SuccessFactors HCM Suite

CUSTOMER

November 2014 Release
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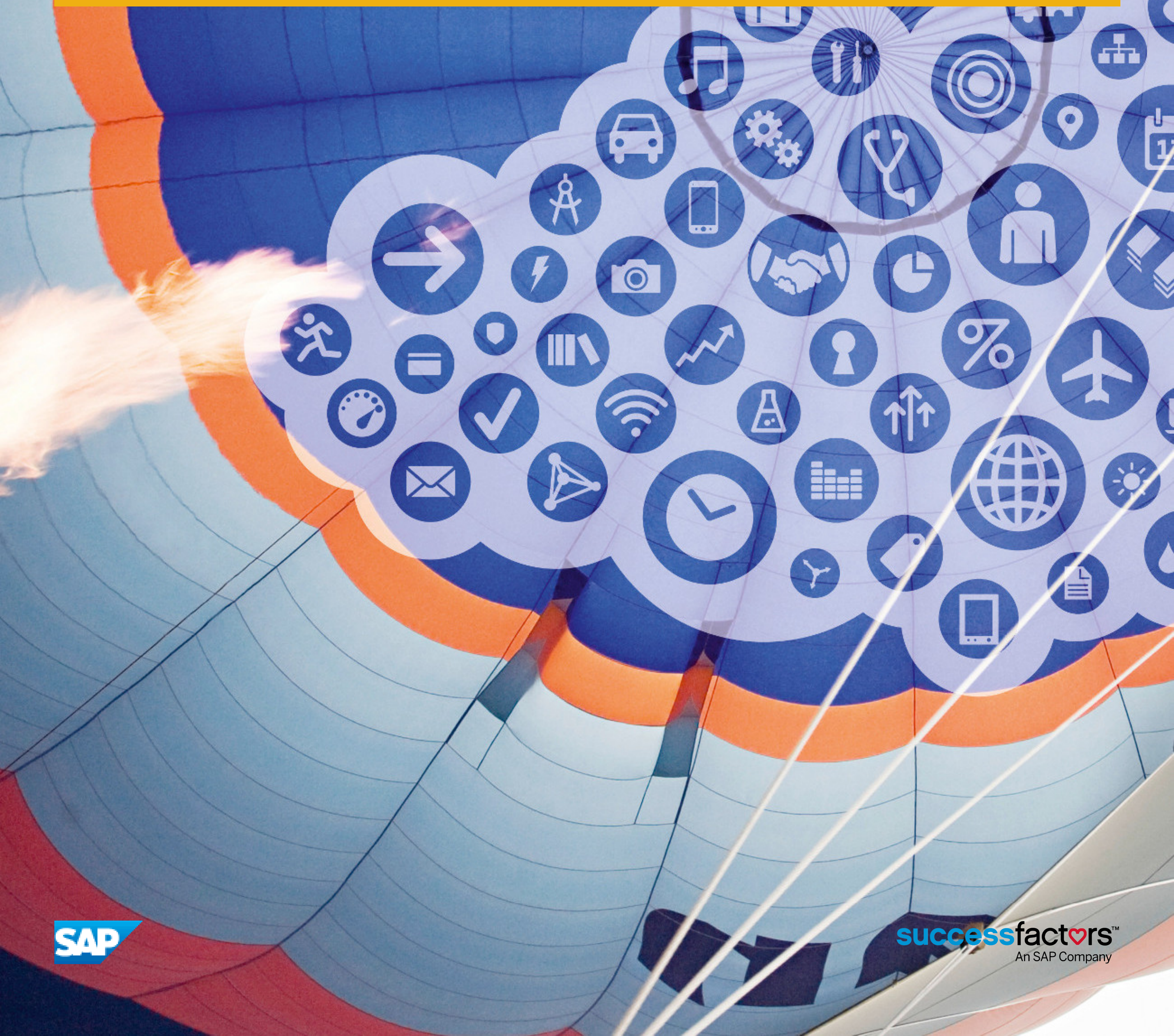
SuccessFactors Recruiting Marketing

Administration Guide



Content

1 Change History

This section reflects the changes made to the document between publication versions.

The following table provides a historical overview of the most important changes made to this document since its initial publication.

Version	Date	Description
1411	December 5, 2014	• When a candidate visits a strategy, category, or SEO page with no jobs, the suggested jobs performs match the locale of the page. • Customers can choose to have agent emails honor the recipient's chosen locale. Configure this option in Command Center. • Talent Community members can edit their personal information and job agents on the Candidate Profile. • New section on the fields required for custom job distribution.

2 About Recruiting Marketing

Recruiting Marketing provides customers with a solution to find, engage and track the best talent for their open positions. The Recruiting Marketing solution helps recruiters with sourcing and candidate engagement in one platform, providing career site optimization, multi-channel job posting, social network integration and mobile career sites

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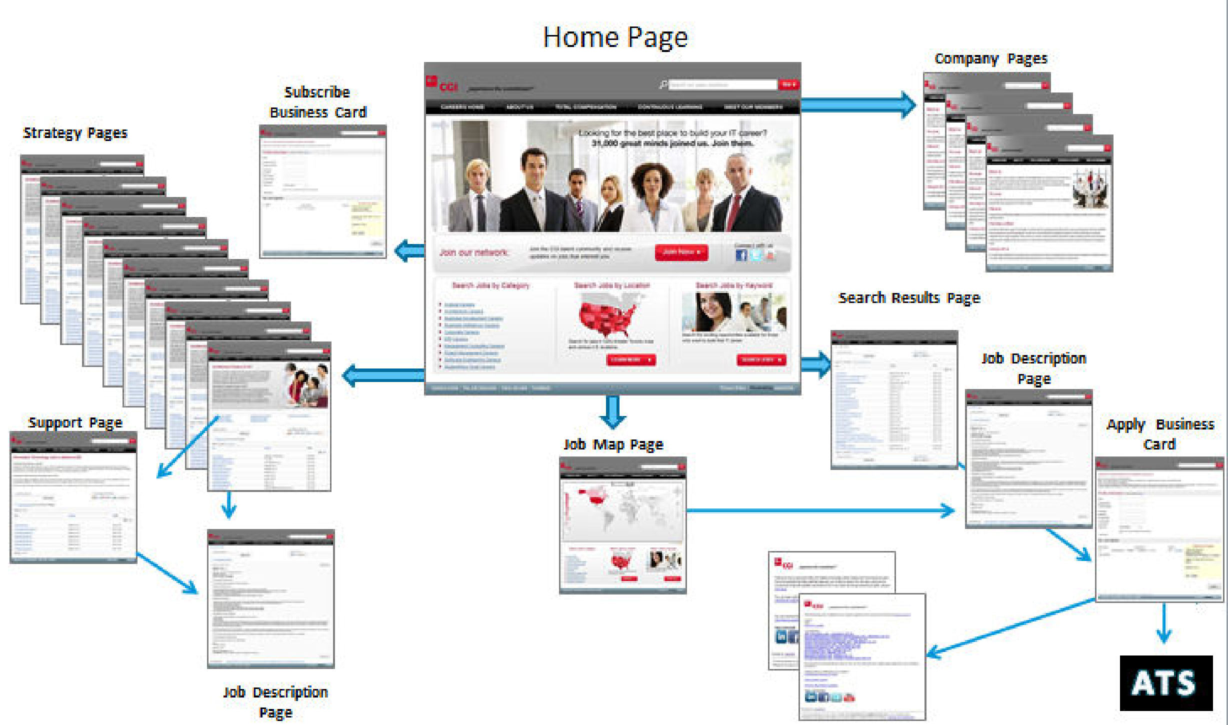
2.1 About Recruiting Marketing Career Sites

The Recruiting Marketing Career Site takes a company's job postings from behind the gate of a traditional Applicant Tracking System and makes them searchable and scrapable by search engines.



The centerpiece of the Recruiting Marketing solution is the career site. The career site takes a company's job postings from behind the gate of a traditional Applicant Tracking System and makes them searchable and scrapable by search engines.

The Recruiting Marketing career site also captures candidate information in the Talent Community, which allows recruiters to continue to engage passively interested candidates. When a candidate begins a job application on a Recruiting Marketing site, or when a candidate signs up for alerts, they join the Talent Community.

A standard Recruiting Marketing Career Site includes:

- Home page
- Ten Strategy pages - these are typically for high-volume or difficult-to-fill jobs or job areas

- Up to four company pages
- SEO pages
- Interactive Job Map page
- Job Description pages
- Subscribe and Apply Business Cards
- Talent Community emails
- Mobile site

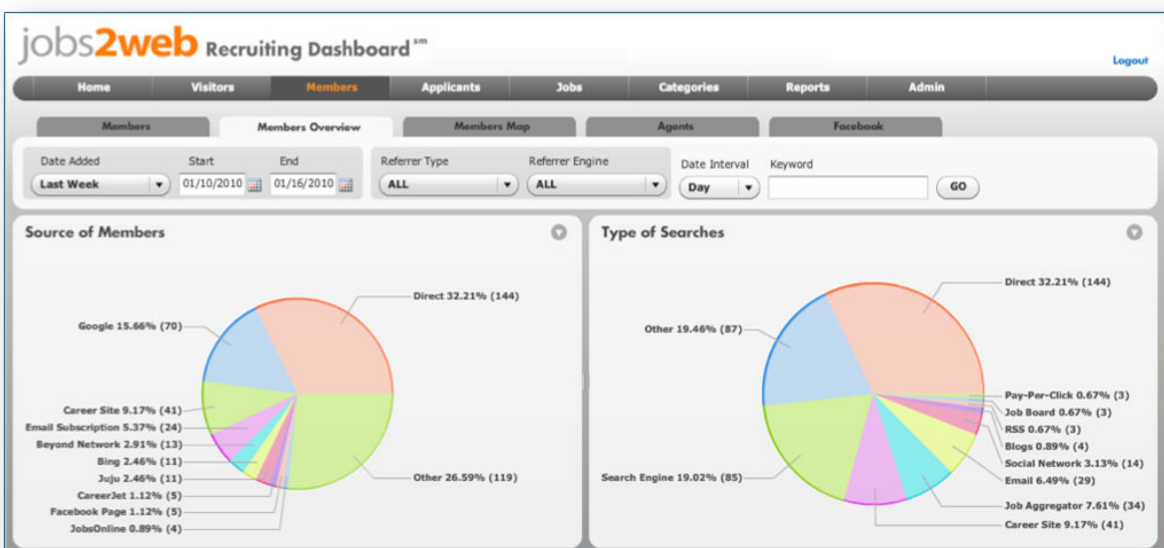
Additional features, such as language packs or additional content, may come with additional cost.

Related Information

Recruiting Marketing Glossary [page 9]

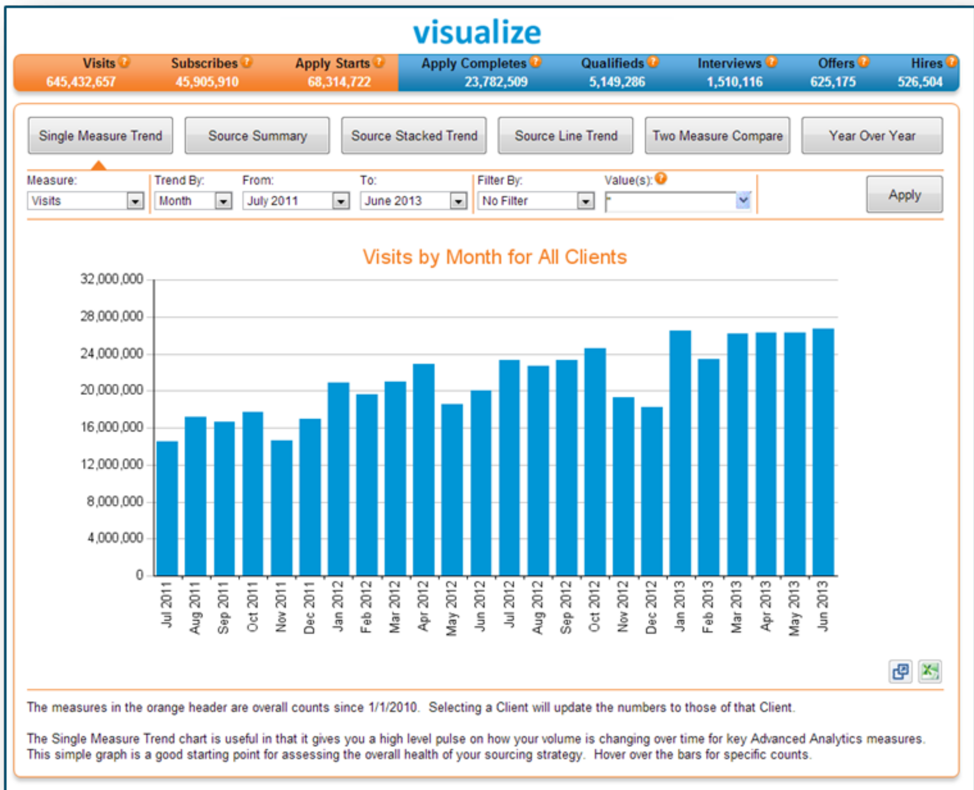
2.2 About the Recruiting Dashboard

The Recruiting Dashboard allows customers to access the data underlying their career site. Recruiters and sourcers can run reports, set up alerts and mine data from the Talent Community, including site traffic and visitor sources.



2.3 About Advanced Analytics

Advanced Analytics combines the data from the ATS and the RMK system to create full line-of-site data from a candidate's first visit to their eventual hire.



Advanced Analytics is a separate analytics package that customers can purchase with RMK. Advanced Analytics has more sophisticated reporting than the Recruiting Dashboard, including reports on candidate quality, quantity, cost per hire, time to fill, source behavior and more.

2.4 About Media and Job Distribution

Recruitment Marketing Media Services include search engine marketing and media services, XML feed creation and distribution, creative services and asset production, manual posting services, media campaign services, major job board support, and reporting / metrics support. These services are purchased separately from Recruiting Marketing and can be tailored to the customer's needs.

2.4.1 Standard Data Fields for Job Distribution

If a customer wishes to use job boards to distribute job postings, SuccessFactors requires a minimum amount of data to create job feeds.

The SuccessFactors media team can moderately customize feeds using basic mapping. The information passed is what is captured from the customer's ATS. Naming conventions of the fields can be customized to match the customer's schema.

Table 1: Job Distribution Standard Fields

XML Field Name	Value	Type
publisher	Client Name	Alphanumeric
publisherurl	Client URL	Alphanumeric
title	ATS Job Title	Alphanumeric
date	Postition Create Date	Numeric

XML Field Name	Value	Type
ID	Client Internal ID	Numeric
url	Job Specific Apply URL	Alphanumeric
company	Client Name	Alphanumeric
city	Job City	Alphanumeric
state	Job State	Alphanumeric
postalcode	Job Postal Code	Numeric
country	Job Country	Alphanumeric
Position Location	Full Job Location	Alphanumeric
Department	ATS Category	Alphanumeric
Position Description	ATS Job Description	Alphanumeric
Joblocale	Job Locale	Alphanumeric

2.5 Recruiting Marketing Glossary

Common terms used in Recruiting Marketing implementations

- **Advanced Analytics:**Online tool for customers to view data collected on visitors, members, and applicants who visit the customer's Recruiting Marketing site. Cost data can also be loaded into the system to allow customers to drill down to cost per hire.
- **Applicant:** A user who has clicked the "Apply" button in Recruiting Marketing and started the process of applying to a job
- **Backlink:** A link between two websites, in this case, a link from a customer's site to a Recruiting Marketing page to drive SEO.
- **Business Card:** A Recruiting Marketing page that captures basic information about a candidate. Can be customized for each individual customer.
- **Candidate Single Sign-On:** The ability for a candidate to create a profile in either Recruiting Management or Recruiting Marketing, then use the same login for both products. Only available for Recruiting Execution implementations.
- **Command Center:** Backend system used to configure Recruiting Marketing sites.
- **Company Page:** Part of a Recruiting Marketing career site that contains company content, like benefits information or information about the company culture.
- **Footer:** The bottom section of almost all pages on a Recruiting Marketing career site. Typically includes links to Home, Top Job Searches, View All Jobs, and Mobile. Customizable for individual customers.
- **Header:** The area on a Recruiting Marketing career site that contains the customer's logo.
- **Hosted Site:** One of two options for Recruiting Marketing implementation. In this option, the Recruiting Marketing career site replaces the customer's existing career site.
- **Integrated Site:** One of two options for Recruiting Marketing implementations. In this implementation, widgets and backlinks are placed on a customer's career site to drive apply traffic through the RMK business card and improve the SEO ranking of the Recruiting Marketing career site.

- **Jobs2Web:** Company accquired by SuccessFactors, where the Recruiting Marketing product originated.
- **Job Collection:** Collecting jobs from an applicant tracking system, either by using a screen scraping technology (Kapow) or by XML feed.
- **Job Data Quality Assessment (JDQA):** A review of the customer's existing job data in the customer's applicant tracking system to determine the quality of the data, and the ability of that data to display properly in the Recruiting Marketing system.
- **Job Description Page:** Part of the Recruiting Marketing career site that contains the job description and other job details.
- **Job Distribution:** Distributing jobs to online sources like job boards, job aggregators, or social networks.
- **Member:** A user who has joined the Talent Community
- **Real-Time Job Sync:** The ability to sync job posting data between Recruiting Management and Recruiting Marketing. This eliminates the need for job collection and updates jobs on the Recruiting Marketing site in real time. Only available for Recruiting Execution customers.
- **Recruiter Single Sign-On:** Allows recruiting users to pass from the Recruiting Dashboard to the Recruiting Management system using the same login. Only available for Recruiting Execution customers.
- **Recruiting Dashboard:** Online tool for customers to view data collected on visitors, members and applicants.
- **Recruiting Execution (Rx):** Customer implementations of Recruiting Marketing and Recruiting Management together
- **Recruiting Management (RCM):** The SuccessFactors HCM applicant tracking system. Sometimes referred to as Recruiting.
- **Recruiting Marketing (RMK):** Recruiting Marketing consists of several components, including the customer's Recruiting Marketing career site, job distribution to online sources, and visitor, member, and applicant analytics through the Recruiting Dashboard and Advanced Analytics.
- **Rule:** The logic that routes jobs to specific pages on a Recruiting Marketing site. Recruiting Marketing career sites use Solr search and Lucene search syntax to govern these rules.
- **Search Engine Optimization (SEO):** Building a website with relevant content to help the site display higher in search engine results.
- **Secure Socket Layer (SSL):** Used to encrypt data transmitted online. Required for all Recruiting Marketing implementations.
- **SEO Copy:** Search engine optimized text that includes merge fields for keywords and locations.
- **SEO Page:** Recruiting Marketing careers site page with jobs, standard SEO copy, no image, and a system generated rule.
- **Source:** The origin of a job seeker or candidate. In terms of Recruiting Management, most often the original website the job seeker visited prior to coming to the Recruiting Marketing site.
- **Strategy Page:**Recruiting Marketing page with jobs, custom copy and graphic, and a custom rule. They are typically found under the featured jobs section on the home page
- **Support Page:**Recruiting Marketing page with jobs, standard SEO copy, no image, and a custom rule. They are found as a series of links on a strategy page.
- **Sub-Domain:** A domain that is part of a larger domain. This is best explained using an actual URL that is a domain name, such as www.successfactors.com. When text replaces www, this is a sub-domain (jobs.successfactors.com or products.successfactors.com). In the context of Recruiting Marketing, a customer is required to set-up a sub-domain (such as jobs.customername.com or careers.customername.com) because the customer legally owns the domain, it is a better user experience, and it is best for search engine optimization (SEO).
- **Talent Community:**A proprietary talent pool captured in the Recruiting Dashboard. Talent Community members have signed up to receive updates on jobs. Recruiters can use the data captured in the Recruiting Dashboard to mine talent.

- **Talent Community Marketing:** A tab within the Recruiting Dashboard that allows users to send out branded job emails. Not all customers have access to this tab.
- **URL Builder:**A tool in the Recruiting Dashboard used to add tracking codes to the end of a Recruiting Marketing URL to segment data in the Recruiting Dashboard and Advanced Analytics.
- **Visitor:** A user who visits the customer's Recruiting Marketing site
- **Widget:**A piece of portable HTML code that can be placed on a customer's website. This functionality includes the ability to search for jobs, join the talent community, or use the interactive job map

3 Recruiting Marketing Initial Setup

3.1 Tools for Using Recruiting Marketing

Recruiting Marketing is configured and implemented using two primary tools, Command Center and the Recruiting Dashboard.

Command Center

Command Center is the backend system used to configure site-wide settings for Recruiting Marketing sites. Functions of Command Center include:

- New Site setup
- Category Page creation
- Rule Writing
- Email template configuration
- Widget configuration
- Single-Sign On setup

Most users will work on a single site in Command Center, but some Command Center settings affect all Recruiting Marketing sites. Access to these options is controlled through the *System Users* menu.

Command Center has two environments, Stage and Production. Stage is used for building a career site before it goes live, in the Production environment. The URLs to access these environments vary depending on which datacenter houses the customer's site.

Table 2: Command Center URLs

Datacenter	Stage URL	Production URL
Rackspace	command.stage.jobs2web.com	command.jobs2web.com
DC 12	N/A	command12.jobs2web.com

Recruiting Dashboard

The Recruiting Dashboard allows customers to view data collected on visitors, members and applicants that visit Recruiting Marketing sites. Users can also configure some aspects of Recruiting Marketing in the Dashboard, such as roles, marketing emails and URLs for marketing campaigns.

URLs for the Dashboard are dependent on the customer's site.

Table 3: Recruiting Dashboard URLs

Datacenter	Stage URL	Production URL
Rackspace	clients.stage.jobs2web.com	clients.jobs2web.com
DC12	N/A	clients12.jobs2web.com

3.2 Recruiting Marketing Roles

Groups of users have different roles within the Recruiting Marketing system. These roles have varying permissions and system access, and are controlled through Command Center and the Recruiting Dashboard.

User Types

There are three types of roles in Recruiting Marketing – System Users, Client Admin Users and Public Users.

- System Users have access to system-level Command Center functions across multiple sites, and their permissions are controlled using the System Users Menu. These users are generally restricted to internal SuccessFactors users.
- Client Admin Users have access to the Recruiting Dashboard and may have access to Comand Center. Their permissions are controlled either by the Command Center Users Menu or the Recruiting Dashboard Roles menu. These users can be customers or partners.
- Public (site) Users are people who have visited a Recruiting Marketing site and applied for a job or joined the Talent Community. Client Admin and System Users can access Public user information either via the Recruiting Dashboard or the Command Center Users Menu. Public users can be further divided into applicants (those who have clicked "Apply" and started the application process), members (those who have subscribed to the Talent Community and are signed up for job updates) and visitors (those who have visited an RMK career site). There is a fourth class of public user, employees, who are relevant for sites with Employee Referral. These users are already employeed by a given company and can either apply for jobs posted by their employer, or refer contacts to open posotions using Employee Referral.

3.2.1 Creating and Editing System User Roles

The Admin User Role Edit menu allows a user with System Users Menu access to define a user role and set its permissions. The Role Management editor allows a user with System Users menu access to define a user role and set its permissions

Procedure

1. Navigate to *System Users* > *Role Management* > *Create New Role* or click the tablet icon to the left of an existing user role.

2. Enter a name and description for the new role. This updates the “Last Updated” and “Last Updated By” fields when the role is saved. Permissions are defined using the checkboxes in the lower area of the menu.

   The *System Users Menu* permission grants users the right to create, edit and delete user roles, as well as assign roles to users. The *System Menu* permission gives the user access to the Command Center System Menu. The *Workspace Menus* permission grants users access to the remaining Command Center menus (Site, Jobs, Categories, Functions, Users and Email).

   > **Note**
   >
   > It is possible for a user to deny themselves System User Menu access, thereby locking themselves out of the system. In this case, another user with System Users Menu access for their site will have to reset their permissions.

   There are three common RMK roles

   - All Permissions: This grants a user access to the System, System Users and Command Center Workspace menus.
   - Site Manager: This role grants a users Command Center Workspace access for a site or selected sites.
   - System and Workspace Only: This is the most commonly used role, which grants access to everything except the System Users Menu.

   > **Note**
   >
   > Changes made in the *System* and *System Users* menu affect all career sites, and change made here in the production environment affect live sites. No customer should be added as a System User.

3. Once you have created the System User Roles, navigate to *System Users Menu* > *Search System Users.* Here you can search for users across all Recruiting Marketing instances and assign them roles. Once you have executed a search, click on the name of the desired System User, then select the desired role from the *Role* drop down menu.
   a. Choose the sites the user will have access to. Under *Site Selection* check *All Sites* to grant the user access to all Recruiting Marketing Instances. Choose *Site Selector* to grant the user access to only some sites. Click the green plus sign to add sites from the left *Site List* to the right *Selected Site List.* Clicking the red X on the right list removes a site from the *Selected Site List.* Click *Done.*
4. Click *Save.* Repeat as necessary for additional users.

3.2.2 Managing User Roles

The Role Management menu allows you to create new user roles with given permissions and edit existing permission roles. The menu displays the role name, role description, last updated and last updated by information.

Procedure

1. Navigate to *System Users Menut* > *Role Management.*

There are two default roles in the Role Management window- All Permissions and Site Manager. The All Permissions role has access to all Command Center functions, including the System Users and System Menus. Site Managers will have access only to the "workspace" menu options-either for all sites or select sites. These default roles cannot be edited or deleted.

2. Select "Create a New Role" in the upper right of the pane, or click the tablet icon to the left of an existing role open the Admin User Role Edit menu. Use this menu to define or edit permissions for a role, including the role name, description and access levels.
3. Delete roles from this menu by clicking the red "X" to the far right of the role. A confirmation message will appear before the role is deleted

3.2.3 Creating New Client Admin Roles

Client Admin users have access to Command Center and the Recruiting Dashboard. These roles are created and controlled using the Recruiting Dashboard.

Context

Note

Tool: Recruiting Dashboard

Procedure

1. Navigate to *Recruiting Dashboard* > *Tools* > *Roles.*

   Note

   For new sites, you will see a single role called *Default Permissions*. This role is system-generated and cannot be modified or deleted.

2. Click *Add Role.* Name the role and enter a description, if desired.
3. Grant the desired permissions for the role. These permissions only apply to the Recruiting Dashboard and only for the current site being worked on.

   Available Permissions:

   - Home: Grants access to the Recruiting Dashboard homepage.
   - Visitors: Grants access to the Vistiors menu.
   - Members: Grants access to the Members menu. You can permissions the ability to add/edit members and the ability to anonymize members separately.
   - Applicants: Grants access to the Applicants menu.
   - Jobs: Grants access to the Jobs menu. You can permission the ability to search Craigslist job postings seperately.

- Pages: Grants access to the Pages menu.
- Emails: Grants accesss to the TCM menu.
- Reports: Grants access to the Reports menu.
- Tools: Grants access to the Tools menu. You can permissions access to individual tabs in the Tools menu separately. You can also grant permissions to view users and add edit users seperately, so a recruiter could have the ability to view Talent Community users, but not add or update user records.
- Cross System: Grants the ability to export reports and export images/PDFs from the Dashboard.

4. Click *Save Role.*
5. To designate a default role, select a configured role from the *Set Default Role* drop down menu in the upper right. When new Client Admin users are created in Command Center, they will be placed into this role and will have the associated permissions.

3.2.4 Resetting RMK Passwords

Client Admin users can be locked out of the Recruiting Dashboard or Command Center. The message "Authentication Failed" displays, or the user sees a prompt to contact their administrator for a password reset.

Context

> **Note**
>
> **Tool** Recruiting Dashboard

Procedure

1. Navigate to *Recruiting Dashboard* > *Tools* > *User Admin.*
2. Search for the user who needs a password reset by name or email address. Click the name of the user to see their password status.

   The *Password* field will have one of the following statuses:
   - Enabled: The user should be able to login with their old, original password.
   - Locked Out: The user is presently locked out, typically due to too many login attempts with an incorrect password.
   - Suspended: The user's password has been "reset" and there is a pending password reset link available for that user.
3. Click the *Reset Password* link next to the *Password* field. The user's password status automatically resets to "Suspended" and the user receives a new password reset link via email. The user can use this link to reset their password.

4 Implementing a Recruiting Marketing Site

Implementing a Recruiting Marketing site involves four phases: Prepare, Realize, Verify and Launch. During the prepare phase, professional services consultants work closely with customers to gather necessary information, scope the project and plan for the site build.

The Realize phase is when the professional services team builds the customer's career site. Using Command Center, the professional services team sets up the site to the customer's specifications, the website is designed and built and the customer's jobs are imported into public site. The phase requires coordination between the professional services project management team and the site build teams to the deliver the site on time.

During the Verify phase, professional services ensures the public site is functioning properly and is built to customer specification. The Professional services quality assurance team verifies the site and resolves issues, and it's also verified by the professional services consultant and the customer before the site goes live.

The final phase in implementing a Recruiting Marketing site is the Launch phase. During Launch, the public site is moved from its pre-production environment to production. Then, the site is verified again by the QA team, and professional services helps transition the customer to the Customer Success team.

5 Implementation Overview

The official start of the Recruiting Marketing project is the kick-off call. Before the kick-off call takes place, the professional services consultant and shared services team develop a design and approach for the site. During the Kick-off call key stakeholders for the project meet and agree to a project timeline and deliverables. Work done before the kick-off call is especially important to the project, as it sets the baseline for the design and approach to follow.

Key Roles in the Recruiting Marketing site build include:

- Implementation Consultant: Individual who guides the Recruiting Marketing site implementation, serving as a liason between the customer and RMK Professional Services.
- Customer Success: Team focused on customer leveraging, upselling and relationship-building with customers.
- Success Delivery: Focused on resolving technical issues, problem, and bugs with the platform directly with customers.
- Product Development: Creates, tests and builds new functionality for the RMK platform. Also includes Sustaining Engineering, who investiagte and resolve complex technical issues with Success Delivery.
- Product Management: Enhance, improve, and refine the RMK platform
- Professional Services Shared Services: Work to implement new content, functions,and features, as well as build new sites and maintain exisiting customer sites.
- Media: Focuses on major job distribution campaigns that customers undertake and the measurement and refinement of job distribution.
- Analytics: Focused on building, maintaining and improving the Advanced Analytics team.
- Systems: Focused on the servers that house the site, Command, Dashboard and other various functions related to RMK.

5.1 Important Implementation Dependencies

Certain changes or events in a project can impact the Recruiting Marketing Professional Services's team ability to follow a customer's implementation timeline. Identifying these potential delays before implementation can smoothe the implementation process.

Table 4: Implementation Dependencies

Dependency	Potential Impact
Anticipated or confirmed Marketing rebranding of the customer's corporate site	Is the customer planning to revamp their brand in the next 12 months? If so, this deviation from the existing assets and site requirements will impact both the time and cost of the project.
Multiple module depoyment	If the customer would like to implement a Recruiting Execution solution, integration with Employee Central or other SuccessFactors modules, the project will likely require additional professional services support and additional hours and cost to the project timeline.

Dependency	Potential Impact
Global implementation	Additional language packs are required, and global implementation will add time to the duration of the project.

6 Preparing for a Career Site Build

Before a career site is built, the transition from the Sales team to RMK Professional services must be complete.

Prerequisites

The following tasks must be complete before beginning the Recruiting Marketing site build:.

- Signed contract (Schedule A), Statement of Work and Professional Services Estimator must be completed. The PSE details the number of hours allocated to the RMK implementation. These documents come from the PS consultant's practice manager/director.
- Set up the project in ByDesign. For questions about ByDesign, email pshelpdesk@successfactors.com
- Set up the customer SharePoint site.
- Conduct the Sales Transition call
- Complete the Recruiting Marketing demo. The RMK demo is conducted by the salesperson and professional services consultant.
- Complete the Readiness Checklist. The consultant and customer work together to complete the Readiness Checklist. You may need to work with the customer in order to capture their key hiring areas, critical employee functions and primary work locations.
- Send customer the Site Design Questionnaire.

6.1 Performing the Initial Job Collection

Recruiting Marketing is compatible with any Applicant Tracking System (ATS). Job collection is the means by which job data is taken from the ATS and displayed on the RMK career site.

Jobs can be collected from a customer's ATS in three ways : via screen scraping, from an XML feed or from an API. Screen scraping is the most common method, as it has no associated additional cost. The XML feed allows the customer to pass data to Recruiting Marketing that they may not want visible in the external job posting. Collecting jobs through an API often has an additional associated cost for the customer.

> **Note**
>
> These job collection options are only available for customers using RMK stand-alone. Customers using Rx instances should use real-time job sync.

A customer can use multiple Applicant Tracking Systems. Each HTML or XML data element is mapped to an RMK data field.

Job collection must be very specific about how data is parsed, extracted, and assigned. Collections are run nightly, typically starting at 8 p.m. Central Time. Jobs that are not in the ATS when the nightly collection runs are not added to the career site. When the nightly collection runs, new jobs are added to the career site, jobs updated in the ATS are updated on the career site, and jobs no longer listed in the ATS are deactivated.

A Job Data Quality Assessment is performed for all implementations, regardless of what ATS the customer uses. The JDQA ensures all required data is presented in a usable format for job collection. The Job Collection team looks for proper formatting of job descriptions, unsupported characters and HTML from MS Word, for example. At this step the Job Collection team will also determine if an Rx customer can be considered for the real-time sync (and if not, what it would take to be supported).

6.1.1 Job Data Requirements and Best Practices

Consistent data from the customer's Applicant Tracking System is critical to Recruiting Marketing working successfully. Customers should ensure their data follows best practices.

To address any potential job data issues early in the implementation, the customer's data is reviewed for consistency and to ensure it meets the minimum standards for collection. Data is also reviewed to see if it meets best practices to allow for the best reporting results in the Recruiting Dashboard and Advanced Analytics. This Job Data Quality Assessment (JDQA) is completed before the customer's career site build can begin.

These data elements are **required** for job collection.

- Unique Job ID/Internal ID - A unique identifying number is required for job import. Jobs with duplicate IDs will not be imported.
- One primary location - City, State (where applicable) and Country are required. Customers can use secondary locations in a different field, but must have a primary location, formatted correctly.
- Job Description - The job description works best when the first few sentences are relevant to the specific job, rather than general information about the company or department.
- Apply URL - This connects RMK to the ATS and is the URL candidates would visit to apply for the job.

Recommended Fields

Certain fields are not required for RMK to function, but they are highly recommended, where appropriate, to ensure the best functionality of the career site.

- Ad code - The ad code can direct the routing of applicants or provide recruiters with a way to segregate certain types of applications (for example, those aimed at campus recruiting).
- Job Category/Job Function/Industry - The category or industry of the job listing, for example "Information Technology." Using this field provides additional data about the job that can be used in RMK.
- Department/Organization/Business Unit - This is a sub-section of the category field, and can include more specific groupings like "Web Development."
- Experience/Education Level - Experience level or education level required
- Facility - Physical location or branch where the position is located. Customers who want to provide information like "Corporate Headquarters" or "Downtown Branch" should use this field, rather than the location field.
- Shift/Schedule - The shift field designates what the job hours are, such as "First Shift" or "Overnight."

> **Note**
>
> Only use basic HTML formatting for job descriptions. Do not use complex CSS or in-line styling. Do not paste content from programs like Microsoft Word.

6.2 About the Site Design Process

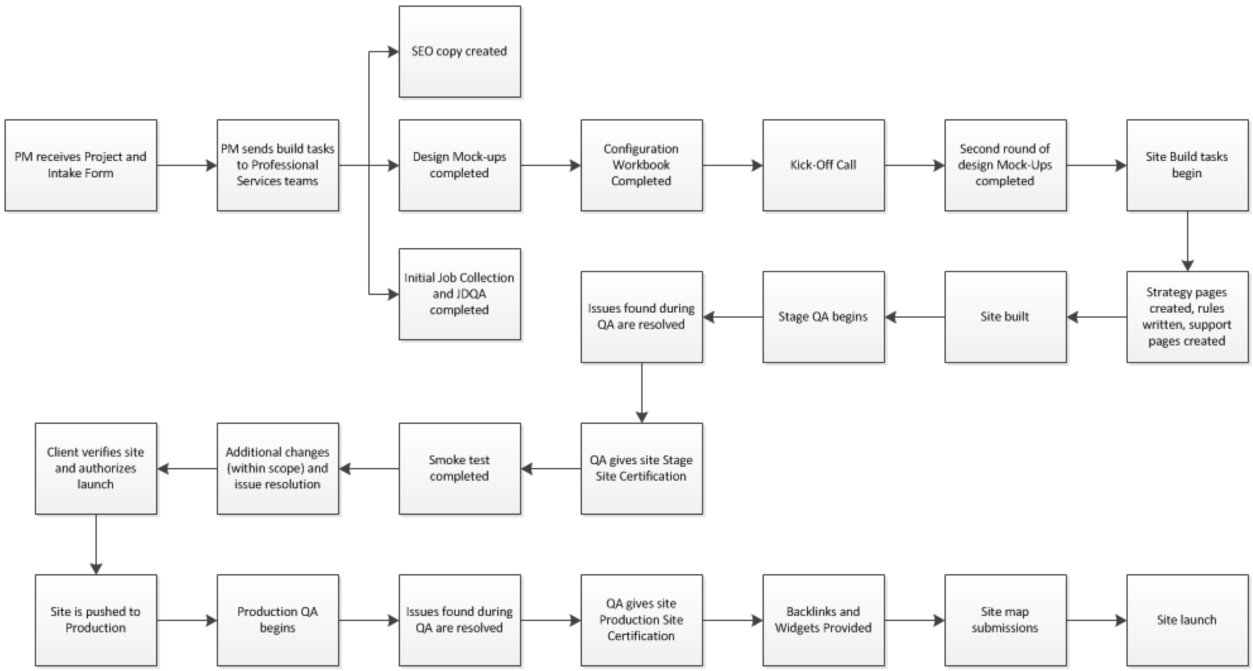
The first step of the site design process is the creation of the first round of mock-ups. The professional services consultant submits a task to the design team requesting mock-ups before the Kick-Off call is held. The design team provides mock-ups of the home page, strategy pages and job pages. If the customer wants mock-ups of additional pages, there may be an additional cost associated.

The first iteration of the mock-ups is presented to the customer during the Kick-Off call. The PS consultant collects feedback from the customer, and the design team creates a second iteration of the mock-ups. More feedback is collected and the design team provides a final iteration of the design. Three rounds of design iterations are included with the standard implementation. Additional iterations may have an additional cost.

> **Note**
>
> Not all elements of the RMK career site are customizable.

7 Building a Career Site

The career site is configured and then built to the customer's specifications. This phase of the project requires cooperation between the Professional Services consultant and Professional services build teams.



7.1 How to Set Up a Recruiting Marketing Site

Before the actual site build begins, the Implementation Consultant and Professional Services team must complete initial site build tasks.

Context

> **Note**
>
> **Tool:** Command Center

Procedure

1. Request the Site Build and QA

Submit a QuickBase task to the Shared Services team to have the RMK career site build. Include the Configuration Workbook and initial design mockups.

> **Note**
>
> Once the Site build task has been submitted, the consultant cannot make changes to the Configuration Workbook or other site assets.

When submitting the request for the site build to the web design team, the professional services consultant should include the customer's approved mockups and assets, including image assets, font guidelines and build specifications.

Consultants should include complete text for the home page, company pages, strategy pages, custom business cards, headers, footers and the custom pre-apply page with the completed Configuration Workbook.

The completed Configuration Workbook should also include any options for the main navigation that is not standard, and should note required and optional fields for the business cards, and header/footer link information.

If the customer chooses to configure any branded pages, this content should also be included with the site build request.

> **Note**
>
> For implementations with multiple languages, the consultant should provide the Web Design team with the appropriately localized copy and links for any language packs purchased by the customer.

2. Slice Assets and Create RMK Emails

   Once the Site Build request is submitted, the Web design team breaks down the mockups into assets, optimizes those assets for the web, and processes the files for the Web Development team.
3. Build the RMK site

   Once all site assets are created and sent to the Web Development team, the team builds the career site on the stage server. During this process, the Web Development team also builds the mobile site in the stage environment.
4. Write Rules and Create Strategy Pages and Support Pages

   SuccessFactors creates three kinds of pages to support career sites: Strategy Pages, Support Pages and Search Engine Optimization (SEO) Pages.

   - Strategy pages contain copy unique to each page, usually a description of a particular functional area. These pages contain an image and custom rules to pull in jobs, based on a field, keyword or unique keyword/job code.
   - Support pages display boilerplate SEO copy and are provided as part of the SEO copy task. These pages do not have an image, but contain custom rules, also based on field, keywork or unique keyword/ job code.
   - SEO pages contain boilerplate SEO copy and auto-generated rules. These pages are deployed for US locales only.

   Jobs are routed to Strategy and Support pages in three ways:

   - Custom rules written against a field in the ATS, show on the public-facing job description. These rules are specific and commonly used on Strategy pages. For example, jobs with a location of "Boston, MA," or jobs with a "Job Function: Engineering."

- Keyword-based rules. These rules are written against a word shown anywhere in the body of the job description. These broad rules are most commonly used on SEO pages. For example, a rule might pull jobs with "Marketing" anywhere in the title, fields or body of the job description.
- Unique keyword or job code (jcode) rules specifically target a code or keywork added by recruiters to a job description. These rules are very narrow and used as a last resort because of the recruiter effort involved. For example, these types of rules can be used to target campus/university positions by using a code like "sfcampus."

8 Verifying the Recruiting Marketing Site

During site verfication, the build site is checked against the customer's specification and the site scope to ensure it's built to the customer's expectations.

Quality Assurance milestones:

- **Stage QA Certification** Sent via email after Stage testing is complete and all issues are resolved. Provides the Consultant permission to present the site to the customer in Stage to begin Customer Stage Site Testing.
- **Consultant Smoke Test** The Consultant Smoke Test is a check completed by the Consultant after Stage Site QA has been completed and before showing the site to the customer.
- **Customer Stage Site Testing Defect Resolution** After issues/changes from Customer Stage Site Testing are made, the Task goes to QA for confirmation.
- **Production QA Certification** Sent via email after Production testing is complete and all issues are resolved. Provides the Consultant the permission to announce the site as live internally and externally.

9 Launching the Recruiting Marketing Site

During the launch phase of a Recruiting Marketing site, the customer and Professional Services ensure the site is ready for production.

Launch phase tasks:

- The PS team certifies the site meets their requirements and ensures they are comfortable with the quality. PS signs off on the site launch
- Customer gives us their final sign-off.
- The site map is submitted, which allows Google and other search engines to crawl the site, registering the site with the search engine. This also activates the job feeds.
- The Professional Services team delivers a list of recommended backlinks and widget code to the client. This allows the customer to deploy RMK widgets on their career site and to link to the RMK career site for optimal integration between the two.

10 Career Sites - Candidate Experience

10.1 Applying for Jobs

The job application process can be configured with a number of different options in Recruiting Marketing, depending on a customer's needs.

The majority of job applications are started from job pages. Once a user starts an application from a job page, they can be routed in a number of different ways.

Candidate SSO

Single sign on is only available for Recruiting Execution customers using the SuccessFactors ATS. If a user is already a member of the Recruiting Marketing Talent Community, or has credentials for the Recruiting Management ATS, they will be prompted to log in before beginning their application. If the candidate is a new user, they can create an account in the Recruiting Marketing system. The user can choose to use Social Apply with the SSO process, in which case they are directed to the social pre-apply page. The user is directed to a pre-apply page (social or standard) then through to the ATS.

Business Card

If a user initiates an application for a job on a client site, using the "manual apply" option, they will be taken to the Business Card to fill out their personal information and added to the Talent Community. If the user is already a member of the Talent Community, they will be prompted to sign in. "Skip this Step" can also be implemented at this stage, allowing the user to bypass the Business Card.

Apply with LinkedIn

After initiating an application, a user can choose to use the "Apply with LinkedIn" function. This takes a user's existing LinkedIn account information and uses it to populate the Business Card. If the user is new toRecruiting Marketing, they will see an authentication screen, then the Business Card will be skipped and the user's LinkedIn information will be written to the User Record. If the user is an existing user (and does not have cookies enabled) and chooses the Apply With LinkedIn option, they will be prompted to log in, then they will bypass the Business Card and their user information will be written to the User Record.

Social Apply

The user will see an "Apply Now" button with a drop-down menu indicator on it, instead of the standard "Apply Now" text on site with Social Apply enabled. When a user clicks a social network's "start apply" link, if they are not already logged in as an RMK user, or if we don't have their RMK user email address available in the session, then a field is shown in which the user can enter their email address, along with a Start button to submit the email. When the user clicks the Start button, validation for length and email address validity is done. Upon successful completion of authentication with the social network, the window closes and the user is forwarded to the Social business card. If the user cancels out of authentication, they can choose another social network, apply manually, or click anywhere else on the document to close the Social Apply now button drop-down menu. Note that a candidate's credentials are not stored, regardless of the cookie type a client may have configured. Once a user authenticates a social network and that authorization expires, the user cannot be re-authenticated. For users choosing to apply with a social network, once a valid email address and authentication has been gathered, we will attempt to auto-skip the business card and take the user directly to the pre-apply page for the social network.

When a candidate uses social apply from a Recruiting Marketing site, their basic information will be passed and populated into their Recruiting Management Candidate Profile. The Recruiting system will attempt to pass and populate the following fields, where available:

- email
- password
- phone
- partnerSource
- partnerMemberId
- locale
- country
- candidateSource
- jobReqId
- firstName
- lastName
- address
- homePhone
- cellPhone
- dateOfBirth
- profileUrl

Recruiting will also attempt to extract the following information about a candidate's employment history from their social (LinkedIn or Facebook) profile.

- startDate
- endDate
- title
- description
- company
- current

The following information about the candidate's education can also be retreived:

- startDate
- endDate

- name
- degree
- fieldOfStudy

Direct Apply

If a user visits any job page with /talentcommunity/apply/xxxxxx/ (where xxxxxx is the job ID) appended to the URL (i.e. jobs.successfactors.com/talentcommunity/apply/xxxxxx) they will arrive on the Business Card, prompted to enter their information, and added to the Talent Community. Once this is complete, the candidate is sent to apply for the job. An email agent is automatically created based on the job details.

10.2 Subscribing to the Talent Community

Subscribe from Category Pages (TLPs)

Social Subscribe

When social subscribe is configured, the candidate sees an option to subscribe to the Talent Community with their LinkedIn and/or Facebook account, as well as an option for the non-social, manual apply. When a user clicks on one of the social options, they will see additional text describing the terms of the social subscribe process. If a user elects to subscribe using a social account, they will be presented with an authentication screen. After they authenticate the social network, they will bypass the business card ("auto-skip"), and will land on the progress bar for joining the Talent Community. Behind the scenes, the business card is populated using their social network information. The user ends on the social landing page appropriate for the social network they used to subscribe. If the user is logged in and their email address is available, clicking on a social option will not show the email field or moreText for the network, but will begin authentication immediately. If the user is still authenticated with the social network, then clicking on a social option takes the user directly through the business card.

Business Card

After the candidate clicks "Email similar Jobs to Me", the subscribe page welcomes the user to the Talent Community, asking the user to provide some personal information. If the email the user enters is already in the system, the user will be prompted to log in. In addition to the business card information, the job or category page the user subscribed from will populate the Job Agents portion of the page. The candidate can modify Job Agents easily. After the subscription is complete, the user is routed to a "Thank you" / "Done" page. Clicking "Done" routes the user back to their search results.

Subscribe from an External Site

Event Page

Event pages serve to capture member information faster at a client sponsored event like a job fair. The user is presented with a simplified version of the business card, typically asking for only email address, and first and last name. Once the user has entered this information, they are routed to a "Thank You" page. Different pages are available for new and existing users. Users can be tracked with additional configuration.

Direct Link

If a user visits any job site with /talentcommunity/subscribe appended to the URL (i.e. jobs.successfactors.com/talentcommunity/subscribe) they will arrive on the business card and will be entered into the Talent Community.

Subscribe Widget

Generated code that creates a link or form which can be used on a customer's site. Clicking the link or submitting the form takes the user to the subscribe page. If an email address is provided in the link (as a URL variable, which is unlikely) or form (as a form field that the user enters their email address in, which is more common) and the user is already a member of the Talent Community for that site, but is not logged in, they are first prompted to login. Any URL variables or form fields supported on the business card that were submitted from the link or form will pass through the login interrupt to the subscribe page once the user logs in successfully.

Other Subscribe Sources

Manual Add

A user can be manually added directly to a Talent Community via the User API.

User Import

Users can also be imported in a client's Talent Community via Command Center. The process requires a CSV file of user data to initiate. It is not possible to import an existing user.

10.3 Recruiting Marketing Business Card

The Business Card is configured in Command Center and is associated with four Profile Types: Standard, Mobile, ERM (Employee Marketing Referral), and Social.

Standard Profile

Subscribe

After the user subscribes to a category, the Subscribe Page welcomes the user to the Talent Community, asking the user to provide more personal information. The additional information captured on the Business Card is configured using Talent Community Setup. In addition to the Business Card information, additional Job Agent information is captured. The Job Agent information is based on the details of the page the user subscribed to, for example job or category details.The user can modify Job Agents easily, but the agent field will not accept more than 260 characters. If the agent is generated from URL data or automatically generated from category, search or job, the field will truncate to 260 characters. After the user subscribes to a category, the user is routed to a "Thank you" / "Done" page. Clicking "Done" routes the user back to their search results.

Apply

The Apply Page is similar to the Subscribe Page. The only difference is the user is routed directly to the Applicant Tracking System if they are already logged in. If the user is new or is not logged in, the user will be routed to the Business Card thanking the user for being interested in a particular job. Then, the user is asked to fill out their information or click *Sign In*if the user is already a member. After completing this step, the user is routed to the Applicnt Tracking System. If the user cancels out of the Log In dialogue, they will be routed directly to the ATS without entering their information. This behavior differs from that of the On-Page Business Card.

Mobile Profile

When a user applies through the mobile application, only a member record should be created. An apply record should NOT be created. An apply record should only be created when the user logs into the client site to complete the apply process.

ERM Profile

Logged in users with a user type of "Employee Referral" who land on the Business Card are directed to the ERM Business Card. Users that land on the Business Card with parameter "tcsetyptype=erm" in the URL will see the ERM Business Card, whether they are logged in or not. User type is a parameter passed in the User API, and is indicated by a number 3 in the <usertype> node and "Employee Referral" in the <usertypedescription> node. These users typically come from email referral.

Social Profile

The Social profile type is only used in conjunction with social applications such as the Socialmatcher or with the Social Apply button. Public users can enter international LinkedIn URLs such as uk.linkedin.com/in/johnsmith. Users can also enter any Facebook URL, as long as it contains "facebook" somewhere in the string.

10.4 Locale Display Priorities and Scenarios

Users can configure locales for Category or Job pages, as well as for Talent Community Profiles using the Talent Community Setup, Category Edit or Job Edit pages. Once configured for specific locales, subsequent Public Site pages will take on the language specified.

Locale Types

RMK uses four distinct types of locales to determine how page content, jobs, or emails display for users of the public site.

- **Session Locale**: Determined when a job seeker visits a public site, either passively through a session variable or actively by using a locale selector configured by the Web Dev team. This locale is limited to the length of the user's session, determined by the site's cookie configuration and user actions.
- **User Locale**: Set when a user makes a locale selection on the Talent Community Business Card, then completes the subscribe process. Location is only set during a candidate's first apply if the user has never subscribed to the Talent Community This locale only displays for the when they are logged in to the Talent Community.
- **Configured Locale**: Only applies to job and category (TLP) pages. The Web Development team configures these locales during site setup. Configured locales always override session or user locales.
- **Default (Site) Locale**: Configured during site setup. This locale populates the session locale in instances where the user has not chosen a locale, or a page locale is not configured.

Localization of content also works differently on different pages of the Recruiting Marketing public site.

- Home Page: Very little content on the home page is available for translation, since most content is custom created, rather than system generated. However, any system-generated elements, such as the search widget will display in the session locale (often the same as the site locale).
- Job and Category Pages: Content on these pages displays in the locale configured during page creation. This overrides any session variable or user selected locales.
- System Pages: System pages include search results pages, login page, reset password, candidate profile, Business Card, View All Jobs, Top Jobs, and any error messages. These display in the session locale, except in instances where the user is logged in, when they display in the user locale.

Setting Locales

Locales are set in a number of ways on an RMK site. There are two distinct locale selectors a job seeker may see on an RMK Site.

- **Session Locale selector**: This locale is configured by the Web Development team, and can appear on any RMK public site page. The selector is not constrained by the locales configured for a site . For example, it is possible for a site to have two locales configured (en_US and es_MX), and for three locales to appear in the session locale selector (en_US, es_MX, and fr_CA). If a candidate selects the non-configured locale from the selector, the site uses the default locale instead. Pages cannot display in a non-configured locale, with the exception of job and category pages.

- **System Locale selector**: This locale selector is system-generated and as such appears on system-generated pages, such as the Business Card, password reset and site login pages. If a user selects a locale on one of these pages, then completes the page action (joins the Talent Community, resets their password, or logs in), the selected locale is saved as the user locale

Locals and Search Results

If a user visits a category, strategy, or SEO page with a configured locale, and the page does not contain any jobs, the suggested jobs display in the locale of the page. If a user has a session locale or a user locale, when they perform a search the elements of the search page display in that locale.

If a user performs a search, customers have the option of limiting jobs returned by a search to a specific locale. Limiting search results to a selected locale requires custom configuration by the Professional Services Web Development team. If the search results are not limited by locale, the jobs in search results can be in any locale.

Locales and Emails

The system sends users emails in their user locale, if templates for the translated email are configured for the locale in *Command Center* > *Emails* > *Email Templates.* . This has no impact on the jobs presented in the email. If the client chooses to have the emailed jobs respect the user locale, enable the configuration option in *Command Center* > *Site* > *Site Setup* > *Communication* > *User Locale to determine jobs presented in agent emails.* When this option is enabled, the user sees only jobs matching their locale in agent emails. For example, if the user locale is en_US, they will not receive jobs in any other locale.

Locale Priority

For Category and Job Pages with configured locales, the configured locale of the page takes precedence over any other location designation. In cases where a user arrives on the Business Card, or other Talent Community Page, from a job or category page, the display locale will be determined by the locale of the job or category page. For example, if a user tries to apply for a job with a configured locale of en_MX, the Business Card displays in that locale (where configured), regardless of the user's session locale (see Locale Selector) or the site's default locale. This behavior only applies if the job/category page is configured in a locale that's been configured for the system. Job and category pages can display in any locale, but the Business Card never displays in a locale not implemented for the site.

System Locale Selector

If two or more locales are configured in Talent Community Setup for a Profile Type, the job seeker can switch between the languages set for that Profile Type. The Locale Selector is displayed on the Business Card, Already a Member page, Reset Password page, and Thank You page.The Thank You page always displays the list of locales for the Profile Type the user came from. Reset Password page and Already a Member page display all locales found in all Profile Types due to not being able to detect where the user may have came from. If there is only one locale configured for a Client Site, then the Locale Selector does not display. The Business Card and subsequent pages are displayed in the one system locale. There is no "On / Off" switch for the Locale Selectors. If two or more locales are configured in the Talent Community Setup for a Profile Type, the System Locale Selector is automatically turned on. To delete (or make unavailable) a locale, the 'Use default profile' checkbox must be checked in Talent Community Setup for all Profile Types using that locale. Then by clicking out of the Talent Community Set up window and going back in will show that it has been removed. A user CANNOT remove en_US. This always appears in the dropdown. Updates made as part of Project Valhalla dictate that if URL variables are passed into the business card and the user changes the locale, those URL variables should be passed to the business card shown in the new locale. (Ex.: ?email=foo@bar.com). These rules do not apply to the session locale selector configured by Web Dev.

Updates made as part of Project Valhalla dictate that if URL variables are passed into the business card and the user changes the locale, those URL variables should be passed to the business card shown in the new locale.

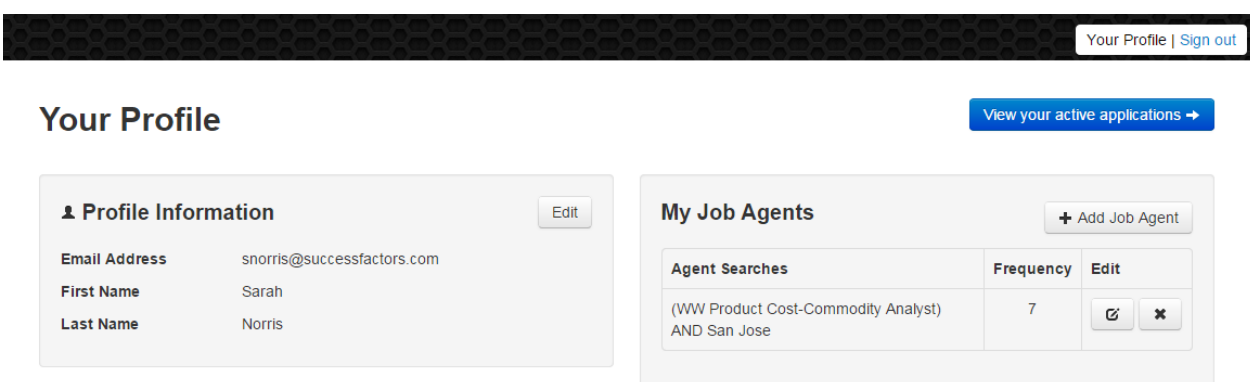
10.5 Using the Candidate Profile

The candidate profile page provides a single page where a user can view and take action on their information.

The Profile Information section of the profile displays information that was entered on the business card, or collected from a social network or imported during a user import. Candidates can edit this information by clicking *Edit* in the *Profile Information* section of the profile. Updating this information updates the user record directly.

> **Note**
>
> The information shown on the profile page may not be shown on the business card, and therefore not be editable, depending on the configuration of the Standard TC Setup profile for the site.

The *My Job Agents* section displays the job agents set up for the candidate. Candidates can edit or delete existing agents, or create new agents on the profile page.



After logging in, the user sees the *Profile Information* and *My Job Agents* sections. While the user is navigating the site, they can return to the profile page by clicking *Your Profile* in the profile widget. Once a user has applied for a job in RCM through Candidate SSO, and received an ATS ID, they will see a *View your active applications* button on the profile page allowing them to browse their job activity.

If the user is also an RCM user, a link to RCM will be shown so the user can see the status of their applications. When the user initially logs in, the RMK platform initialize session-based timer ("gated session"). If the user clicks on the *View your active applications* button before this timer expires, they will go directly to the RCM applications page. If they click the *View your active applications* button after this timer has expired, they will see a dialog asking them to verify their password. If they do so successfully, the platform generates a refreshed link for the *View your active applications* button, and uses that link to take them directly to the RCM applications page. Once the user clicks the link, they are prompted to sign in using their email and password. The user can also reset their password if they have forgotten it, or create an account if they are a new member. When a users logs out of one system (RMK for example), they are also logged out of the other (RCM).

Configuration

There is no additional Command Center configuration required for the Candidate Profile. Instead, a widget is provided which contains the logic to show a link to the *Sign In* page when the user is logged out, and *Your Profile* text which is linked to their profile page and a *Sign out* link when the user is logged in. The URL for the profile page is `{protocol}://{site domain}/talentcommunity/profile/`. Ex.: `http://iocrd.alpha.valhalladev.com/talentcommunity/profile/` This URL will work on any Valhalla site automatically. There is no support for the Candidate Profile on legacy mobile sites.

Recommendation

If you try to access the Candidate Profile link directly without logging in, an error message displays. Click *Sign In* to enter your Talent Community credentials and access the Candidate Profile.

You can pass a locale to the profile page by specifying it on the URL as a query parameter named "locale" as you can do on other pages. To add a Profile widget, use the `<profile:ProfileWidget />` tag in the layout of the career site as desired, and use CSS to style the generated content to fit the design of the site. You can configure multiple profile widgets on a page. The URL to sign in to the profile or the profile widget can be placed anywhere on the career site, including in custom header and footer templates.

10.6 Using Socialmatcher

When Socialmatcher is enabled, candidates can authenticate with social networks and view job matches.

There are two views in the Socialmatcher, the login view, where social network authentication takes place, and the jobs view, where social matching results and referral options display.

Links to the Socialmatcher point to the login page, where the candidate can choose from the available social networks. From this page, the user can authenticate with social networks, and when ready, move to the jobs view to see job results for them and their network connections. If a candidate is already logged in to a social network, they will bypass the *Launch* option for the Social Matcher and land directly on the *Jobs for You* page. The candidate also has the option to sign in with an additional social network on this page, and see jobs from both networks in the same stream.

The *Jobs for You* tab is the default tab in the Jobs view. The first job matched to a candidate displays expanded in an accordion style. The remaining jobs are collapsed. From this screen, the candidate can either *Read More and Apply* for the job (which routes the user to the job's detail page) or *Apply*, which takes the user to the business card to complete the apply process. Both apply links open in new windows.

Next to the *Based on* job search criteria in the *Jobs for You* tab, there is a *Change Search* button that, when clicked, toggles the search criteria editor. In the editor, you can modify the job title and/or location used to recommend jobs. Clicking the *Search* button submits the job title and location you entered, and returns the matched jobs. Once a search for different job matching criteria has been made, an additional *Cancel* button appears. Clicking this button restores the candidate's original search criteria and resubmits the search, effectively restoring the *Jobs for You* results to the set originally shown.

The *Jobs for Your Network* tab displays all of the user's non-private contacts from all authenticated social networks in an "address book" style, in alphabetical order by last name. The filter features above the address book allow the user to search for a contact by entering text that matches their name, title, or company name, and to only show matches from specific social networks. Filtering is done as soon as text is entered in the filter field. Clicking on a contact in the address book displays the following information about that contact (if available):

- photo
- job
- title
- location
- link to view the contact's public profile
- top three jobs that may be referred to that person based on relevance
- contact education
- contact experience

Using the *Refer* button, the user can refer jobs to people in their social networks. Specifics vary, but in general, upon clicking the *Refer* button in a matched job for a connection in your network, a URL to the job detail page on the site and message are created and presented in a dialog for the user's review, and is passed off to the social network's messaging API to be delivered to the recipient when the user clicks a final send/refer button. *Jobs for Your Network* matches up to three jobs per contact. This is not configurable.

Referring ID (userID) will be added to all Facebook/LinkedIn messages and emails. UserID will only be captured if the user is logged in.

Job URLs used in messages are tagged with referral information. The default values are:

- utm_source =[LinkedInInMails|ENG:FacebookSend]
- utm_campaign = socialmatcher

> **Note**
>
> Referral tracking information is lost when sending URLs via Facebook Messaging. If you want the entire URL, including tracking information, to be included in the message, you will have to copy and paste the bit.ly URL into the Message field of the message you are composing.

10.7 Searching for Jobs

Candidates can search for jobs in a number of ways on RMK career sites, including using Advanced Search and Radius Search.

Radius Search

Radius Search allows candidates to enter a postal code and a radius in order to find jobs in a wider area. When using the Radius search, a user can only enter a valid postal code into the zip code box, and as the candidate types, ZIP Codes matching their entered digits will appear in a predictive text box, from which they can select a postal code. The type-ahead zip codes will display in the locale of the page (for example, on a fr_FR page, country names will appear in French). The locale of the page the user is on functions as preference for the type-ahead. For example, if the user is on an en_US page, and begins typing "554" into the zip code box, US zip codes will appear first.

Only zip codes for countries with active jobs will display in the type-ahead. For example, if a client has jobs in the US and Canada, all zip codes for those countries will be available in the type-ahead. The RMK platform does not support certain zip codes, including military codes like APO, FPO and DPO. The zip codes also display their corresponding country. Only countries where the site has active jobs will display. The user can switch between searching by postal code and searching by location by clicking *Search by Zip Code* or *Search by Location*. The unit of radial search will appear in the locale of the page where the user is performing the search. For example, if a page's locale is fr_FR, distance measurements will be in kilometers. Only pages configured for en_US locales will display measurements in miles (This is not configurable).

10.8 Email Agents

When a candidates applies for a job or subscribes to the Talent Community, email agents are created to notify them of future job openings.

Email agents are recurring email alerts sent to candidates after they apply for a job or subscribe to the RMK Talent Community. These agents are based on the job the candidate applied for or the search terms entered on the RMK site. The user can edit their job agents from the email itself, or by signing in and updating their agents through the candidate profile.

Some common email agent creation scenarios:

- A candidate applies for a marketing job in Chicago. If they are new to the Talent Community (have not previously applied for a job or subscribed), when they fill out the Business Card, an agent is automatically created to alert the candidate of other marketing jobs in Chicaog. Agents are sent weekly by default. For existing users, the agent is automatically created.
- If a candidate subscribes to the Talent Community from a category page (Sales Jobs in New York), the email agent is created based on the rule governing the category page. This alerts the candidate of any jobs that would typically appear on that page.
- If a candidiate performs a job search on the RMK site, then subscribes to the Talent Community from the search results page, an agent is created based on their search terms.

10.8.1 Radius Agents

For sites with Radius Search enabled, job seekers can create and edit email agents based on zip code information.

If a user performs a Radius Search on a public site, they have the option to save that search as an email agent, as they would any other search. To do so, they can click *Email Job to Me* from the site search results. If they are already signed in, the agent is added to their member record. If not, they are prompted to fill out the Business Card and join the Talent Community.

The user can also edit location agents on the Business Card when they create their account. Once the agents are created, they can be viewed from the user's candidate profile, where enabled. Users can also edit or remove these agents as they would other email agents.

When viewing a member's agents in the Dashboard or Command Center, the zip code displays in the *Location* column. An administrator cannot edit the Location column of a Radius Agent. To view a member's agents in the Command Center, navigate to *Users* > *Search Public* and perform a search of the users. Click on the name of the desired user to open the *User Edit* window, then click the *Agent* tab to view the member's agents. If you attempt to edit the location column, you will receive a message that you are unable to edit the Location of a Radius Agent.

Previewing a Radius Agent opens a new browser tab with the public site search and results. Other email agents display as a list in the same Command Center window.

To view a member's agents in the Recruiting Dashboard, navigate to the *Members* tab and perform a member search. Click on the name of the desired user to open the *Member Detail* tab, then click on the Agents tab to view the member's agents. If you click *Edit Member* you cannot edit the Location of the Agent. Previewing a Radius Agent opens a new browser tab with the public site search and results. Other email agents display as a list in the same Command Center window.

11 Recruiting Dashboard

11.1 Components of the Recruiting Dashboard

The Recruiting Dashboard is divided into nine primary menus that recruiters can use to search for candidates, create reports and assign permissions, among other tasks.

- **Home** – Displays a quick snapshot of Recruiting Marketing activity
- **Visitors** – Displays information related to users who have visited RMK pages.
- **Members** – Displays information related to users who have become members by applying to a job or joining the Talent Community.
- **Applicants** – Displays information related to who have started to apply for a job.
- **Jobs** - Displays information about jobs in the Recruiting Marketing system.
- **Pages** – Displays ranking information for Search Engine Optimized pages.
- **TCM** – (Optional) Setup and displays information related to Talent Community Marketing (TCM) Emails. Allows you to create and send email communications to targeted members of your Talent Community.
- **Reports** – Provides access to reports and data managed by the Recruiting Marketing platform.
- **Tools** – Allows you to configure the Recruiting Dashboard.

11.2 Understanding Referral Source

You can use the Recruiting Marketing Dashboard to view subscribers, memebers, and applicants by source. Referral Source provides information about how users arrived on an RMK site.

As candidates interact with RMK sitesthrough emails, links, and web pages, the RMK source engine tracks the source of traffic and segments the data into source categories. This traffic is separated into major Types and Engines, and where applicable, the actual source of information and campaign type is dislayed.

For example, a candidate searches on Google for **`Accounting Jobs in Minneapolis`** and in the search results clicks on a like to an RMK site. Recruiting Marketing captures the visitor source as*Google.com* and the keywords as *Accounting Jobs in Minneapolis.* Recruiting Marketing also captures the visitor source type as *Search Engine* and engine as *Google.*

If a candidate performs a serach for **`Accounting Jobs in Minneapolis`**on a job board, like Indeed, then lands on the Recruiting Marketing site, the Recruiting Marketing captures the visitor source as *Indeed* and the keywords as *Accounting Jobs in Minneapolis.* The visitor source type is recorded as *Job Board* and engine as *Indeed.*

In both cases, the keyword and source data is associated with the visitor and appropriate job data.

11.3 Recruiting Dashboard Member Types

Members are individuals who have joined the Talent Community and are not users of the Recruiting Dashboard.

- **Subscriber** – These users have signed up via email subscribe, filled out the Business Card during the apply process, or were manually loaded into Recruiting Marketing with this member type.
- **Employee** – Current employees who have been loaded into RMK as a part of Employee Referral Marketing product or users who signed up using an employee specific Talent Community join page. Employees are emailed jobs with a tracking parameter in the URL, allowing RMK to track when an employee shares a job with their network, and whether or not this resulted in a referred subscriber.
- **Past Applicant** – Past applicants loaded into RMK as part of re-recruiting.

11.4 Using the Recruiting Dashboard

11.4.1 Using the Home Menu

The Home tab of the Recruiting dashbaord displays a snapshot of activity in RMK.

- Totals Bar – Displays an overview of some key measures: jobs, visitors in the current month, members in the Talent Community, applies started, average number of emails sent over the past 30 days, and return applies (the number of members who returned and started an application more than one day after joining the Talent Community).
- Search Your Talent Community – Allows recruiters to search Talent Community members and create saved searches. The *My Saved Searches* button displays any saved searches, but not shared searches.
- Sourcing Report – Clicking *Run Report* takes the recruiter to the Source Report page, where they can create a report that visualizes sourcing data.
- Rotating Charts – Show a rotating chart view. Clicking on the chart will stop the rotation. Carts displayed:
  - Total number of visitors to an RMK site for the month to date, by source This chart only shows the top ten sources. Sources not in the top ten are aggregated into the *Other* category.
  - Total number of visitors that have either subscribed to the Talent Community or applied to a job.
  - Total number of active jobs
- Explore More Features – Access the Customer Community and other information about SuccessFactors Recruiting

11.4.2 Using the Visitors Menu

The Visitors tab displays information about users who have visited a Recruting marketing public site page.

- **Search** – Dashboard users can use the Search tab to display a list of visitors based on fitlers. Vistitor search results can be filtered by:
  - Visit Date - A predefined set of date ranges. A user's visit date is based on the day the visitor is captured in RMK. You can also search for a customer date range by entering dates in the *Start* and *End* fields.
  - Referrer Type - A dropdown list that allows the Dashboard user to filter the list of visitors by referrer type. This list is alphabetical and contains only referrer types currently in use.
  - Referrer Engine - A dropdown list that allows the Dashboard user to filter the list of visitors by referrer engine. The list is alphabetical and contains only referrer engines currently in use.
  - Country - A dropdown menu that allows the Dashboard user to filter visitors by the country associated with their IP address.
  - Keyword - A text field a Dashboard user can use to filter visitors by keywords used when searching for jobs.
  - Source - A text field a Dashboard user can use to filter visitors by the source URL of the visitor. You can enter a full URL or only part of it.
  - Campaign -A text field that allows the Dashboard user to filter visitors by campaign code.
- **Overview** - Displays the percent of visitors by Type and Engine, and shows the cumulative visitors by day, week, or month. Data for this report is available from 2010 onward.
  - Source of Visitor - Displays the percentage of visitors by Source Engine for the selected filters. Only the top ten sources are displayed. Visitors who do not belong to the top ten sources will be aggregated into the 'Other' category.
  - Types of Searches - Displays the percentage of visitors by Type for the selected filters. Only the top ten sources are displayed. Visitors who do not belong to the top ten sources will be aggregated into the 'Other' category.
  - Inbound Candidate Traffic - Displays the total number of visitors for the selected report criteria for the selected timeframe.
- **Map** - Displays a world map, as well as corresponding locations with the visitor count. The map can be filtered by *Segment Category* and *Segment Subcategory*, which allow the user to select the primary category for the job or the subcategory for the job as defined in RMK's Segment Engine. Hover over specific section of the map legend on the right highlights countries and their corresponding visitor count in the list on the left. Clicking a country displays more detailed visitor counts by state or region, and a user can dtrill down to more specific counts by city. Visitor counts by location are based on the availability of the visitor's IP address and accuracy of their network provider. Because of this, counts on the Visitors Map may be different than counts on other reports. The map is indented to provide an overview and give you a general idea where visitors are located. If a customer chooses not to capture IP address, the function of the Map tab will be impacted.
- **By Date & Time** – Displays the count of visitors by the day of the week and time of day. Data on the By Date and Time tab is only available for the previous 90 days.
  - Visitors by Day of Week (Vertical Bar Chart) – Displays the total count of visitors for each day based on the selected filter criteria.
  - Visitors by Time of Day (Central Time) (Vertical Bar Chart) – Displays the total count of visitors segmented hourly for one day.
- **Segments** - Displays the visitor count by job category. RMK uses keywords entered in search engine or aggregator searches and applies the rules of the Job Segments Engine to determine the appropriate category and sub category of the search. Only visitors who have used a captured keyword display in the result set. The Segments tab displays two charts. The first displays the count of visitors searching for jobs in each segment

category, based on the selected filters. The second chart displays the count and percentage of visitors seraching for jobs in each segment category, based on the selected primary category from the first chart.. Select the Data Grid tab for an individual chart to list each job category with the corresponding visitor count and percentage of the total count for the selected filters.

- **Mobile Traffic Overview** - Displays the percent of mobile visitors by Type and Engine, and also shows the cumulative visitors by day, week, or month. Data for the Mobile Traffic Overview is only available from 2010 onward. The Mobile Traffic Overview displays three charts:
  - Source of Visitor - Displays the percent of mobile visitors by Source Engine for the filter set. Only the top ten sources are displayed. Visitors who are not in the top ten sources will be aggregated into the 'Other' category.
  - Types of Searches - Displays the percent of mobile visitors by type for the selected filter set. Only the top ten sources are displayed. Visitors who are not in the top ten sources will be aggregated into the 'Other' category.
  - Inbound Candidate Traffic - % Mobile Traffic view displays the percentage of total traffic that comes from mobile visitors for the date range defined by filters. Mobile Traffic view displays the number of mobile visits for the date range defined by filters

  .

11.4.3 Using the Members Menu

The Members menu displays information related to users who have joined the Talent Commuity or applied for a job.

- **Search** - Search results in the Members menu display a detailed listing of candidates, showing detailed information on individual members and their source data. Clicking *Export Results* exports the Search results to Excel. Users can search specific Solr fields to further narrow member searches.

  > Example
  >
  > title:sales will search the *title* field for the keyword *sales*. Do not enter spaces between field declarations and keywords when searching Solr fields.

  Operators:
  - OR - When used between keywords, returns results for records matching any of the keywords listed.
  - AND - When used between keywords, returns results for records matching all of the keywords listed.
  - NOT - The NOT operator must be used in conjunction with other operators. Using the NOT operator by itself will not return any results.No results are returns for any keywords following the NOT operator.

  The Recruiting Dashboard Member search allows users to build and save custom member searches with a large number of different filters.
  - Create New Search- Dashboard users can choose between *Create New Form Builder Search* or *Create New Search Bar Search* . A Form Builder Search uses a library of pre-defined syntax and filter options. A Search Bar Search is a more advanced search that requires the user to enter syntax directly.
  - Current Search - Displays the curent search filters and allows you easily select a system or a saved search. Three System Searches are available: Groups, Recruiter and Source. For each System Search, you can set a number of data filters.

- Date Added - Displays a predefined set of date ranges that you can select. This is used to filter on the date the member was added to the RMP.
- Start and End – Displays a predefined set of date ranges from the period filter, and also allows you to enter a customizable range.
- IP Country – A drop-down field that displays a pre-defined set of countries. This is used to filter the associated country from the visitor's IP address.
- All Fields Search – A free-form field that searches that allows the search of multiple fields. Includes: Current Title, First Name, Last Name, email, IP City, IP Region, IP Country, Referrer Engine, Referrer Type, Campaign, Source, Group Name, and Agent Keyword.

Each of the System Searches also has distinct search fields. For the Group search, users can seach on the *Group* and *Recruiter* fields. The *Group* field allows a user to select from a list of groups memebers are associated with. The *Recruiter* field is a text field where you can search for members assigned to individual recruiters.
The Recruiter search has *User Type*, *User Status* , and *Recruiter Status*field options. The *User Type* is a pre-defined list of available member types. The *User Status* is typically limited to Active, Inactive, or all statuses. *Recruiter Status* is a text field that allows the user to search the status of the member in the recruiting cycle.
The Source system search also contains the *User Type* and *User Status* search fields.

- My Searches – Personal saved searches.
- Shared Searches – Saved searched you can share with other users within your company.
- Open Search Manager - The *Open Search Manager* option opens the *Members Search Manager* window. This menu displays all saved searcheds and their properties. Using the *Members Search Manager*, you can create shared searches by checking the *Shared* checkbox. Checking the *Save Form Value* option, saves the user-entered values for text fields and other custom selections. Enabling the *Recruiter Alert* checkbox sends the search as a Recruiter Alert to the user at the specified interval.
- Feedback – You can send feedback regarding the Member to Recruiting Marketing.
- Add New Member – Clicking this button will allow you to manually enter a member record in the RMP.
- Search Form / Search Bar – Builds a search filter query using the library to drag and drop filters into the search form allowing you to customize queries and reporting.
- Show/Hide Library – Toggle that shows/hides the possible filters and usable syntax. Note: By default search queries use 'AND' to join filters. Example: LastName AND CurrentEmployer
- Save Search – Opens the Member Search Manager
- Clear– Clears Search Form/Search Bar.
- If TCM (Talent Community Marketing) is enabled, you will have the options to "Add Selected Members to TCM Email" and "Add All Results to TCM Email". Adding large records will take a short time to complete. Members with bounced email addresses will not be added as recipients.
- Datagrid View - The Datagrid View menu allows you to switch betwen the different system views for search results, and create custom and shared views. The menu displays the curent datagrid view. Records are returned based on the Added Date.Each Each system view shows different fields in its search results.

  Source:

  - Added – Date the member was added to the Talent Community.
  - First Name – First name of the member. Clicking on the name of a specific member opens a detailed member record.
  - Last Name – Last name of the member. Clicking on the name of a specific member opens a detailed member record.

- Email – Email address for the member. Clicking on the email address opens your email program and inserts the member's email into the to: field.
- Company – Value the member entered in the subscribe form.
- Title – Value the member entered in the subscribe form.
- Phone – Value the member entered in the subscribe form.
- Type – The member's RMK user type.
- Recruiter Source – Copied from the member source.
- Campaign – Custom code tracked in the referring URL. The maximum campaign length is 100 characters.
- Applies – The number of times the member has applied for jobs using RMK
- Recruiter Contact – A selectable list that filters the member's selection of being contacted by a recruiter.

Recruiter:

- Added – Date the member was added to the Talent Community.
- First Name – First name of the member. Clicking on the name of a specific member opens a detailed member record.
- Last Name – Last name of the member. Clicking on the name of a specific member opens a detailed member record.
- Title – Value the member entered in the subscribe form.
- Company – Value the member entered in the subscribe form.
- Phone – Value the member entered in the subscribe form.
- Applies – The number of times the member has applied for jobs using RMK.
- Contact – Clicking the icon in this column allows you to contact the candidate. The icons in this columns appear based on the contact information stored on the member record.
- Recruiter – Name of the recruiter assigned to the member.

Groups

- Added – Date the member was added to the Talent Community.
- First Name – First name of the member. Clicking on the name of a specific member opens a detailed member record.
- Last Name – Last name of the member. Clicking on the name of a specific member opens a detailed member record.
- Title – Value the member entered in the subscribe form.
- Company – Value the member entered in the subscribe form.
- Recruiter Source – Copied from the member source.
- Campaign – Custom code tracked in the referring URL. The maximum campaign length is 100 characters.
- Groups - The name of the group(s) currently associated with the member.Clicking *Add* opens a window where you can select one or more groups to associate with the member record.
- Agents – Displays the Agents that the member is currently subscribed to.

- My Views - Lists saved personal datagrid views.
- Shared Views – Lists shared datagrid views.
- Open View Editor – Lists all saved datagrid views and their basic properties, allows you to save and share custom views, as well as create new blank views.
  - Create New Blank View – Creates a new view.
  - Close Search Editor – Closes the View Editor.

    - View List - Displays current views to select. Clicking the X next to a custom view deletes the view. You cannot delete the System views: Groups, Recruiter and Source.
    - Shared – Checking this box makes the view a Shared search.
    - Available Columns – Add a column to the view by double clicking or clicking the arrow icon. Clicking the X next to a column deltees it from the view.

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- **Overview (New)** - Displays a percentage of members by Type and Engine, and also shows the cumulative visitors by day, week, or month. Users can search data from the most recent 25 months. The *Referrer Type* and *Referrer Engine* filters allow you to filter the search results to a specific source type and engine. These dropdown menus only show actively used source types and engines. The *Overview (New)* report displays three charts:
    - Source of Member - Displays the percent of members by Engine for the selected filters. Only the top ten sources are displayed, and members who are not part of these ten sources are aggregated into the "Other" category.
    - Types of Searches - Displays the percent of members by Type for the selected filters. Only the top ten sources are displayed, and members who are not part of these ten sources are aggregated into the "Other" category.
    - Members by Date - Displays the total number of members for the selected report criteria for the selected date interval and time frame.
- **Referrals** – Displays a detailed listed of both members and the person who referred them to the Talent Community. a. Contracted All Referrals button – Groups the data by referring member. b. Expand All Referrals – Displays a list of all referred subscribers along with the person who is responsible for referring them. This reveals duplicates in the referring members' area where a member has referred more than one new member.
    - Date Added - Displays a predefined set of date ranges used to filter the date the referred member was added to the Talent Community.
    - Start and End - Allows you to enter a customizable range that shows the number of referrals within a defined range.
    - Referred Search - You can conduct a normal or advanced search on this field for members who were referred to the Talent Community. To run a normal search, enable the checkbox next to the desired fields in the dropdown, then enter search terms in the text fields. The search runs against all the selected fields. To conduct an advanced search, enter search terms for each of the available fields. Search terms entered in the advanced search have an "AND" relationship.
    - Referring Search - You can conduct a normal or advanced search on this field by the recruiter who referred the member to the Talent Community. To run a normal search, enable the checkbox next to the desired fields in the dropdown, then enter search terms in the text fields. The search runs against all the selected fields. To conduct an advanced search, enter search terms for each of the available fields. Search terms entered in the advanced search have an "AND" relationship.

  Results of this search show details about both the member referred to the Talent Community and the user who referred them.
  Referred Members – These are members who subscribed as the result of a referral. 1. Added– Date the member was added in the Talent Community. 2. Name – Name of the member. Clicking on the name of the member will open the detailed member record. 3. Email – Email address for the member. Clicking on the email address will open your email program and insert the member's email into the To: field. 4. Company – Value member entered in the subscribe form. 5. Title – Value member entered in the subscribe form. 6. Phone – Value member entered in the subscribe form. 7. Applies – Displays the number of times the member has applied to jobs in the RMP. 8. Contact – Displays Yes or No to indicate if the member is agreeing to be

contacted by your organization. iv. Referring Members – These are the members who referred new subscribers. 9. Name – Name of the member. Clicking on the name of the member will open the detailed member record. 10. Email – Email address for the member. Clicking on the email address will open your email program and insert the member's email into the To: field. 11. Type – Displays the user types in the RMP. 12. Count – Displays the total number of referred members for the reporting data when contracted.

- **Map** - Displays a world map, as well as corresponding locations with the visitor count. The map can be filtered by *Keyword* and *Group*. The *Keyword* field filters on keywords tracked in RMK. Hover over specific section of the map legend on the right highlights countries and their corresponding visitor count in the list on the left. Clicking a country displays more detailed visitor counts by state or region, and a user can dtrill down to more specific counts by city. Visitor counts by location are based on the availability of the visitor's IP address and accuracy of their network provider. Because of this, counts on the Members Map may be different than counts on other reports. The map is indented to provide an overview of visitors' location. If a customer chooses not to capture IP address, the function of the Map tab will be impacted. Clicking on a highlighted zone in a state/region or city list displays the members from that zone in the Members Detail report.
- **Group** – Displays user-defined member groups. The report shows the name of the group and the number of members in the group. You can also use the Auto-Assign feature to automatically assign members to a group on a nightly basis based on the configured keywords. These keywords are displayed in the report *Keywords* column.
  The Groups menu also allows you to view, edit, add, and delete member groups. To create a new group, enter the group's name in the text field and click *Add Member Group.* Click *Save Changes* to save new groups. You must save changes betore leaving the Groups tab. You can also delete groups by selecting the checkbox next to a group and clicking *Delete Selected.*
- **Facebook** - Displays employees who have installed the Recruiting Marketing Facebook application. Also displays details associated with Facebook. Availalbe filters:.
  - Name/Email – A text field search on the employee's name or email address
  - User Status – The status of the Facebook application on the employee's Facebook Profile. When an employee uninstalls the application, the status changes to Inactive. There may be a slight delay in the status update from Facebook.
  - Number – Controls the number of rows to return in the result set.
    Clicking the member's name in the search results opens the employee's Facebook profile.
- **Overview** - Displays a percentage of members by Type and Engine, and also shows the cumulative visitors by day, week, or month. Filters availalbe in the *Overview* tab match those availalbe in *Overview (New)*. The Overview tab displays three charts:
  - Source of Member - Displays the percentage of members by engine for the selected filters. Only members from the top ten sources are displayed. Members who do not fall into these sources are aggregated into the "Other" category.
  - Types of Searches - Displays the percentage of members by type for the selected filters. Only the top ten sources are displayed. Members who do not fall into these sources are aggregated into the "Other" category.
- **Member Detail** - This tab is only visible when a user clicks on a member's name in one of the other tabs. The Member Detail tab shows detailed data for each member.

  Table 5: Member Details Tab Fields

Field	Description
First Name	Member's first name
Last Name	Member's last name

Field	Description
Type	RMK user type that identifies what types of emails the user receivers
Email	Member's email address
Email Active	Displays if the email is active or inactice. If set to inactive, the system will not generate emails or allow the Dashboard user to update agents for the user. A member can be set to inactive at their request, by a user setting their record to inactive, or if an email sent to them bounces. Email bounce codes: ○ HB - Hard bounce ○ UR - User replied to the email with an unsubscribe request ○ UUR - User unsubscribed via the web page ○ INVD - invalid email
Password Status	Indicates if the user's password is active. *Enabled*indicates the password is active, *Susupended* means the password neds to be reset. Clicking *Reset Password*begins the password reset process.
Active	Possible values are *True* or *False.* Inactive members will not receive emails.
Interest Level	Member specified value entered during the subscribe process.
Locale	Indicates the member's preferred locale. The user can select a value based on the active locales.
Recruiter Contact OK	Value the member specified during sign-up, indicating if they want a recruiter to contact them.
Custom 1	Customers can configure this field to gather more information from public users. Custom 1 can only be a Yes/No (boolean) question.
Custom 2	Customers can configure this field to gather more information form the public user. Custom 2 can only be a multiple choice questions. Custom 2 can be dependent or required based on the public user's answer to Custom 1.
Last Login	The last time the member signed in to their profile.
# of Referrals	The number of members referred by the member
Groups	Groups the user is associated with in RMK. Editing the member record displays an option to edit the member's groups.

Field	Description
Notes	Text field where recruiters can enter additional comments or information about the user.
Current Employer	Value specified by the member about their current job.
Current Title	Value specified by the member about their current job.
Phone Number	Member's phone number
Emails Sent	Number of emails sent to the member from RMK.
Jobs Sent	Number of jobs sent via email to the member from RMK
Agents	Number of agents associated with the member.
Jobs	Number of jobs the member has applied for.
Recruiter/Owner	Text field where a recruiter can define a relationship with the member.
Source	System data obtained from the referring URL when a member is created. Dashboard users can override this data with a manual entry.
Recruiter Status	Text field where the recruiter can identify the status of the member in the recruiting cycle.
Re-contact	Date when the recruiter may re-contact the member.
LinkedIn	The recruiter can enter the LinkedIn profile URL of the member. Clicking *Search* when the field is empty will search LinkedIn for the member name.
Facebook	The recruiter can enter the Facebook profile URL of the member. Clicking *Search* when the field is empty will search Facebook for the member name.
Twitter	The recruiter can enter the Twitter profile URL of the member. Clicking *Seach* when the field is empty will search Twitter for the member name.
Google+	The recruiter can enter theGoogle+ profile URL of the member. Clicking *Search* when the field is empty will search Google+ for the member name.

Anonymize User – The Anonymize User button kicks off the anonymize user process. This process does not delete user data, but renders it unreadable to RMK users. The user can still be tracked for analytics purposes, but their personal details (name, email, etc) are encrypted and unreadable. Once this process is completed, the user data cannot be retrieved. If the client is using Candidate Single Sign On, the user's data will also be anonymized in the Recruiting Management system.

- Agents – Displays the agents to which the member is currently subscribed.

- TCM Emails – Displays the TCM emails the member is currently associated with (sent & unsent), where applicable. This tab shows the date sent, view count, click count, and campaign.
- Jobs – Displays the jobs the member has applied to in the RMP
- Referral Info – Displays the source and/or referral information of the member. Available fields:

Referral Info

Table 6: Members Detail Referral Info Fields

Field	Description
Referrer Type	The member's source type. Only actively used types are available.
Referrer Engine	The member's source engine. Only actively used engines are available.
Referring URL	URL passed to RMK servers from the member's originating server when they signed up.
Referring User	Existing user who referred the member.
Referring User Email	Email of the referring member.
Referring User Type	The RMK user type of the referring member.
Keywords	Keywords captured by Recruiting Marketing when the member initially subscribed.
Landing Page	RMK page the member arrived on when they initially subscribed.
Campaign	RMK campaign code used and captured when the member initially subscribed. The maximum campaign length captured is 100 characters.
Address	IP Address captured from the member when they initially subscribed. If the customer chooses not to capture IP address, this field and others based on it will be blank.
Country	Member country based on the captured IP address.
Region	Member region based on the captured IP address.
City	Member city based on the captured IP address.
Zip	Member zip code based on the captured IP address.
ISP	Name and information about the member's of the Internet Service Provider.
Domain Name	Name of the domain for the IP address associated with the member.
Location	Coordinates based on the member's IP address. Where populated, the Dashboard user can look up the member location using Google Maps.

11.4.3.1 How to Create a New Form Builder Search

Context

Procedure

1.

11.4.3.2 How to Create a New Search Bar Search

Context

Procedure

1.

11.4.3.3 Recruiting Dashboard Member Search Fields

When searching members, Recruiting Dashboard users can either use pre-defined searches or maually enter search terms.

Table 7: Members Detail Referral Info Fields

Field	Description
All Fields Search	Entering search terms in the fields searches: Current Title, First Name, Last Name, Email, IP City, IP Region, IP Country, Referrer Engine, Referrer Type, Campaign, Source, Group Name, and Agent Keyword
First Name	Member's first name.

Field	Description
Last Name	Member's last name.
Email	Member's email address.
Email Enabled	Member selection to allow email communicaiton. *Enabled* indicates member receives emails, *Disabled* members do not receive emails.
Company	Member-entered value for current company name.
Title	Member-entered value for current job title.
Phone	Member-entered phone number.
Interest Level	Member-selected value for interest level.
Custom 1	Member-selected answer for the question configured in the Custom 1 field.
Custom 2	Member-selected answer for the question configured in the Custom 2 field.
Member Locale	Dropdown menu of locales in the site's member records. Displays the locale associated with the member.
Referrer Type & Referrer Engine	Dropdown menu of sites RMK has defined for tracking user traffic. Contains only acively used source types and engines.
Campaign	Customer campaign codes. Maximum campaign code length is 100 characters.
Source	Source data copied from the referring URL during member creation.
IP City	City derived from the member's IP address.
IP Region	Region derived from the member's IP address.
IP Country	Dropdown menu of a pre-defined set of countries. Filters on the country derived from the member's IP address.
IP Zip	Zip code derived from the member's IP address.
IP Address	IP address captured when the member initially subscribed. If the customer chooses not to capture this IP address, this field and fields derived from IP address will be blank.
IP Domain Name	Name of the domain for the member's IP address.
IP ISP	Name and information about the member's Internet Service Provider.
Job ID	ATS Job ID associated with the member's apply
Job Location	Job location associated with the member's apply.

Field	Description
Job Title	Job title associated with the member's apply.
Recruiter	Recruiter assigned to member.
Recruiter Contact	Member's selection indicating if they want to be contacted by a recruiter.
Recruiter Notes	Information entered in the Notes field on the member record by the recruiter.
Recruiter Source	Source captured when the member subscribed, or the source manually entered by a recruiter.
Recruiter Status	Recruiter-entered value that identifies the member's status in the recruiting cycle.
Re-Contact	The next contact date for the member. The Dashboard filters based on the date entered by the recruiter and any earlier date.
Add Type	Dropdown menu of availalbe methods of adding users to the Talent Community: All, Imported, Manual, Self-Subscribed, LinkedIn, and Facebook.
Group	Dropdown menu of member groups.

11.4.4 Using the Applicants Menu

Displays information related to individuals that have applied to jobs through the Recruiting Marketing platform.

Clicking on the Export to Excel link will export the data from the report into your Excel application. b. Recruiter View/Source View – Toggle that allows you to alter the filter and report elements for the report.

- **Search (Source View)** – Dashboard users can search applicants using oe of three views: Source, Recruiter, or Groups. The Source viewSummary listing of applicants that have applied to one or more jobs. Available search filters:
  - Date Added – Displays a predefined set of date ranges you can select. These are used to filter on the date the member was added to the RMP.
  - Start and End – Displays the predefined set of date ranges from the period filter, and also allows you to enter a customizable range.
  - Country – A drop-down field that displays a pre-defined set of countries. This is used to filter the associated country from the applicant's IP address. iv.
  - User Type (Source and Recruiter view) – A selectable list that filters results on the type of member. v.
  - User Status (Source and Recruiter view) – A selectable option to choose between Active, Inactive, or all user statuses. vi.
  - Name|Title|Email|Company (Source and Recruiter view) – A free-form field that filters results based on the member record field's Name, Title, Email and Company. vii. Source – A free-form field that filters on the actual source URL of the member. The member source is defined as the source that was tagged on the visitor record when the member signed up for the Talent Community. viii.
  - Campaign (Source view only) – A free-form field to filter results on the campaign codes used by the client.

- Source (Source view only) – A free-form field to filter on the actual source URL of the applicant. The applicant source is defined as the source that was tagged on the visitor record when the applicant signed up for the Talent Community.
- Re-Contact (Recruiter view only) – A date field that allows you to filter on the next contact date for the members. The system filters based on the date entered and any date prior for the result set. ix.
- Recruiter (Recruiter view only) – A free-form field you can use to find members assigned to individual recruiters.
- Group (Groups view only) – A selectable list that filters results on the group members are associated with. v.
- Search Options (Groups view only) – A selectable option to choose what fields are used in the filter criteria.
- Search Text (Groups view only) – A free-form field used to determine the value(s) used with the Search Options selection

The following applicant information is returned from the Applicant Search:

- Added – Date the member was added in the Talent Community. ii.
- Name – Name of the member. Clicking on the name of the member will open the detailed member record. iii.
- Email – Email address for the member. Clicking on the email address will open your email program and insert the member's email into the To: field. iv.
- Company – Value member entered in the subscribe form. v.
- Title – Value member entered in the subscribe form. vi. Phone – Value member entered in the subscribe form. vii.
- Type – Displays one of the four user types in the RMP. viii. Source – Displays the source URL for the member. ix.
- Campaign – Custom code that can be tracked in the referring URL from the RMP. The maximum campaign length captured is 100 characters. x.
- Applies – Displays the number of times the member has applied to jobs in the RMP. xi.
- Contact – Displays Yes or No to indicate if the member is agreeing to be contacted by your organization.
- Contact (Recruiter view) – Displays icon(s) you can select to automate the communication to the candidate. The appearance of selected icons is based on the contact information stored on the member record.
- Re-Contact – A date field from the member record that you have identified as the next contact date. iii.
- Status – A user-entered status from the member record.
- Phone – Value member entered in the subscribe form. viii.
- Recruiter Source – The data gets copied from the source of the member, but can be overwritten by you. Changing this field will not change the actual source data captured in the RMP.
- Recruiter – Displays the name of the recruiter assigned to the member.
- Source – Displays the source from the member record.
- Agents – Displays the keywords(s) used in the members agents. Displays when you hover over the number with your mouse
- d. Action Items i. Group Update Action – Selectable option that completes an update on all selected records in the report. ii. Add Members to Group – Adds all selected members to the associated groups selected in the Selected Groups Field. iii. Remove Members from Group – Removes all selected members from associated groups in the Selected Groups field. iv. Selected Groups – Displays all groups managed in the RMP. You can select one or more group

- Overview - Displays separate charts intended to give you an overview on applicants in the RMP, based on their source and application date. .
    - Source of Applicants (Pie Chart) i. Displays the percent of applicants by the RMP Source Engine for the filter set. ii. Only the top 10 sources are displayed. Members not in the top 10 sources will be aggregated into the ‘Other’ category.
    - Types of Searches (Pie Chart) i. Displays the percent of applicants by RMP Source Type for the filter set. ii. Only the top 10 sources are displayed. Visitors not in the top 10 sources will be aggregated in the ‘Other’ category.
    - Applicants by Date (Vertical Bar Chart) i. Displays the total number of applicants for the selected filter criteria from the date Interval and timeframe filter.
- **Referrals** – Displays a detailed listed of both members and the person who referred them to the Talent Community. a. Contracted All Referrals button – Groups the data by referring member. b. Expand All Referrals – Displays a list of all referred subscribers along with the person who is responsible for referring them. This reveals duplicates in the referring members’ area where a member has referred more than one new member.
    - Date Added - Displays a predefined set of date ranges used to filter the date the referred member was added to the Talent Community.
    - Start and End - Allows you to enter a customizable range that shows the number of referrals within a defined range.
    - Referred Search - You can conduct a normal or advanced search on this field for members who were referred to the Talent Community. To run a normal search, enable the checkbox next to the desired fields in the dropdown, then enter search terms in the text fields. The search runs against all the selected fields. To conduct an advanced search, enter search terms for each of the available fields. Search terms entered in the advanced search have an "AND" relationship.
    - Referring Search - You can conduct a normal or advanced search on this field by the recruiter who referred the member to the Talent Community. To run a normal search, enable the checkbox next to the desired fields in the dropdown, then enter search terms in the text fields. The search runs against all the selected fields. To conduct an advanced search, enter search terms for each of the available fields. Search terms entered in the advanced search have an "AND" relationship.

  Results of this search show details about both the member referred to the Talent Community and the user who referred them.
  Referred Members – These are members who subscribed as the result of a referral.

    - 1. Added– Date the member was added in the Talent Community. 2.
    - Name – Name of the member. Clicking on the name of the member will open the detailed member record. 3.
    - Email – Email address for the member. Clicking on the email address will open your email program and insert the member’s email into the To: field. 4.
    - Company – Value member entered in the subscribe form. 5.
    - Title – Value member entered in the subscribe form. 6.
    - Phone – Value member entered in the subscribe form. 7.
    - Applies – Displays the number of times the member has applied to jobs in the RMP. 8.
    - Contact – Displays Yes or No to indicate if the member is agreeing to be contacted by your organization. iv.
      Referring Members – These are the members who referred new subscribers. 9.
        - Name – Name of the member. Clicking on the name of the member will open the detailed member record. 10.

- Email – Email address for the member. Clicking on the email address will open your email program and insert the member's email into the To: field. 11.
    - Type – Displays the user types in the RMP.
    - Count – Displays the total number of referred members for the reporting data when contracted.
- Map (Geo-spatial map) – A summary listing of applicants that have applied to one or more jobs. Filters and fields are focused on information relevant to a recruiter to take action items on the individual. a. Filter i.

    - Apply Date– Allows you to select from a predefined set of date ranges. Used to filter on the date the applicant applied to a job. ii. Start and End – Displays a predefined set of date ranges from the period filter, and also allows you to enter a customizable range. iii. Search Options – Allows you to select from Job Title, Job Location, Recruiter Source, or Campaign when executing a search. iv. Search – A free-form box used with the Search Options to filter the result set. v. User Type – A selectable list that filters results on the type of member. vi. Recruiter Contact – A selectable list that filters the results on the member's selection of being contacted by a recruiter. vii. Group – A selectable option that filters the results on members associated with the selected member group.

    Hovering over specific section of the map legend on the right highlights countries and their corresponding visitor count in the list on the left. Clicking a country displays more detailed visitor counts by state or region, and a user can dtrill down to more specific counts by city. Visitor counts by location are based on the availability of the visitor's IP address and accuracy of their network provider. Because of this, counts on the Members Map may be different than counts on other reports. The map is indented to provide an overview of visitors' location. If a customer chooses not to capture IP address, the function of the Map tab will be impacted. Clicking on a highlighted zone in a state/region or city list displays the members from that zone in the Members Detail report.
- Applicants By Job – Applicants by job is focused on the total number of applicants defined by the unique combination of the applicant and job. When viewing information and counts, the system will display a record for each applicant and job combination. Example: an applicant that applies to Job A twice and Job B once within the selected timeframe would be counted twice. a. Filter

    - Apply Date– Allows you to select from a predefined set of date ranges. Used to filter on the date the applicant applied to a job. ii.
    - Start and End – Displays a predefined set of date ranges from the period filter, and also allows you to enter a customizable range. iii.
    - Search Options – Allows you to select from Job Title, Job Location, Applicant Name, Recruiter Source or Campaign when executing a search. iv.
    - Search – A free-form box used with the Search Options to filter the result set. i.
    - Country – A drop-down field that displays a pre-defined set of countries. Used to filter on the associated country from the visitor's IP address. v.
    - User Type – A selectable list that filters results on the type of member type. i.
    - Recruiter Contact – A selectable list that filters the results on the member's selection of being contacted by a recruiter.
      The Applicants by Job search returns the job title, job ID and location of the job, as well as the name, email and source of the applicant. The search results also display the campaign code, where applicable.
- Unique Applicant Overview - Displays separate charts intended to give you an overview on applicants in the RMP focused on their source and applies by date. This report uses the power of Advanced Analytics and will use the most recent 25 months' worth of data for reporting purposes. The Date Range drop down selection has been updated to reflect this. As of release b1204-1, "Applicants by Job Overview (New)" reads "Unique Applicants Overview" When viewing information and counts, the system will display a record for each application. Example: an applicant that applies to Job A twice and Job B once at any time since tracking has been turned on would be counted twice. b

- . Source of Applicant (Pie Chart) i. Displays the percent of applicants by engine for the filter set. ii. Only the top 10 sources are displayed. Visitors not in the top 10 sources will be aggregated into the ‘Other’ category. c.
  - Types of Searches (Pie Chart) i. Displays the percent of applicants by Type for the filter set. ii. Only the top 10 sources are displayed. Visitors not in the top 10 sources will be aggregated into the ‘Other’ category. d.
  - Unique Applicants by Date i. Displays the total number of applicants for the selected report criteria. The system will automatically change the labeling of time intervals depending on the timeframe that you select (day, month, or year).
- Applicants by Job Overview - Displays separate charts intended to give you an overview on applicants in the RMP focused on their source and applies by date. When viewing information and counts, the system will display a record for each application. Example: an applicant that applies to Job A twice and Job B once within the selected timeframe would be counted twice. e. Filter i
  - . Date Added – Displays a predefined set of date ranges you can select. Filter is based on the date the applicant was added as a member in the RMP. ii.
  - Start and End – Displays a predefined set of date ranges from the period filter, and also allows you to enter a customizable range. iii.
  - Referrer Type – A selectable filter for narrowing the result set to a specific source grouping/type. This list contains only actively used types in alphabetical order. iv.
  - Referrer Engine – A selectable filter for narrowing the result set to a specific source. This list contains only actively used types in alphabetical order. v.
  - Group – A selectable option that filters the results on members associated with the selected member group. vi.
  - Date Interval – A selectable filter that only affects the Inbound Candidate Traffic report. The amount of data items displayed is related to the date range and option for the Date Interval field. vii.
  - Country – A drop-down field that displays a pre-defined set of countries. This is used to filter the associated country from the visitor’s IP address. viii.
  - Keyword – A free-form field that filters keywords tracked in the RMP when a member joins the Talent Community.

  The *Applicants by Job Overview* tab displays the following charts:

  - Source of Applicant - Displays the percentage of applicants by engine for the selected filters. Only the top ten sources are displayed, and members who are not part of these ten sources are aggregated into the "Other" category.
  - Types of Searches - Displays the percentage of applicants by Type for the selected filters.Only the top ten sources are displayed, and members who are not part of these ten sources are aggregated into the "Other" category.
  - Unique Applicants by Date - Displays the total number of applicants for the selected report criteria for the Date Interval and timeframe filters.

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11.4.5 Using the Jobs Menu

The jobs tab allows Dashboard users to search, edit, and share jobs managed by RMK.

- **Search** – Displays information related to jobs in RMK.

- Job Title – A free-form field that filters the Job Title from the job record in the RMP. ii.
- Job ID – A free-form field that filters the unique ID from the job record that was captured from the client's job information in their ATS. iii.
- Location – A free-form field to filter on the location from the job record in the RMP. iv.
- Category – A selectable option that filters jobs associated with a specific Talent Landing Page. v.
- Status – Filters job status. For jobs that are manually created but inactive, selecting the imported option will filter the result set for that criteria.

- Clicking on *Create New Job* allows the Dashboard user to manually enter a job's details and description.
- **Batch Actions** – From the search results, you can perform a number of operations on groups of jobs.
  - Make Jobs Agent Eligible - Running this process includes the selected jobs in subscriber emails.
  - Remove Selected Jobs Agent Eligibility - Running this process removes the selected jobs from subscriber emails.
  - Make Selected Jobs Inactive
  - Make Selected Jobs Active

  Clicking the link icon in the job search results opens the Recruiting Marketing URL Builder and populates it with the job information. You can also access the URL Builder by clicking the job's title, which opens the Job Detail page.
  Search results fields:
  - Title – Job title stored in the job record.
  - Location – Location identifier from the job record
  - Created –Date the job was created in RMK.
  - ID – Unique Job ID stored in the job record
  - Views – The number of times site visitors viewed the postion
  - Applies – The number of times someone applied for the position.
  - Agent – Indicates if job is eligible for email agent inclusion in subscriber emails. Agent eligi
  - Active – Indicates if job is active on the site.
- **Overview** – Displays active jobs by RMK job segment.
  - Chart 1 – Displays the count of jobs in each RMK job category based on the selected filters. Clicking on an individual bar in the chart displays the subcategories for the selected segment in the second chart. Selecting the Data Grid tab for the chart lists each category with the corresponding visitor count and percentage of the total count for the selected filters.
  - Chart 2 – Displays the count and percentage of the subcategory for the selected primary category in the first chart. Selecting the Data Grid tab for the chart lists each category with the corresponding visitor count and percentage of the total count for the selected filters.
- **RSS** – Dashboard users can create custom RSS feeds for tracking using this tab.
  - Search Terms – Text field used to find information from the job record.
  - Campaign – The entered campagin code tracks visitor, member, and apply data when a candidate clicks on a job link from an external site. The maximum campaign code length captured is 100 characters.
  - Date Used – Select either *referencedate* or *created.* Reference date is updated every 30 days after the initial created date and is displayed on the client sites. Created date is the date that the job was first imported into the Recruiting Marketing system.
  - Sort – Sort the search based on either the date (default) or the relevancy of the search terms
  - Rows – Te number of rows returned from the search results (20 is the default).
- **Craigslist Search** - You can use the RMP to filter on jobs and track your postings in Craigslist. See the section titled Craigslist for additional details.

- **Job Detail** - Provides information about the jobs managed by RMK. Click *URL Builder*to open the URL Builder window.
  - Job Details – The RMK job details
  - Job Description – Displays the job description and the apply URL.
  - Job Categories – Displays the associated Talent Landing Pages for the job.

Table 8: Job Detail Fields

Field	Description
Internal ID	Job ID from the client's career site. Identifies existing RMK jobs during imports.
Alt Job ID	Alternate job ID from the client's career site.
Job Title	Customer's job title derived from the RMK career site.
Location	Location from the job record. Determines job location for maps and the SEO Market.
Alt Location	Alternate location field used to track job information on the customer's career site.
City	Derived from the job location.
State	State location of the job, derived from the customer's career site.
Zip	Derived from the job's location information. If the job record contains city and state information, RMK can populate the Zip code.
Country	Countyr location of the job, derived from the customer's career site.
Employer Title ID	Customer-facing field from the job record.
Job Type	Customer-facing field from the job record. Typically used to identify full-time, part-time or contract positions.
Agent Eligible	When checked, agent emails sent to Talent Community members will include the job.
Is manually entered?	When checked, import files will not overwrite the job data.
Start Date	Customer-facing field that identifies when to post a job.
End Date	Customer-facing field that identifies when a job posting is no longer available on an RMK site. If left blank, the job will not expire.
Alt Title	Alternate title or sub-title the customer can use for a posting.

Field	Description
Est. Apply value	Not currently used
Department/Division	Customer-facing field from the job record.
Business Unit	Customer-facing field from the job recrod.
Import Date	Date the job was imported into RMK.
Last Modified	Date the job data was last rewritten.
Apply Clicks	Number of times a member has applied to the position.
Active	Job status: Active, Inactive, or Imported. Active jobs are viewable; inactive jobs are not available to visitors or members.
Locale	Language and location combination that dictates a job posting's translation.

11.4.5.1 Individual Job Fields Used for Search

A job must go through multiple stages before it is available for searching in the Recruiting Marketing RMP. First, a scheduled process imports jobs into the Recruiting Marketing system from your company's career site. Second, custom rules for your company are used to interpret job data and store appropriate information in the designated job fields within the Recruiting Marketing system. Next, the jobs are integrated into the Recruiting Marketing search engine, which takes the job data and constructs a collection of the records that are used for searches. The ability to locate specific jobs or job sets is based on the data stored in this collection and the advanced features of the Recruiting Marketing search tool.

Table 9: Job Fields for Search

Common Name	Search Field	Viewable in Results	Description
Job Title	title/titleExact	Yes	Customer's job title from the imported job. Use of titleExact prevents using "stemming" for the search.
Job Description	description	Yes	Information from the imported job used to store and present multiple items or fields from the original job. This field varies by customer.

Common Name	Search Field	Viewable in Results	Description
Location	location	Yes	Derived from information on the original job. RMK can perform some operations on the customer-provided location data, such as reformatting.
Department	dept or department	Yes	Derived from the original job information.
Facility	facility	Yes	Derived from the original job information.
Shfit Type	shiftype	Yes	Derived from the original job information.
SEO Major Market	marketmajor	No	This field is unique to the job in the RMK system, and is dynamically populated based on rules configured in Command Center. This field is case-sensitive.
SEO Secondary Market	marketsecondary	No	This field is unique to the job in the RMK systemand is dynamically populated based on rules configured in Command Center.Case Sensitive
Recruiter User Name	recruitername	No	Derived from the original job information.
Business Unit	businessunit	No	Derived from the original job information
Zip Code	zip	No	Derived from the original job information.
Job Segments	segments	No	Dynamically popluated based on rules configured in Command Center.

Search field names are case sensitive and must be followed by a colon when used in a search. For example, to search the title field, enter `title:` followed by search terms.

The following fields are case sensitive: City, State, State Name, Country Name, Country Code, SEO Major Market, SEO Secondary Mrket and Business Unit. For example, you should search for `marketmajor: San Francisco` rather than `san francisco` or `San francisco.`

11.4.6 Using the Pages Menu

Displays ranking information for Talent Landing (category) pages in Recruiting Marketing

- Search - Dashboard users can search information related to TLPs.
  - Name – A free-form field that filters the Page Title from the page record in the RMP.
  - Brand ID – A drop-down field that filters results by brands implemented in the RMP. iii.
  - Locale A drop-down field that filters results by locales implemented in the RMP.
  - Types – A drop-down field that filters results by “Mobile” or “Desktop” classification
  - Status – Filters page status. To capture all active and inactive pages, select “All”

  The Pages search returns the following fields: Report Elements

  - Title – Page title from the page record
  - Link icon- Pre-populates the URL Builder with the page URL iii.
  - Created –Date the page was created in RMK
  - Last Modified — Date the page was last changed.
  - Locale — The page's implemented locale. Default is en_US.
  - Brand — Brand (if any) implemented for the page
  - Display — Active or Inactive. Active pages display, inactive pages do not.
  - Type — Desktop for standard pages, Mobile for mobile pages
- **Rankings** – Displays a list of Talent Landing Pages and their rank in Google, Yahoo! and Bing. Each row in the result set has a magnifying glass icon. Clicking the magnifying glass displays the historical ranking for the selected page.
  You can search the existing pages by the date the page was last checked for a ranking, keywords used on the page, or the page's existing rank. for example, entering 3 in the *Rank/Page* field displays all pages ranked 1-3.
  You can also search for pages by engine using the *Engine* dropdown menu.
  The Pages search returns the following fields:

  - Date – Date the page was checked for rank.
  - Keyword – Keywords for the Talent Landing Page.
  - Google – Page Rank on Google.
  - Yahoo – Page Rank on Yahoo!
  - Bing – Page rank on Bing.
  - Google Page – The number of the search results page where the TLP appears in Google search results. For example, pages on the first page of search results display a 1

  .
- **Rankings Overview** – Displays the count of selected pages for their corresponding page association on Google for the selected timeframe. Only pages one through ten are displayed as their own segment in the chart. Available filters:
  - Rank Date – Allows you to select from a predefined set of date ranges. Dates are based on the date the rank check was run for the corresponding page.
  - Start and End - Displays a predefined set of date ranges from the period filter, and also allows you to enter a customizable range.
  - Engine – User-seleced search engine.
- **Rankings Detail** – Displays the selected Talent Landing Page and the history of ranking results. Accessible when the hourglass icon is clicked from the *Rankings* tab.

11.4.7 Using the TCM Menu

Recruiting Dashboard users can create and send Talent Community Marketing emails using this menu, if the customer is using Talent Community Marketing. TCM is enabled in the Site Setup menu of Command Center.

To create a new Talent Community Email, click *Create New Email.* This opens the *Email Detail* tab, where you can enter the relevant information about the marketing email.

Dashboard users can perform certain batch actions on multiple selected emails at once.

- Archive Selected Emails - Moves selected emails from *Open* to *Archived.*
- Activate Selected Emails - Moves selected emails from *Archived* to *Open.*
- Delete Selected Unsent Emails - Deletes selected emails. Only unsent emails can be deleted.
- Clone Selected Emails with Recipient List - Clones selected emails, including the recipient list. Appends *"_copy"* to the cloned email name.
- Clone Selected Emails without Recipient List - Clones selected emails, not including the recipient list.

The *Email List* tab displays a list of all emails created for the customer's site. Clock the email name to open the *Email Detail* tab. After an email is sent, it can no longer be edited or deleted. To deactivate an email, select it by clicking the checkbox to the left of the email name, then select *Archive Selected Emails* from the *Batch Actions* menu. The metrics measured for TCM emails (Recipient, Views, Clicks, Undeliverable and Unsubscribed) are updated multiple times in a 24-hour period. Available filters for TCM email search:

- Name / Description - A text field that filters results based on the email name or description in the Recruiting Dashboard.
- Date Sent – Displays a predefined set of date ranges. Filters on the date the email was sent.
- Start and End – Displays the predefined set of date ranges from the period filter, or allows you to enter a customizable range.
- Locale - Filters results on the locale of the email.
- Campaign – A text field that filters results on the campaign codes.
- Show Archived – When checked, search results include archived emails.

Report Fields

- Name – The name of the email. Clicking the link opens the Email Detail tab.
- Date Sent – Date email was sent.
- Status – Displays the user-selectable option of Active or Archived. Archived emails are only displayed when the *Show Archived*check box is enabled.
- Recipients – Total number of recipients. Clicking the link opens the Email Detail tab.
- Views – Total number of recorded views. In order to record a view, the email must but opened supporting HTML. Emails opened in a text-only format will not record as views.
- Clicks – Total number of times the link in the email has been clicked.
- Undeliverable – Total number of emails bounced and undelivered.
- Unsubscribed – Total number of emails that resulted in the recipient unsubscribing.
- Locale – Displays the locale types used for the email.
- Campaign – Displays the email campaign.
- Description – Preview of the email description.

Email Detail Tab Email details cannot be edited once the email is sent. Before the email is sent, a Dashboard user can edit the body of the email.

- View Recipients – Opens Email Recipients tab and displays all current recipients.

- Send Test Email – Defaults to the Admin User's email and can be sent to any email address for a preview of how the email will appear. Tracking is not done on test emails.
- Send Email – Sends the email to the selected recipients. Once sent, the email cannot be recalled or edited.
- Details
  - Name – User-entered name of the email.
  - Status – User-selectable email status, Open or Archived.
  - Locale – User-selectable locale identifying the locale of the email. The email editor defaults to the selected locale for the spell checker and other features. Only active locales display.
  - Campaign - Custom code that can be tracked in the referring URL. The maximum captured campaign code length is 100 characters.
  - CC Sender – When the check box is marked, the email will be sent to the email's author.
  - Description – Editable field that provides the details of the email. This field is not required and is not viewable to recipients.
  - From Display - Editable field that displays the text of who the email is from. By default, the company name displays.
  - From Address - Displays the email address that will appear on the email. This field cannot be edited.
  - Reply-to Display - Editable field that displays the text of the email in the reply-to message. The default is the User who created the email.
  - Reply-to Address - Recipient addres for reply to emails. Bounced emails and unsubscribed recipients are excluded. The default is the User's email that created the TCM Email. If an email is used, a valid email format is required. This field can be left blank; however, no one will receive replies.
  - Subject – Editable field for the email subject.
  - Body – Editable field contains the email body. This will be displayed in the HTML format.

  Email Recipients – Displays the list of intended email recipients. Once the email is sent, the list cannot be edited.

  - Find New Recipients – Opens the Members tab, allowing the Dashboard user to query and select specific members or groups.
  - Add Recipients by Group – Selecting a group adds current members of the group as recipients.
  - Remove Selected Recipients- Removes selected or all recipients from the email.
    The followig filters are available for the *Email Recipients* search:
    - Email - A text field that filters results based on the member's email. i
    - First Name – A text field that filters results based on the member's first name.
    - Last Name – A text field that filters results based on the member's last .name.
    - Viewed – User selectable option to choose between: All, Viewed, or No Activity.
    - Clicked – User selectable option to choose between: Clicked and No Activity.

    The *Email Recipients* search returns the member's first name, last name, email view count and email click count.

  For unsent emails and new TCM emails, clicking *Edit Body* opens the email edtior in a new view. The email editor provides formatting tools and will automaticall format the email using HTML. You can add images to the email, but the maximum email size is 500KB per image. You can copy and paste available tokens from the list in the right side of the editor. The Unsubscribe token is required for Employee Referral, Past Applicant, Subscription, EmployeeReferralWeclome, PastApplicantWelcome and SubscriptionWelcome emails. You cannot save the email without including the unsubscribe token. Clicking *Check Spelling* will spell-check the email in its configured locale. Click *Close Editor* to save changes and exit the editor.
  Click *Preview Body* to open an HTML view of the email body.

Email statistics appear to the right of the email details.

- Sent Date: Displays the date the email was sent. If it hasn’t been sent, it will appear blank.
- Recipient Count: Displays the total number of recipients.
- Undeliverable Count: Displays the number of bounced emails.
- Unsubscribed Count: Displays the number of recipients who have unsubscribed from future TCM emails as a result of this email.
- View Count: Number of views for the TCM email. Updated nightly.
- Click Count: Number of clicks for links in the TCM email. Updated nightly.
- Created By: User who created the TCM email.
- Created Date: Date the TCM email was created.
- Last Modified By: User who last modified the TCM email. This value will be blank if the email has not been modified..
- Last Modified Date: Date the TCM email was last modified. Default is the same date as the created date.

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11.4.8 Using the Reports Menu

The Reports Tab provides access to reports and data managed with Recruiting Marketing.

Reports Tab

- Visitors - Information about users who have visited pages managed by RMK.
- Members - Information about users who have become Talent Community member by applying for a job or joining the Talent Community.
- Applicants - Information about users who have applied for jobs through RMK.
- Jobs - Informatoin about the jobs managed by RMK.
- Categories - Ranking information for Talent Landing Pages in RMK.

Conversions Overview – Displays the counts for visitors, members, and applicants for the selected filters as a funnel chart. Allows you to see the progression of public site visitors converting to applicants. Data is only available for the past 90 days. Older data is not available for the Conversions Overview report. The following filters are available:

- Visit Date – A selectable predefined set of date ranges. Dates are based on the day the visitor was captured by RMK.
- Start and End – Displays the start and end date of the selected visit date range, and also allows you to enter a custom date range.
- Referrer Type – A dropdown list of active referrer types for narrowing search results to a specific source grouping/type.
- Referrer Engine – A dropdown list of active referrer engines narrowing search results to a specific source.
- Campaign – A text field that filters search results by a company's campaign codes.

All search results fields displays the corresponding count and percentage. Members and applicants percentage calculations are based on the conversion from visitors, and are rounded to the nearest whole number.

- Visitors – Number of visitors captured for the selected filters.
- Members – Number of members added to the Talent Community for the selected filters.
- Applicants – Number of members added to the Talent Community for the selected filters who applied for one or more jobs, regardless of the apply date.

Email Activity – Displays the number of agent emails sent for the selected filters. Allows the user to report on the number of emails by user type. Only emails sent after September 10, 2010 will be included in this report.

- Start and End – Displays the start and end date of the selected visit date range, and also allows you to enter a custom date range. The date is based on when the email was sent.
- User Type – A selectable list that filters results on the member type.
- Clustered Graph – Toggle between Clustered and Standard Graph. The clustered graph displays all user types in a clustered bar graph by date. The standard view allows you to select one user type to display.

Source Report – This report visualized key sourcing data and trends based on data from the Advanced Analytics engine. This report uses the most recent 25 months' worth of data.

- Date Range – A selectable predefined set of date ranges. Dates are based on the day the visitor was captured by RMK.
- Start and End – Displays the start and end date of the selected visit date range, and also allows you to enter a custom date range.
- Department (optional) – List of the customer's departments.
- Country – A dropdown list of a predefined set of countries. This field filters results based on the associated country from the visitor's IP address.
- Region/State – A dropdown list of a predefined set of states or regions. This field filters results based on the associated state or region from the visitor's IP address.
- Referrer type – A dropdown list of field allowing you to select how to display the type of referrer. Choices are *Current Referrer* and *Originial Referrer* For current referrer, apply starts are groups by the source that referred each visitor. Original referrer groups apply starts by the source used when the applicant first joined the Talent Community.
- Campaign – A search field allowing you to search by campaign number. You must enter the exact campaign ID. The system will not search on partial campaign IDs.

The Source Report search returns the following fields:

- Source – Sources are categorized by RMK based on the custom rules engine.
- Visitors – Displays the visitor count for the selected source.
- Subscribers – Displays the subscriber count for the selected source.
- Apply Starts – Displays the apply start for the selected source. An Apply Start is recorded when a candidate clicks on the Apply Now button on a job on a Recruiting Marketing public site.
- Visit/Apply % - Percent of applies per visit. This measure is calculated by dividing the number of Apply Starts by the number of Visits.
- Charting Options
    - Visitors Pie Chart
    - Subscribers Pie Chart
    - Apply Starts Pie Chart
    - Conversion Funnel
    - Show Trend
    - Add Trend to Series – Compares multiple trends

The beginning of the apply process tracked in the RMK is called an “Apply Start”. Apply Starts are summarized in slightly different ways in reporting from Advanced Analytics. These reports only count the first time a given Talent Community Member begins to apply for a particular job. If a single user begins to a apply for a job this week, and then starts a second apply for the same job next week, analytics will only count the first of these two apply starts. This applies for Source Reporting. Reporting not powered by Advanced Analytics summarizes apply starts differently. These reports include one apply start per person, per job for a selected time period. For example, if a user applies for a job this month, and again next month, a report run for the month will count one apply start for the user. A report run for next month would also count one apply start. A report run for both months would count a single apply start

11.4.9 Using the Tools Menu

The Tools tab allows you to control access and configure the functionality of the Recruiting Dashboard.

- *User Admin* – In this tab, you can create new users and search existing users.
  Add User - Click to create a new user and enter personal information including their first name, last name, email, title, phone number, or social network URLs. When adding a new user, you can assign them roles in this pane. Available roles are configured in the *Roles* tab. In the *User Admin* tab, you can also search existing users by first name, last name, email, or role, or y entering a search string in the *Search* box. In the search results, you can click the user's first name, last name or email to view the detailed user record.
- *Apply Tracking* –
  Dynamic Source Tracking is used to pass source codes from RMK to a customer's Applicant Tracking System. You can use different source codes for each Applicant Tracking System. Dynamic Source Tracking must be enabled and configured in Command Center. The *Apply Tracking* tab displays the configured Apply Tracking System targets and existing source tags. Each configured Applicant Tracking System appears in its own section with a list of corresponding source codes.
  Source codes consist of three components: Group Source, Exact Source and Tracking Code. The Group Source defines the major source categiroes. For example, Search Engine or Job Board. The Exact Source defines the unique location of the source. For example, Google would be an Exact Source for the Search Engine Group Source. The Tracking Code is passed into the customer's Applicant Tracking System. These codes must match between the ATS and Command Center. Source codes are tagged to the activity when an individual applies to a job. If a change is made to the source code list, it will not affect existing data stored on the Recruiting Marketing Platform or Applicant Tracking System. To update the source code list, chose the Group Source, the associated Exact Source and then enter the Tracking code from the ATS. Complete all the tracking codes for one Group Source before moving on to the next.
  Dynamic Source Tracking should not be used for Recruiting Execution implementations.
- *URL Builder* - The URL Builder allows you to create a URL with tracking codes to use for manually posting on job boards, niche job sites, social networks, blogs, and other online and offline sources.
- *Roles* – Displays the different roles configured in the Recruiting Dashboard, and includes the ability to add new roles. The *Set Default Role* allows the user to assign a default role for new Talent Community users. The dropdown displays all active roles configured in the Dashboard. Client Default Role- This drop down allows the user to assign a default role for users added to the Talent Community.The selected role is added to any new Talent Community member, both manually added and imported.
- *User Vendor Groups* - Allows the Recruiting Dashboard user to search for users by the vendor groups they are assigned to. Users can search by vendor type, vendor group, or user-specific information. Once the search has been executed, the user can see the users' name, email address, the number of vendor groups to which they are assigned and the user status. Select a user or users to run *User Actions*.
  - Remove from Vendor Groups: The Remove from Vendor Groups is not an action by itself and may be selected, but has no associated action, and the gear button will be disabled if this item is selected.
  - Remove from ALL: The selected user(s) are removed from all vendor groups to which they are currently assigned. This effectively removes all of their job distribution capabilities.
  - Remove from "vendor type" groups: The selected user(s) are removed from all vendor groups of the selected vendor type to which they are currently assigned. They will remain associated with any vendor groups not of the selected vendor type.

- Add to Vendor Groups: Add to Vendor Groups is not an action by itself and may be selected, but has no associated action, and the gear button will be disabled if this item is selected.
- Add to "vendor group name": The selected user(s) are added to the selected vendor group. If any of the selected users are already in a group with the same vendor type as the selected vendor group, you will see a confirmation letting you know that because a user may be in only one vendor group per vendor type, the affected users in the selection will be removed from the existing group with that vendor type and added to the selected group with the same vendor type. You can click *OK* to perform the reassignment, or *Cancel* to return to the search results to modify your selection or take another action. If there are other users who are not in a vendor group with the selected type, they are added to the group as they normally would be as a part of this process.

Related Information

Creating Tracking URLs with the URL Builder [page 68]
Managing Roles in the Recruiting Dashboard [page 69]

11.4.9.1 Creating Tracking URLs with the URL Builder

Track marked jobs by using custom URLs built with the URL builder.

Context

> **Recommendation**
>
> If you are setting up multiple jobs for the same campaign and/or source, just paste the job URL, copy the new generated URL, and repeat. There is no need to clear or re-enter the same settings. A new URL is auto-generated.

Procedure

1. Enter the *Jobs2Web URL* for the page on the RMK site you'dlike to market. If you arrive at the URL Builder from another page in the Dashboard, this field is pre-populated.
2. Select the desired *Source* from the available dropdown list. This determines the options available in the second dropdown list.
3. Enter a custom campaign name, if necessary. For example, to track jobs marketed as part of college recruiting, you might name the campaign **`Campus Recruiting`**.
4. Once you have selected the Type and Engine, the *Campaign URL* and *Campaign HTML* links populate with the appropriate tracking information. Click *Copy* to copy the URL. .

5. To create a short URL, choose your preferred URL shortener (bit.ly or Google) from the *Short URL* dropdown, then click *Generate URL*.
6. To share the URL via a social network, select from the listed social networks. Sharing the URL by choosing one of these buttons automatically populates the type and engine for tracking with social network information. Any manual selection made using the Type and Engine dropdown list will be overridden. Will populate the with social network tracking information, even if the social network is not available in the type/ engine dropdown.
7. If a Short URL is generated a QR code can be created and saved as an image file.

11.4.9.2 Managing Roles in the Recruiting Dashboard

Using the Tools tab in the Recruiting Dashboard, you can create and edit permission roles for Dashboard Users.

Context

Navigate to the *Tools* > *Roles* to begin working with Dashboard roles. .

Procedure

1. Click *Add Role* to create a new role, or on the name of an existing role. This opens the *Role Detail* tab.
2. Enter a name and description for a new role You cannot edit the name or description for an exsiting role. This tab also displays the date the role was last updated and email address of the user who created the role.
3. Designate permisisons for the role by enabling the appropriate check boxes.
    - **Home** - Controls access to the Dashboard Home tab.
    - **Visitors** – Controls access to the Dashboard Visitors tab.
    - **Members** – Controls access to the Dashboard Members tab.
        - Add/Edit Members – Controls a user's ability to add or edit members. When the Add/Edit Members permission is selected, the user can view all tabs in the Members menu by default.
    - **Applicants** – Controls access to the Dashboard Applicants tab.
    - **Jobs** – Controls access to the Dashboard Jobs
        - tab. Craigslist – Controls access to the Craigslist tab. You do not need to be associated to the Jobs tab to have access to the Craigslist tab
    - **Pages** – Controls access to the Dashboard Pages tab.
    - **Emails** – Controls access to the TCM tab.
    - **Reports** – Controls access to the Dashboard Reports tab.
    - **Tools** – Controls access to the Dashboard Tools tab.
        - My Account – Controls the ability to access their user record
        - View Users – Controls the ability to view users of the Recruiting Dashboard.
        - Add/Edit Users – Controls the ability to edit the user record. When the Add/Edit User permission is selected, the user can view all users by default.

- Apply Source Tracking
- URL Builder
- Roles – Controls access to the Roles tab.
- Recruiter Alert Emails
- Vendor Group Assignment

.

- **Cross System**
  - Export – Controls access to the export link on various views for the detailed reports.
  - PDF/Image Export – Controls access to the export icon next to graphs on various views.

11.4.10 How to Post a Job to Craigslist

Craigslists does not allow third-parties to create posts, however Recruiting Marketing provides Dashboard users with a way to expedite and track job postins.

Context

Clients can use the Dashboard to track postings and quickly copy and paste pre-formatted job data into Craigslist.

Procedure

1. Navigate to *Jobs* > *Craiglist Search.* Enter the search criteria for the job(s) you would like to post and click *Go.* Under the Craigslist tab in the Job Section, the system will display search criteria to find jobs that are posted or need to be posted to Craigslist. 2.
2. In the search results, click the checkbox next to the jobs you would like to post on Craiglist. You can also select all jobs for posting.
3. Click *Post.* This opens the *Posting Detail* pane. This menu pre-populates the job ID, job title, job location and job description based on the job's RMK data. Click *copy* to copy this data and paste it into your Craigslist posting.
4. After you create the job positng in Craigslit, enter either the *Craigslist Posting ID* or the *Craigslist Posting URL.* Entering the posting URL creates a link to the job posting directly form the Recruiting Dashboard. To view/ manage a job for Craigslist, enter the search criteria and select "Go." Job search for Craigslist 3.
5. Click *Mark as Posted.* Once the job is posted, you can view its details by clicking the *Post* link in the Craigslist search results.

11.4.11 RSS Feeds in the Recruiting Dashboard

Recruiting Marketing RSS feeds are commonly used to publish updated jobs to social networks, blogs, personal RSS readers, and other web applications. Each Talent Landing Page contains icons/links to quickly capture the

RSS feed and publish it to the desired channel. Using RSS feeds allows your company to automatically market jobs across their media channels while maintaining consistent messaging and enhanced usability. When new jobs are updated on the Talent Landing Page, you will be notified via RSS. Recruiting Marketing updates the RSS feeds on a daily basis. Data appearing in your RSS reader may vary depending on the RSS readers' schedule and update times in the RMP. 1. Navigate to a Talent Landing Page. 2. Locate the RSS feed icons. Select the desired distribution mechanism. 3. You have four options to feed content. First, the orange square will open a browser window and provide URL content for the feed for the user to view and copy. The URL can be used to post in any RSS friendly site or application to receive updates. Secondly, you can choose to post directly into your Google, Yahoo! or MSN portal pages. The user experience and options presented will depend on your subscription to Google, Yahoo!, and MSN. In addition, the view and options presented to you for selecting option one will also vary depending on the internet browser being used and any RSS reader applications installed on your computer.

11.4.11.1 How to Build Targeted RSS Feeds

Context

Procedure

1.

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