the number of history items that would be deleted permanently if the task's status was Active and the task was run immediately. How is this feature useful? Suppose you created a new task, which included a number of criteria, to delete certain questions permanently. The information contained in the Count section of the “Summary” step provides you with an estimate of the number of questions that will be deleted whenever the task will be run. This information can be useful when evaluating the load that the system will incur while the task is running.

IMPORTANT: The “Summary” step contains a section generated by the system: Count. This section indicates the number of History items that would be deleted permanently if the task's status was Active and the task was run at that moment. This information can be useful when evaluating the load that the system will likely incur when the task is run. **It is recommended that you click the link in**

the Count section to view the list of History items that would be deleted. By studying the list of History items, you can determine whether the task targets the ones you want it to delete permanently.

Viewing a Specific Automated Task's Details

To view the details of a specific automated task, perform the following steps.

1. In the Administrator WebTop, click the **Automated Tasks** icon at the top of the window.
2. The system displays the list of existing automated tasks. The following information regarding each task is displayed along with the task name: the task's type, status, frequency (recurrence), the most recent date on which the task was started; the next date on which the task will be started (automatically), the processing status of the task, and an action that can be performed with respect to the task.

The task list is typically sorted by alphabetical order of task name. To use a different sorting criterion, click the small triangle next to the column header you want to use as the criterion.

3. In the Name column, click the name of the task whose details you want to view. The system displays a new page on which the task's details are displayed. The task details typically include the following information.
 - The actions that you can initiate with respect to the task. Actions might include **Execute**, **Stop**, and **Delete**.
 - The type of data that the task processes (candidates, WebTop users, requisitions, templates, or questions).
 - The type of action that the task performs, for example, **Permanently delete**.
 - The last execution date, the status of the last execution, and the number of items processed.
 - The next execution date, the status of the next execution, and the number of items that would be processed if the task was started immediately. Knowing the number of items can be useful when evaluating the load that the system will likely incur when the task is run. You can click the number to view the list of items that would be processed. By studying the list of items, you can determine whether the task targets the correct items.
 - The Task Properties section contains information concerning the task's name, its status (**Active** or **Inactive**), the execution date, and the task's recurrence if the task is performed on a recurring basis.
 - The criteria that determine which items the task processes.

Starting an Automated Task Immediately

If you want to execute a task immediately rather than wait for the task to begin automatically at the scheduled time, perform the following steps.

1. Open the task details page of the task you want to execute (consult the ["Viewing a Specific Automated Task's Details"](#) section if necessary).
2. If **Execute** is displayed in the left column, click the icon, and then the task will begin processing the items immediately.

Note: You cannot execute a task that is already running or whose status is **Inactive**. If you need to change the task's status to **Active** (in the Task Properties section), click **Edit...** (in the Task Properties section) and then select the radio button that corresponds to **Active**.

Stopping an Automated Task while It is Running

You can attempt to stop a task while it is running rather than wait for the task to finish processing all of the items by performing the following steps.

1. Open the task details page of the task you want to stop (consult the [“Viewing a Specific Automated Task’s Details”](#) section if necessary).
2. If **Stop** is displayed in the left column, click the icon, and then the task will typically stop processing the items.

If the task is processing a *batch* of items when you click **Stop**, the task will stop after it has finished processing the batch.

Note: If you stop an automated task that has been configured to run on a recurring basis, it will indeed start again at the next scheduled time. To prevent a recurring task from running in the future, you must change its status to **Inactive** or select **No** in the Recurrence section of the task details page). Consult the [“Stopping a Recurring Task from Executing in the Future”](#) section.

Editing an Automated Task

To edit tasks you have created (“System” tasks cannot be edited), perform the following steps. A task cannot be edited while it is running.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.
2. To modify a task, click the link that corresponds to the name of the task, and then the system will display a summary of the task information.
3. If you want to edit the task property information, click **Edit...** in the Task Properties section and then make your changes on the page that appears.
4. If you want to edit the task criteria (criteria are used to specify which items the task will process), click **Edit...** in the Criteria section and then make your changes on the Criteria page.
5. Click **Done** when you are satisfied with your changes.

Editing an Automated Task’s Execution Dates and Recurrence (Frequency)

You can view a task’s last execution date (or run date), view or edit the task’s next execution date, and view or edit the task’s frequency (recurrence) by performing the following steps.

1. In the Name column of the Automated Tasks list, click the name of the task whose execution dates or recurrence you want to view or edit. The system displays a new page on which the task’s details are displayed. The task’s last and next execution dates are displayed in the Overview section.

2. Perform one of the following steps or both of them.
 - To edit the next execution date, click **Edit...** in the Task Properties section and then use the calendar icon in the Execution Date section to specify a new execution date.
 - To edit the task's frequency click **Edit...** in the Task Properties section and then select one of the radio buttons in the Recurrence section: **No** if you do not the task to run on a recurring basis; **Yes** if you do want the task to run repeatedly. In the latter case, you must specify when the task is to be run (i.e. how often) by making a selection from the corresponding list.

Stopping a Recurring Task from Executing in the Future

1. Open the task details page of the recurring task you want to stop (consult the [“Viewing a Specific Automated Task’s Details”](#) section if necessary).
2. In the Task Properties section, click **Edit...**
3. Perform one of the following steps.
 - Click the radio button next to **Inactive** and then click **Done**. The task will not run until you change its status to **Active**.
 - If you want the task to run on the start date but do not want it to run on a recurring basis afterward, click the radio button next to **No** in the Recurrence section.

Viewing the “History” of an Automated Task

You can view information regarding the history of a task. This is particularly useful when you want to study the results of a task that is run repeatedly.

1. In the Administrator WebTop, click the **Automated Tasks** icon at the top of the window.
2. The system displays the list of existing automated tasks. Click the link that corresponds to the task whose history you want to view. A new page is displayed that includes information about the task.
3. In the Snapshot section, click **View History**. A new page is displayed that includes “historical” information about each past and current iteration of the task: the day and time that each iteration started and ended, the length of time during which the task ran, the name of the person or the system that initiated the iteration, the iteration's current status, the number of items processed, and the number of errors.
4. To return to the list of automated tasks, click **Back**.

Viewing the Items that an Automated Task Processed

You can view the list of items processed for each iteration of a particular task.

1. In the Administrator WebTop, click the **Automated Tasks** icon at the top of the window.
2. The system displays the list of existing automated tasks. Click the link that corresponds to the task whose history you want to view. A new page is displayed that includes information about the task.
3. In the Snapshot section, click **View History**. A new page is displayed that includes “historical” information about each past and current iteration of the task: the day and time that each iteration

started and ended, the length of time during which the task ran, the name of the person or the system that initiated the iteration, the iteration's current status, the number of items processed, the number of items not processed, and the number of errors.

4. Locate the iteration whose items you want to view and then click the corresponding number in the Nb. Processed column. This column lists the number of items processed by a particular iteration of the task. A new page is displayed that includes information about all of the items that were processed by the particular iteration of the task. The columns and the information they contain vary according to the type of task. For example, the columns and information that are displayed for an Export Candidates type of task is different from the columns and information that are displayed for Permanently Delete Requisitions type of task.

Restoring Items Deleted by an Automated Task

1. In the Administrator WebTop, click the **Automated Tasks** icon at the top of the window.
2. The system displays the list of existing automated tasks. Click the link that corresponds to the task you want to view. A new page is displayed that includes information about the task.
3. In the Snapshot section, click **View History**. A new page is displayed that includes “historical” information about each past and current iteration of the task: the day and time that each iteration started and ended, the length of time during which the task ran, the name of the person or the system that initiated the iteration, the iteration's current status, the number of items processed, and the number of errors.
4. Locate the iteration whose items you want to view and then click the corresponding number in the Nb. Processed column. A new page is displayed that includes information about all of the items that were processed by the particular iteration of the task. The columns and the information they contain vary according to the type of task. For example, the columns and information that are displayed for an Export Candidates type of task is different from the columns and information that are displayed for Permanently Delete Requisitions type of task.
5. To restore a deleted item, perform one of the following steps.
 - Locate the item in the list.
 - Use the Search tool, if there are a large number of deleted items, by entering your search term in the Search field and then clicking **Search**.

The search engine will search for the term among all the items deleted by the task including all iterations of a recurrent task, The search engine will not search for the term among the items deleted by different tasks (even if the tasks are of the same type (for example, two different tasks that delete candidate files)).

Locate the item in the results list.

6. Click the **Restore** icon that corresponds to the item you want to restore. Alternatively, if you want to restore all of the items that were deleted by the iteration, click **Restore All**.

Note: In the case of deleted candidate files, if the candidates had referred other candidates, such references cannot be restored afterward even if the candidate files are later restored.

Deleting an Automated Task

To delete a task (other than a “System” task, which cannot be deleted), perform the following steps.

1. In the Administrator WebTop, click the Automated Task icon at the top of the window. The system displays the list of existing automated tasks.

2. Perform one of the following steps.

- Click the **Delete Task** icon that corresponds to the task you want to delete and then click **OK** to confirm your decision.

Note: If the task's status in the Processing column is Running, the task cannot be deleted directly.

- Click the link that corresponds to the task you want to delete. The system displays a summary of the task information, which you can consult. Click **Delete** to delete the task and then click **OK** to confirm your decision.

Note: The task cannot be deleted directly if it is currently running. You can wait until the task has finished processing the items and then click **Delete** and **OK**, or you can attempt to stop the task, if it was started manually, by clicking **Stop** and then delete it by clicking **Delete** and **OK**.

Deleting Candidate Files in the Staffing WebTop

IMPORTANT: If your organization is not subject to the Office of Federal Contract Compliance Programs (OFCCP) regulation regarding the collection of candidates' gender, race and ethnicity data, all of the information contained in this section applies to you. If your organization is subject to the OFCCP regulation, and the company setting that controls whether Advanced and Conceptual Search results are logged and kept for a period of two years is activated, the information contained in this section applies only to the Quick Search. In other words, the recruiters and hiring managers will be unable to delete candidates files of candidates who are displayed in Advanced and Conceptual Search results.

When you are using the Staffing WebTop, you can delete up to thirty candidate files at a time (and possibly up to one hundred depending on your MaximumSelectedItems setting) provided you possess the necessary permissions. The deleted candidate files do not appear in the Staffing WebTop or Manager WebTop but they are not deleted permanently from the Taleo databases until your system administrator performs this task.

1. Using the Staffing WebTop, you first locate the candidate(s) you want to delete. You typically do this by performing a Quick Search, a Conceptual Search, or an Advanced Search.
2. From the search results list, you identify the candidates whose candidate file you want to delete. To verify that the files you think you have identified for deletion are the right ones, display each of the files and study its contents.
3. Select the check box that corresponds to each candidate file you want to delete, up to thirty of them (and possibly up to one hundred depending on your MaximumSelectedItems setting), and then click the Delete Candidate File icon.
4. To delete the files, click **Yes**, when a message requesting confirmation appears.

5. The deleted candidate files no longer appear in the Staffing WebTop or Manager WebTop. If you delete a candidate file by mistake, contact your system administrator as soon as possible; it might be possible to restore the file.

The candidates whose files were deleted can no longer gain access to their profile by way of career sections, and new candidates can use the user name previously used by the deleted candidates.

If the candidates have been associated with a requisition, their “place” on the requisition does not become available until they are deleted permanently from the Taleo databases (a task only your system administrator can perform).

Data regarding the deleted candidate files can, however, still be included in reports in the Staffing Metrics Reporter.

If the system administrator later restores the deleted candidate files, the **Tracking** tab mentions when the deletion occurred and the name of the person who initiated the deletion. The system administrator can also delete permanently candidate files.

OFCCP and Automated Tasks

The purpose of the OFCCP feature, within the context of candidate searches, is to keep a record of the search results whenever a user performs a search for candidates for a requisition.

When a user performs a search for candidates for a specific requisition, a log file that contains the candidates retrieved by the search is created. Once the candidate is entered in the log, the candidate entry cannot be deleted for two years. Such log files can be indispensable if the organization has to undergo an audit.

Impact on Automated Tasks

If you create and run a task to delete (“all data can later be restored” or “nonidentifying data can later be used for reporting purposes”) candidate files, future candidate searches will not retrieve the deleted candidate files even if the candidates are recorded in OFCCP logs.

If you create a task to permanently delete candidate files, candidate files associated with candidates entered in OFCCP logs will be deleted but not permanently deleted (in compliance with OFCP). Consequently, future candidate searches files will not retrieve the deleted candidate files but the data contained in the OFCCP logs will be maintained.

Candidate Identifying Information

The following “identifying” information is deleted and cannot be restored with respect to candidate files that are deleted by a task whose “action” is **Delete candidate files (nonidentifying data can later be used for reporting purposes)**.

- First name
- Last name

- Initial
- Address line 1
- Address line 2
- City
- Zip code
- Phone numbers (all)
- Email address
- Website
- Employee number
- Social security number (or Government ID)
- Values before change, kept in the Tracking History for Contact Information Updated events
- Date of Birth
- Place of Residence (Country, State/Province and Region)
- User Defined Fields
- Reference by an agent or another candidate
- Cover letter
- Pasted resume
- Additional information
- Career objective
- Attached file masked fields

Events that Trigger Updates to “Candidate File Last Update” and “Last Activity Date”

Whenever certain events (actions) occur, the “Candidate File Last Update” and the “Last Activity Date” are updated. Except where otherwise noted, the following events trigger an update to both the “Candidate File Last Update” and the “Last Activity Date”.

Career Section Actions:

- Forgot Password Link
- Change Password

- Update Basic Profile
- Update Personal Information (including UDFs)
- Update Skill Answers
- Update Question Answers
- Update Disqualification Question Answers
- Update Additional Information (Pasted Resume, Pasted Cover Letter, etc.).
- Create, Delete or Update Studies (including UDFs)
- Create, Delete or Update Work Experiences (including UDFs)
- Update EEO answers (USA/Canada)
- Attach or Remove a File
- Update the “Accept invitations by email...” check mark

WebTop Actions – General Actions:

- Attach or Delete a File on the Tracking or Resume Tabs
- Match to a Requisition – only the “Last Activity Date” is updated
- Generate New Password
- Unlock Account
- Add Referrer
- Remove Referrer
- Delete Candidate
- Restore Candidate

Candidate Progression is a Selection Process:

- Change Status – only the “Last Activity Date” is updated
- Move – only the “Last Activity Date” is updated
- Bypass – only the “Last Activity Date” is updated
- Revert – only the “Last Activity Date” is updated

Edits to the Candidate File

- Update any value on the Prescreening, Resume, or Profile Tabs
- Update any answer on the Regulations Tab
- Add or Change Referring Agent on the Tracking Tab