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Oracle Taleo Cloud for Midsize (TBE)

TBE - NetSuite Integration and SuiteApp Guide

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Hardware and Software, Engineered to Work Together

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Advisory

Please ensure that you are working with the latest version of this Guide.

The latest version is available on the Oracle Technology Network at

http://www.oracle.com/technetwork/documentation/default-1841567.html

About this guide

What does the SuiteApp do?

This guide provides details about the functionality supported by the Oracle Talent Cloud for Midsize (TBE) SuiteApp that can be used to integrate a TBE Zone with a NetSuite Account.

How is the SuiteApp installed and configured?

The guide also provides the instructions on installing and configuring the SuiteApp as well as the configuration steps required in both TBE and NetSuite to realize the integration.

Oracle Talent Cloud for Midsize (TBE) SuiteApp

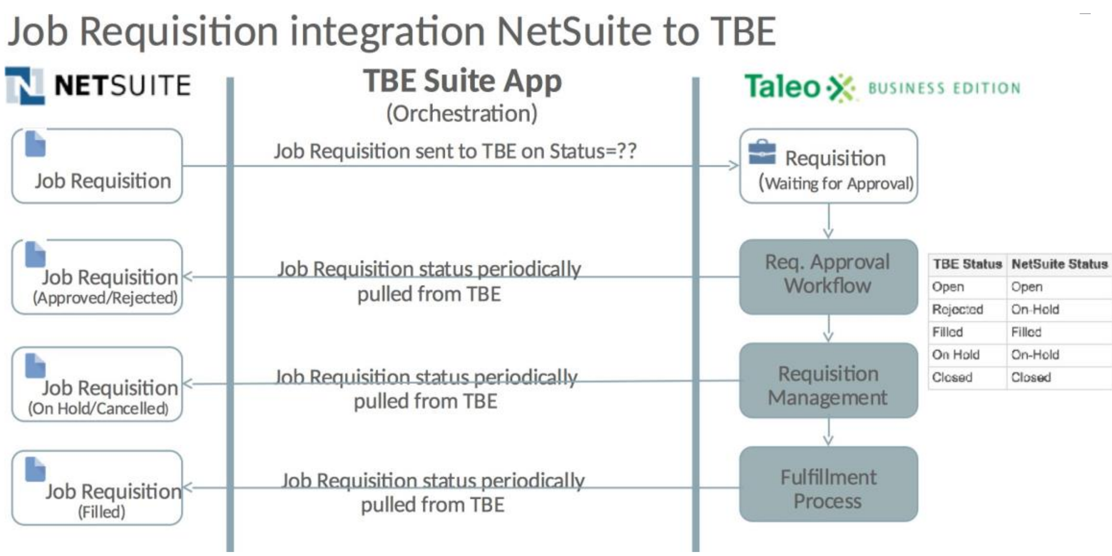
Overview

The Oracle Talent Cloud for Midsize (TBE) SuiteApp can be enabled in a NetSuite environment to integrate NetSuite and TBE. It provides NetSuite customers with an integrated recruiting and onboarding application.

Once installed, configured and enabled, the SuiteApp covers the following integration (one or the other or both can be used):

Job Requisition Synchronization

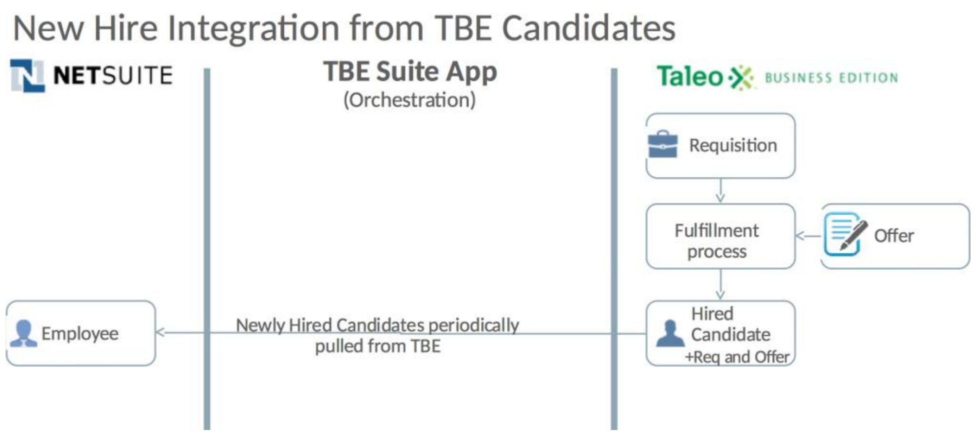
- Create Requisition in TBE from Job Requisitions created in NetSuite.
- Periodically update the Job Requisition Status in NetSuite based on activity in TBE.



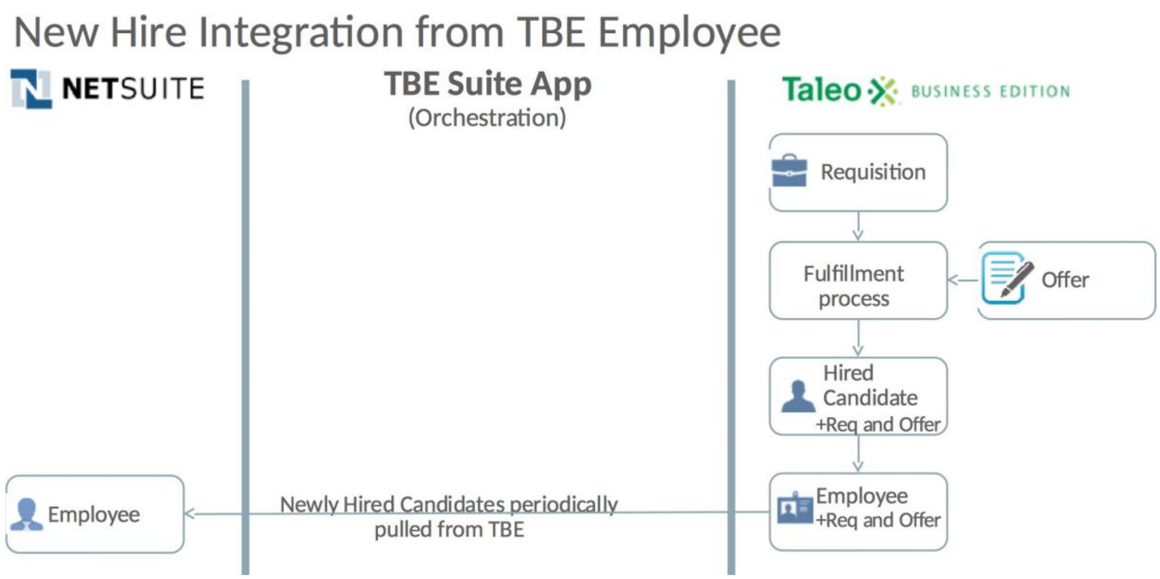
New Employee Synchronization

- Create new Employees in NetSuite from newly hired TBE Candidates or TBE Employees on a periodic basis.

From TBE Candidates:



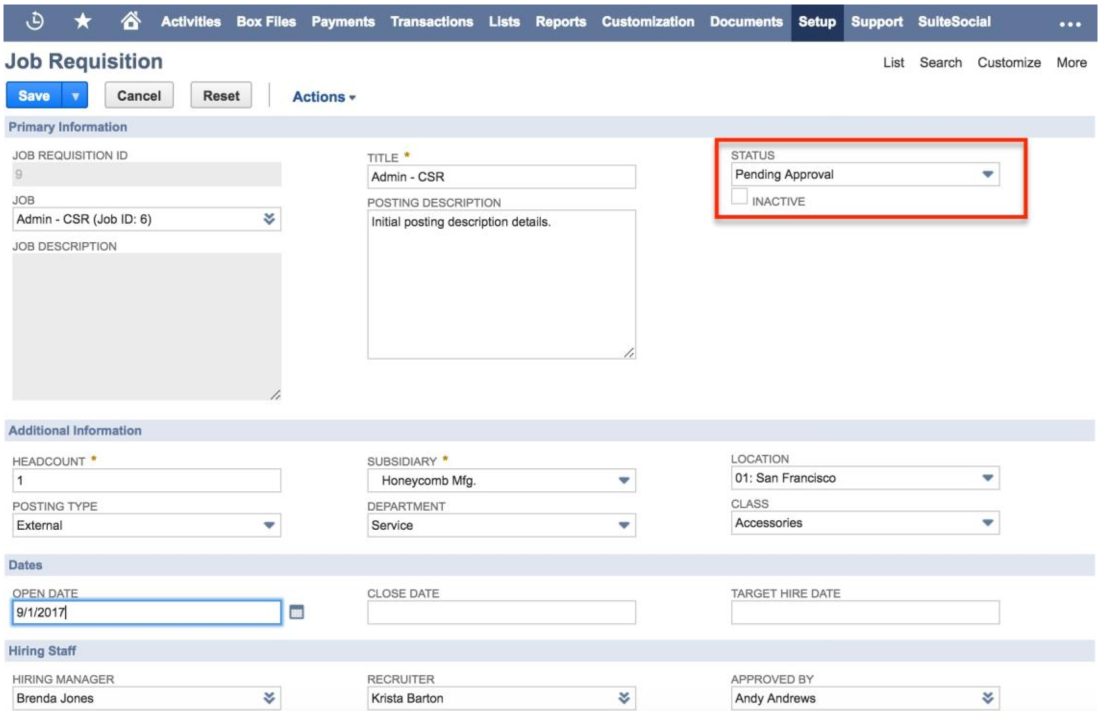
From TBE Employees:



The SuiteApp does not currently sync any organizational or master data, such as Locations and Departments. See the setup steps covered below for how these structures must be maintained.

Job Requisition Sync Details

Job Requisitions in NetSuite will be synced to create a new Requisition in TBE when it is saved in the triggering status: either ‘Open’ or ‘Awaiting Approval’.



- This is a triggered integration and happens in near real time.
- Only supports NetSuite Job Requisitions saved in the triggering status in the UI. I.e. Not for upload or other method of creation in the triggering status.
- The details of the NetSuite Requisition are synced **once and only once** to TBE. Changes made in NetSuite after the Job Requisition was sent to TBE are not reflected in TBE.
- Any of the fields, listed in the data mapping below, will be sent to TBE if they are populated on the Job Requisition in NetSuite.
  - Fields sent will be validated for the expected value in TBE and must be set up prior to enabling the integration (See “Populate/Verify you Master Data and Picklist Set-up in TBE” section of this document below).
  - Fields not populated on the Job Requisition in NetSuite or not in the data mapping below are not sent to TBE.
  - The TBE Requisition required fields, Posting Title and Location, must be populated on the Job Requisition in NetSuite.
  - The TBE Requisition required field, Owner, will be set to the Integration User provided in the configuration in NetSuite.
  - Additional Owners, as well as, Requisition Hiring Managers, Requisition Recruiters and Requisition Approvers will be set on the Requisition in TBE if the NetSuite Employees named on the NetSuite Requisition can be resolved to TBE Users (see ‘Resolving Named Requisition Actors’ logic below for additional details).

- The Requisition in TBE will be created in the status on either ‘Open’ or ‘Pending Approval’ depending on the triggering status set for the NetSuite Job Requisitions; ‘Open’ or ‘Awaiting Approval’ respectively.
- The Requisition ID of the Requisition created in TBE is recorded on the corresponding NetSuite Job Requisition in the custom field Taleo ID.
- The field NetSuite Requisition ID on the TBE Requisition created will be populated with the NetSuite Internal ID of the NetSuite Job Requisition from which it was created.
- By utilizing the NetSuite Requisition ID field, the Status of the Job Requisition in NetSuite will periodically, every 15 minutes, be updated to reflect any status changes to the TBE Requisition.

TBE Status	NetSuite Status
Open	Open
Rejected	On-Hold
Filled	Filled
On Hold	On-Hold
Closed	Closed

Data Mapping – NetSuite Job Requisition to TBE Requisition

	NetSuite Job Requisition	TBE Requisition	Notes
Primary Information			
	Job Requisition ID	NetSuite Job Requisition Id	
	Status	Status	
	Title	Title	
	Posting Description	Description	
	Head Count	Number of Openings	
	Subsidiary	NetSuite Subsidiary	See Note (1) below
	Location	Location	See Note (1) below
	Department	Department	See Note (1) below
	Posting Type	Posting Type	See Note (2) below
Dates			

	Open Date	Opened Date	
Actors			
		owners	See Note (3) below
	Approved By	Approvers	See Note (4) below
	Hiring Manager	Requisition Hiring Manager	See Note (4) below
	Recruiter	Requisition Recruiter	See Note (4) below

Notes:

(1) The Locations, Departments and Subsidiaries that might appear on NetSuite Requisitions will need to be set up in TBE Locations and Departments. See “Populate/Verify you Master Data and Picklist Set-up in TBE” section of this document below.

(2) If Posting Type is going to be used on the NetSuite Job Requisition, a Posting Type field will need to be added to the TBE Requisition entity in TBE. See “Populate/Verify you Master Data and Picklist Set-up in TBE” section of this document below.

(3) The Owner of the Requisition in TBE will be set to the Integration User provided in the setup of the TBE SuiteApp in NetSuite. Additional Owners will be assigned per the ‘Resolving Named Requisition Actors’ logic below.

(4) Approvers, Requisition Hiring Manager and Requisition Recruiter on the TBE Requisition will be set with a TBE User if one can be determined. See ‘Resolving Named Requisition Actors’ logic below. Otherwise, they are not populated on the TBE Requisition.

Resolving Named Requisition Actors

If NetSuite Employees are selected for any of the Hiring Staff fields – Hiring Manager, Recruiter and Approved by – on the Job Requisition in NetSuite, TBE will attempt to add the TBE User associated with these employees to the Requisition in TBE into the list of Owners of the Requisition as well as into the Requisition Hiring Manager, Requisition Recruiter and Requisition Approvers fields in TBE according to the logic laid out below.

(1) If there is a TBE Employee record that has the NetSuite Employee Number field populated with the Internal ID of the NetSuite Employee.

(2) A located TBE Employee from #1 is linked to a TBE User.

(3) The TBE User will be added to the appropriate Actor field on the TBE Requisition.

New Employee Synchronization Details

The New Employee Synchronization periodically checks TBE to see if there are any newly hired people for whom NetSuite Employee records need to be created in NetSuite. If any are found, the information is extracted from TBE and new corresponding NetSuite Employee records are created.

TBE Candidates or TBE Employees

The source of the NetSuite Employee information in TBE can be either based off of the TBE Candidates or the TBE Employees, but not both. It is important to understand the differences in operation and capabilities so that the best choice is made. The details and differences are laid out below.

New NetSuite Employees from TBE Candidates

If TBE Candidates are the chosen Source (set in the SuiteApp configuration in NetSuite), the integration will look for recently hired Candidates (based on Hire Date) that have not been sent to NetSuite for new Employee creation and attempt to create their NetSuite Employee record.

- A recently hired Candidate will be picked up for integration with NetSuite if the following are true:
    - Candidate does not already have a NetSuite Employee Number on their TBE Candidate Record.
    - The Hire Date on the Candidate is on or after the integration go-live date (set in the configuration of the SuiteApp in NetSuite).
    - The NetSuite Integration Status on the Candidate Record in TBE is either 'Not Submitted' OR 'Failed'
- If any of the fields in the data mapping below are to be included in the Employee Record in NetSuite where the source is from the TBE Requisition, the Candidate must have to have been hired in TBE for the requisition in question. That is, they must have had their Req Specific Status for the requisition set to a status that is 'Considered Hired' so that this link is established.
- Any of the fields, listed in the data mapping below, will be sent to NetSuite if they are populated on the Candidate and Requisition in TBE.
    - Fields sent will be validated for the expected value in NetSuite and must be set up prior to enabling the integration (See "Populate/Verify you Master Data and Picklist Set-up in TBE" section of this document below).
    - Fields not populated on the Candidate and Requisition in TBE or not in the data mapping below are not sent to NetSuite.
- Any issues encountered with a given Candidate will be recorded on the TBE Candidate in the NetSuite Failed Reason Field and the NetSuite Integration Status will be se to 'Failed'.
    - The SuiteApp with re-attempt to integrate the TBE Candidate again the next time it runs; assuming all of the above criteria for selection are still met.
- When a NetSuite Employee record is successfully created, the NetSuite Employee Internal ID value is recorded on the TBE Candidate in the NetSuite Employee Number field; the NetSuite Integration Status on the TBE Candidate is also set to 'Processed'.

Data Mapping – TBE Candidate to NetSuite Employee

	NetSuite Employee	TBE Candidate	Notes
Primary Information			
	Salutation	Salutation	
	First Name	First Name	
	Middle Name	Middle Initial	
	Last Name	Last Name	
	Supervisor	N/A	Not sent from TBE Candidates
Email/Phone			
	E-Mail	Email	
	Phone	Phone	
	Mobile Phone	Cell Phone	
Classification			
	Title	Requisition Title	From Requisition for which the Candidate was hired in TBE.
	Department	Requisition Department	From Requisition for which the Candidate was hired in TBE. See Note (1) below.
	Location	Requisition Location	From Requisition for which the Candidate was hired in TBE. See Note (1) below.
	Subsidiary	Requisition NetSuite Subsidiary	From Requisition for which the Candidate was hired in TBE. See Note (1) below.
Address			
	Country	Country	See Note (1) below.
	Address 1	Address	
	Address 2	Address 2	
	City	City	
	State	State	
	Zip	Zip Code	
Human Resources			
	Social Security Number	ssn	
	Birthdate	Birthdate	
	Employee Status	Requisition Duration	From Requisition for which the Candidate was hired in TBE. See Note (1) below.
	Hire Date	Hired Date	
	Marital Status	Marital Status	See Note (1) below.
	Gender	Gender	See Note (1) below.
	Ethnicity	Race	See Note (1) below.

(1) The Locations, Departments, Subsidiaries, Country, Employee Status, Marital Status, Gender and Ethnicity that might appear on NetSuite Employees will need to be set up in TBE. See “Populate/Verify you Master Data and Picklist Set-up in TBE” section of this document below.

New NetSuite Employees from TBE Employees

If TBE Employees are the chosen Source (set in the SuiteApp configuration in NetSuite), the integration will look for recently hired Employees (based on Hire Date) that have not been sent to NetSuite for new Employee creation and attempt to create their NetSuite Employee record.

- A recently hired Employee will be picked up for integration with NetSuite if the following are true:
  - Employee does not already have a NetSuite Employee Number on their TBE Employee Record.
  - The Hire Date on the Employee is on or after the integration go-live date (set in the configuration of the SuiteApp in NetSuite).
  - The Employee is in an Active status on TBE.
  - The NetSuite Integration Status on the Candidate Record in TBE is either ‘Not Submitted’ OR ‘Failed’
- Since Hire Date, NetSuite Integration Status and Employee status all play a role in making the TBE Employee eligible for integration to NetSuite, any of these can be used to control the timing of the integration of the Employee data to NetSuite.
- Any of the fields, listed in the data mapping below, will be sent to NetSuite if they are populated on the Employee in TBE.
  - Fields sent will be validated for the expected value in NetSuite and must be set up prior to enabling the integration (See “Populate/Verify you Master Data and Picklist Set-up in TBE” section of this document below).

    - Fields not populated on the Employee in TBE or not in the data mapping below are not sent to NetSuite.
    - The Supervisor of the NetSuite Employee record will be set to the NetSuite Employee Record of the Supervisor if it can be resolved from the Manager specified in TBE for the Employee. (see 'Resolving Employee Supervisor' logic below for additional details).
- Any issues encountered with a given Employee will be recorded on the TBE Employee in the NetSuite Failed Reason Field and the NetSuite Integration Status will be se to 'Failed'.
    - The SuiteApp with re-attempt to integrate the TBE Employee again the next time it runs; assuming all of the above criteria for selection are still met.
- When a NetSuite Employee record is successfully created, the NetSuite Employee Internal ID value is recorded on the TBE Employee in the NetSuite Employee Number field; the NetSuite Integration Status on the TBE Candidate is also set to 'Processed'.

Resolving Employee Supervisor

The Supervisor filed on a newly created NetSuite Employee will be set if:

- The Manager field on the TBE Employee is populated with another TBE Employee AND
- The NetSuite Employee Number is populated on the Manager's TBE Employee record AND
- The value of the Manager's NetSuite Employee Number matches the Internal ID of a NetSuite Employee.

Data Mapping – TBE Employee to NetSuite Employee

	NetSuite Employee	TBE Candidate	Notes
Primary Information			
	Salutation	Salutation	
	First Name	First Name	
	Middle Name	Middle Initial	
	Last Name	Last Name	
	Supervisor	Manager	See 'Resolving Employee Supervisor' section above.
Email/Phone			
	E-Mail	Email	
	Phone	Phone	
	Mobile Phone	Cell Phone	
Classification			
	Title	Job Title	
	Department	Department	See Note (1) below.
	Location	Location	See Note (1) below.
	Subsidiary	NetSuite Subsidiary	See Note (1) below.
Address			
	Country	Country	See Note (1) below.

	Address 1	Address	
	Address 2	Address 2	
	City	City	
	State	State	
	Zip	Zip Code	
Human Resources			
	Social Security Number	ssn	
	Birthdate	Birthdate	
	Employee Status	Duration	See Note (1) below.
	Hire Date	Hired Date	
	Marital Status	Marital Status	See Note (1) below.
	Gender	Gender	See Note (1) below.
	Ethnicity	Race	See Note (1) below.

(1) The Locations, Departments, Subsidiaries, Country, Employee Status, Marital Status, Gender and Ethnicity that might appear on NetSuite Employees will need to be set up in TBE. See "Populate/Verify you Master Data and Picklist Set-up in TBE" section of this document below.

Preparing your NetSuite Environment

To successfully install the Oracle Talent Cloud for Midsize (TBE) bundle(s) in the NetSuite environment, certain settings must first be enabled in NetSuite.

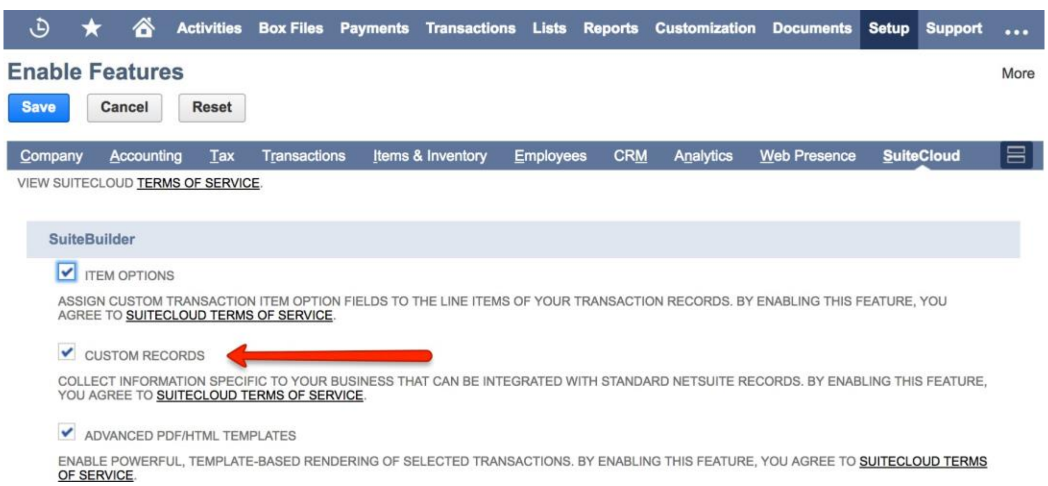
1. Enable Custom Records

Installing the Oracle Talent Cloud for Midsize (TBE) bundle(s) requires that Custom Records are enabled in your NetSuite environment.

To enable or verify:

Steps:

- Go to **Setup** → **Company** → **Enable Features**
- Click on the **SuiteCloud** link.
- In the SuiteBuilder section, check the **Custom Records** checkbox
- Click **Save** button



2. Enable Client SuiteScript and Server SuiteScript

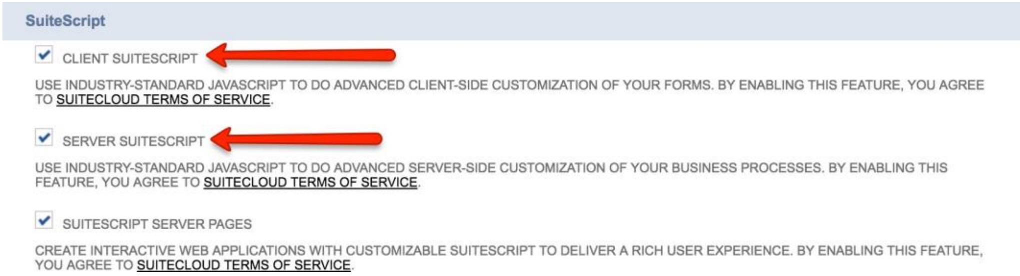
Installing the Oracle Talent Cloud for Midsize (TBE) bundle(s) requires that Client SuiteScript and Server SuiteScript are enabled in your NetSuite environment.

To enable or verify:

Steps:

- Go to **Setup** → **Company** → **Enable Features**
- Click on the **SuiteCloud** link.
- In the SuiteScript section, check the **Client SuiteScript** and the **Server SuiteScript** checkboxes

- Click the **Save** button



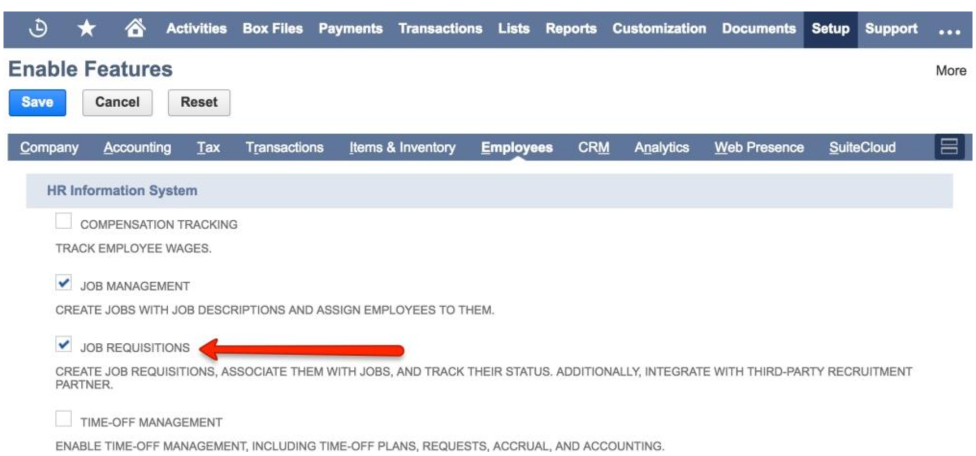
3. Enable Job Requisition Feature

If NetSuite Job Requisition to TBE Requisition synchronization is to be implemented, installing the Oracle Talent Cloud for Midsize (TBE) bundle for this requires that the Job Requisition feature is enabled in your NetSuite environment.

To enable or verify:

Steps:

- Go to **Setup** → **Company** → **Enable Features**
- Click on the **Employees** link.
- In the HR Information System section, check the **Job Requisition** checkbox (If this option is not visible, the HCM module has not been installed to your NetSuite environment).
- Click the **Save** button.



4. Enable Locations

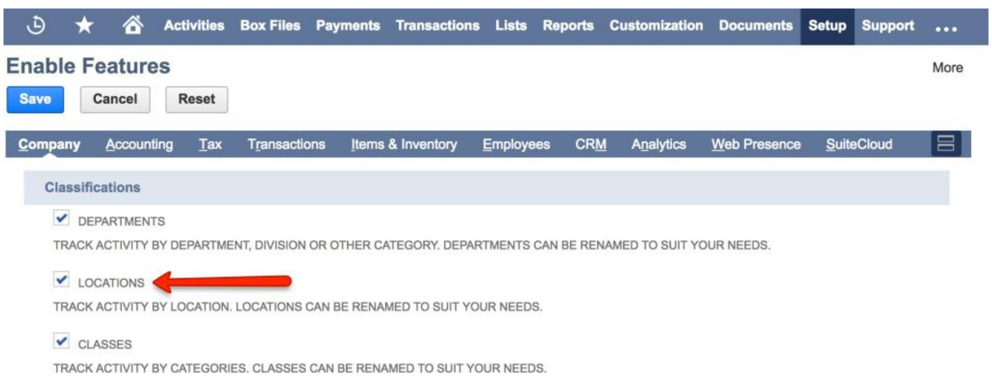
If NetSuite Job Requisition to TBE Requisition synchronization is to be implemented, locations will need to be enabled in your NetSuite environment. Location is a required element in creating Requisitions in TBE so Location must be part of the Job Requisition in NetSuite.

Additionally, if Location is to be set for new NetSuite Employees created from newly hired TBE Employees/Candidates, Locations will also need to be enabled in NetSuite.

To enable or verify:

Steps:

- Go to **Setup → Company → Enable Features**
- Click on the **Company** link.
- In the Classifications section, check the **Locations** checkbox
- Click the **Save** button.



5. Enable Departments

If Department is to be set for new NetSuite Employees created from newly hired TBE Employees/Candidates, Departments will also need to be enabled in NetSuite.

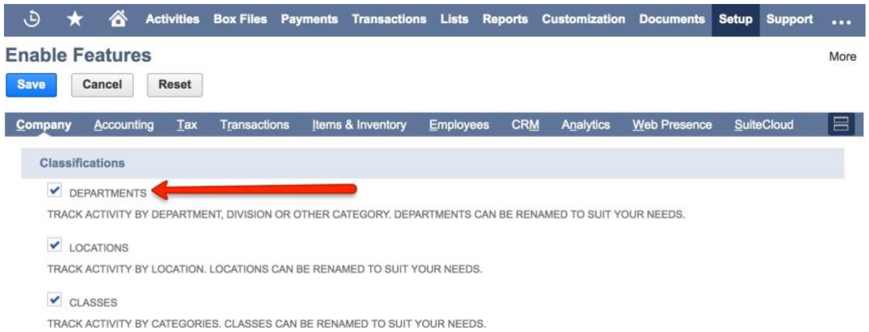
Additionally, if Job Synchronization is being implemented and Department should be set on the Requisition in TBE, Departments will also need to be enabled in NetSuite.

To enable or verify:

Steps:

- Go to **Setup → Company → Enable Features**
- Click on the **Company** link.
- In the Classifications section, check the **Departments** checkbox

- Click the **Save** button.



Preparing your Oracle Talent Cloud for Midsize (TBE) Environment

1. Enable NetSuite Application Integration Fields

Steps:

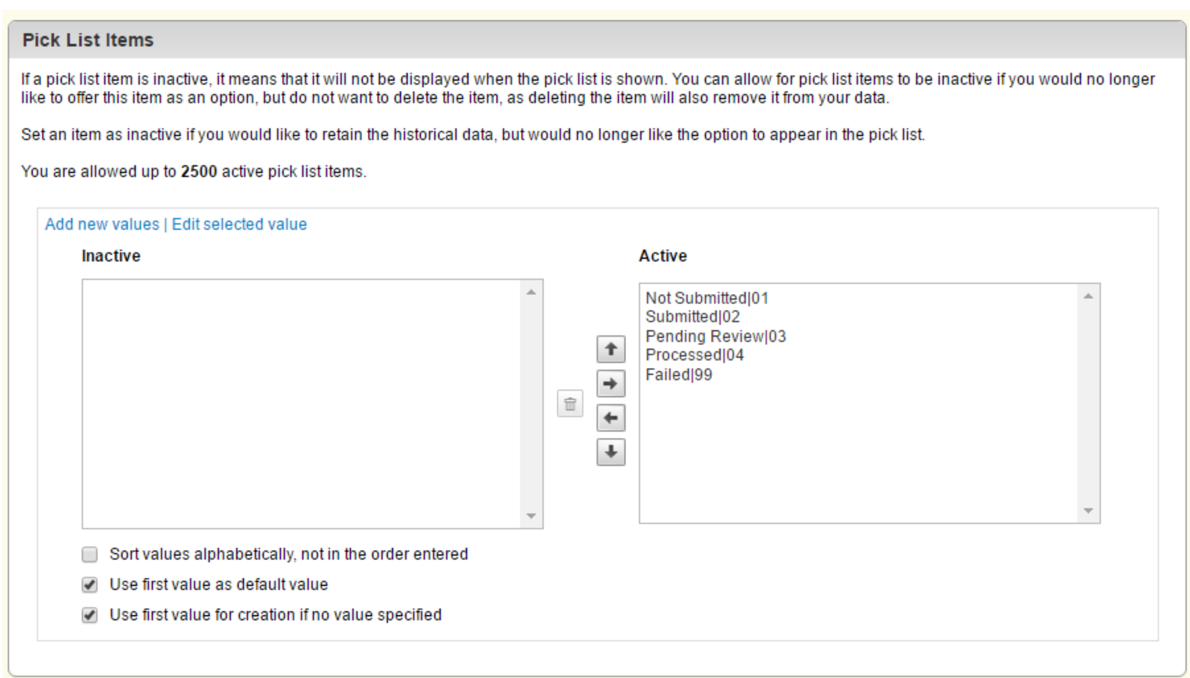
- Go to Administration → Organization → System & Email Setting
- Scroll to 'Enable Application Integration Fields section.
- Enable 'NetSuite' checkbox.
- 'Save'

2. Validate the Pick-List Values for the NetSuite Integration Status fields.

For each of the entities that you will be integrating to NetSuite – Employee and/ or Candidate – ensure that the NetSuite Application Integration field in TBE has the expected values.

Steps:

- For Employee, go to Administration → Customize Onboard or Perform → Employee Fields → Scroll to the 'Employee Application Integration Fields' section.
- For Candidate, go to Administration → Customize Onboard or Perform → Candidate Fields → Scroll to the 'Employee Application Integration Fields' section.
- Locate the field 'NetSuite Integration Status' and select 'Edit' in Actions column
- Ensure the values populated and the check box settings are as below.
- 'Save'



3. Include NetSuite Application Integration Fields in the TBE Page Layouts and List Views

For Employees, the recommendation is that you add the following fields in a 'NetSuite Information' of your Page Layouts:

Field	Page Layout
NetSuite Employee Number	View Employee
NetSuite Integration Status	Add Employee, View Employee
NetSuite Subsidiary	Add Employee, Edit Employee, View Employee
NetSuite Sync Failed Reason	View Employee

For easier viewing of these fields, you should also add them to your Employee List Views.

For Candidates, the recommendation is that you add the following fields in a 'NetSuite Information' of your Page Layouts:

Field	Page Layout
NetSuite Employee Number	View Candidate
NetSuite Integration Status	Add Candidate, View Candidate
NetSuite Sync Failed Reason	View Candidate

For easier viewing of these fields, you should also add them to your Candidate List Views.

For Requisitions, the recommendation is that you add the following fields in a 'NetSuite Information' of your Page Layouts:

Field	Page Layout
NetSuite Requisition Id	View Requisition
NetSuite Subsidiary	Add Requisition, View Requisition, Edit Requisition

For easier viewing of these fields, you should also add them to your Requisition List Views.

4. Populate/Verify you Master Data and Picklist Set-up in TBE

For the various codified lists and master data (Departments and Locations), the values set in TBE as the integration values must match those expected by the NetSuite Environment. To do this, you will need access to the NetSuite Environment to get the IDs of each of the lists.

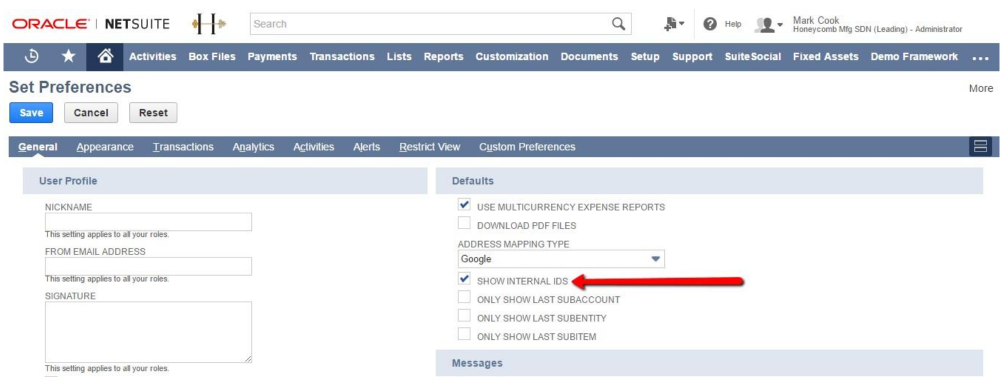
If a field is not being populated in TBE, the list need not be populated (example if not using Race). Only fields populated in TBE will be sent to NetSuite for Employee creation.

4.1 Prepare your NetSuite User to perform this task.

TIP: Before starting these steps, you should ensure that your user has the SHOW_INTERNAL_IDS preference set.

Steps:

- Go to 'Home' icon menu → Set Preferences
- Check the checkbox for SHOW_INTERNAL_IDS if it is not already checked.
- Click 'Save'

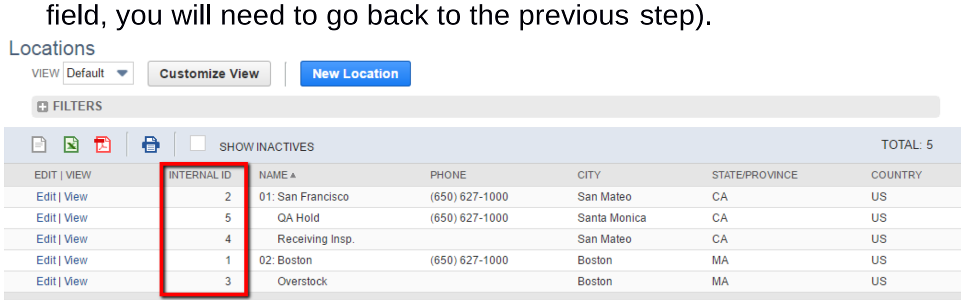


4.2 Locations

Get Name/ID pairs from NetSuite.

Steps:

- Go to, Setup → Company → Classifications → Locations
- You will get a list of Locations. (NOTE: If you do not see the INTERNAL_ID field, you will need to go back to the previous step).



EDIT | VIEW	INTERNAL ID	NAME ▲	PHONE	CITY	STATE/PROVINCE	COUNTRY
Edit | View	2	01: San Francisco	(650) 627-1000	San Mateo	CA	US
Edit | View	5	QA Hold	(650) 627-1000	Santa Monica	CA	US
Edit | View	4	Receiving Insp.		San Mateo	CA	US
Edit | View	1	02: Boston	(650) 627-1000	Boston	MA	US
Edit | View	3	Overstock		Boston	MA	US

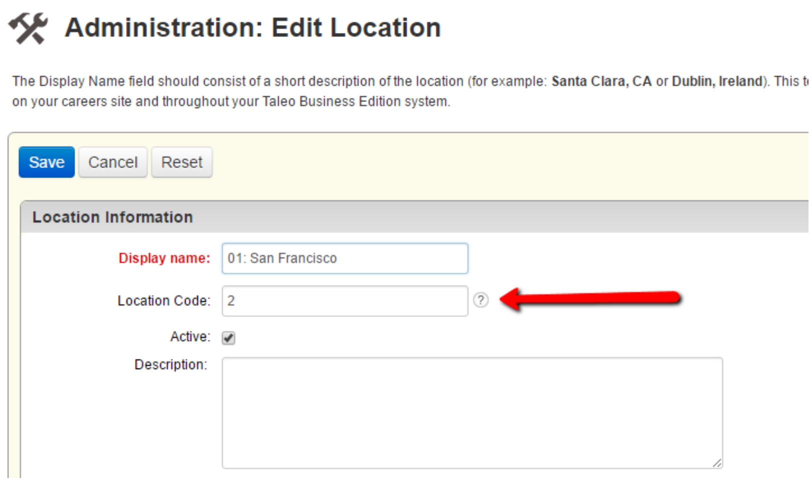
- For each of the Locations list for which you want to hire Employees into or post Requisitions for in TBE, you will need to enter the NetSuite INTERNAL_ID as the Integration Code in the corresponding TBE Location.
  - TIP: You can export the list of locations to Excel or Text File to make this exercise easier.

Populate the values in TBE

- For Example, for the Location '01: San Francisco' I would enter the following in TBE.

Steps:

- In TBE, go to Administration → Organization → Region, Location, Division and Department Settings
- Scroll to the Locations section.
- Add Location or Edit and existing Location by populating the Integration Code with the values expected by NetSuite. Name is not required to match but it is recommended:



4.3 Departments

The steps are similar to the Location steps covered above.

To get Name/ID pairs from NetSuite.

- Go to, Setup → Company → Classifications → Departments

To populate the values in TBE

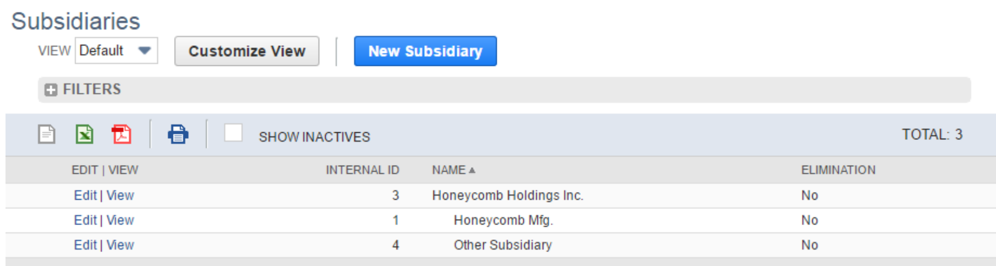
- In TBE, go to Administration → Organization → Region, Location, Division and Department Settings
- Scroll to the Departments section.
- Add Department or Edit and existing Department by populating the Integration Code with the values expected by NetSuite.

4.4 Subsidiary

NOTE: Subsidiary is a required field in NetSuite for creating Employees and Requisitions if using NetSuite OneWorld. If Subsidary is required, the Locations and Departments will be validated as belonging to the Subsidiary on any new Employee and will be rejected if they do not match.

To get Name/ID pairs from NetSuite.

- Go to, Setup → Company → Classifications → Subsidiaries



To populate the values in TBE

The Subsidiary field in TBE is a NetSuite Application Integration field, enabled when NetSuite Integration Fields enabled, that is shared by both the Requisition and Employee entities in TBE.

Steps:

- In TBE, go to Administration → Customize Onboard → Employee Fields → Scroll to the 'Employee Application Integration Fields' section.
  OR
- Go to Administration → Customize Recruit → Requisition Fields → Scroll to the 'Employee Application Integration Fields' section.
- Locate the field 'NetSuite Subsidiary' field and select 'Edit' in Actions column
- Populate the values with the values retrieved from NetSuite in the Active list following the pattern Display Name|Internal_ID
  For Example:

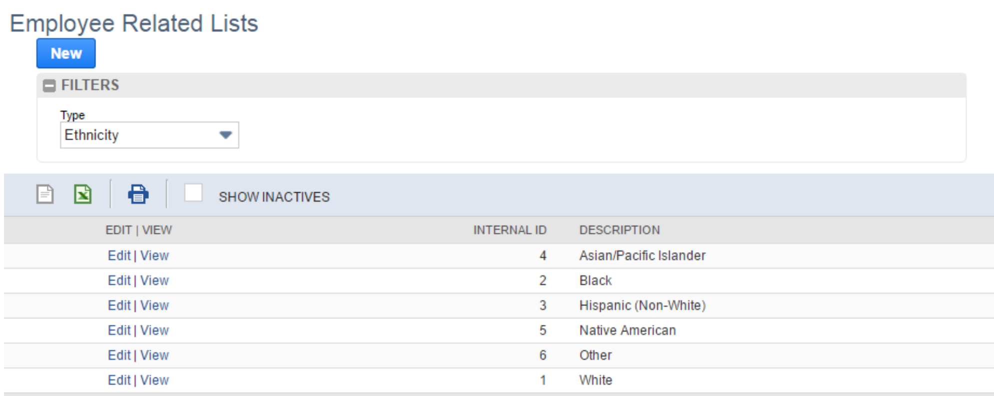
4.5 Employee Related Lists – Employee Status/Duration, Marital Status, Ethnicity/Race

If any of these fields are to be included in the integration, their values must be set up in TBE to match the values expected by NetSuite.

To get Name/ID pairs from NetSuite.

These fields are all considered Employee Related lists in NetSuite and can be located in the same place.

- In NetSuite, go to, Setup → Accounting → Setup Tasks → Employee Related Lists
- You will be able to filter for each of the related lists to get the Name/Id Pairs needed.



EDIT | VIEW	INTERNAL ID	DESCRIPTION
Edit | View	4	Asian/Pacific Islander
Edit | View	2	Black
Edit | View	3	Hispanic (Non-White)
Edit | View	5	Native American
Edit | View	6	Other
Edit | View	1	White

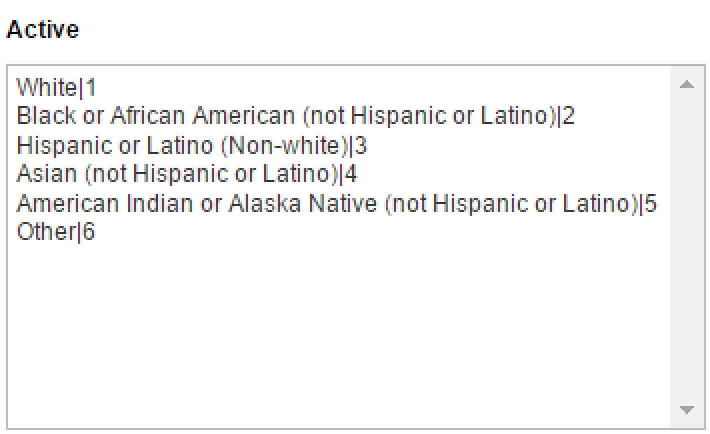
To populate the values in TBE

These fields are standard TBE fields shared across the entities. See table below steps on where to locate these fields in TBE.

Steps to validate/populate their values.

- In TBE, go to, Administration → Customize Recruit/Onboard/Perform → locate Entity Fields (for example Employee Fields)
- Locate the particular standard field (for example Race) and select 'Edit' from the Action column.
- Populate the values with the values retrieved from NetSuite in the Active list following the pattern Display Name|Internal_ID

  For Example:



NetSuite Field Name	**TBE Field Name**	**Entities**
Employee Status	Duration	Requisition, Employee
Marital Status	Marital Status	Candidate, Employee
Ethnicity	Race	Candidate, Employee

4.6 Gender

Gender is not a customizable list in NetSuite. As a result, the TBE Gender field, shared across Candidate and Employee, must be set with the fixed values that NetSuite expects.

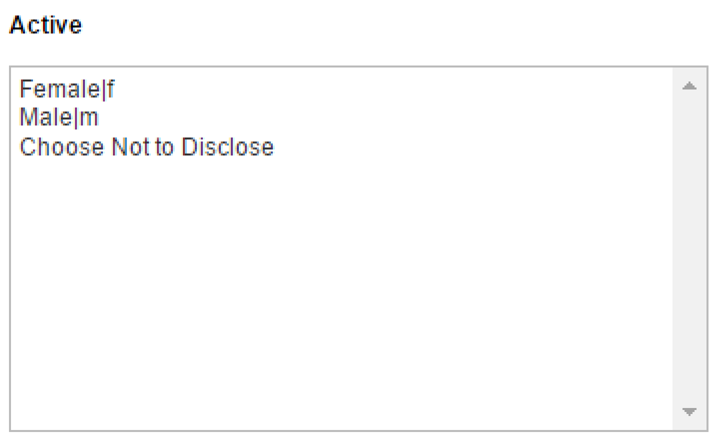
If capturing Gender in TBE before creating an Employee in NetSuite. The Gender Field must be set up in TBE.

Steps:

- In TBE, go to Administration → Customize Onboard → Employee

Fields OR

- Go to Administration → Customize Recruit → Candidate Fields
- Locate the field 'Gender' field and select 'Edit' in Actions column
- Populate the values in this picklist with 'Male|m' and 'Female|f'. **Note**: you can include other options such as Choose Not to Disclose, but these values will not be sent to NetSuite.



4.7 Country

NetSuite expects that the Country value sent is the Two-Digit ISO code. Your Country List in TBE should be set with the Two-Digit Code for the Countries you plan to use in the integration.

For Example: 'United States|US'

4.8 Posting Type

If the Posting Type field is being used and populated on the NetSuite Job Requisitions being sent to TBE, a custom pick-list field will need to be created on the TBE Requisition with the external name ‘postingType’.

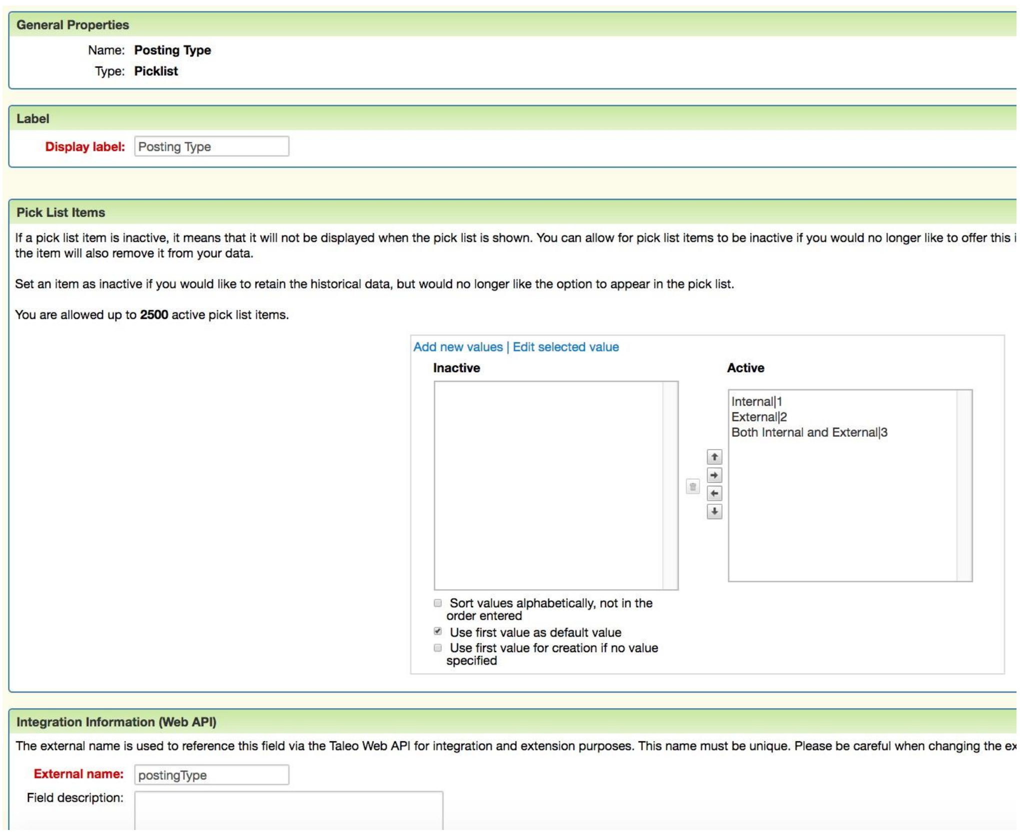
The values of the custom pick-list will need to be set with the values:

Internal|1

External|2

Both Internal and External|3

Custom filed setup in TBE:



5 Create you NetSuite Integration User in TBE

You will need to create a User in TBE to be used for the NetSuite integration. Later on, you will provide NetSuite with the username and password of this user when setting up the SuiteApp in NetSuite.

- The User must be an ‘Administrator’ role

- If SSN and/or Date of Birth are to be captured in TBE before the Employees are created in NetSuite, the user must have ‘Confidential Data Access’ enabled on the TBE User record.

Installing the Oracle Talent Cloud for Midsize (TBE) SuiteApp

Overview

The Oracle Talent Cloud for Midsize SuiteApp consists of two bundles. Customers wishing to use the integration will need to install one or both of the bundles into their NetSuite instance depending on the functional parts they wish to use.

Bundle Descriptions

Oracle Talent Cloud (TBE) Employee

- This is the primary bundle and must be installed to use the integration.
- This bundle will allow the customer to define the connection from their NetSuite Instance to their TBE environment for all integrations.
- This bundle allows the customers to configure and enable the integration from TBE to NetSuite that creates new NetSuite Employees.
- This bundle works with all variations of NetSuite; NetSuite and Net Suite OneWorld; both with or without SuitePeople.

Oracle Talent Cloud (TBE) Requisition

- This add-on bundle will be installed if the customer wishes to leverage the NetSuite Job Requisition to TBE Requisition Integration.
- This bundle will only install and work if the SuitePeople module is present in the NetSuite instance **and** the Job Requisition feature has been enabled.

Locate and Install the Bundles

To set up and use the SuiteApp/integrations, the bundles will need to be installed into your NetSuite instance by an Administrator.

Steps (repeat for each bundle to be installed):

1. In NetSuite, go to Customization → Suite Bundler → Search & Install Bundles
2. Search for a bundle to install. – either Oracle Talent Cloud (TBE) Employee or Oracle Talent Cloud (TBE) Requisition
3. Optionally, click the Name of a bundle to display its Bundle Details page.
    - Click the Documentation link to review documentation for the bundle.
    - The Overview subtab displays the bundle abstract, and description. It also displays a link to any bundle-specific terms of service. See Viewing Bundle Terms of Service.
    - The Components subtab lists bundle objects, including their custom script IDs, referencing objects, and lock status.
    - The SuiteApp Info subtab displays details about the bundle from SuiteApp.com
4. When you have decided that you want to install a bundle, click the **Install** button.
5. After you have clicked the Install button, the Bundle Details page displays. Click the **Install** button on this page.

- The terms of service that require acceptance will display in a dialog. Click **I Agree** to proceed.
- The Preview Bundle Install page displays.

6. Start the process of installing the bundle in the NetSuite account by clicking the **Install Bundle** button on the Preview Bundle Install page.
    - The Installed Bundles page displays.
    - If the installation is not complete, the Status column displays ‘Pending’ or the percentage of installation progress.
    - When the installation is successfully completed, the Status column displays a green check.
    - If the installation was not successfully completed, the Status column displays a red x .
      Hovering over the red will provide additional details needed to help resolve the issue.

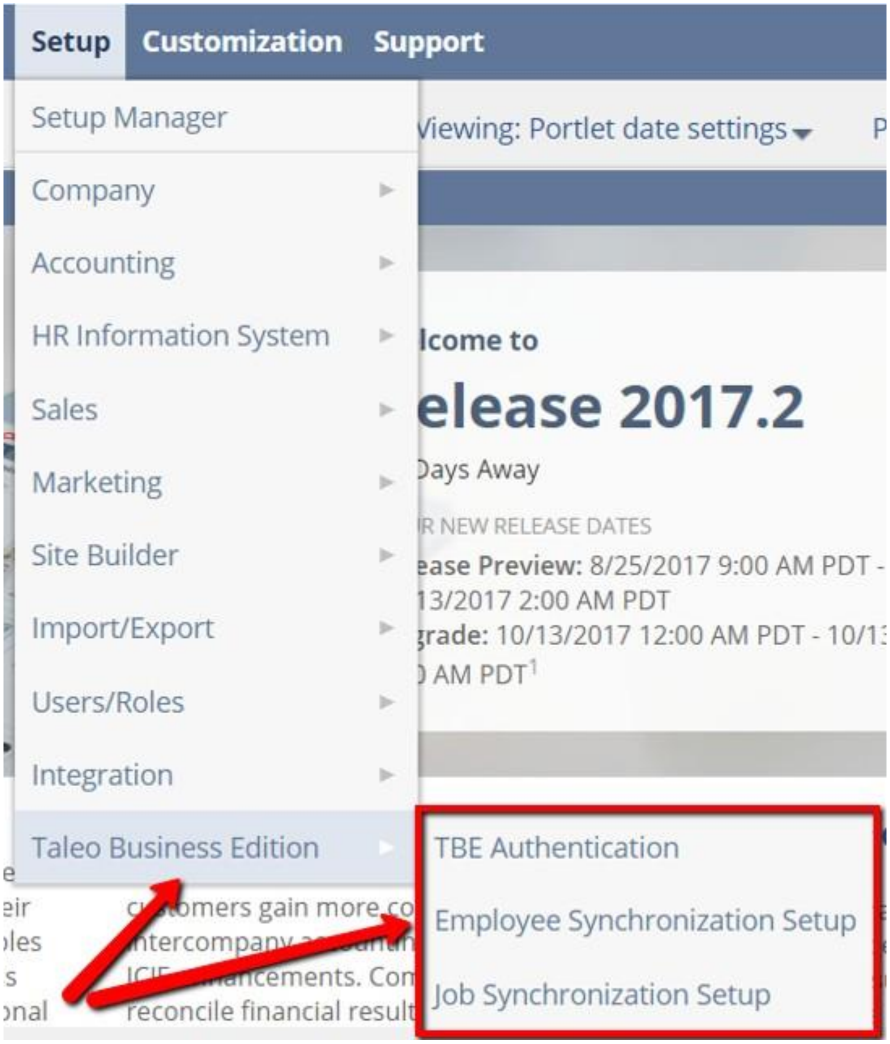
Configure and Enable the Oracle Talent Cloud for Midsize SuiteApp in the NetSuite Account

Overview

Once the bundle(s) is installed into the NetSuite Account, some custom pages are made available for the administrator in NetSuite to complete the setup and configuration of the SuiteApp. The Administrator will:

- Setup the TBE Authentication
    - Define the customer's TBE zone (Company Code)
    - Provide the username and password of the integration user to be used (creation of this user covered in the 'Preparing your TBE Environment' section above.
- Setup and Configure the Employee Synchronization
    - Enable it if it is being used.
    - Set the parameters to control the behavior.
- Setup and Configure the Job Synchronization
    - Enable it if it is being used.
    - Set the parameters to control the behavior.

After the primary bundle (Oracle Talent Cloud (TBE) Employee) is installed or after both bundles have been installed, the pages to configure and enable the integrations will appear in NetSuite under **Setup → Taleo Business Edition**

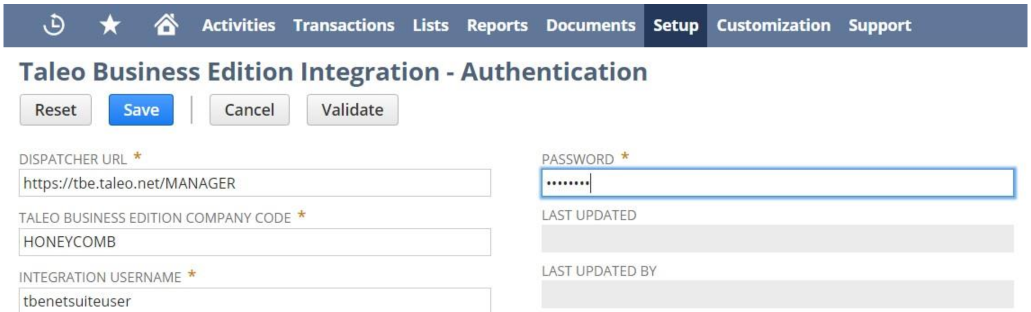


Setup Authentication and Connection to TBE

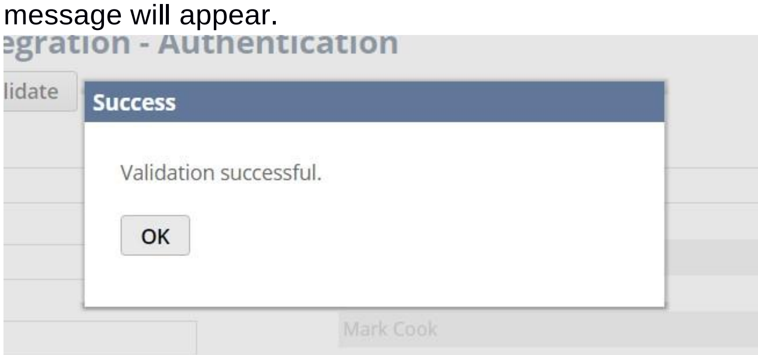
To integrate the NetSuite Account with a Taleo Business Edition (TBE) zone, information needs to be provided as to which TBE is being used as well as authentication credentials for the integration user to be used. Both the Employee Synchronization and the Job Synchronization features require that the authentication information be populated and verified.

Steps:

1. In NetSuite, go to **Setup → Taleo Business Edition → TBE Authentication**
   - The TBE Authentication UI will appear.



2. Verify that the field **DISPATCHER URL** should be defaulted to 'https://tbe.taleo.net/MANAGER'
    - If it is not, populate with this value:
3. Enter the TBE Company Code that the NetSuite Account will be integrating with in the **TALEO BUSINESS EDITION COMPANY CODE** field.
4. Enter the TBE username of the TBE User created for this integration in the **INTEGRATION USERNAME** field.
5. Enter the password of the TBE User created for this integration in the **PASSWORD** field.
6. Click the **Validate** button to check that the information entered is correct.
    - If any of the DISPATCHER URL, TALEO BUSINESS EDITION COMPANY CODE, INTEGRATION USERNAME or PASSWORD are not correct, an error message notification will appear.
    - If the information entered correctly is correct, a 'Validation Successful' message will appear.



7. Click **Save** to save the connection and authentication information.

Setup and Configure the Employee Synchronization

If the Employee Synchronization is to be used to create new NetSuite Employee records automatically from newly hired TBE Candidates/Employees, some basic configuration must be done and the synchronization saved as enabled.

Steps:

1. In NetSuite, go to **Setup → Taleo Business Edition → Employee Synchronization Setup**
    - The Taleo Business Edition – Employee Synchronization setup UI will appear.

2. In **SOURCE TBE ENTITY**, select either Candidate or Employee depending on the scenario required. (This can be changed at any time after setup).
3. Set **EFFECTIVE START DATE**, this is the earliest date the integration will look back to for newly hired Candidates/Employees in TBE. (This can be changed at any time after setup).
4. If ready to have the integration start happening, check the **ENABLED** checkbox.
5. Click **Save**

After this sequence of steps, if save as enabled, the SuiteApp will attempt to create new NetSuite Employees from newly hired Candidates/Employees, if any, the next time the scheduled script for this integration runs.

Setup and Configure the Job Requisition Synchronization

If enabled the Job Requisition Synchronization will automatically create Requisition in TBE from NetSuite Job Requisitions. In addition, the Status of the Job Requisitions in NetSuite will be kept up to date based on the recruiting and fulfillment activity in TBE. To realize this integration, some basic configuration must be done and the synchronization saved as enabled.

Steps:

1. In NetSuite, go to **Setup → Taleo Business Edition → Job Synchronization Setup**
   - The Taleo Business Edition – Job Synchronization setup UI will appear.

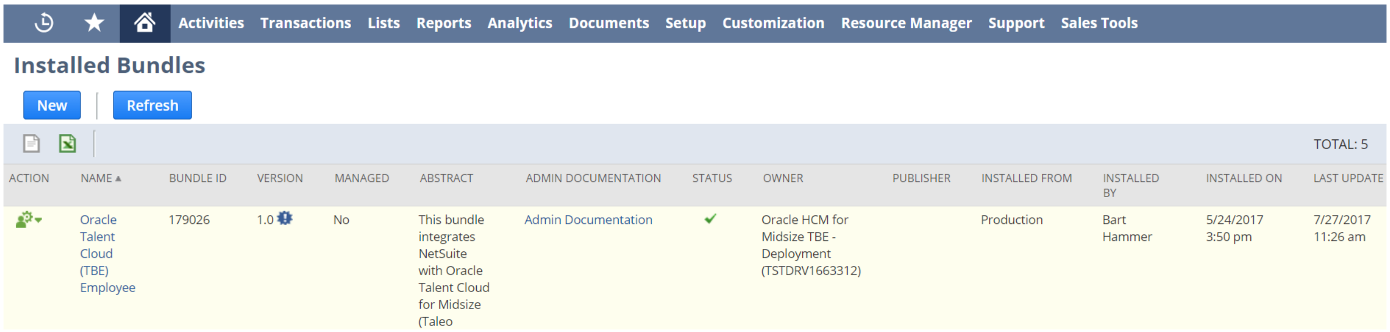
2. In **NETSUITE TRIGGERING STATUS**, select either Pending Approval or Open depending on the scenario required. (This can be changed at any time after setup).
3. If ready to have the integration start happening, check the **ENABLED** checkbox.
4. Click **Save**

After this sequence of steps, if save as enabled, the SuiteApp will attempt to create new TBE Requisitions whenever a Job Requisition is save in the **NETSUITE TRIGGERING STATUS** selected. The Status of any NetSuite Job Requisition that was sent to TBE will periodically be updated as its status changes in TBE.

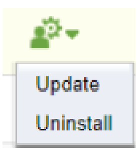
Update an existing Installed Bundle

When changes are done to the existing bundles (Oracle Talent Cloud (TBE) for Employee or Oracle Talent Cloud (TBE) for Requisition), these bundles need to be updated to reflect the changes.

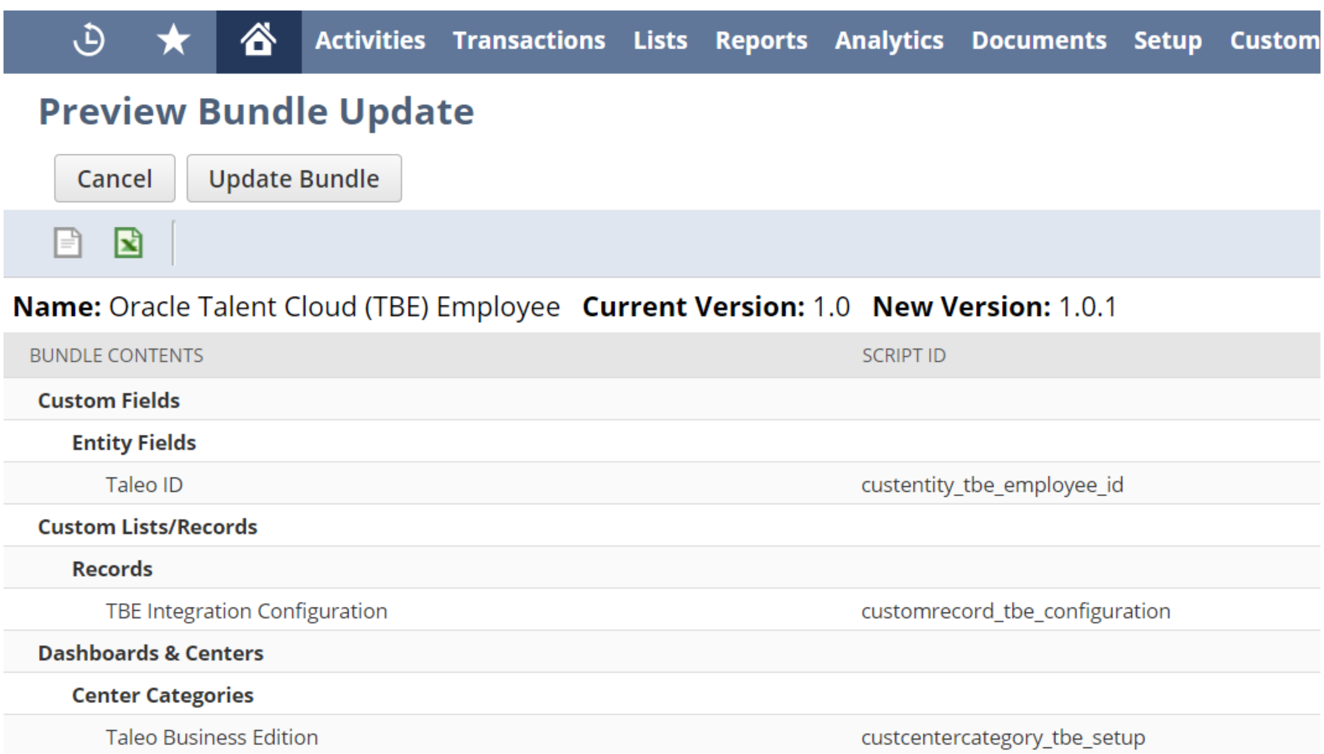
Navigate to the following page: Customization > Suite Bundler > Search & Install Bundles > List



The option to update the bundle is available by hovering on the Action icon.



Click on 'Update' to update the bundle to view the Preview of Bundle update.



By clicking on 'Update Bundle', the bundle will be updated to reflect the latest changes in the bundle.

Sync Employment Type and Education History

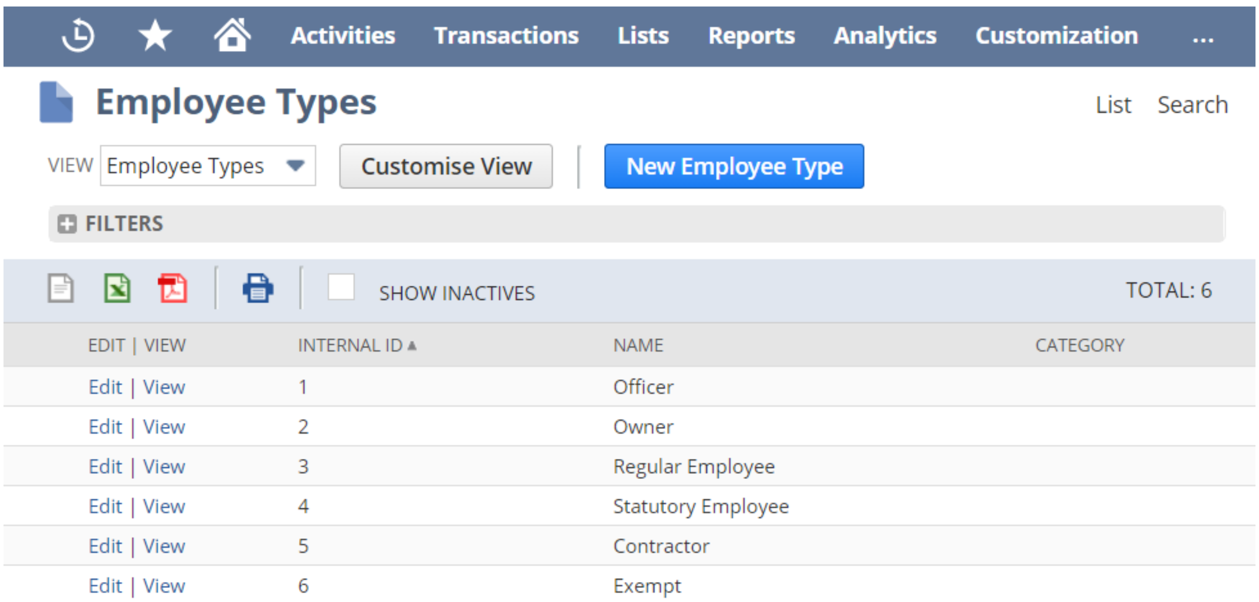
As part of employee/candidate sync, employment type and education history can be moved to NetSuite from TBE as part of creating a new hire or adding a new employee in Taleo Business Edition (TBE).

Employment Type Synchronization:

The following fields need to be mapped for successful synchronization:

Employee Type in NetSuite to Employment Type in Taleo Business Edition (TBE):

Navigation in NetSuite: Setup > Accounting > Employee Related Lists > Employee Type

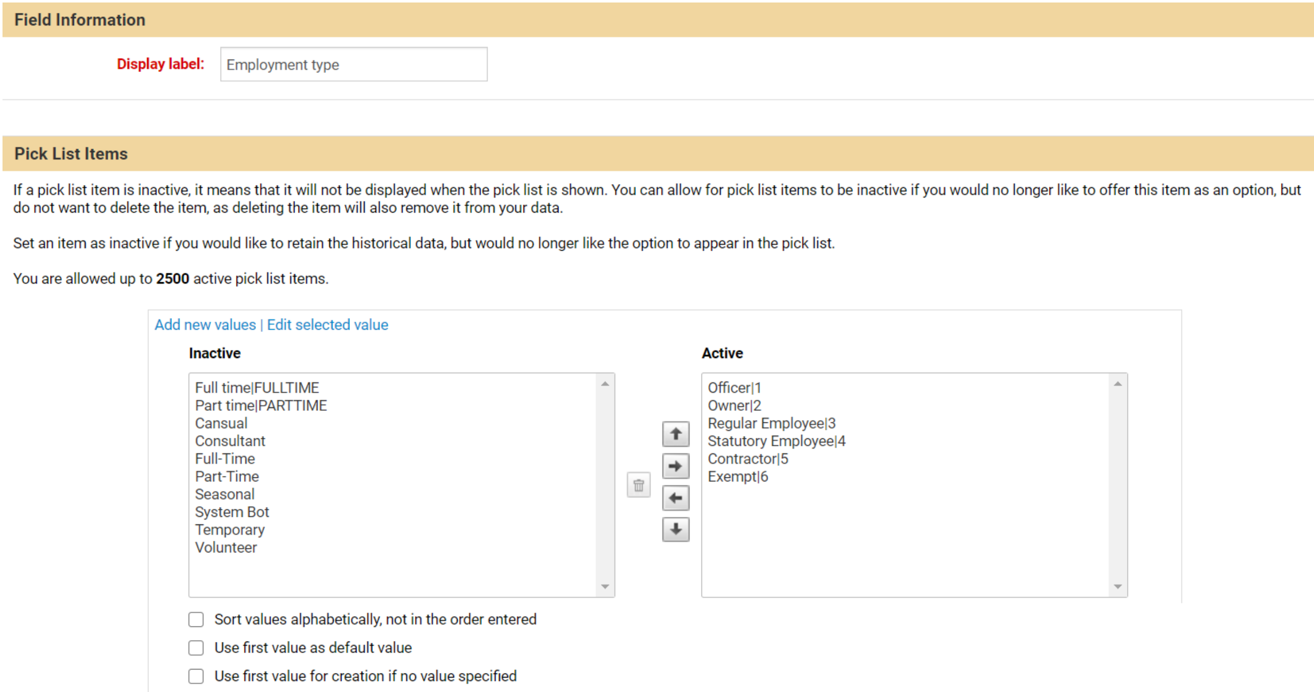


EDIT | VIEW	INTERNAL ID ▲	NAME	CATEGORY
Edit | View	1	Officer	
Edit | View	2	Owner	
Edit | View	3	Regular Employee	
Edit | View	4	Statutory Employee	
Edit | View	5	Contractor	
Edit | View	6	Exempt	

Employment Type mapping for the Employee:

Navigation in TBE for Employee Sync: Administration > Customize Perform/Customize Onboard > Customize Fields > Employee Fields > Employee Standard Fields > Employment Type

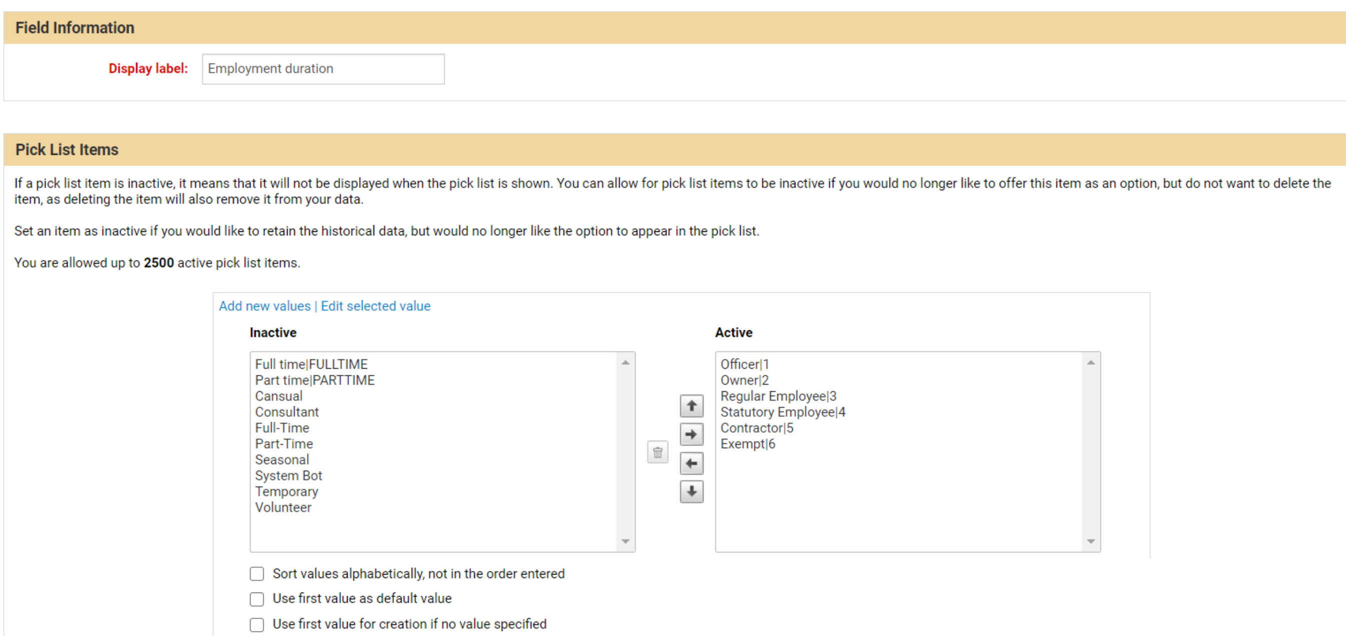
The mapping in TBE needs to be defined as per NetSuite employment type list values definition. Please refer to the following screenshot for mapping. The Internal ID values needs to be mapped as mentioned below along with the list values.



Employment Type mapping for the Candidate:

Navigation in TBE for Candidate Sync: Administration > Customize Recruit > Customize Fields > Requisition Fields > Requisition Standard Fields > Employment Duration

The employment duration comes from the requisition for which the candidate is hired. The mapping in TBE needs to be defined as per NetSuite employment type list value definition. Please refer to the following screenshot for mapping. The Internal ID values needs to be mapped as mentioned below along with the list values.

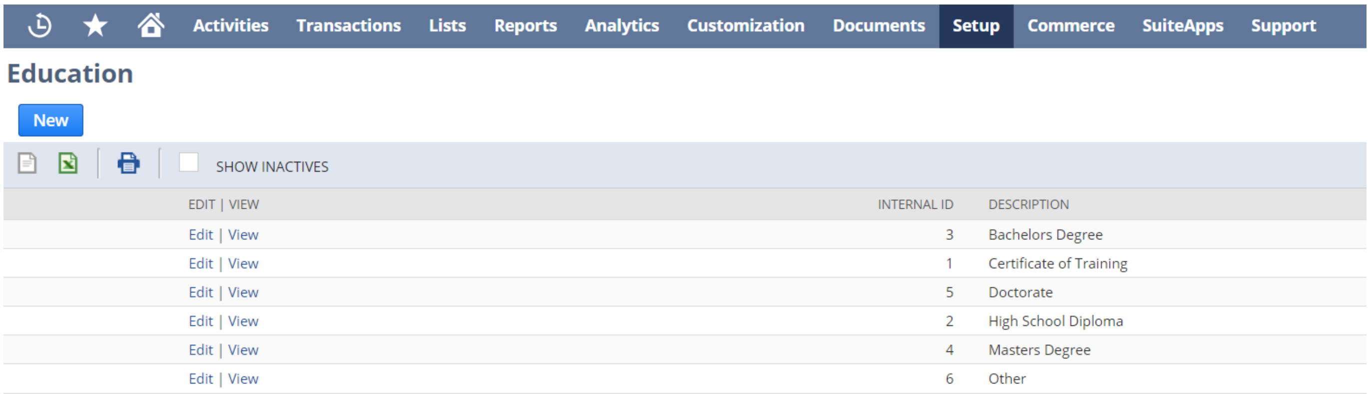


Education Synchronization:

The following fields need to be mapped for successful synchronization:

Education in NetSuite to Education History in Taleo Business Edition (TBE):

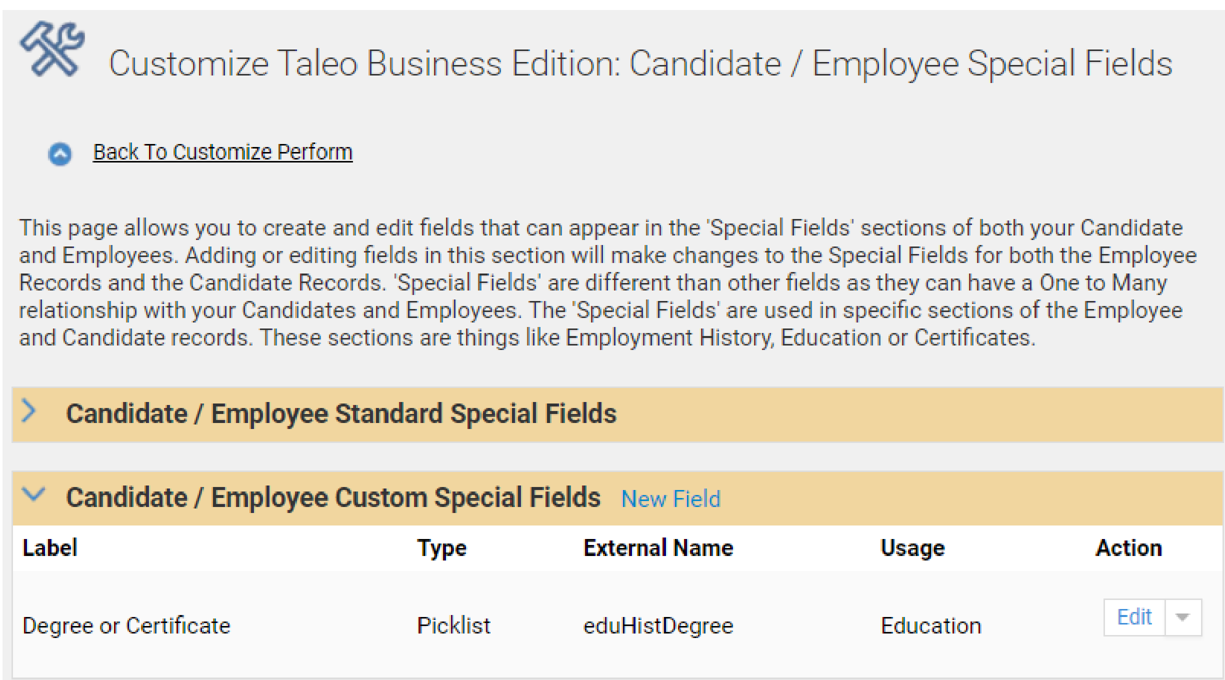
Navigation in NetSuite: Setup > Accounting > Employee Related Lists > Education



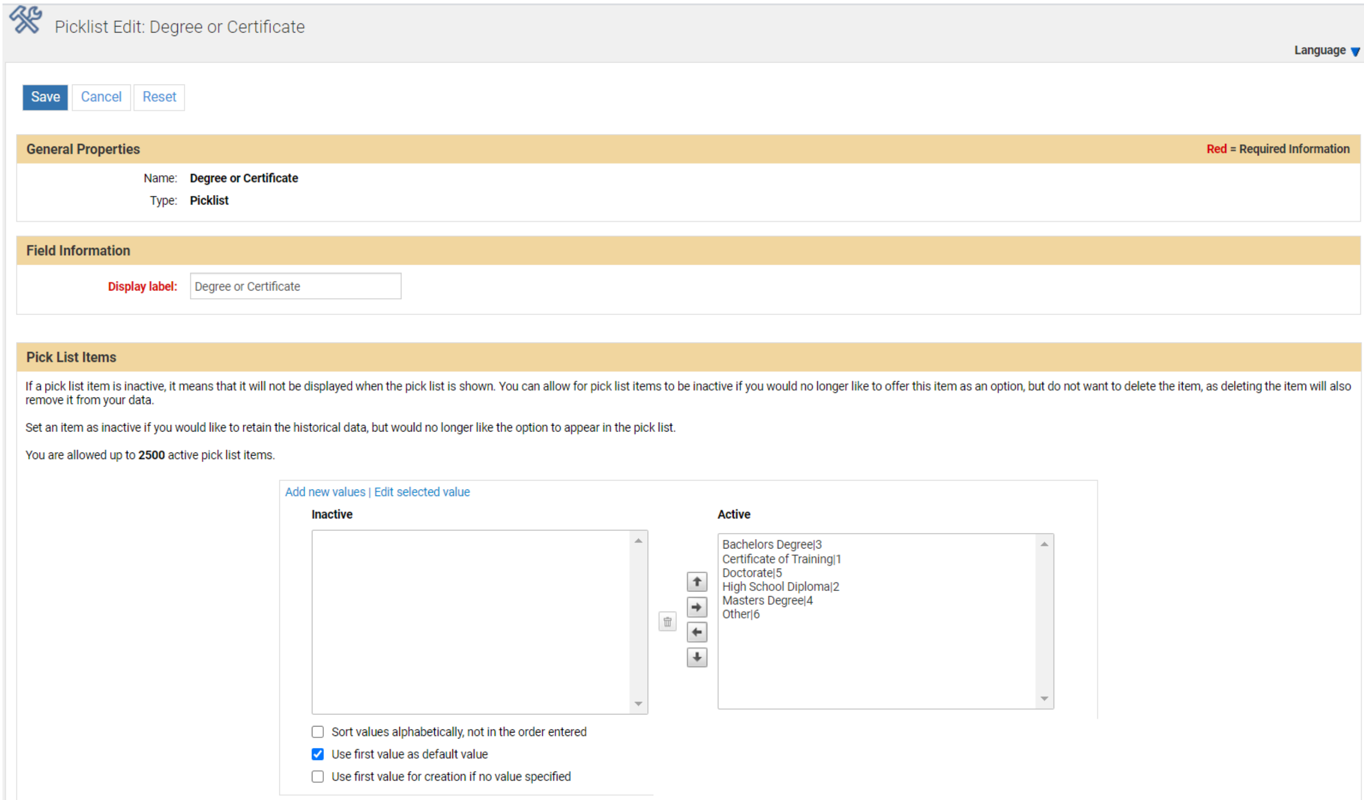
Education mapping for the Employee or Candidate:

Navigation in TBE for Employee/Candidate Sync: Administration > Customize Perform/Customize Onboard > Candidate/Employee Special Fields > Candidate / Employee Custom Special Fields > Degree or Certificate

If the special custom field is not available already, then add the field 'Degree or Certificate' as mentioned below.



The mapping in TBE needs to be defined as per NetSuite education list values definition. Please refer to the following screenshot for mapping. The Internal ID values needs to be mapped as mentioned below along with the list values.


Picklist Edit: Degree or Certificate
Language
Save
Cancel
Reset
General Properties
Red = Required Information
Name: Degree or Certificate
Type: Picklist
Field Information
Display label: Degree or Certificate
Pick List Items
If a pick list item is inactive, it means that it will not be displayed when the pick list is shown. You can allow for pick list items to be inactive if you would no longer like to offer this item as an option, but do not want to delete the item, as deleting the item will also remove it from your data.
Set an item as inactive if you would like to retain the historical data, but would no longer like the option to appear in the pick list.
You are allowed up to 2500 active pick list items.
Add new values | Edit selected value
Inactive
Active
Bachelors Degree|3
Certificate of Training|1
Doctorate|5
High School Diploma|2
Masters Degree|4
Other|6
Sort values alphabetically, not in the order entered
Use first value as default value
Use first value for creation if no value specified

Document History

Date	Changed by	Comments	Version
09/11/2017	Mark Cook	Initial version.	V1.0
04/09/2020	Gurava Maruri Kathy DiPaola	Second version. Updated with ‘Update Bundle’ section	V2.0
02/15/2021	Gurava Maruri Kathy DiPaola	Third version. Updated with ‘Syncing employment status and education history’ section	V3.0