



# **Taleo Business Edition**

## **Partner Practices: Simple Integration Guide**

## Welcome

### AUDIENCE

This guide is intended for Taleo Business Edition Solution, Network and Premier Partners.

### REQUIRED KNOWLEDGE AND SKILL

Use of this guide assumes you have advanced level of knowledge in navigating, administering, and using your Taleo Business Edition instance. For basic training of Taleo Business Edition, please access the Resource Center which is available from your zone (linked in the upper right navigation of your TBE user interface).

In addition, you may require familiarity with:

- HTML
- XML and XHTML
- REST Web Services API

### BACKGROUND

This guide is intended for developers who plan to utilize the Taleo Business Edition (TBE) platform to interface or integrate a third-party website or application. The goal is to enable partner or customer developers to utilize existing TBE functionality for integrations as determined with ease.

## Simple Integration Guide

### INTRODUCTION

The Taleo Business Edition (TBE) platform provides multiple methods where partners and customers can engage their products and services. These methods can be as simple or advanced as chosen – depending on the required interoperability required between TBE and the third party solution. These methods may include:

- RSS Feeds
- Reports
- Email Templates
- Web Services API
- Embedded HTML
  - HTTP Post
  - iFrame

In most scenarios, partners will use a combination of two or more integration methodologies for engaging their products and services with Taleo Business Edition. One method to post or access the third-party application (i.e. embedded HTML or an email template), and the other to post back results (API).

For customer integrations, these are primarily data oriented requests. As such, customer integrations are primarily driven solely on the Taleo web services API.

The Taleo web services API is the only method for posting back results to a Taleo database.

This document will now discuss in more detail the available options for integration.

## RSS FEEDS

RSS (Really Simple Syndication) feeds are an open method of syndicating and aggregating web content to share from one web location to another. RSS feeds are available with Taleo Recruit to syndicate open job postings / requisitions of a specific customer's instance to a secondary location. Taleo's RSS feed includes the full job posting text, plus metadata such as job posting published date, the job posting title and the job posting URL.

For Candidates, the likely use-case for Taleo Business Edition RSS feeds is for retrieving open requisitions from a specific organization to an RSS feed news reader or aggregator, like a Google homepage or a mobile device. This allows the candidate to quickly view open jobs with their ideal employer.

For Developers, the primary use-case for using the RSS feed output is for posting jobs out to a:

- 3<sup>rd</sup> party sourcing provider
- Custom website
- Job aggregator

To take advantage of the Taleo Business Edition RSS feeds for development usage, users must have knowledge of: HTML, XML and XHTML.

For configuration and integration details around RSS Feeds, refer to the Taleo Resource Center.

## REPORTS

Taleo's Insight Reports allows you to configure a report and have that report automatically emailed on a desired schedule. File types supported for manual export include:

- Excel,
- Word
- PowerPoint
- PDF

Report generation provides instant, on-demand views into key metrics of Taleo Business Edition, which can then be manually uploaded within a third-party solution.

Each report provides drill-down capabilities and can be filtered based on parameter criteria such as dates, location, department, role, user, and source.

Scheduling reports to run in the background on predetermined days and frequencies is also supported with Taleo Insight. Scheduling reports that you access regularly enables you to automate the process, saving you time and eliminating manual task work – it's one less thing you have to remember to do.

For additional details around Insight Reports and data export, refer to the Taleo Resource Center.

## EMAIL TEMPLATES

Taleo Business Edition offers candidate or user based email submission capabilities. These can be manually sent or automatically sent based on workflow step. Email templates can be configured to support a simple integration request, where the most common use is requesting a candidate to click on a background check or assessment request link.

Email templates can be formatted in simple TXT or HTML. The template's can pass along mail merge field values to dynamically form URL strings as well, for example:

Dear <<CANDIDATE\_NAME>>,

Please click <a href='http://xxx?c=<<COMPANY\_ID>>&aid=<<CANDIDATE\_ID>>&ad1=<<CANDIDATE\_FIRST\_NAME>>&ad2=<<CANDIDATE\_LAST\_NAME>>&gid=<<REQUISITION\_ID>>target='\_blank'>here</a> to log in to Complete your assessment.

For additional details around Email Templates, refer to the Taleo Resource Center.

## WEB SERVICES API

Taleo Business Edition includes an open web services API for Premium Service Level customers – the API utilizes REST for data transfer of XML or JSON data.

The API is passive, i.e. it does not have the ability to make outgoing calls of partners API's, nor can it push data externally (all requests are inbound).

A REST client can be written in a wide range of development tools and platforms, such as Java, Visual Basic, Perl, C#, PHP, .NET, etc. As such, Taleo does not provide platform code support or sample code to developers. The API is inherent to the application; Taleo assumes that developers are experts in their platform of choice and with utilizing web services.

Details regarding the TBE API including WSDLs are located here:  
<http://www.oracle.com/technetwork/documentation/default-1841567.html>

Taleo has also partnered with System Integration companies for outsource integrations - Please contact your Customer Sales Manager for details.

## EMBEDDED HTML

Simple Data Integration Services are available by allowing customers to embed HTML on most pages within the application. When viewing a candidate or a requisition, adding a user or most other function based steps can include mark-up simply by going to the Administration panel and choosing Page Layouts. By embedding commands into these page layouts – customers or partners can claim some on screen real-estate and use various methods to effect action for third-party systems.

Aside from simply static html addition, developers are also able to embed iFrames Template HTML, allowing the population of dynamic data elements (merge fields).

This document will further discuss adding embedded code within pages of TBE.

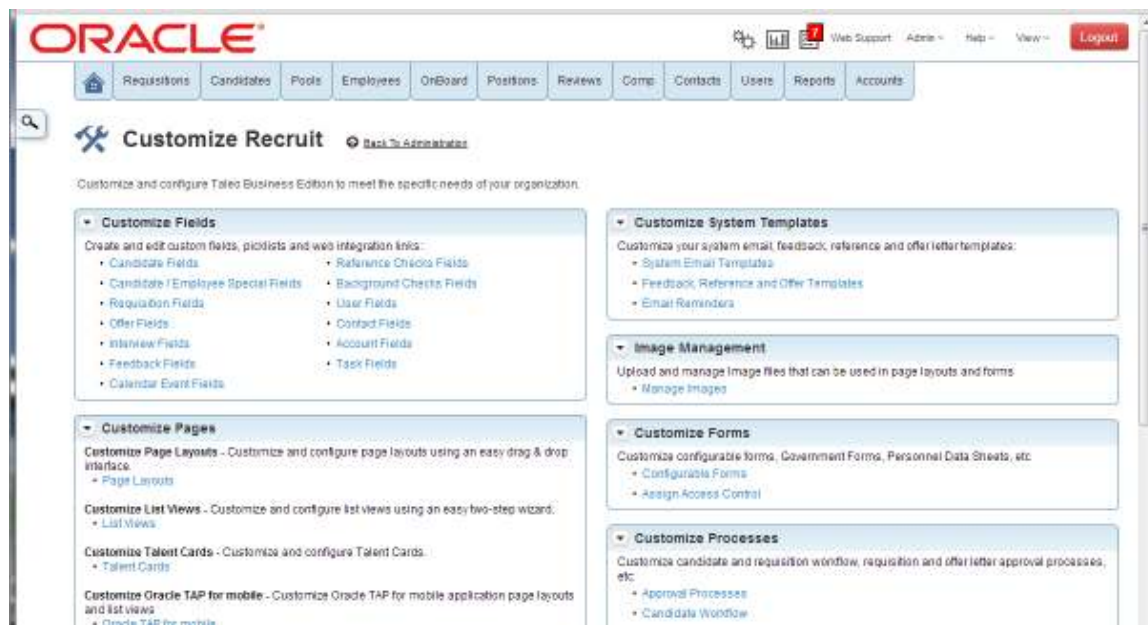
### Embedding Code within Taleo Business Edition

TBE is designed to allow application administrators to manage the configuration and customizations of virtually every primary page and data element within the solution. This includes the ability to add custom code within a specific section of a specific page layout for a specific user role. For example, an iframe of a background check application can be embedded within a candidate view page but only viewable by 'HR Administrators' if needed.

Each primary tab within TBE provides a List View and a Page Layout view. A List View is the splash page incorporated to the primary tab the user has clicked on (i.e. Requisitions, Candidates, Accounts, Users, etc.). A List View provides a glance at the records associated within the selected tab in a table format solely. As such, embedded code cannot be incorporated within a List View page. Only primary pages (Page Layouts), not splash pages (List Views) can incorporate your mark-up. These are found within the Page Layout section within the Administration tab.

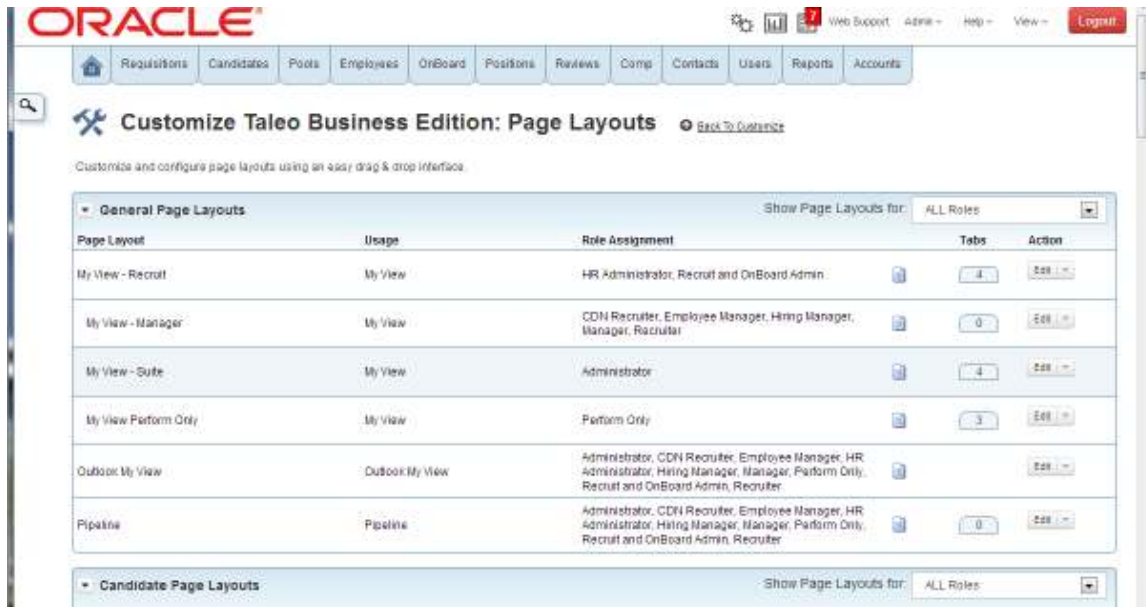
The following section provides instructions on how to add custom code within a specific Page Layout. Please note: administrator access is required within the client zone you are customizing.

Go to Administration > Customize Taleo Business Edition > Customize Pages > Page Layouts:



Under Page Layouts, you will need to take the template page that you are editing and create a version, or copy of it, for creating your own custom page. In the screenshot below we are using the View Candidate Page as an example.

Simply go to the right side of the screen next to the View Candidate page and click the drop down arrow next to the Edit text and select "Add a Version":



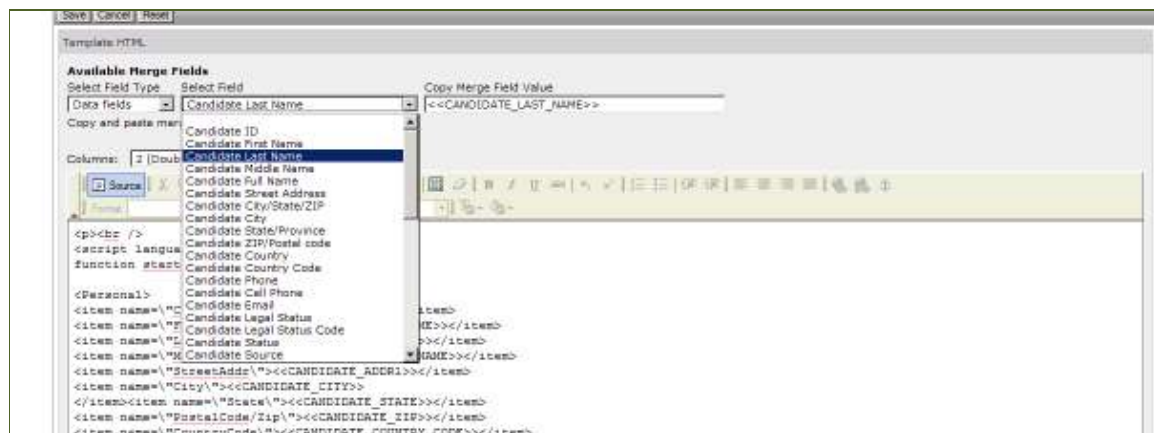
Name your new Page Layout version in standard format that is consistent (i.e. Partner Name or Integration Name).

Click the Insert link anywhere on the page in order to add your markup above a certain field or section that you have clicked on. When clicking Insert, simply choose the appropriate element to be added and location:

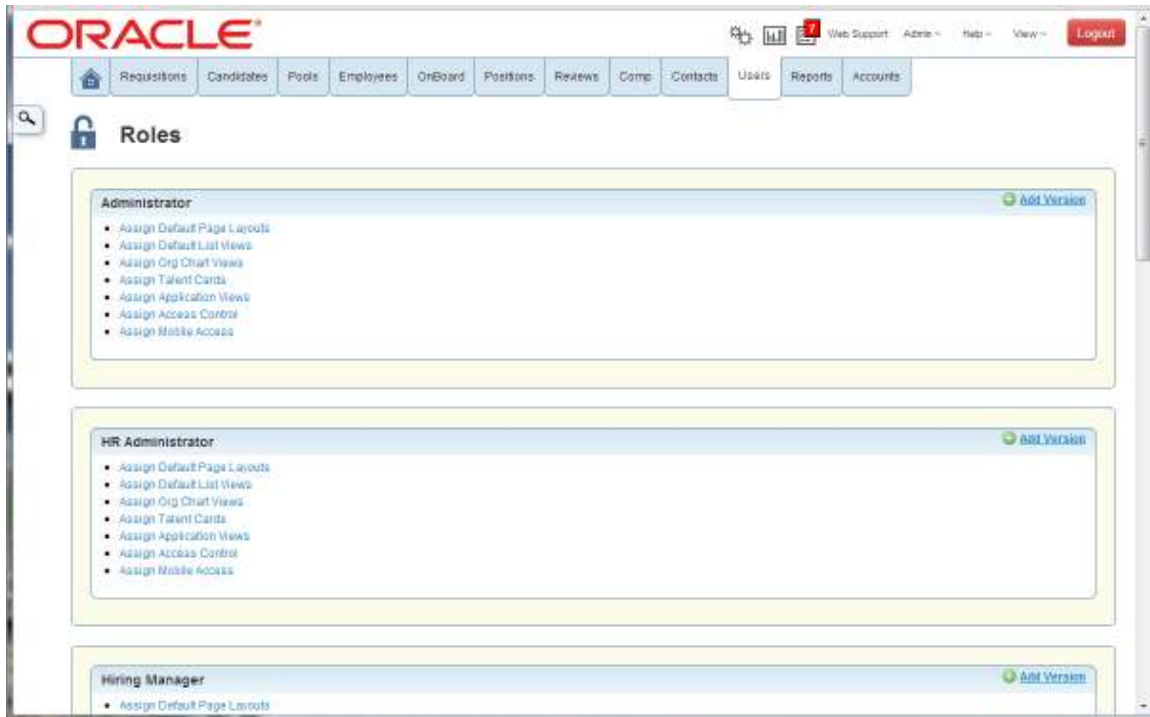
- **Title:** Populates a section within the page with the correct TBE formatting for sectioning off your markup. It is recommended that you create your own section and title within the page and populate your code within that section. Choosing title will allow you to incorporate a single column or two column data elements within your titled section.
- **Static HTML:** Allows you to incorporate any type of standard HTML code within the inserted area of the page, for example an iFrame.
- **Template HTML:** Allows you to incorporate any type of standard HTML code within the inserted area of the page with the addition of using TBE code values inserted which determine the data values to be extracted and placed at the point when code has been initiated (i.e. Merge Fields).
- **iFrame:** Allows you to incorporate an embed web page within a section of the page that
- **Input Field:** Allows you to add a standard or custom field that exists for that data object.



For iFrames and Template HTML, you can include the approved merge field values required along side your HTML. You will only be able to choose the merge fields available on that specific page (i.e. a Candidate page will not display Requisition merge fields as they are out of application support).

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Once you have built your custom page with your custom code, it is now required to make this the default viewable page layout for the appropriate user role. This can be managed through the Users section within the system. Go to Users > Roles > > Assign Default Page Layout Views and choose your appropriate role and page layout and click the save button.



Once you click on 'Assign Default Page Layouts, you will be able to view every page that the individual will have access to with their appropriate workflow. Simply click the appropriate page drop down list value and choose the custom page you have built and ensure you click the Save button.

## HTTP Post

With an HTTP Post, clients/partners are able to include elements to make a section of TBE appear as a doorway to their product. Below is an example of how your Post might look in the Template HTML field.

You would need to prepare your system to accept the post – and allow whatever form you are using access your data within/from TBE.

```
<form name="SampleForm" target="_blank" action="http://XXXXX" method="post">
<input type="hidden" value="<<USER_EMAIL>>" name="USER_EMAIL" />
<input type="hidden" value="<<REQUISITION_ID>>" name="REQUISITION_ID" />
<input type="hidden" value="<<REQUISITION_TITLE>>" name="REQUISITION_TITLE" />
```

This is a useful way to have a link in TBE take the user to your website – while also transmitting data that you might require as relevant such as details of the Candidate or Requisition that are relevant to your business function.


If you want to return data into TBE – for example updating the status of a request that has gone to your system within TBE, our API allows for updates and insertion of data within TBE.

## HTTP i-Frames

In addition to inserting Titles, Static HTML, Template HTML, and Input Fields, users are also able to embed inherent iFrames within a page layout. An iFrame is essentially a Internet Browser that is embedded within the page. By embedding an iFrame, a user can browse a third party website or application.

The user will be able to compile the iFrame title, the URL part of the iFrame, and any merge fields required to build the frame. Lastly, a default frame height can also be set to prevent the browser from taking too much space within TBE.

For example, choosing the following examples may give you an example of a quick and running iFrame: Go to Administration ☐ Page Layouts ☐ View Candidate and click Insert within a portion of the page. Choose Insert 'iFrame' and click next. Enter in the following variables:



**ORACLE**

Web Support Admin Help View Logout

Requisitions Candidates Pools Employees OnBoard Positions Reviews Comp Contacts Users Reports Accounts

**Insert Web Page Field: Step 2 of 2**

Available Merge Fields  
 Select Field Type: Data fields  
 Selected Field: Copy Merge Field value

Copy and paste merge field into template body below

**iFrame placeholder**

The iFrame will appear as a collapsed section in the page. When the section is opened - the iFrame link identified below will appear. The width is set, however you can change the iFrame height - which is defined in pixels. You are able to use merge fields in both the title as well as the iFrame link. For reference, this box is about 200 pixels high.

Title: Google Search: <CANDIDATE\_NAME>

Frame Link: [http://www.google.ca/search?hl=en&source=hp&q=<CANDIDATE\\_FIRST\\_NAME>](http://www.google.ca/search?hl=en&source=hp&q=<CANDIDATE_FIRST_NAME>)

iFrame Height: 300

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Title: Google Search: <<CANDIDATE\_NAME>>

IFrame Link:

[http://www.google.ca/search?hl=en&source=hp&q=<<CANDIDATE\\_FIRST\\_NAME>>+<<CANDIDATE\\_LAST\\_NAME>>](http://www.google.ca/search?hl=en&source=hp&q=<<CANDIDATE_FIRST_NAME>>+<<CANDIDATE_LAST_NAME>>)

IFrame Height: 300

You can view this iframe within the View Candidate page (as configured above). Simply click on a candidate and scroll to your created section to open the frame.

You will see that your candidate's first name and last name were passed along to Google in the search browser for quick viewing.

#### CONTACT

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