

Outlook for Recruiting Quick Setup Guide

The Outlook integration within recruiting provides both communication and scheduling functionality with SumTotal Recruiting.

To set up, customers must have an Outlook Exchange or Outlook 365 for Business account for their company. Currently all users must be within the same domain as the one used for the integration.

Setup:

Go to: Administration>Recruiting Configuration>Recruiting Configurations>Enable Microsoft Outlook Integration

☒ Enable Microsoft Outlook Integration

Exchange Service URL

Outlook Email Address

Outlook Password

Outlook Versions

Suggestion Window (Days from Current and Selected Date)

Maximum Interview Suggestions Per Day

☒ Enable Import Meeting Rooms

Import Meeting Rooms

roomlist_with only Test rooms.csv ✕

☐ Enable LDAP Connection

Input your:

- Exchange Service URL.
- Outlook Email Address

- This should be an unique address used to send information from either recruiting or a general system email address for emails sent from your company that don't expect responses. (Examples might be: system@yourcompany.com, recruiting@yourcompany.com, hr@yourcompany.com, etc.)
- Select the version of Exchange used by your company
- Select the number of days calendar suggestions are provided. 14 is the recommended period to prevent too many requests from the Exchange server.
- For allowing scheduling of meeting rooms in the Exchange server with interviews, meeting rooms can be added either via direct LDAP connection, or by Importing Meeting Rooms.
 - An LDAP connection will provide the most real time list of meeting rooms. This may not work with all versions of Exchange. Simply insert your LDAP Connection URL

- ☐ **Enable Import Meeting Rooms**
- ☒ **Enable LDAP Connection**

LDAP Connection URL

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- Import Meeting Rooms provides the same meeting room scheduling functionality as LDAP. Simply export your meeting room list from exchange as a .csv file and import using this tool. However, if new rooms are added to Exchange, then the list must be updated by exporting the meeting room list again from Exchange and replacing the current list in SumTotal with the new version.

- ☒ **Enable Import Meeting Rooms**

Import Meeting Rooms

roomlist_with only Test rooms.csv ✕

- ☐ **Enable LDAP Connection**

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- Locations will then become available in the Interview scheduling tool



[Add Interview](#) / [Add Location](#)

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ADD LOCATION

☐ Location Name ^

☐ Test - HQ Eng 1

☐ Test - HQ Eng 2

☐ Test - HQ Sales 1

☐ Test - HQ Sales 2

☐ Test - London Main Conference

☐ Test - London Small Conference

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INTERVIEWERS

Select primary and backup interviewers, and what topics they should discuss. Use a Group if multiple interviewers will interview together.

[+ Add Interviewer](#) [+ Add Group](#)

Interviews can have up to 15 interviewers or groups

Interviewer Name	Backup	Order	Topic	Duration	Location Preference	Actions
Heather Rose	Ashleigh Wright	Always First	General HR Questions	15 Minutes	Best Availability	EDIT
Stuart Bailey		Always Last	Leadership Questions	45 Minutes	Best Availability	EDIT
Sally Benton		--	General HR Questions	30 Minutes	Best Availability	EDIT

LOCATIONS

Select interview locations for interviewers.

[+ Add Existing Location](#) [+ Add Custom Location](#)

Location Name	Location Type	Actions
Test - HQ Eng 1	Existing	REMOVE
Test - London Main Conference	Existing	REMOVE
Test - HQ Sales 1	Existing	REMOVE