



# **Taleo Enterprise**

## Taleo 11A - Taleo Anywhere Configuration Guide

**May 2011**

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# Preface

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## Revision History

Date	Version	Modification	Revised Topic
May	11A	First edition of the configuration guide for this feature pack.	

# Technical Configuration and Software Performance

For the latest information, refer to the *Taleo 10 Technical Configuration and Software Performance Guide* document for the applicable service pack.

# Taleo Inbox for Outlook

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# Taleo Inbox for Outlook

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.

## Detailed Description

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

- approving and rejecting approvals (succession plans, reviews, goal plans)
- responding to feedback requests
- creating feedback on an employee regarding a goal, an employee review or a competency and putting it into their performance reviews
- updating goals
- view development planning activities and modify the progress level
- launching Taleo Performance
- forwarding an e-mail to a Performance Journal that can be referenced later for a Performance Review
- responding to a network invitation
- capturing candidate information from an e-mail and creating a candidate file
- matching a candidate to a requisition
- looking up candidate contact information that is stored in Taleo directly from Microsoft Outlook e-mail.

Taleo Inbox uses Taleo Web services to send and receive data from/to the Taleo servers. Taleo does not use any Exchange or SMTP servers related to Outlook. The Web service authentication is done through WS-Security and WSE 2-0; not HTTP Basic so the user name and password are not displayed in clear text and there is protection against "Replays".

If Microsoft Outlook is placed in offline mode (File > Work Offline), tasks related to Taleo Inbox cannot be performed.

## 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; just select the desired directory 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 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. 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; just select the desired directory 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 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`.

# Configuring Taleo Inbox for Outlook

## Steps

1. Open Microsoft Outlook.
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 one.
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.
6. Click Sign In.

# Dashboard

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

## Detailed Description

The Taleo Inbox Dashboard enables a user to perform the following tasks.

- View and respond to feedback requests.
- View, approve and reject tasks such as employee reviews, goal plans and succession plans.
- View, update and add comments to goals. << Can you actually update goals?!
- View, accept and reject invitations from people who want you to be part of their network within the organization.
- View and update development activity progress.
- Access Taleo Performance.

All data is exchanged via secure Web services. Data is not exchanged via email.

Taleo Inbox Dashboard and the Taleo Inbox Create Feedback are only available to users who have an account in Taleo Performance.

## Manager Dashboard

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

The initial view of the Manager Dashboard is the same as the standard Dashboard, with the exception of a list of direct reports. Typically a manager in Taleo Performance is someone who has access to the Manager Center and is responsible for a number of employees, which is why this list is available. Because of this, managers need access to more features than employees. This includes the following:

- Managers have a default view with a list of their direct reports and tasks that need to be completed, such as feedback requests and approvals
- Managers can select a direct report and access their employee's goal plans and development plans and see specific goals and activities within them
- Managers can comment on specific goals and development activities

# Taleo Anywhere for Lotus Notes 8.0.2

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## Taleo Inbox for Lotus Notes 8.0.2

Taleo Inbox is a Web Service-based solution that enables you to view and take action on various Taleo tasks from within your Lotus Notes application without logging into Taleo applications directly.

Using Taleo Inbox, you can perform the following tasks:

- approve and reject approvals (for succession plans, reviews, goal plans)
- respond to feedback requests
- create feedback on an employee regarding a goal, an employee review or a competency and include the feedback in the performance review
- view your goals and related comments submitted by you or by others
- update progress on Development Planning Activities
- forward an email to a Performance Journal that can be referenced later for a Performance Review
- respond to a network invitation
- capture candidate information from an email and create a candidate file
- match a candidate to a requisition
- look up a candidate's contact information

## Taleo Inbox User Types

**Table 2: 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

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# Retrieving Your Taleo Inbox User Name and Setting a Password

## Prerequisite

You must be a Taleo 10 Recruiting or Performance user.

You will require a user name and password for Taleo Inbox for Lotus Notes during configuration of the product. This is the same username and password that you use when logging into Taleo Recruiting or Taleo Performance.

- If your organization does not use SSO (single sign-on), you must obtain your user name and password for Taleo products from your system administrator before proceeding.
- If your organization uses SSO, Recruiting end users can establish their own password by performing the steps below.
- The Enable Password Change permission must be activated.
- For Performance customers, please contact your system administrator.

Recruiting > Resources > My Setup > General tab > Edit

## Steps

1. In the Account section on the General tab, your user name is displayed in the corresponding field. You should record this information in a safe place.
2. To replace your existing password, enter a new one in the Password and Confirm Password fields.
3. Click Save and Close.

## Result

Your user name and password for Taleo products are now entered in the Taleo system.

## Next Step

Installing Taleo Inbox for Lotus Notes.

# Installing Taleo Inbox for Lotus Notes 8.0.2

## Prerequisite

Lotus Notes 8.0.2 must be installed on your computer.

You require a user name and password for Lotus Notes during installation of the product. This is your Lotus Notes password.

Lotus Notes 802FP6 (Fix Package) is required.

[Lotus Notes] File > Application > Install

## Steps

1. Click Add Folder Location and select the folder containing the Taleo Inbox for Lotus Notes 8.0.2 installation file. Your System Admin will be able to provide this location.
2. Click the check box next to Taleo Inbox for Lotus Notes 8.0.2.
3. To agree with the license agreements, click the corresponding radio button.
4. Click the radio button next to Install this plug-in.
5. When the installation displays the question "Would you like to restart?", click Yes.

## Result

The installation program ends and the system closes Lotus Notes. The Taleo Inbox for Lotus Notes plug-in is installed.

## Next Step

Configure Taleo Inbox for Lotus Notes so it becomes operational.

# Configuring Taleo Inbox for Lotus Notes 8.0.2

## Prerequisite

[Lotus Notes] Taleo > Options

## Steps

1. Run a scan for Taleo Products.
2. To change the language of the Taleo Inbox interface, click the arrowhead next to the Language field and select from the list.
3. To select which Taleo Performance features you want to make available from the Taleo Inbox toolbar and the Taleo drop-down menu, click Performance Management Options... .
4. To select which Taleo Recruiting features you want to make available from the Taleo Inbox toolbar, the Taleo drop-down menu and while creating email, click Recruiting Options... .
5. To display Taleo Inbox icons or text or both in the Taleo Inbox toolbar, click the corresponding radio button.
6. Click Change Taleo Server Address.
  - a) Copy and paste the Web address you want to use to connect to the Taleo server.
  - b) Select the check box next to Use Proxy if you have been instructed to do so and then click OK.
  - c) Click Reset user name and password, enter the appropriate values in the corresponding fields and click OK.
7. Click Scan for Products.
  - a) Select the language you want to application to use.
  - b) Configure the Performance options.
  - c) Configure the Recruiting options.
  - d) Configure Other Settings.
8. Click OK.

## Result

Taleo Inbox for Lotus Notes is configured for Lotus Notes and is ready for use.

# Dashboard

The Taleo Inbox Dashboard enables you to take action on talent management tasks from within Lotus Notes.

## 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, goal plans, and succession plans.
- Verify if you have tasks that have not been completed.
- View your goals and related comments and add comments or 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.

# Taleo Sidebar

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# Taleo Sidebar

Taleo Sidebar is a component that plugs into Microsoft Internet Explorer browser 6, 7 or 8 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; just select the desired directory 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 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 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; just select the desired directory 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.

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**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`.

# RSS Job Feed

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# RSS Job Feed

RSS Job Feed allows Taleo clients to create career sections enabling candidates to add RSS job feeds to track job postings through their MSN, Yahoo or Google portals. Candidates can add up to a maximum of five concurrent RSS job feeds by default but you can raise this amount up to 8.

## Detailed Description

The RSS Job Feed feature is activated by the system administrator via the Career Section Administration module.

Once activated, candidates can perform a job search (basic or advanced) on the career section using criteria having the  icon (that is, Job Function and Location), and then click  to create an RSS Job Feed.

The RSS Job Feed can be used with an Internet browser that offers RSS feed capability or a dedicated RSS reader. Jobs on the career section that correspond to the Job Field and Location values are retrieved by the application daily.

RSS feeds are cached on servers and the servers are cleared once a day. Consequently, RSS Feeds are refreshed every 24 hours.

## Benefits

- Visitors to a Taleo client's career section who create RSS job feeds are kept up-to-date on a daily basis on open positions at the organization that meet the Job Field, Location and/or Work Location search criteria they entered.
- Candidates can use one of the major Internet browsers or a dedicated RSS reader to view and apply for positions at the Taleo client's career section.
- Candidates can create multiple RSS job feeds at one Taleo client's career section or at the career sections of multiple Taleo clients.

# Adding the RSS Job Feed Feature to a Career Section

## Prerequisite


Because Taleo's Facebook feeds do not support authentication, RSS can be activated on unsecured career sections only.

Configuration > [Career Section] Administration > Career Sections

## Steps

1. Click on a career section.
2. Deactivate the career section.
3. Click Edit next to Properties.
4. Set the Enable the RSS feature option to Yes.
5. Click Save.
6. Reactivate the career section.

## Result

Candidates can perform a job search on the career section using criteria having the  icon and then create an RSS Job Feed.

# Facebook

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# Facebook Job Openings Application

Facebook enables candidates to be informed of new jobs as they become available and to share those job postings with friends who might be interested in applying.

## Detailed Description

The Facebook Job Openings application feature is activated by the system administrator.

Once activated, candidates can perform a job search (basic or advanced) on the career section using criteria having the  icon (that is, Job Function and Location), and then click  to add the RSS Job Feed to their Facebook account. This action creates a new Facebook application called Job Openings in the candidate's Facebook account (if the candidates are not already logged into their Facebook account, they are prompted to log in or to create a new account). Afterward, the Job Openings application retrieves daily the RSS feed based on the Job Function and Location search criteria the candidates used in the career section.

Candidates can perform a number of operations in the Job Openings application such as:

- viewing job postings
- sending a job posting to a friend
- sharing job postings with friends

Candidates can specify in the Job Openings application in Facebook if they want their Facebook friends to see the job openings they have on their Facebook "wall".

Candidates can perform multiple searches on a Taleo client's career section and create an RSS feed for Facebook for each one up to a maximum of 5.

Facebook users can configure the number of jobs they want Facebook to display, between three and eight (the default is five). If more than eight jobs correspond to the search criteria, the Facebook application retrieves the eight most recently posted listings.

**IMPORTANT:** Because Taleo's RSS feeds do not support authentication at the present time, RSS can be activated on unsecured career sections only.

## Benefits

- The Job Openings application in Facebook ensures that the jobs Taleo clients post reach a wider audience (younger job seekers in particular) via this popular social network.
- Candidates can share job postings with friends who might be interested in applying.
- Candidates receive news on a daily basis of new jobs as the latter are posted.

# Adding the Facebook Feature to a Career Section

## Prerequisite


Because Taleo's Facebook feeds do not support authentication, Facebook can be activated on unsecured career sections only.

Configuration > [Career Section] Administration > Career Sections

## Steps

1. Click on a career section.
2. Deactivate the career section.
3. Click Edit next to Properties.
4. Set the Enable the Facebook feature option to Yes.
5. Click Save.
6. Reactivate the career section.

## Result

Candidates will be able to perform a job search on the career section using criteria having the  icon and add the RSS Job Feed to their Facebook account.

# Fan Page Job Feed

This feature provides administrators the ability to publish job feeds to one or more Fan Pages from a Facebook account.

## Detailed Description

This feature is part of the Facebook Job Openings application.

The Job Openings application needs to be installed on each Fan Page where administrators want to publish Job Feeds.

Each Fan Page administrator(s) can publish job feeds to the Fan Page.

## Benefits

- This feature facilitates the management of job feeds to Fan Pages where the Facebook Job Openings application is installed.
- The (Taleo) Job Openings application in Facebook ensures that the jobs Taleo clients post reach a wider audience. The ability of clients to now add job feeds to fan pages enables clients to reach targeted audiences: candidates who have already expressed an interest in the organization but who have not necessarily visited its career section.
- The feature facilitates management of job feeds because the administrator can publish different job feeds to multiple Facebook fan pages through a single administrator Facebook account.
- Visitors to the organization's Web site can view new jobs as they are published on the fan page via job feeds.

## Impacts

- Implementation

This feature is available for Taleo Anywhere 7.5 and Taleo Anywhere 10.

# On the Wall Job Posting

This feature allows Job Openings users to post jobs on their wall, share specific jobs and select the level of privacy for sharing with their network.

## Detailed Description

This feature is part of the Facebook Job Openings application.

This feature allows Job Opening users to post jobs on their wall. Users can share specific jobs and select the level of privacy for sharing with their network.

## Impacts

- Implementation

This feature is available for Taleo Anywhere 7.5 and Taleo Anywhere 10.

# Installing the Job Openings Application on Fan Pages

This is a short description.

## **Prerequisite**

You must be the administrator of your organization's fan pages.

You must have Job Openings installed on your personal Facebook account.

You must have created a fan page for your organization.

## **Steps**

1. Click Ads and Pages located on the toolbar.
2. Click Browse More.
3. Click Job Openings.
4. In the Search Results, click on the desired job openings.
5. Click Add to my Page.
6. Install the Job Openings application as a tab on the Fan Page.

# Linking Job Feeds to Fan Pages

This is a short description.

## **Prerequisite**

The Job Openings application must be installed on the Facebook account and also on each Fan Page where jobs will be published.

The job feeds published to the Fan Page are determined by the job feed enabled on the Fan Page Administrator account.

Each Fan Page administrator can publish job feeds to the Fan Page.

## **Steps**

1. Go in the Facebook Fan Page administrator account.
2. For each job feed that you want to publish, click Link to fan pages.
3. Select the Fan Page(s) to publish the job feed to.

## **Result**

The job feed will be published to the selected Fan Pages.