Taleo Talent Management System Training

Student Worker Hiring Manual

TEMPLE UNIVERSITY
Human Resources

Contents

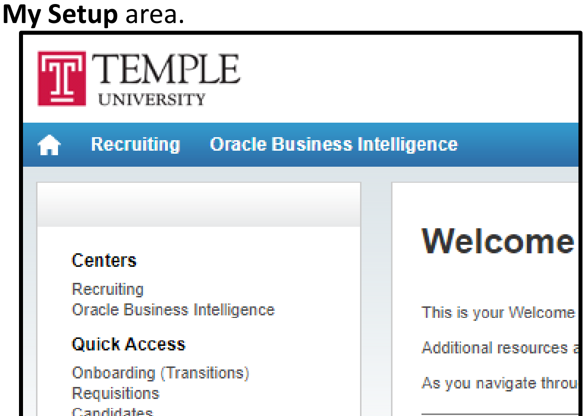
Contents 1
Navigation 3
Creating a Requisition – Student Worker 7
Requisition Structure – Student Worker 10
1. Requisition Structure 10
Identification 10
Structure 11
Owners 12
Collaborators 12
2. Process 14
3. Job Information 15
Profile 15
Compensation 15
Job Description 16
Questionnaire 17
Saving a Requisition 19
Inspect Tool 21
Requesting Approval for a Requisition 22
Taleo Approver Role 24
Email 24
Taleo System 26
Sourcing 27
Posting a Position 27
Unposting a Position 29
Searching a Candidate 30
Candidate Quick Search 30
Find Candidates 30
Linking a Candidate to a Requisition 31
Viewing Candidates 34
Submissions 34
Requisitions 36
Changing Step/Status of Candidates 37
Moving Candidates in Groups 37
Moving Candidates One at a Time 39
Creating an Interview 41
Creating an Interview Evaluation 44

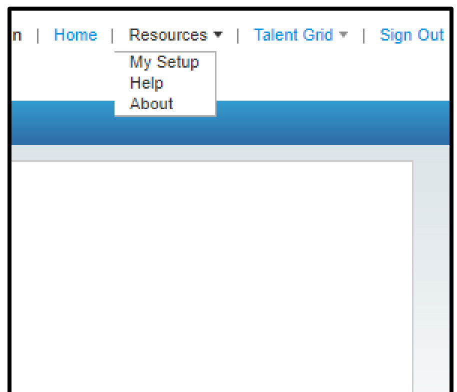
Sending out and Reviewing Interview Evaluations 47
Creating and Extending an Offer – Student Worker 50
Offer Grid 51
Top Section 51
General Terms 53
Details 53
Route for Approval 55
Extend the Offer 56
Hiring – Student Worker 60
Candidate Facing Material – Student Worker 64

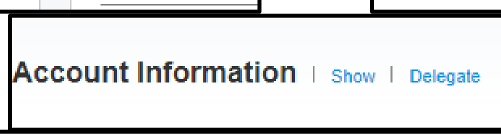
Navigation

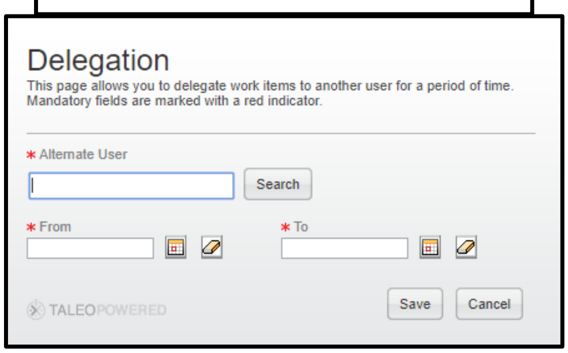
Taleo is accessed from the **TUPortal**. To access, select **Taleo Talent Management System** from TUApplications.

The **Welcome Center** will present you with options to access the **Recruiting Center**, **Onboarding (Transitions)**, **Requisitions**, **Candidates**, and **Resources**. To access the **Recruiting Center** you will need to select the **Recruiting** link at the top of the **Welcome Center** page or you can select the **Recruiting** link in the navigation pane under the **Centers** title. The **Resources** section can be used to **Delegate** access in the **My Setup** area.

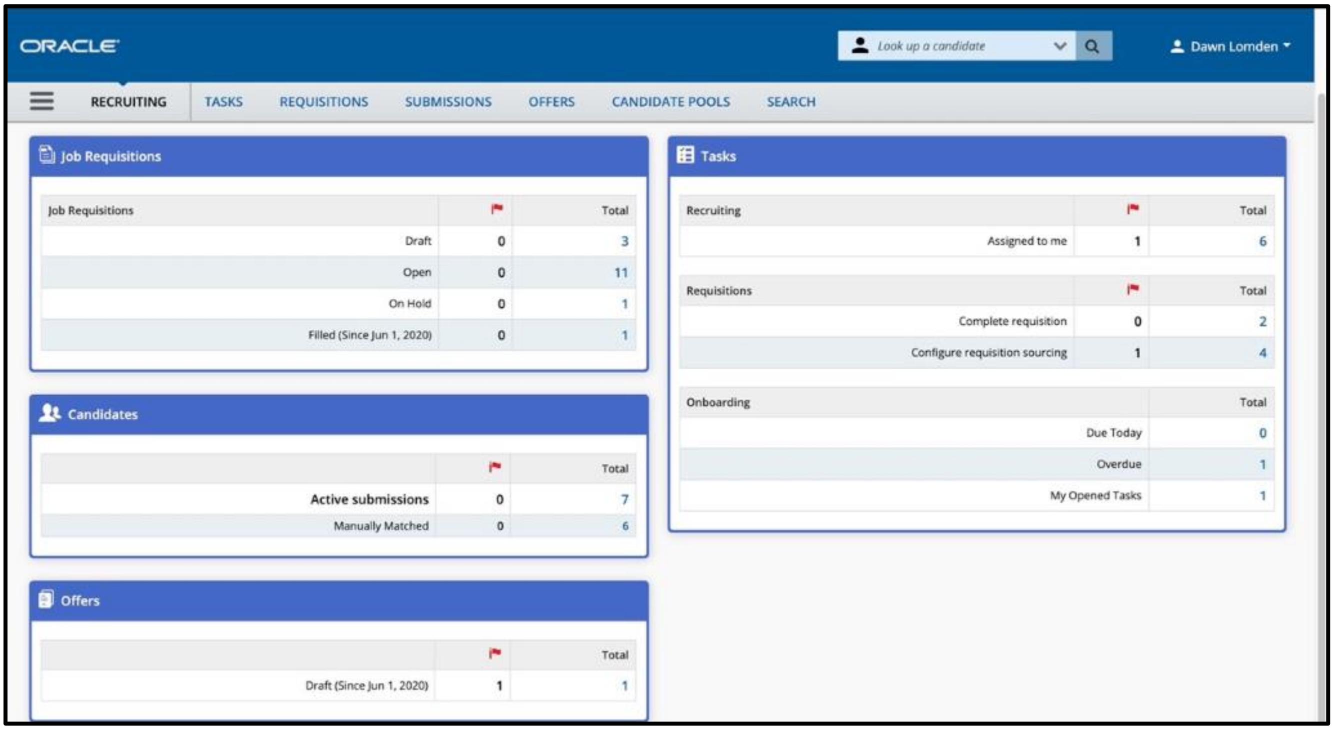




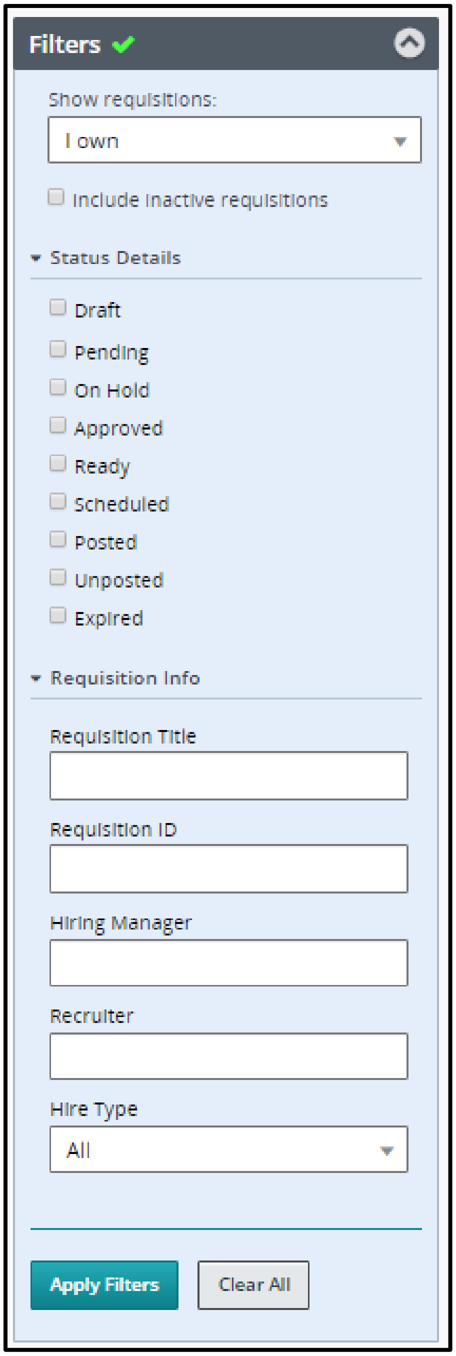




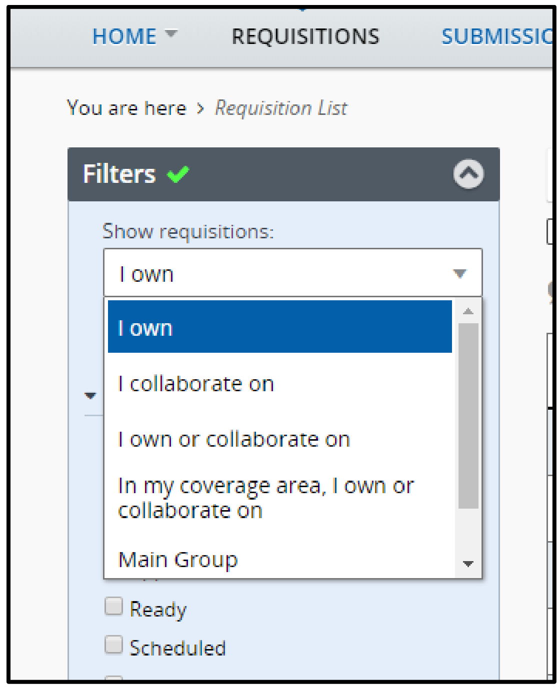
Selecting the **Recruiting** link will bring you to the list of your **Dashboard** page.



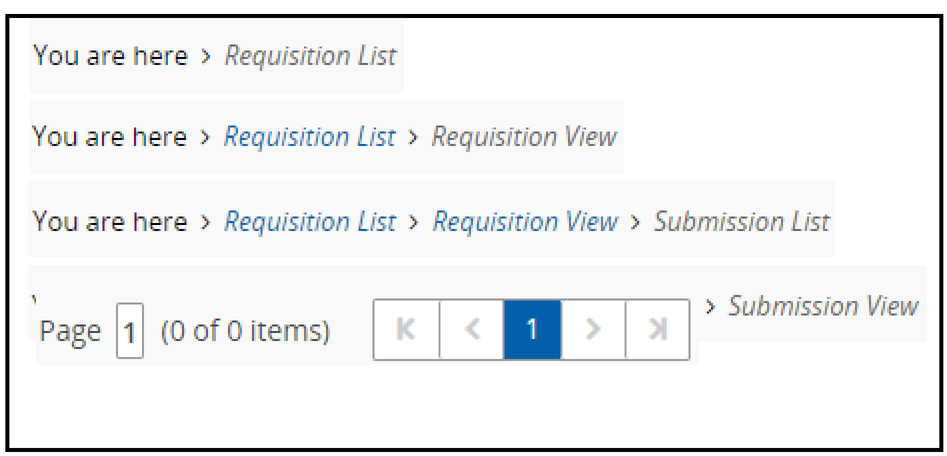
<u>Taleo Tip</u>: To create a Requisition, select the **Requisitions** tab at the top of the page.



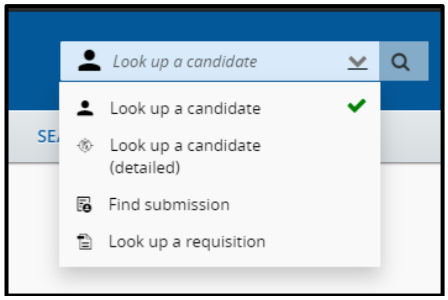
The system automatically defaults to only showing you the requisitions you own. You can change the view by using the **Filters** panel on the left-hand side. You can change your dashboard filter to view information on which you collaborate or information within your coverage area. Coverage areas are Temple's 3 or 5 digit department org.



It is recommended to use links and other navigation tools to move around the Recruiting Center instead of using the browser's Back/Next buttons. Avoid using the Back/Next buttons as they do not always yield consistent results.



1. You can search for your requisition using the **Quick Search** function. From the drop-down, select **Look up a requisition**.



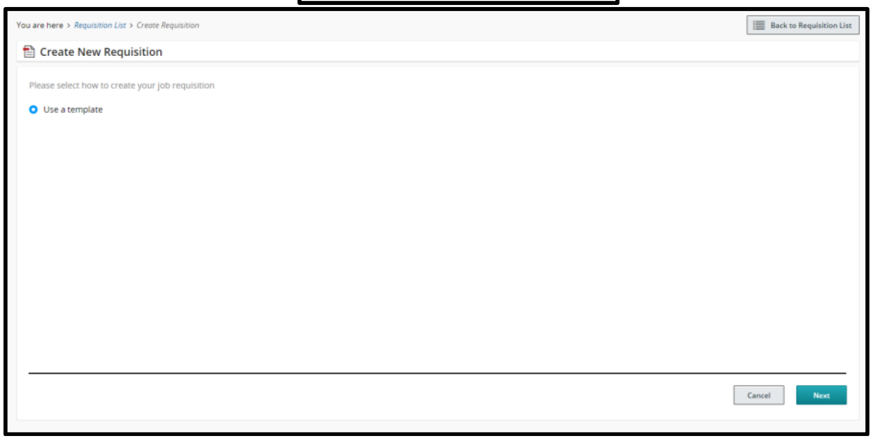
2. Enter the **Posting Title** or **Requisition Number**, then select the magnifying glass or enter to complete the search.

3. The results will populate below. You can use the additional filters on the left-hand side to narrow down your results.
4. The **Menu** bar will bring you to different locations within Taleo. Selecting the specific title will bring you to that specific section. The blue arrow and black text are used to show you which section you are currently working in.

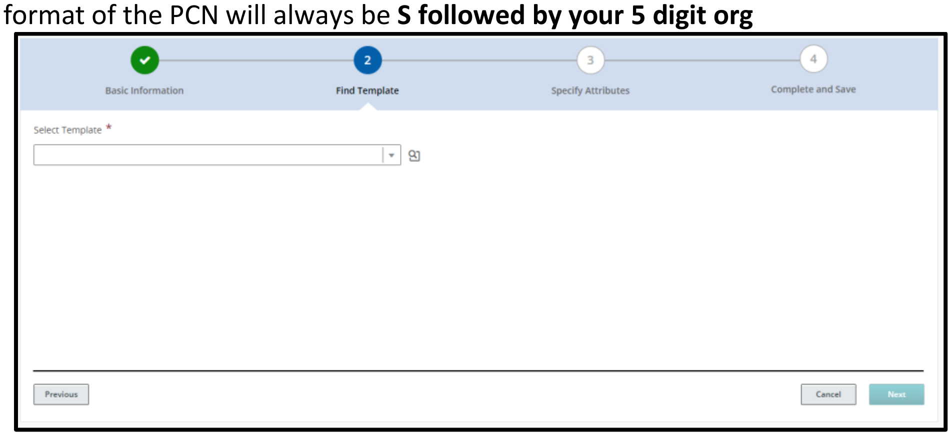
Creating a Requisition – Student Worker

Both the Hiring Managers and Department Recruiters can create a requisition.

1. To start the Requisition, select **Create Requisition** from the Requisitions page. Then select **Next** to **Create New Requisition** with a template.

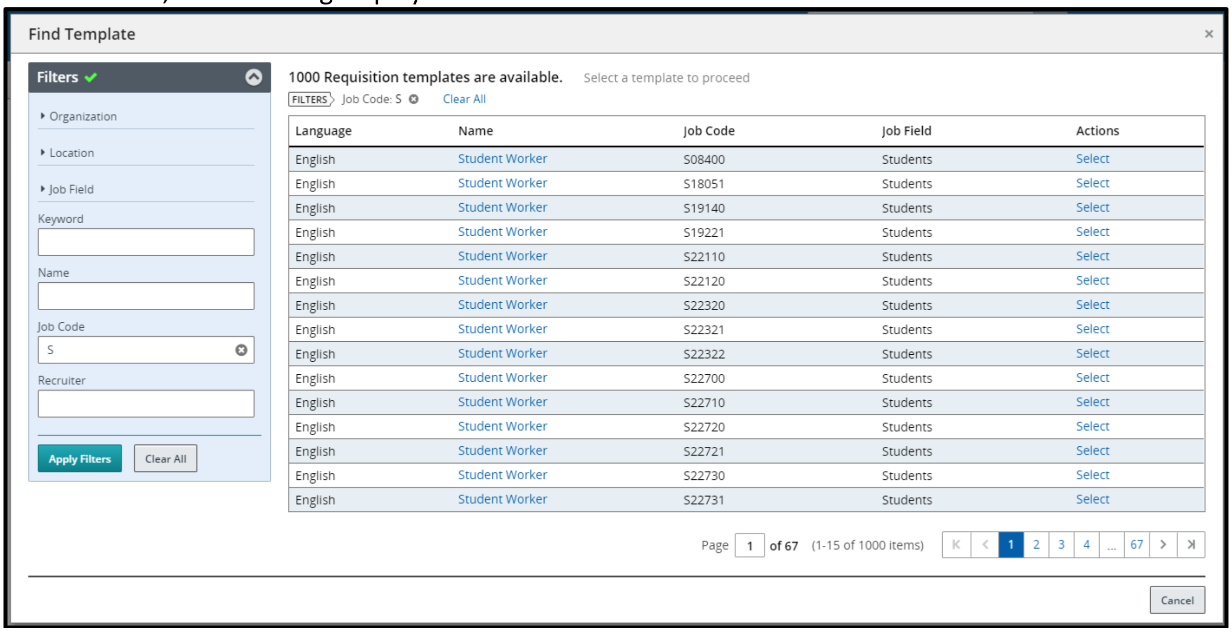


2. The first step is to select a requisition template. The template is selected by entering the PCN of the position you wish to fill.
3. A valid PCN is **required** **before** you start the requisition. Please check with your Human Resources Business Partner if you have any questions about the title, e-class, or grade associated with the PCN.
4. Student Worker positions have pooled PCNs. If you have recently created a new department or changed your org code, you will need to check if a new PCN was created for the Student Worker position.
5. The format of the PCN will always be **S followed by your 5 digit org**



Taleo Tip: Do not use a requisition template/PCN that does not have your org code.

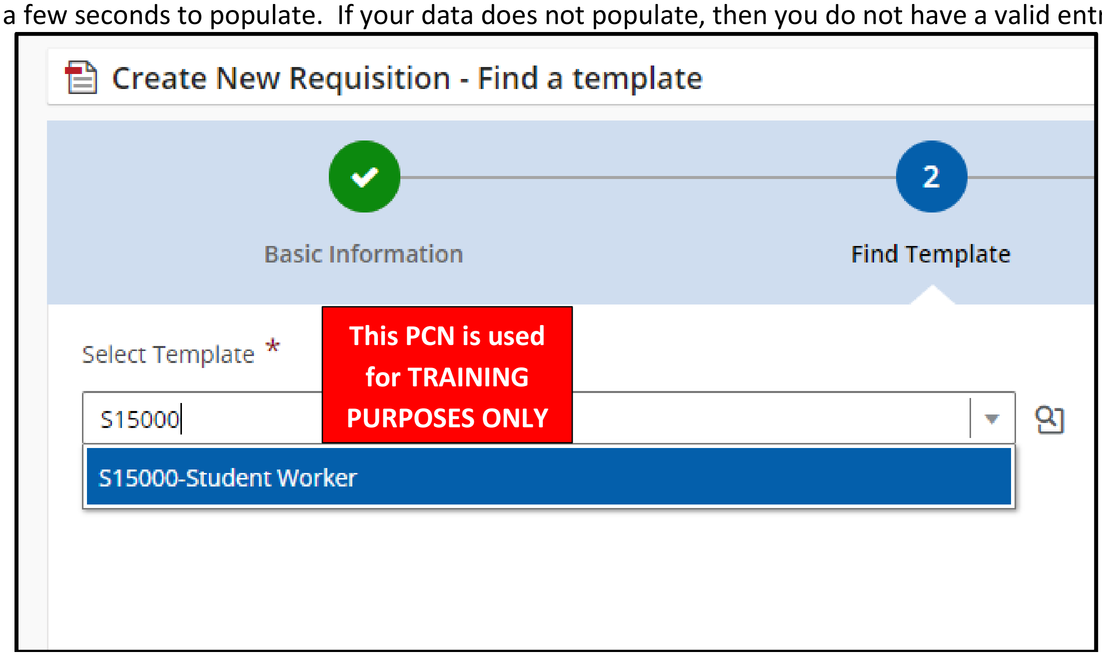
6. You can search for PCN's by using a Quick Filter. For example, if you enter **S** then select **Apply Filters**, the following displays:



Language	Name	Job Code	Job Field	Actions
English	Student Worker	S08400	Students	Select
English	Student Worker	S18051	Students	Select
English	Student Worker	S19140	Students	Select
English	Student Worker	S19221	Students	Select
English	Student Worker	S22110	Students	Select
English	Student Worker	S22120	Students	Select
English	Student Worker	S22320	Students	Select
English	Student Worker	S22321	Students	Select
English	Student Worker	S22322	Students	Select
English	Student Worker	S22700	Students	Select
English	Student Worker	S22710	Students	Select
English	Student Worker	S22720	Students	Select
English	Student Worker	S22721	Students	Select
English	Student Worker	S22730	Students	Select
English	Student Worker	S22731	Students	Select

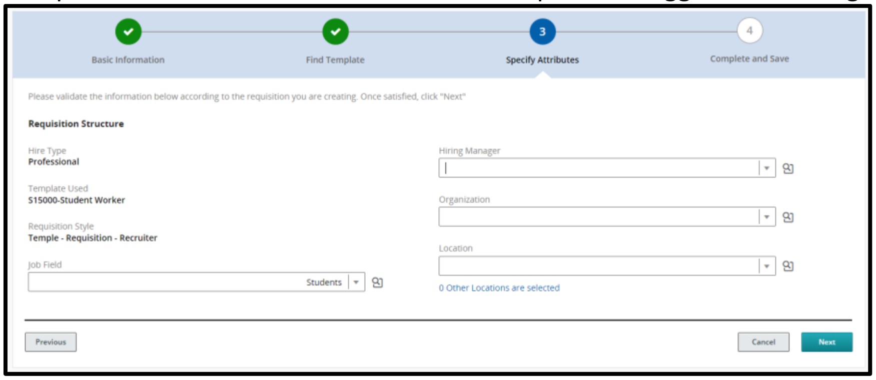
7. Click the **Select** button next to the PCN desired. Your Requisition Template will then populate with your PCN and the template title.

Taleo Tip: You may directly enter data into the fields and the field will begin to auto-complete. The data takes a few seconds to populate. If your data does not populate, then you do not have a valid entry.



8. Next, you will land on the page to **Specify Attributes**. Note: **WE NEVER CHANGE THE JOB FIELD. THIS RESULTS IN REQUISITION PROCESS DYSFUNCTIONS.**
9. Enter the **Hiring Manager**. This can be your name if you are performing that role. Again, you may type in the last name and wait for the field to populate, or you may use the **Filters** function.

10. Next, you will enter the **Organization**. Start to type your **5 digit Home Org** and suggested values will populate. Select the org desired.
11. The next step is to enter the location. Enter the campus and suggested buildings will populate.

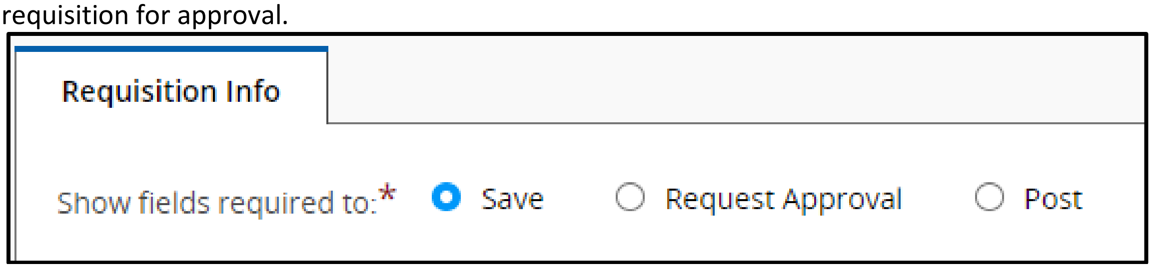


Taleo Tip: If your employee will be working from home or working remotely, you can select **Location INSIDE of PA**, **Outside of PA,** or **Outside of US**. If they will be working both remotely and on campus (in a hybrid format), select **the appropriate campus location**. If they are working only on campus, select **the appropriate campus location**. Also note, if you are hiring multiple employees on one requisition, the location must apply to all employees hired for that requisition.

Country	State/Province	City	Campus	Building	Actions
United States					Select
United States	Location INSIDE of PA				Select
United States	Location OUTSIDE of PA				Select
United States	Pennsylvania				Select

12. The Job Field will populate from your PCN. **Do not change what is entered in this field.**
13. Select **Next** when all of the fields are completed.

There are different sections in the Requisition that need to be reviewed and completed. All required fields are marked with a red **asterisk** *.
Taleo Tip: Change the **Show fields required to** to: **Request Approval**. This will display all of the fields required for approval as opposed to just the fields required to **Save** the requisition. This does not send the requisition for approval.



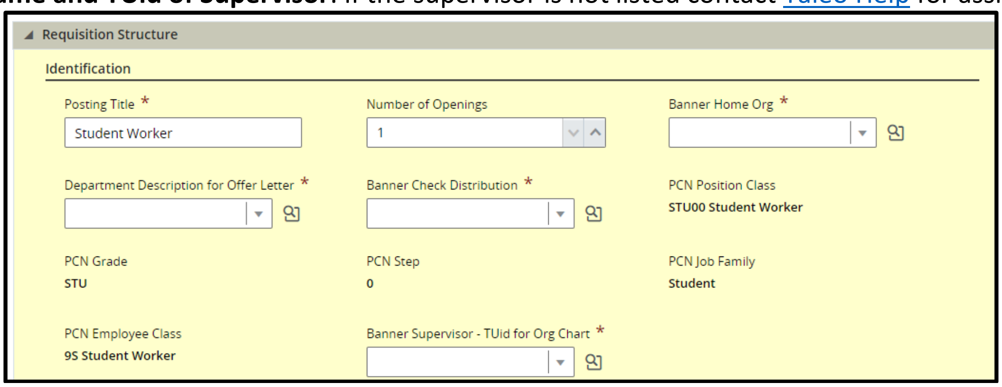
Requisition Structure – Student Worker

1. Requisition Structure

Identification

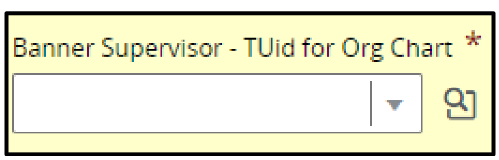
You will need to enter information in this section such as:

1. **Posting Title**: This can be edited to the specific role for the Student Worker
2. **Number of Openings**: This can be edited to be as many positions as needed, based upon your anticipated student workers for the type of position for the year. Please avoid creating requisitions with excessive openings, as Students may not be advised of the true status of their application if the requisition is never filled.
3. **Banner Home Org**: same as the organization from the previous page– use the name from the dropdown or selector icon to filter the correct response
4. **Department Description for Offer Letter**: same as the organization from the previous page– use the name from the dropdown or selector icon to filter the correct response
5. **Banner Check Distribution**: same as the organization from the previous page– use the name from the dropdown or selector icon to filter the correct response
6. **Name and TUid of Supervisor**: if the supervisor is not listed contact [Taleo Help](mailto:taleohelp@temple.edu) for assistance

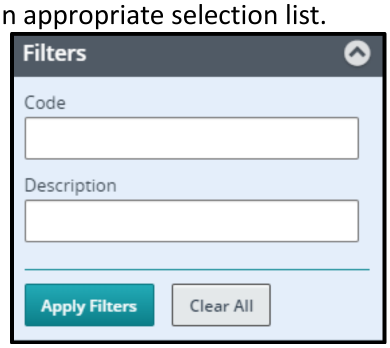


The **Supervisor** field is very important as this field will be imported into Banner and feed other systems such as the **Org Chart**.   You can start to type a **name** or a **TUid** and the field will start to populate. Make sure the entry is available so you know it is valid.

Taleo Tip: Some supervisors use their middle initial which might cause the supervisor to appear as not listed.



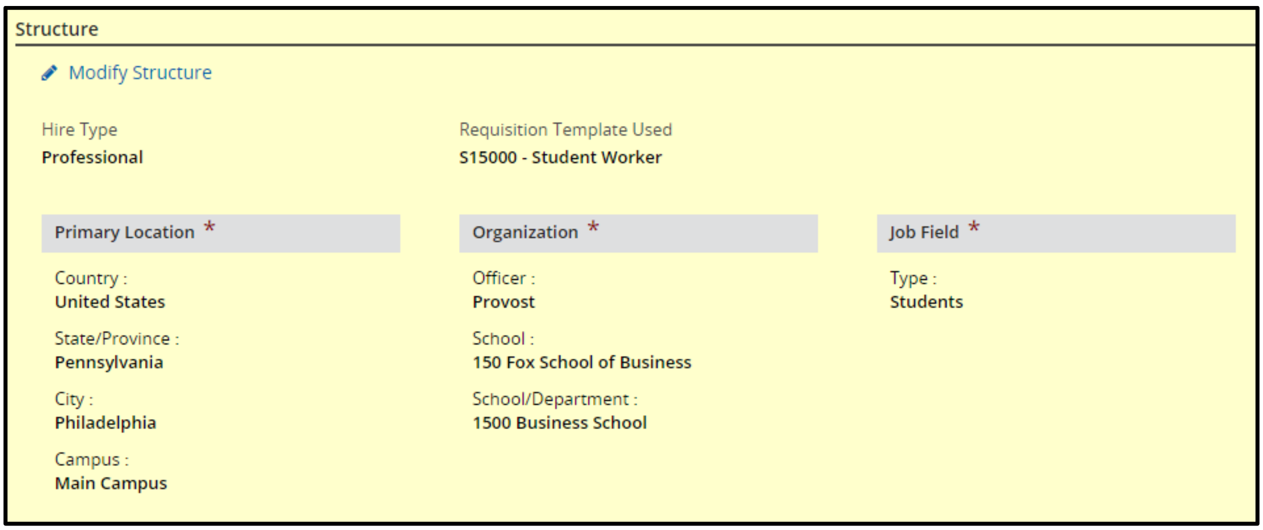
As an alternative, you can use the **Quick Filter** button.   Type in a first name or last name, click the **Apply Filters** button and you will receive an appropriate selection list.



Structure

The structure section was completed after you selected the **Create Requisition** button. Caution should be exercised when making modifications in this section as they can directly impact the requisition process. Changes can be made when the requisition is in Draft (pre-Approval) Status only. Follow these guidelines:

- **Hire Type**: **Do not modify**. If this field is incorrect – then you **MUST cancel the requisition** and start over.
- **Requisition Template Used: Do not modify**. If this field is incorrect – then you **MUST cancel the** requisition and start over.
- **Primary Location**: If you need to make any changes to the location, you can select **Modify Structure** to make these changes.
- **Organization**: If you need to make any changes to the organization, you can select **Modify Structure** to make these changes. This field affects security/organization access on the requisition. Please note that the School/Department Code you use in this section must match the organization code used for the Banner Home Org and Banner Check Distribution fields above. A mismatch could result in users being blocked from seeing the requisition.
- **Job Field**: **Do not modify**. If this field is incorrect – then you **MUST cancel the requisition** and start over.



Owners

Department Recruiter

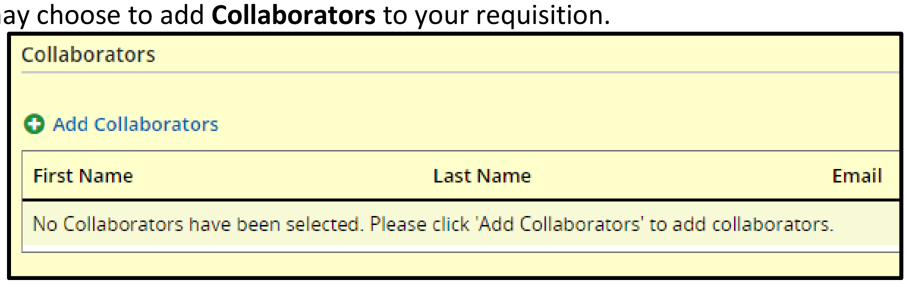
1. You will be entering the name of the **Department Recruiter** for your department. A Department Recruiter can create the requisition, manage the requisition, and manage the candidates. This is the person who will be **creating** and **extending the offer** and **hiring** the employee in the system. If you have the correct access, this could be yourself. Otherwise, this should be someone in your department with **Department Recruiter** access to Taleo.
2. You can start typing in the name of the **Department Recruiter**. Click on the name from the options given by Taleo.

Hiring Manager

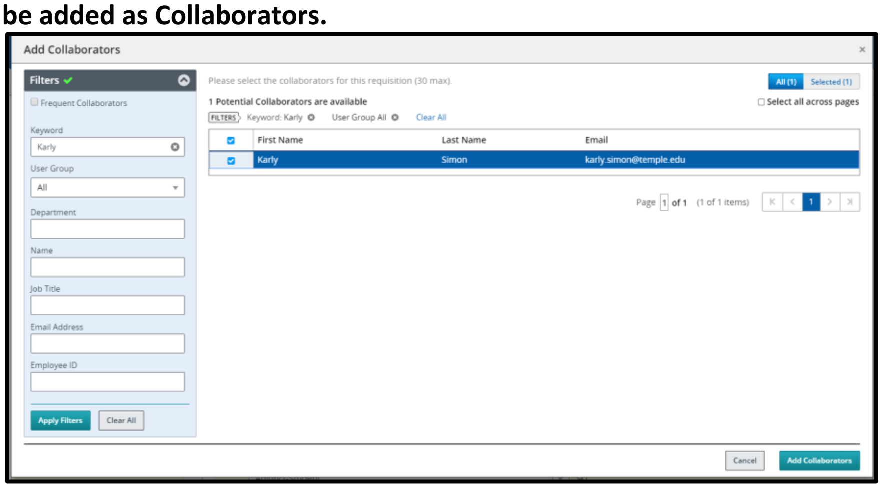
1. The second owner of a requisition is the **Hiring Manager**. This is typically the person creating the requisition, managing the requisition, and changing the step/status of candidates up until the offers are to be created.
2. You can start typing in the name of the **Hiring Manager**. Click on the name from the options given by Taleo.

Collaborators

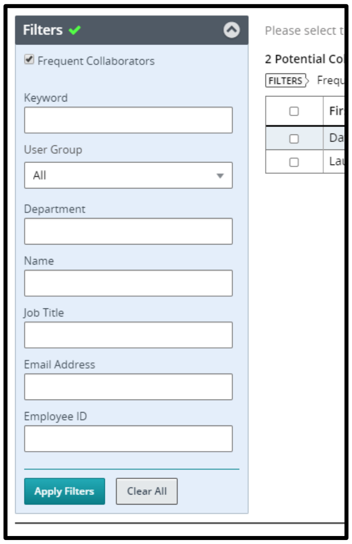
1. You may choose to add **Collaborators** to your requisition.



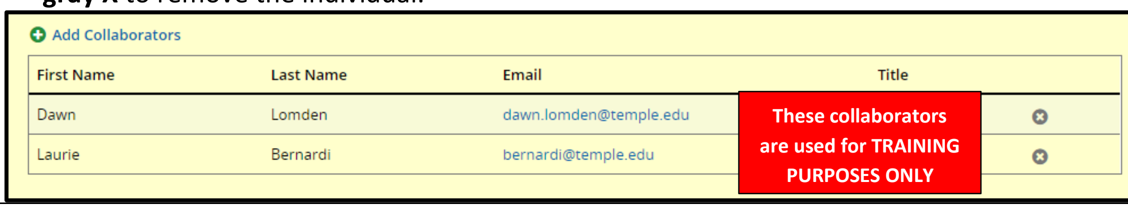
2. Select **Add Collaborators** to bring up a list of Taleo users. Use the Filters box to search for your collaborator. Select the checkbox next to your collaborator's name then select **Add Collaborators**. **Any Requisition Approvers except for the Dept. Recruiter and Hiring Manager should be added as Collaborators.**



3. You can also select the checkbox **Frequent Collaborators** then **Apply Filters** if you have set up your personalized list.



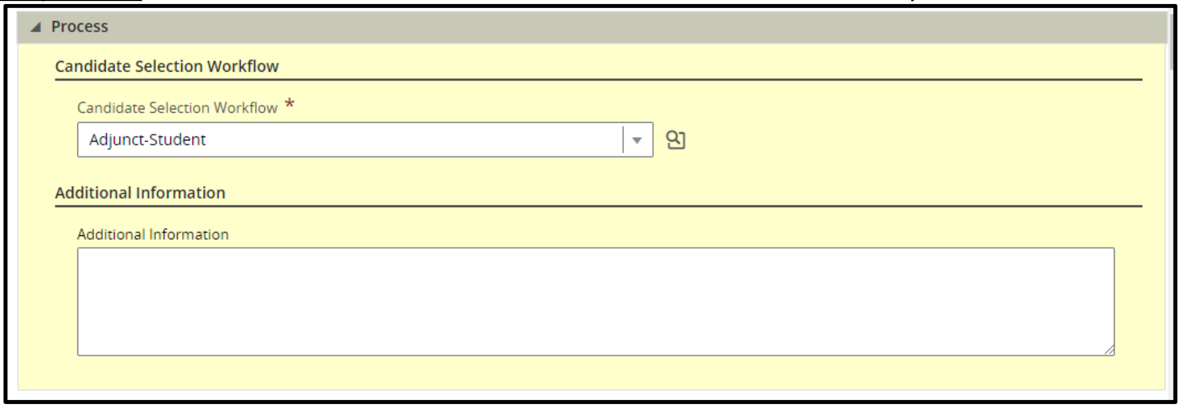
4. All student worker requisitions which may be used to hire student workers who are paid with Federal work-study funds must have **James Amey (Student Financial Services)** as a **collaborator**.
5. If one of your **Frequent Collaborators** does not need to be on this requisition, you can use the **gray X** to remove the individual.



All student worker requisitions which may be used to hire student workers who are paid with Federal work-study funds must have **James Amey (Student Financial Services)** as a **collaborator**. James can be added as a **Frequent Collaborator** in **My Setup** in order to be added during the requisition creation process.

2. Process

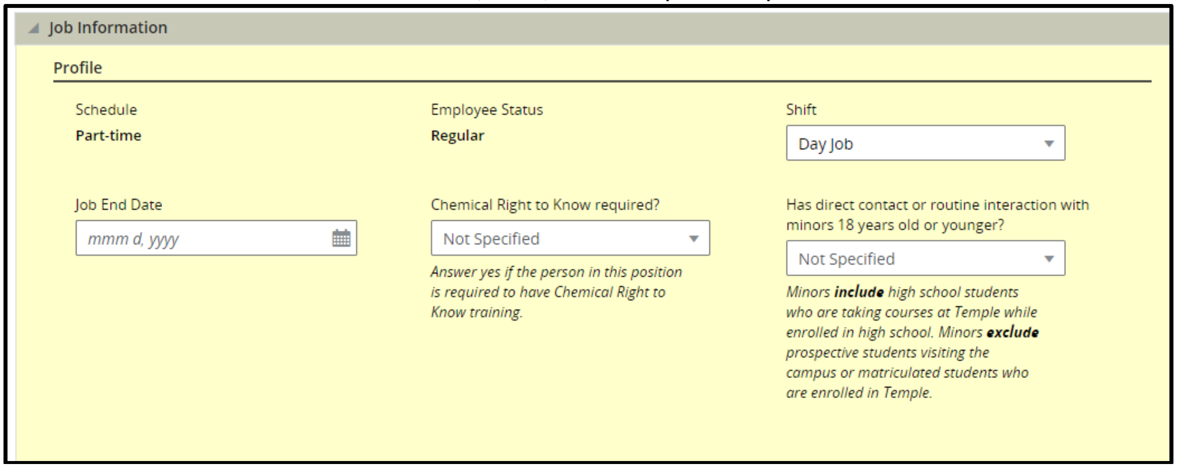
This section displays the system workflow being used. **Do not change the candidate selection workflow for any reason**. The **Additional Information** section is used for internal use only.



3. Job Information

Profile

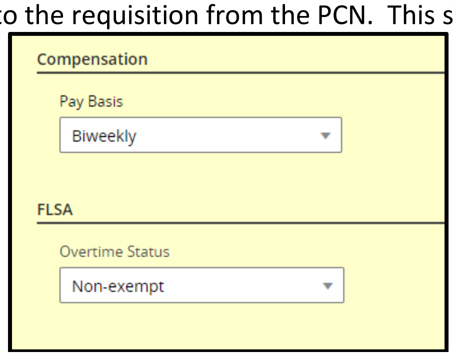
This section contains data such as schedule, shift, and Compliance questions.



Compliance Questions - Answers to these questions trigger processes in the background. These are required for all requisitions. **Not Specified** indicates an answer has not been given. You must choose a **Yes** or **No** answer.

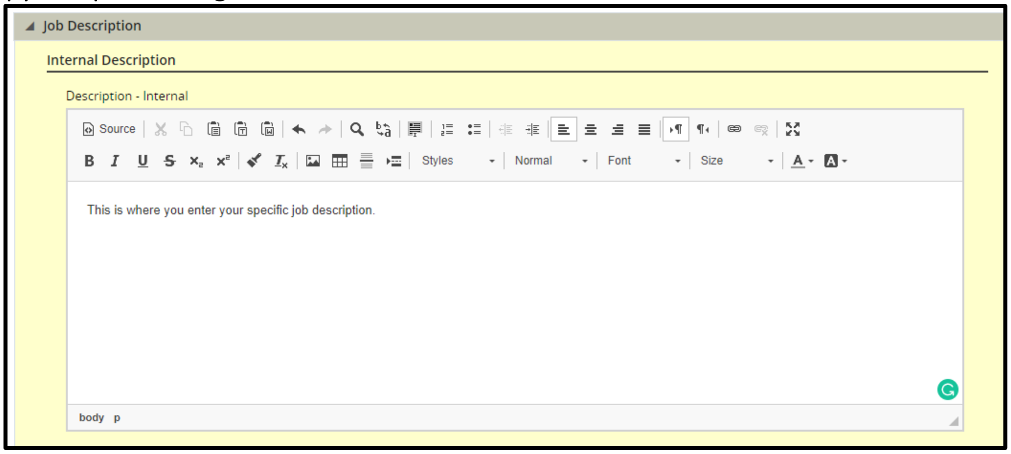
Compensation

1. The **Compensation** section displays the basis of pay for the student workers. All student worker requisitions should reflect a pay basis of **Biweekly** at the requisition level.
2. **DO NOT** make any changes to this section.
3. The **FLSA s**ection pulls into the requisition from the PCN. This should also be left as is.

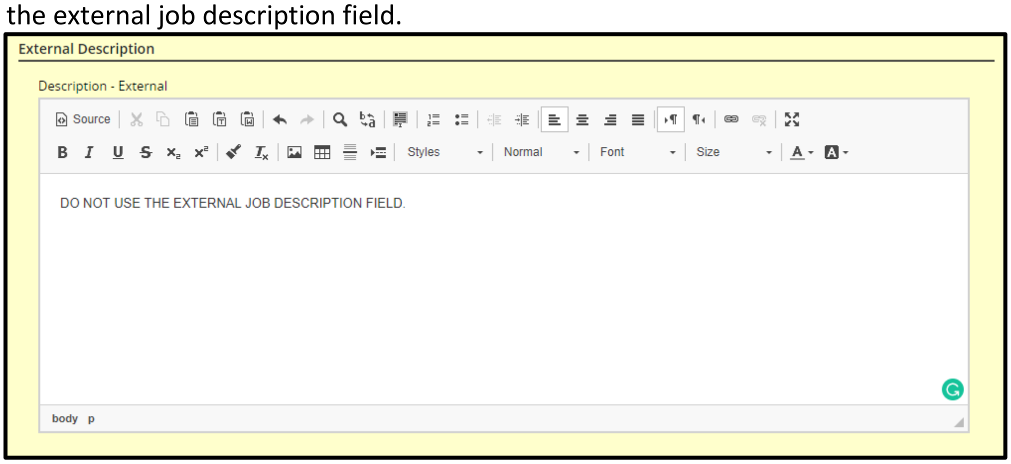


Job Description

1. All student requisitions that have the potential to pay student workers using Federal work-study funds must have a job description that meets Student Financial Services guidelines.
2. Student Financial Services has job description templates available for your use. These can be accessed through the University Forms channel on the Staff Tools tab of your TUPortal.
3. For any requisition created, you need to complete the **Internal Job Description** field. You can copy and paste using the HTML editor.

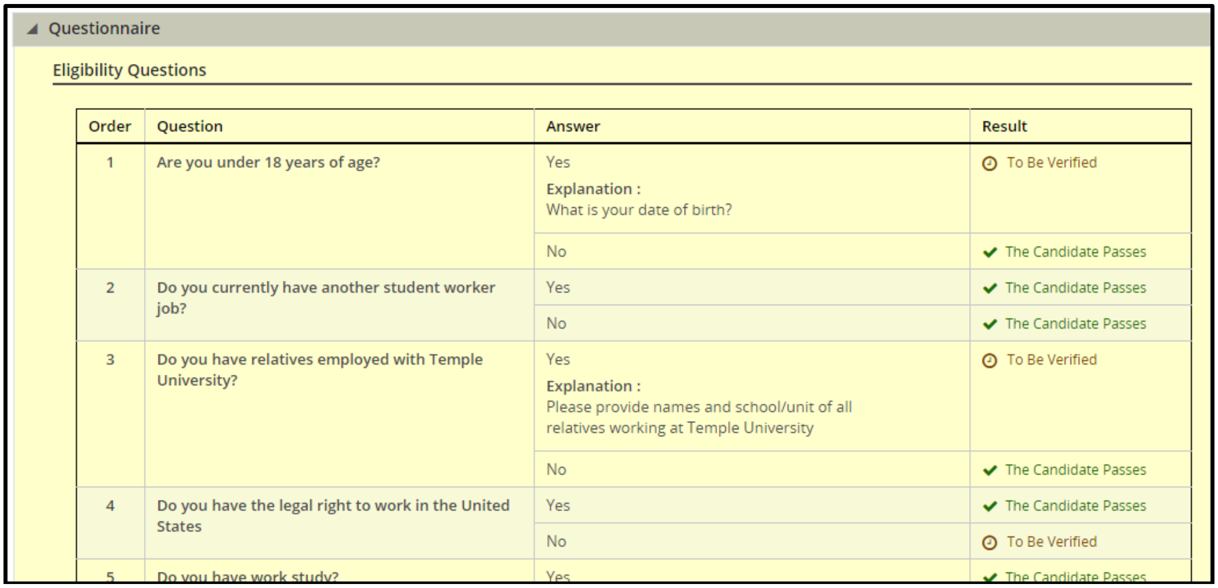


4. You have the option to paste directly into the field using the CLT+V function from your keyboard.
5. Even if you are using a generic template to create your requisition, you will need to update fields.
6. Student Worker positions are not posted externally. You do not need to enter a job description in the external job description field.



Questionnaire

This section displays questions to be answered by the candidate who is applying to a requisition. The **Eligibility Questions** will be utilized on all requisitions. The applicant's selected answer will have a **green checkmark**.

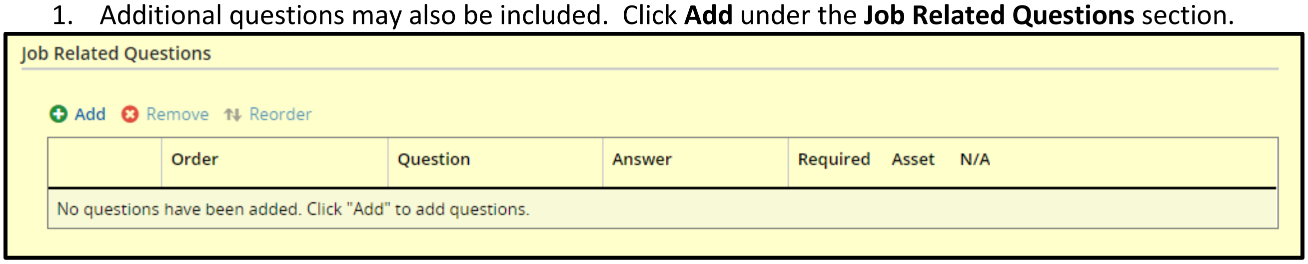


Questionnaire

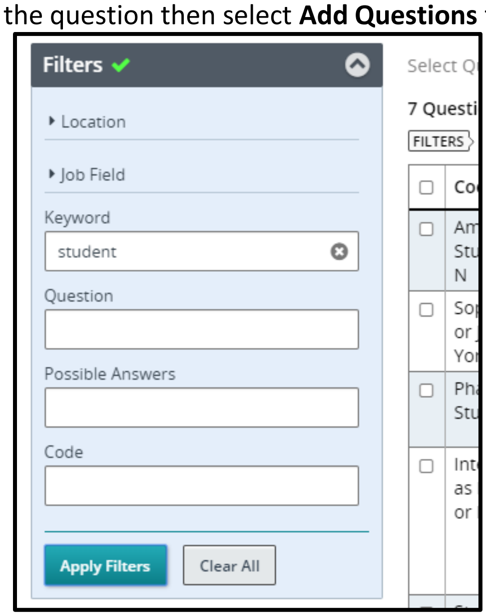
Eligibility Questions

Order	Question	Answer	Result
1	Are you under 18 years of age?	Yes **Explanation :** What is your date of birth?	To Be Verified
		No	The Candidate Passes
2	Do you currently have another student worker job?	Yes	The Candidate Passes
		No	The Candidate Passes
3	Do you have relatives employed with Temple University?	Yes **Explanation :** Please provide names and school/unit of all relatives working at Temple University	To Be Verified
		No	The Candidate Passes
4	Do you have the legal right to work in the United States	Yes	The Candidate Passes
		No	To Be Verified
5	Do you have work study?	Yes	The Candidate Passes

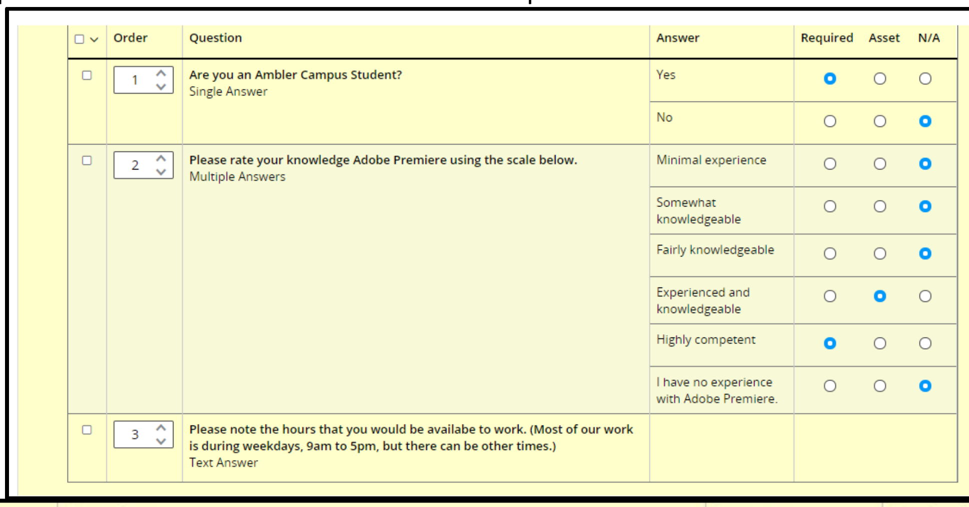
1. Additional questions may also be included. Click **Add** under the **Job Related Questions** section.



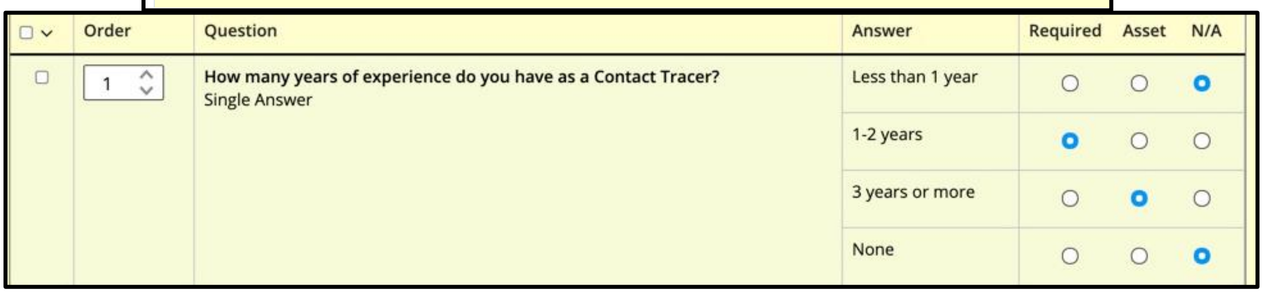
2. Utilizing a keyword you can use the **Quick Filters** on the left to find a question you want to add. Select the checkbox for the question then select **Add Questions** to add your questions.



3. Once the questions are added, choose **Required** for the applicable answer from the radio buttons on the right-hand side of the page. This will indicate to the system which answer meets requirements. If you select **Asset** this will be a response that goes above and beyond requirements. There can be more than one response marked as an Asset.



Order	Question	Answer	Required	Asset	N/A
1	**Are you an Ambler Campus Student?** Single Answer	Yes	●	○	○
		No	○	○	●
2	**Please rate your knowledge Adobe Premiere using the scale below.** Multiple Answers	Minimal experience	○	○	●
		Somewhat knowledgeable	○	○	●
		Fairly knowledgeable	○	○	●
		Experienced and knowledgeable	○	●	○
		Highly competent	●	○	○
		I have no experience with Adobe Premiere.	○	○	●
3	**Please note the hours that you would be availabe to work. (Most of our work is during weekdays, 9am to 5pm, but there can be other times.)** Text Answer				

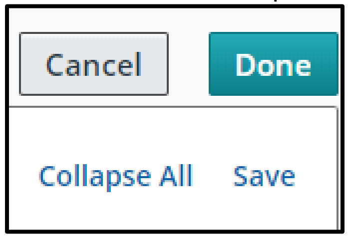


Order	Question	Answer	Required	Asset	N/A
1	**How many years of experience do you have as a Contact Tracer?** Single Answer	Less than 1 year	○	○	●
		1-2 years	●	○	○
		3 years or more	○	●	○
		None	○	○	●

Saving a Requisition

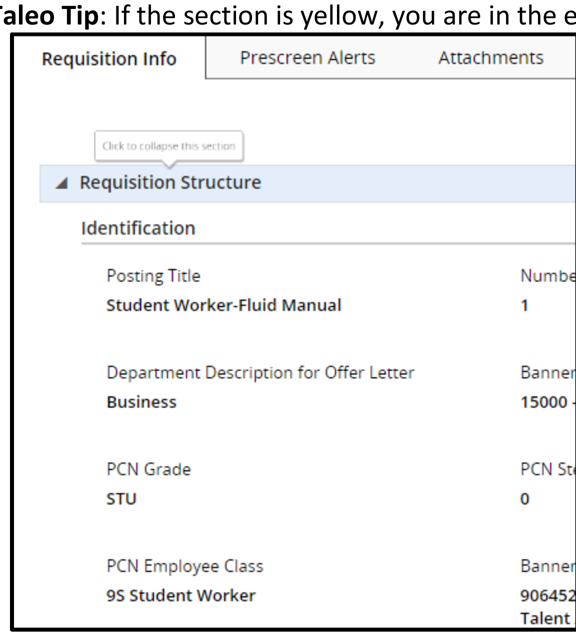
All fields should be filled in and the requisition should be ready for approval. If you are still in the editing mode, at the top of your page, you will have four options.

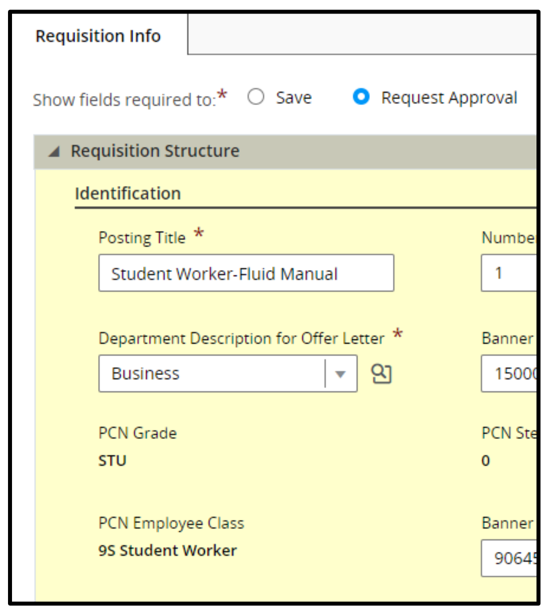
1. **Cancel**: exits out of the requisition without saving changes.
2. **Done**: Save and collapses the various sections of the requisition.
3. **Save**: can be used throughout creating the requisition to ensure your work is being saved as you complete the fields.
4. **Collapse All**: collapses the various sections of the requisition



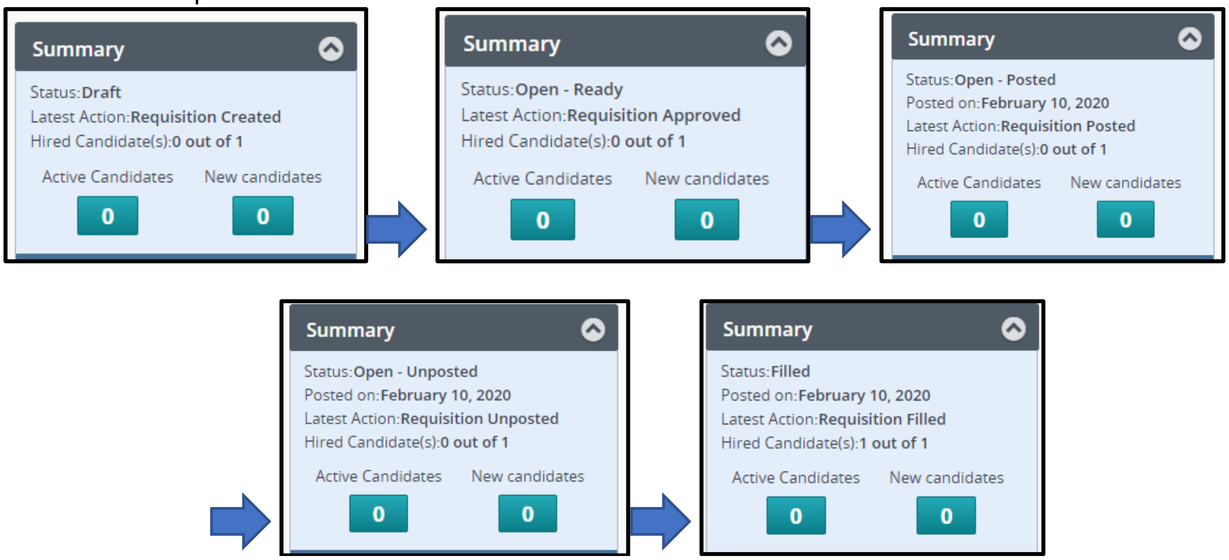
Taleo Tip: If you save your requisition before it is complete and will need to return to it, you will need to edit to make changes. Once a requisition is open and approved, the Edit button will no longer be available. The **Edit All** button will open each field of the requisition. The **Pencil Icon** will open that specific section to edit.

Taleo Tip: If the section is yellow, you are in the editing mode.

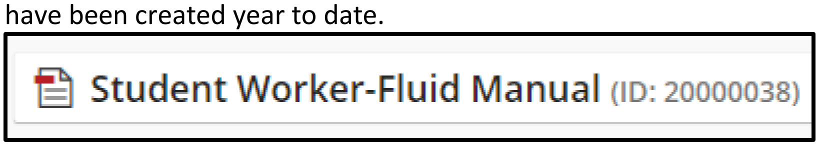




Taleo Tip: As you move through the requisition, the **status box** on the left will update and display the status of the requisition.

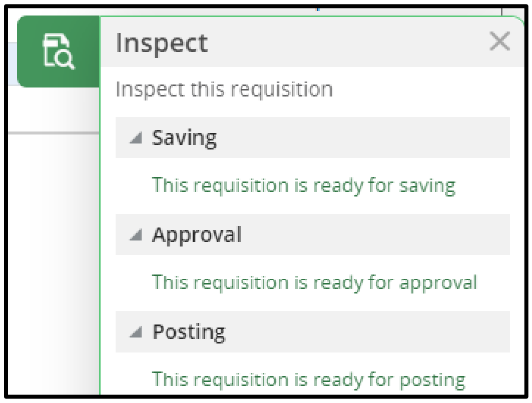


Taleo Tip: Each requisition has a unique number that is used to identify the requisition. This can be found next to the posting title once the requisition has been saved. The first two numbers of the requisition number are for the year the requisition was created. The six numbers following are how many requisitions have been created year to date.

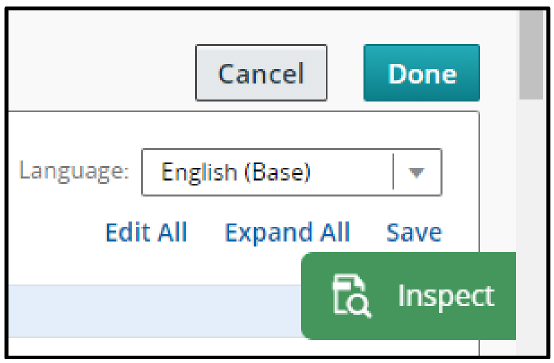


Inspect Tool

1. Use the green **Inspect** tool to review your progress. If any field requires information, it will be listed in the **Inspect Tool**.



2. Select **Save** to review your requisition in the editing mode or select **Done** to save and close out of the editing mode.

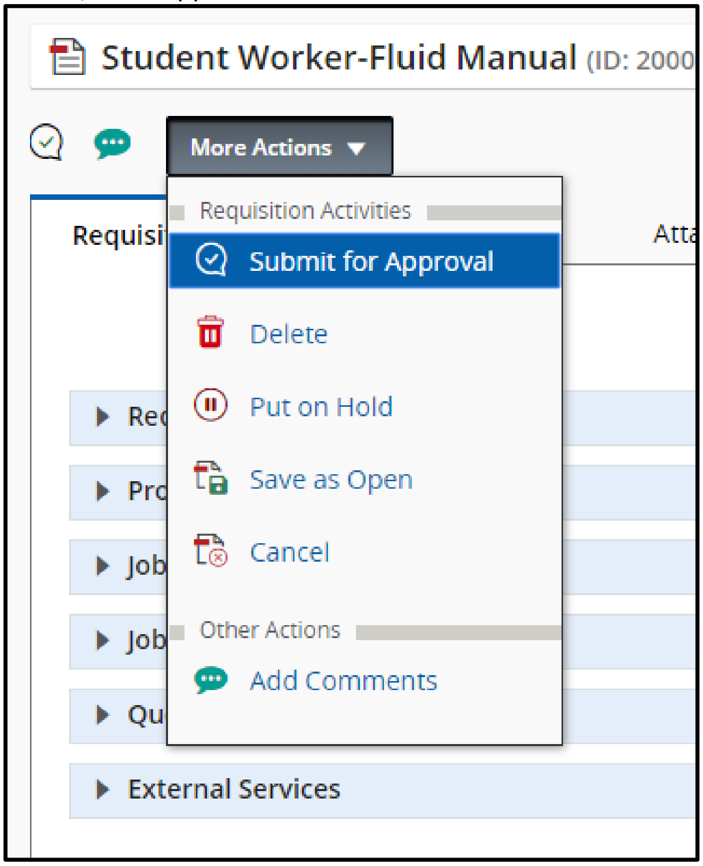


3. You can use the **Edit All** or **Expand All** button to make any changes. If you save your requisition before it is complete and need to return to it, you can select the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.
4. If you are in the editing mode, select the specific item that needs to be completed to be brought directly to that section. Once all items have been completed, select **Done** located at the top right-hand side of the requisition. Now that the requisition is ready for approval, the **Inspect Tool** will read **File ready for approval**.

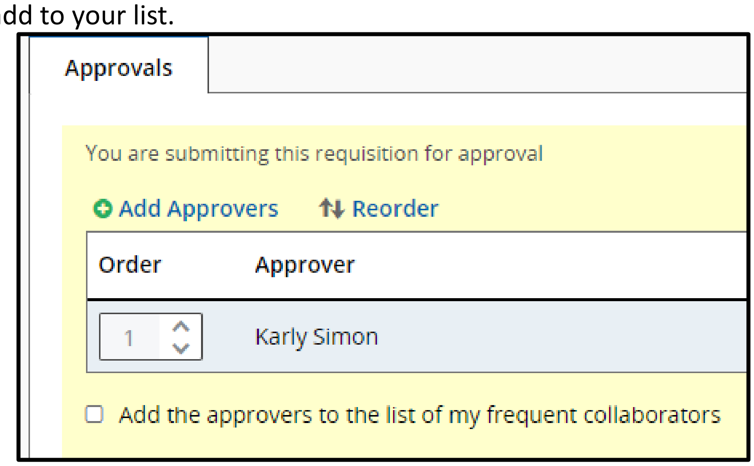
Taleo Tip: This tool is critical when determining why you are unable to save a requisition.

Requesting Approval for a Requisition

1. If you are a **Department Recruiter** and have the appropriate authority to approve a requisition, then you can **self-approve** a requisition by selecting the **Request Approval** from **More Actions**.
2. If you are a **Hiring Manager**, the system will default to your **Department Recruiter** as the first approver. If the position is **grant-funded**, then you must add your **Research Administration** contact, Elyse Castillo, as an approver.



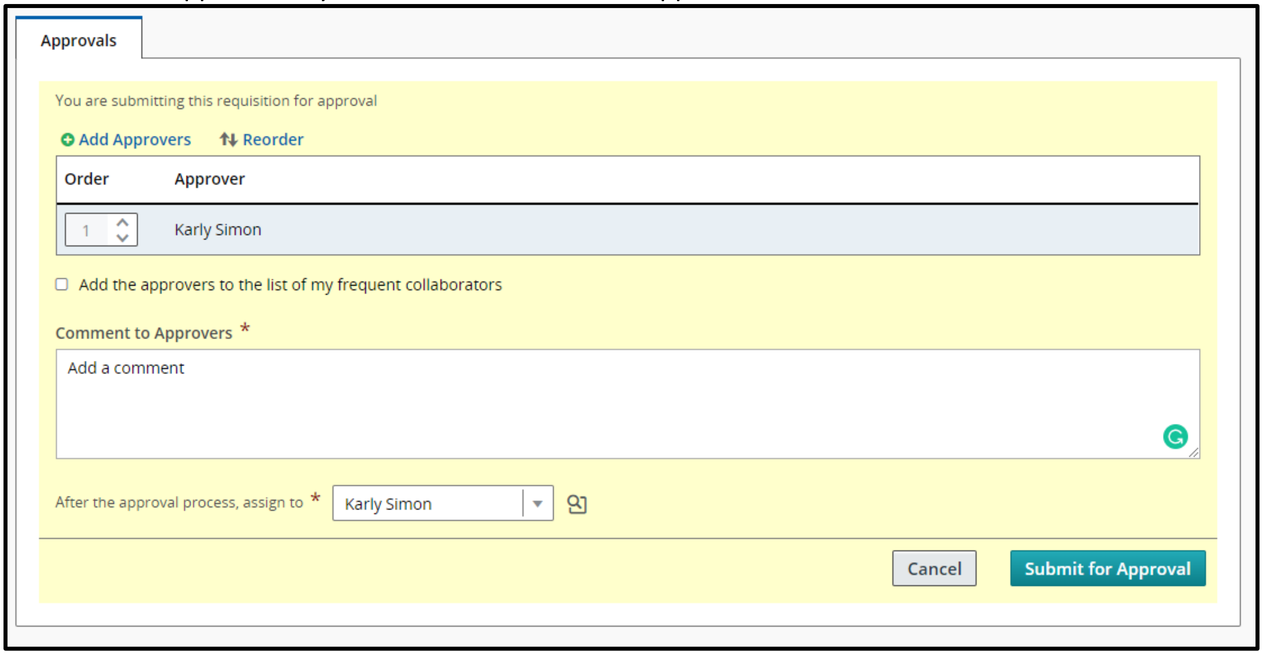
3. To add department approvers, click on **Add Approvers**. You can search for approvers in the new window to add to your list.



Taleo Tip: If your requisition is a grant-funded position, you must include your Research Administration contact, Elyse Castillo, to your approval path as the final approver.

4. When you are ready to request approval, ensure the "after the approval process assign to" field is correct, add a comment in the comment box, then select **Submit for Approval**. An email will be sent to the **Department Recruiter** to approve the requisition, starting the approval chain.

Taleo Tip: the "after the approval process assign to" field is not how you add approvers. You will need to select Add Approvers if you need to add additional approvers.



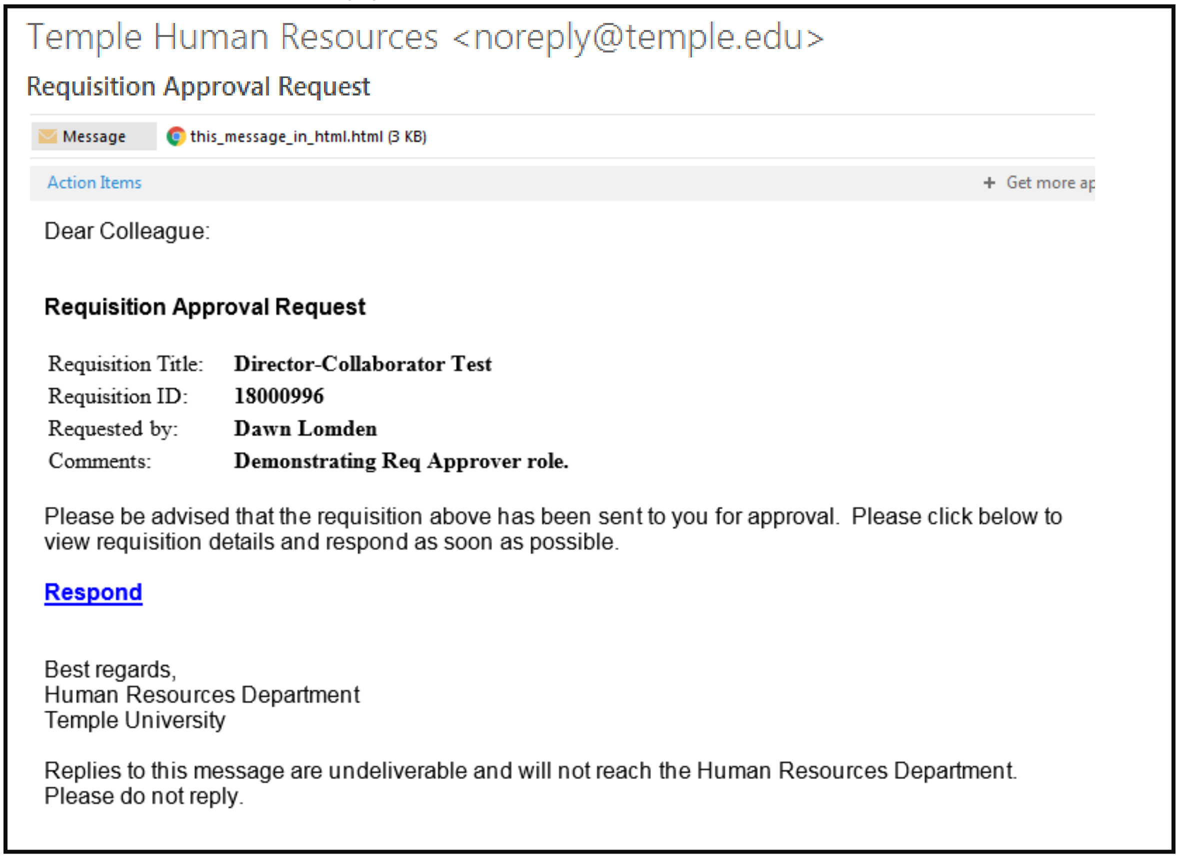
5. If you are the Department Recruiter on the requisition you have created, your name will appear first in the Request Approval box. Your approval will be given automatically since you created the requisition.

Taleo Approver Role

Requisition approvers in Taleo can review requisitions sent to them for approval. After reviewing the information on the requisition, respond with your approval and leave comments for other approvers. This can be done from the approval email or the online website.

Email

1. When a requisition is sent for approval, you will receive an email from Temple Human Resources, via a "**No Reply**" email address.



Temple Human Resources <noreply@temple.edu>

Requisition Approval Request

Message | this_message_in_html.html (3 KB)

Action Items

Dear Colleague:

Requisition Approval Request

Requisition Title:	**Director-Collaborator Test**
Requisition ID:	**18000996**
Requested by:	**Dawn Lomden**
Comments:	**Demonstrating Req Approver role.**

Please be advised that the requisition above has been sent to you for approval. Please click below to view requisition details and respond as soon as possible.

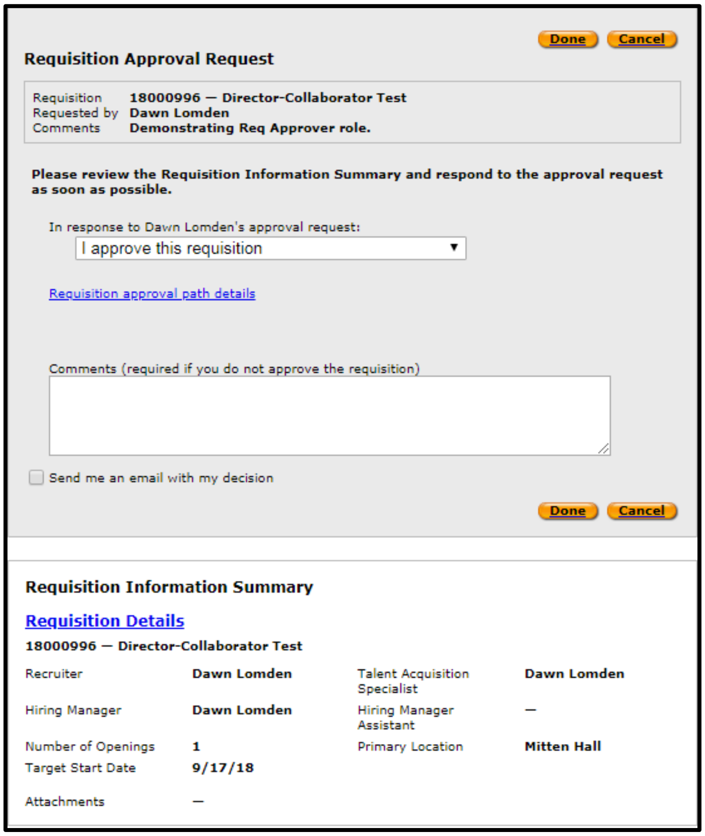
Respond

Best regards,
Human Resources Department
Temple University

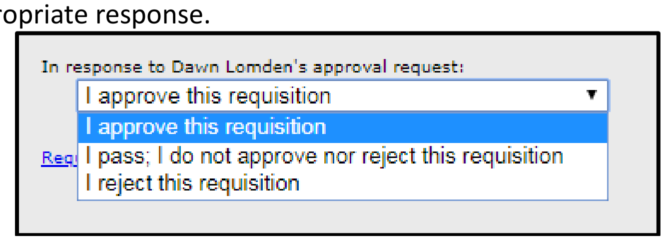
Replies to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.

2. The requisition title, ID number, and comments will be visible in the body of the email, along with the name of the person requesting approval.
3. Select **Respond** in the body of the email.

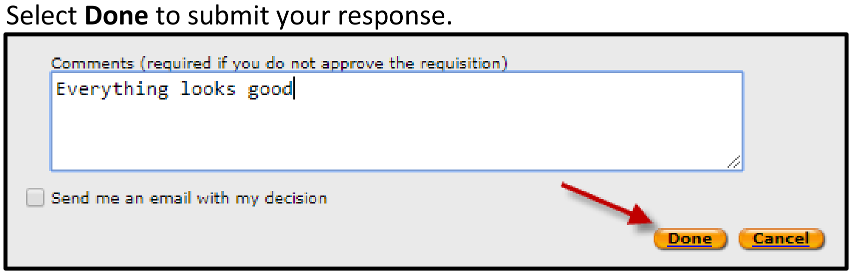
4. At the bottom of the page, select **Requisition Details** to review the requisition information on a new page.



5. After reviewing the requisition details, go to the dropdown menu in the middle of the page to choose the appropriate response.



6. Finally, provide a comment if necessary for other requisition approvers and requisition owners to view. Select **Done** to submit your response.

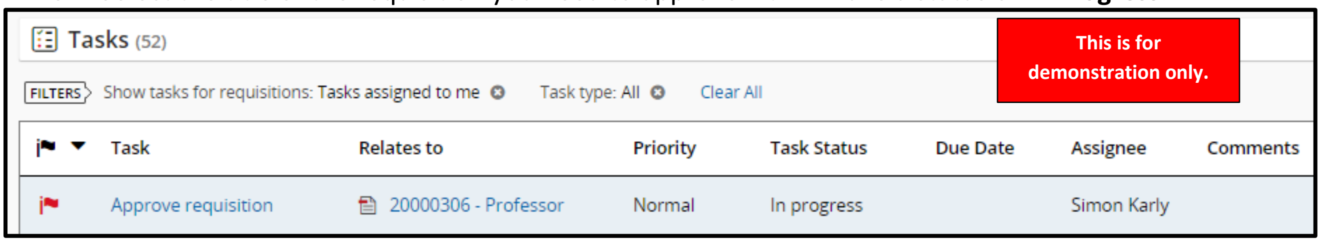


Taleo System

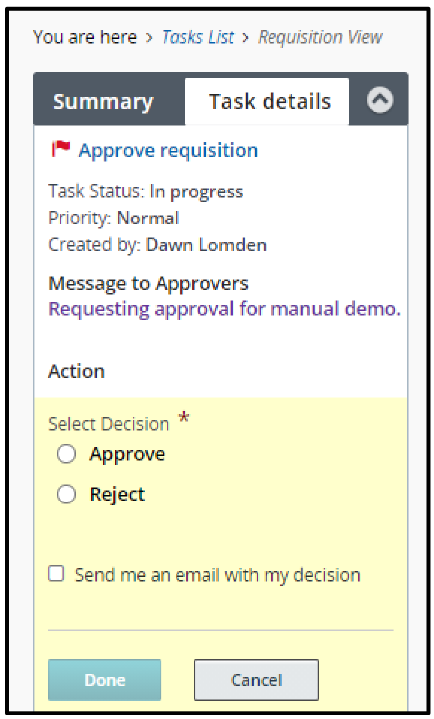
As an approver, you can also log into the Taleo website to view requisitions to approve or reject them.

1. To access Taleo, select the **Taleo Talent Management System** link in TUPortal, under TUApplications. Then select **Recruiting** to open your main page of Taleo.
2. Once you are logged in, select **Tasks** to be taken to a list of the requisitions you have access to

3. Select the title of the requisition you need to approve. It will have a status of **In Progress.**



4. When the requisition opens, you can review the requisition information. After reviewing the requisition, on the left-hand side, select your approval decision. If needed, provide a comment, then select **Done**.

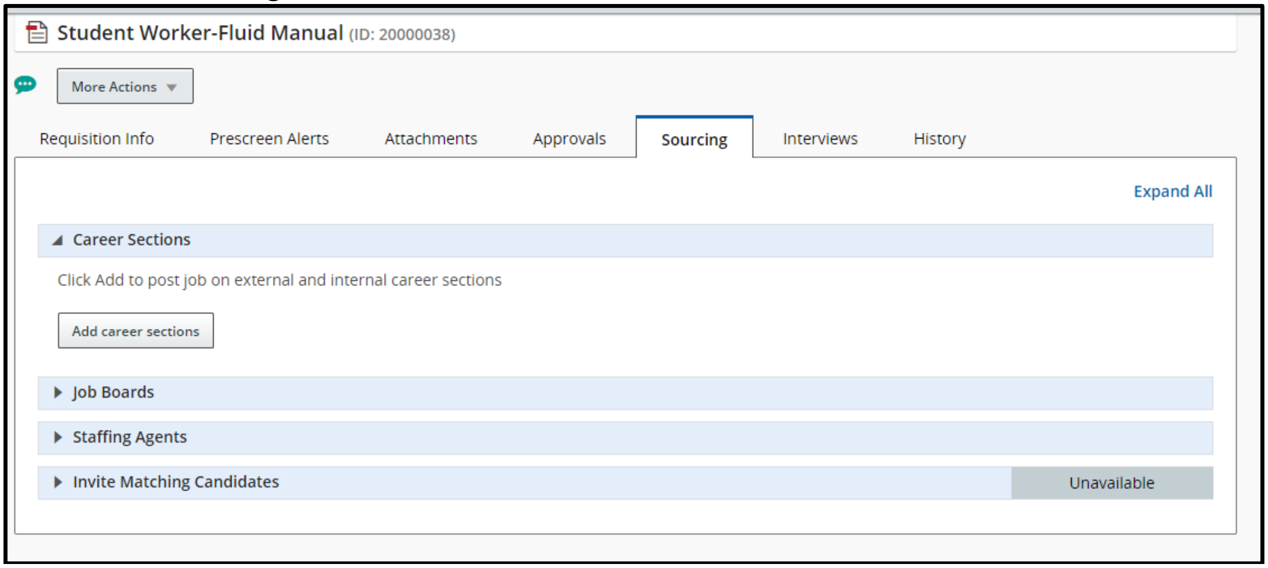


Sourcing

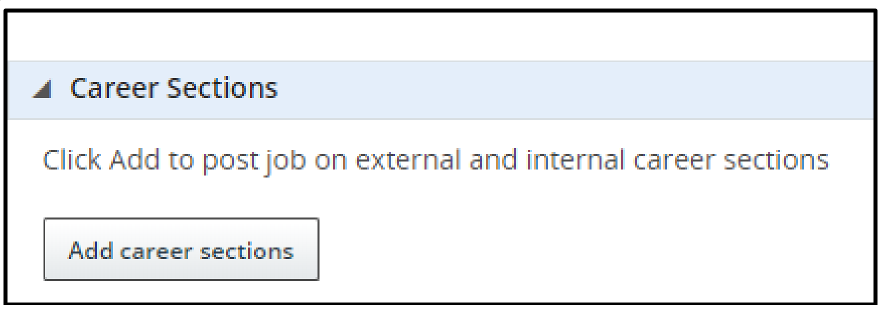
Posting a Position

This step is required if you plan on potentially paying student workers with Federal work-study funds. If you are not using Federal work-study funds, this step can be skipped. It is recommended that you post the position if you are not sure what type of funding you will be using, work-study vs non-work-study.

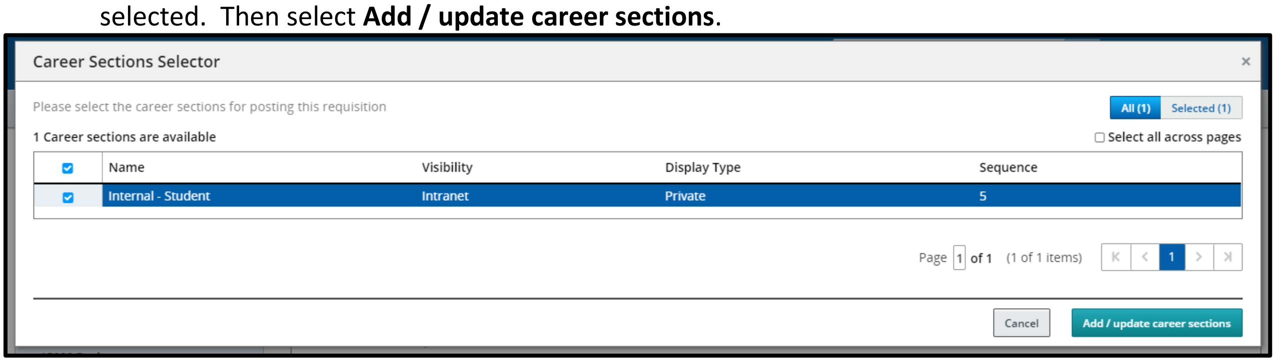
1. Navigate to your approved requisition and open it. From the titles across the top of the page, select **Sourcing**.



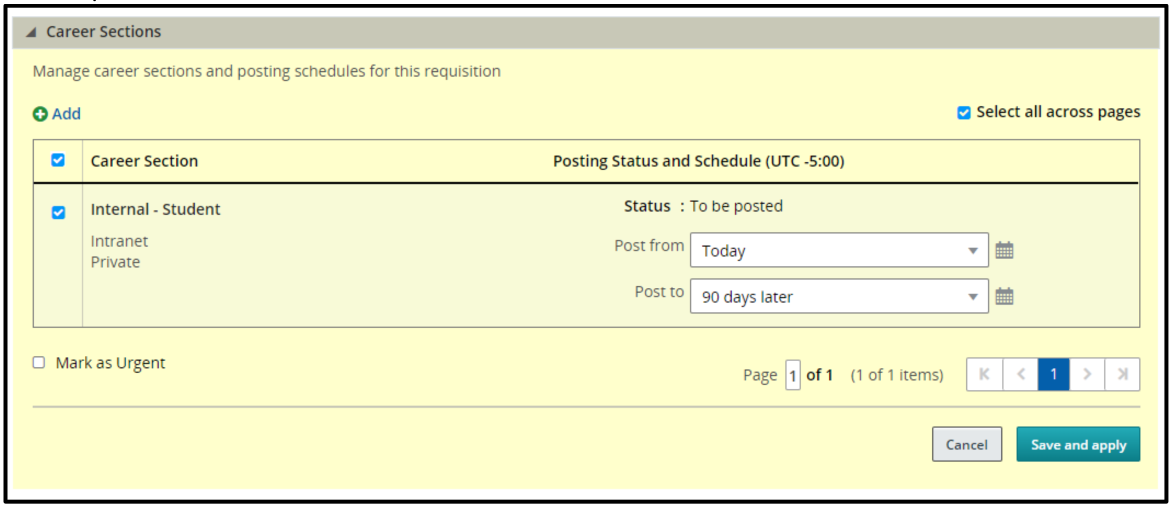
2. Once in **Sourcing**, locate **Career Sections** at the top of the page. Select the **Add career sections** button.



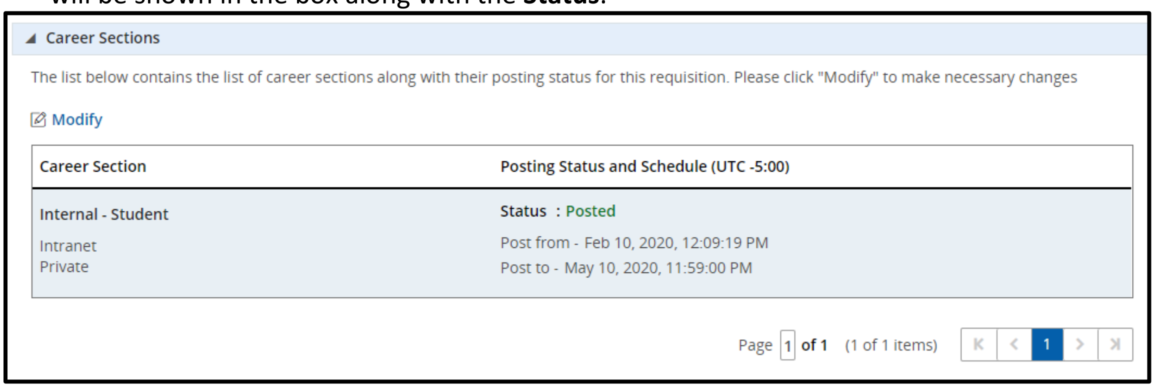
3. A box called **Career Sections Selector** will open. Ensure the **Internal-Student** checkbox is selected. Then select **Add / update career sections**.



4. You can choose when to post the requisition, **Post from**, and when it should be taken down, **Post to**. Use the drop-down menus to pick from a range of timeframes or use the calendar icon next to each drop-down to pick a specific date. Then select **Save and apply** to post the requisition.



5. Student Worker positions can only be posted to the **Internal-Student** career site. Ensure that the box under **Career Sections** is listed for **Internal-Student** only. The designated time frame will be shown in the box along with the **Status**.

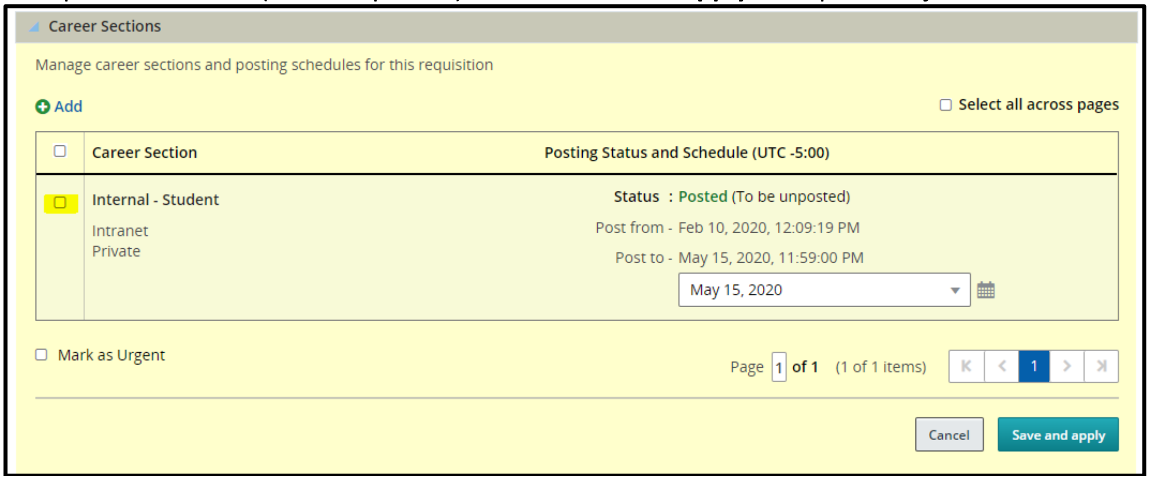


Taleo Tip: There is no external student worker career site. Student worker positions are only posted internally.

6. If you want to make any changes to the posting dates, you can go to the **Sourcing** tab in your requisition at any time. The **Modify** button will be available to you. You can extend or shorten an end date at any time.

Unposting a Position

1. To unpost a position and remove it from the job site, you can use the **Modify** button to open the **Career Section** window. **Uncheck the box** on the left side of the window. Your Status will update to Posted (To be unposted). Select **Save and Apply** to unpost the job.



2. After a job has been unposted, you can use the **Modify** button to repost the job if needed. Follow the directions as indicated above to post a job to the student worker career section.

Searching a Candidate

There are two ways you can search for your candidate.

Candidate Quick Search

1. In the Quick Search box ensure your field is set to **Look up a candidate**.

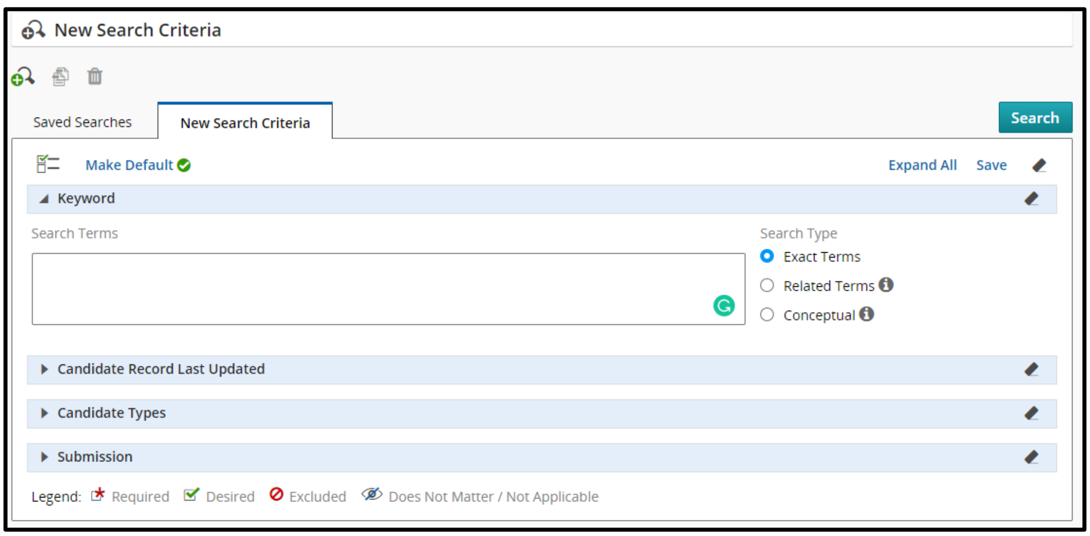
2. Type your candidate's name.
3. Select the **magnifying glass** or **Enter** on your keyboard to generate the search.

Taleo Tip: Always use the candidate's first and last name. Using a TUID could bring up an incorrect profile due to duplicate profiles.

Find Candidates

1. From the menu, use the **Find Candidates** section to search for candidates.

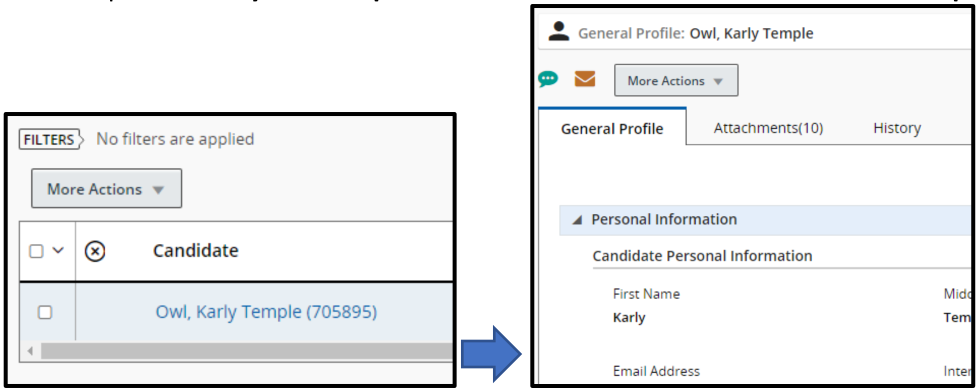
2. In this search box, enter the name of the candidate (or, as a last resort their email or TUID you are searching for. The search function is specific, you will need proper spelling of names. Then select **Search**.



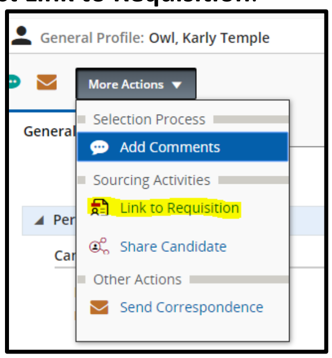
3. The name you searched will return results. If there is more than one profile for your candidate, all names will appear.

Linking a Candidate to a Requisition

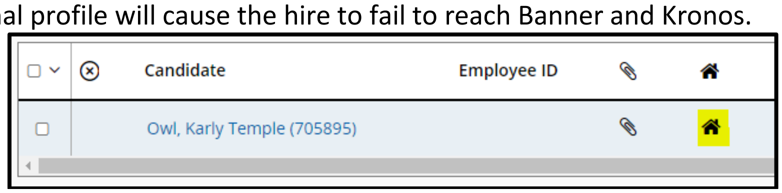
1. Select the checkbox of the name of the candidate you wish to match to your requisition to access their profile. **Only Internal profiles should be linked to Student Worker Requisitions.**



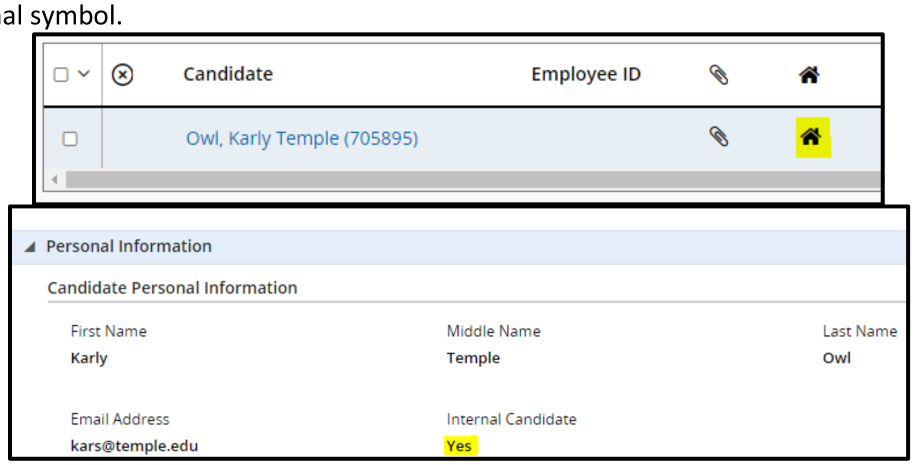
2. Then from **More Actions**, select **Link to Requisition**.



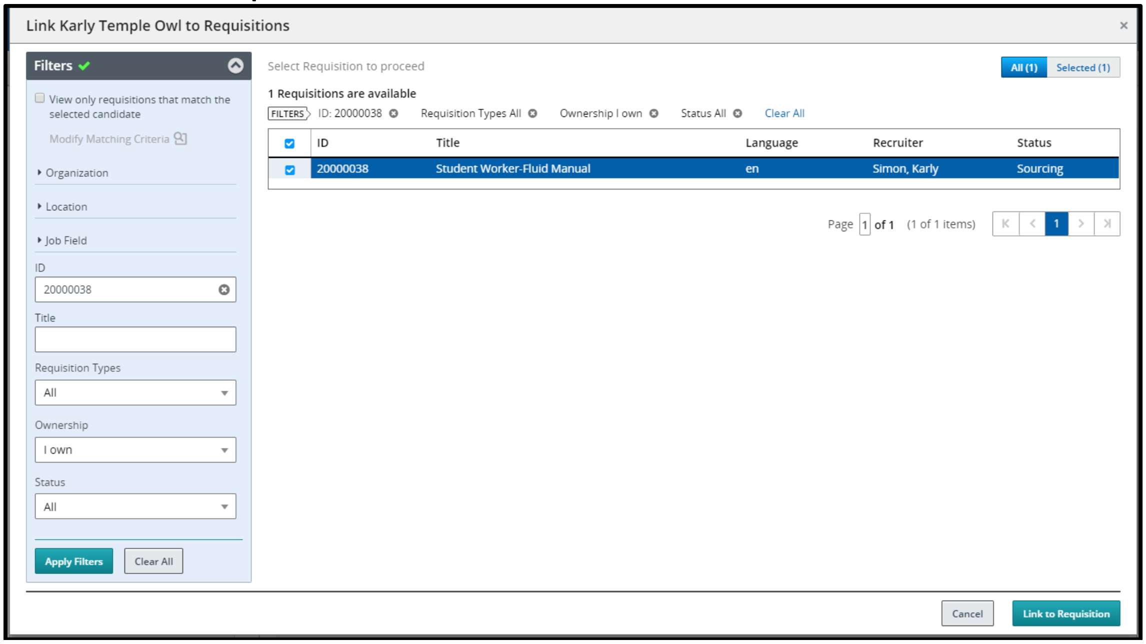
Taleo Tip: Only internal profiles with the **house** icon should be matched to a student worker requisition. Matching an external profile will cause the hire to fail to reach Banner and Kronos.



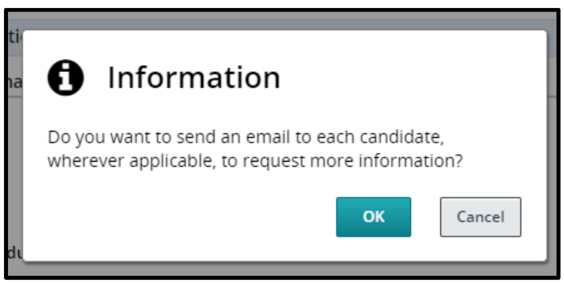
3. Internal candidates will be shown with a **house** icon. Within the profile, the **Internal Candidate** section will be indicated with a **Yes** response. All students or internal employees should have an internal symbol.



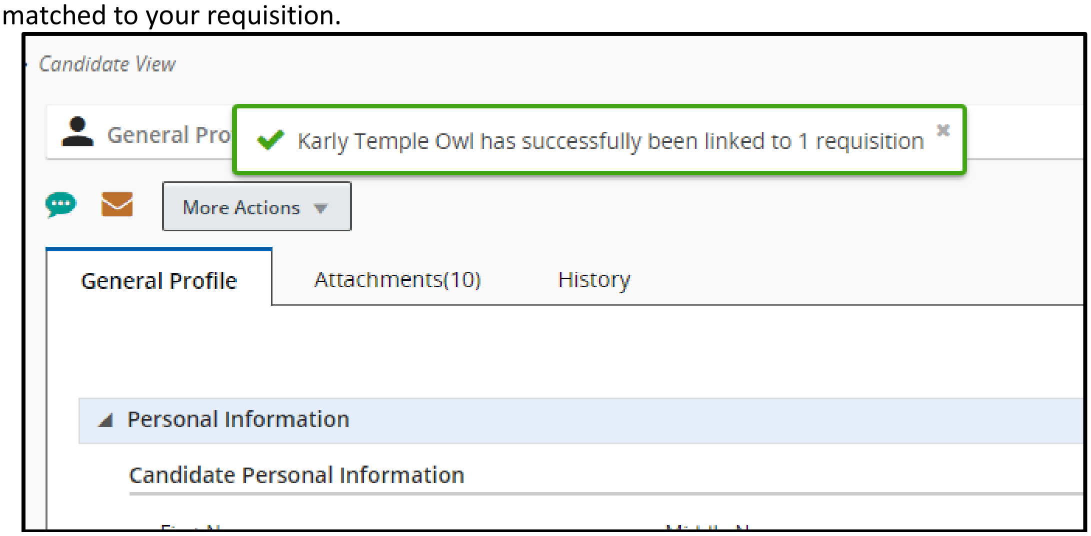
4. After selecting the **Link to Requisition**, a pop-up box will appear with a list of your requisitions. Select the checkbox next to the requisition to which you are matching the candidate. Then select **Link to Requisition**.



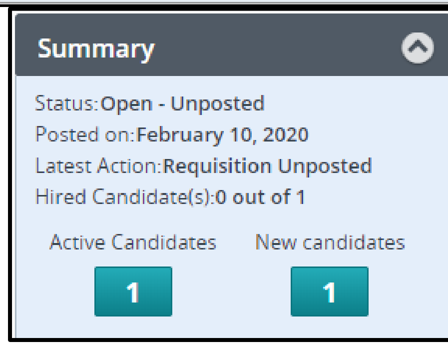
5. After clicking **Done**, a pop-up box will ask if you want to send an email to the candidate. Select **Cancel**, <u>since the e-mail will invite the candidate to apply for the job that you have already linked them to.</u>



6. The window will close and you will receive a notification stating your candidate has been matched to your requisition.



7. Navigate back to your requisition. It will now show a new candidate has been added.



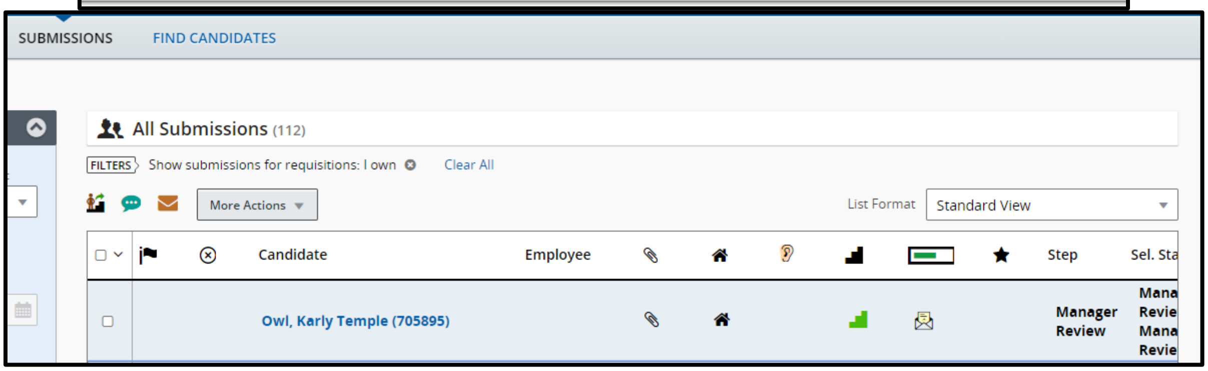
Viewing Candidates

After candidates have either been matched or applied to your requisition, you will be able to view them in Taleo.

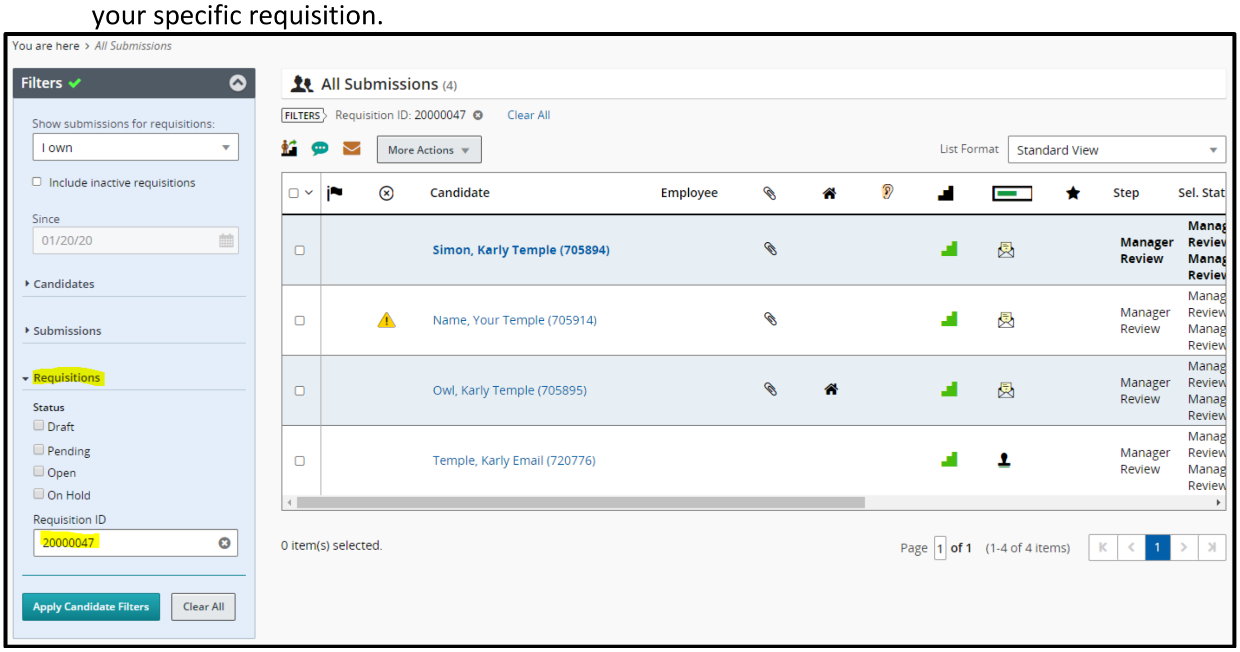
You can navigate to candidates in two ways **Submissions** and **Requisitions**:

Submissions

1. **Submissions**: Navigate from your dashboard to your **Submissions** by selecting the **Submissions** title in your menu bar. Note that there are default filters set which impact your search results, and may give you the false impression that there are no results. Be sure to remove those filters you don't need, such as "**Draft**.".

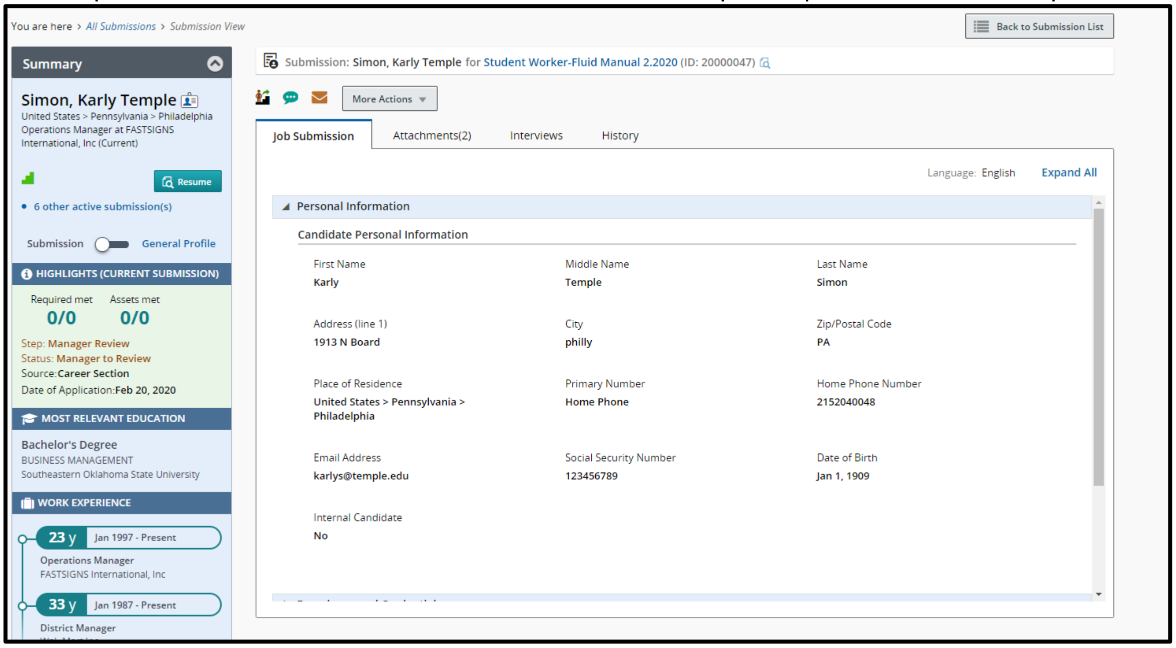


2. Using the **Filters** function, set the parameters to narrow down the submissions results down to your specific requisition.



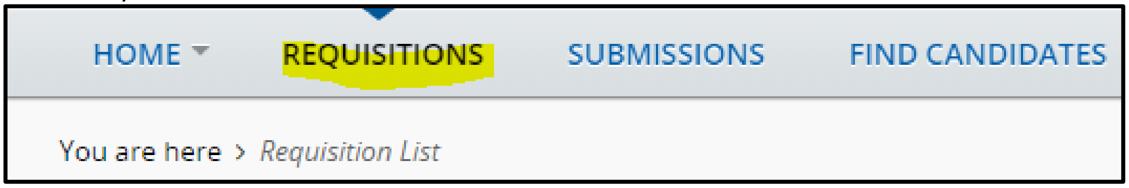
Taleo Tip: Search for candidate submissions using the **Requisition ID** number.

3. Once your results populate, you will be able to see the candidates that applied to your specific requisition. Select the candidate's name to view their specific profile within the requisition.

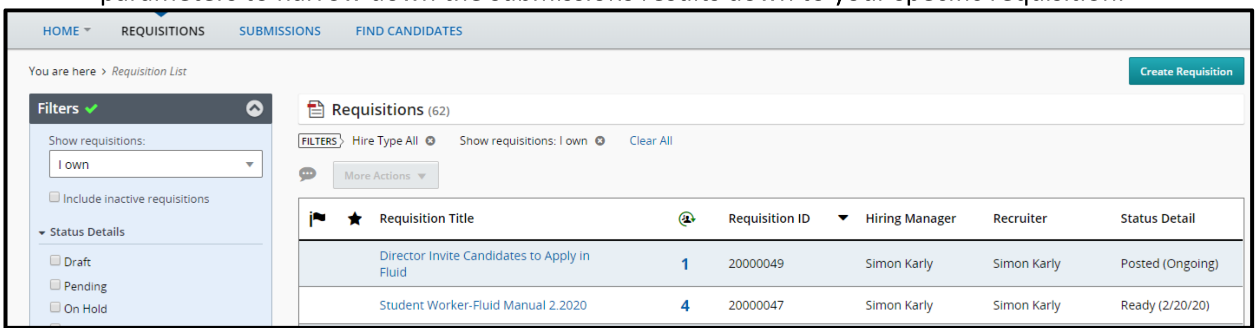


Requisitions

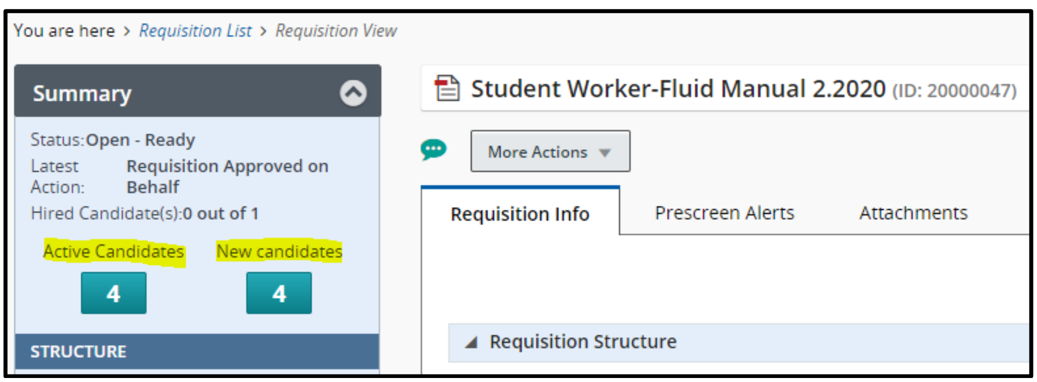
1. **Requisitions**: Navigate from your dashboard to your Requisitions by selecting the **Requisition** title in your menu bar



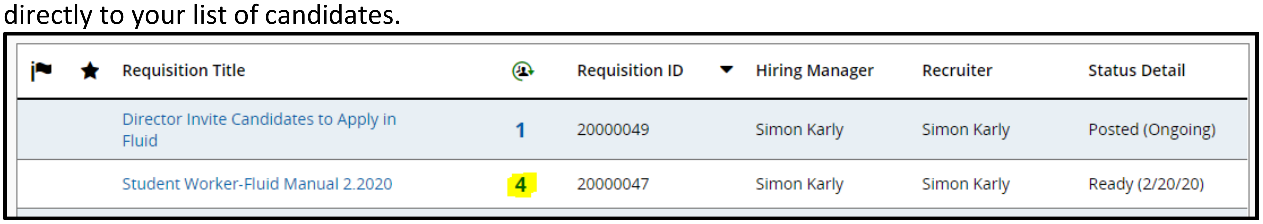
2. A list of active requisitions will show on the screen. You can use the **Filters** function to set the parameters to narrow down the submissions results down to your specific requisition.



3. Select the title of your requisition to be brought to your requisition.
4. You can select the number of active candidates or the number of new candidates to view your candidates.



Taleo Tip: From the list of requisitions you can select the specific number of candidates to be brought directly to your list of candidates.



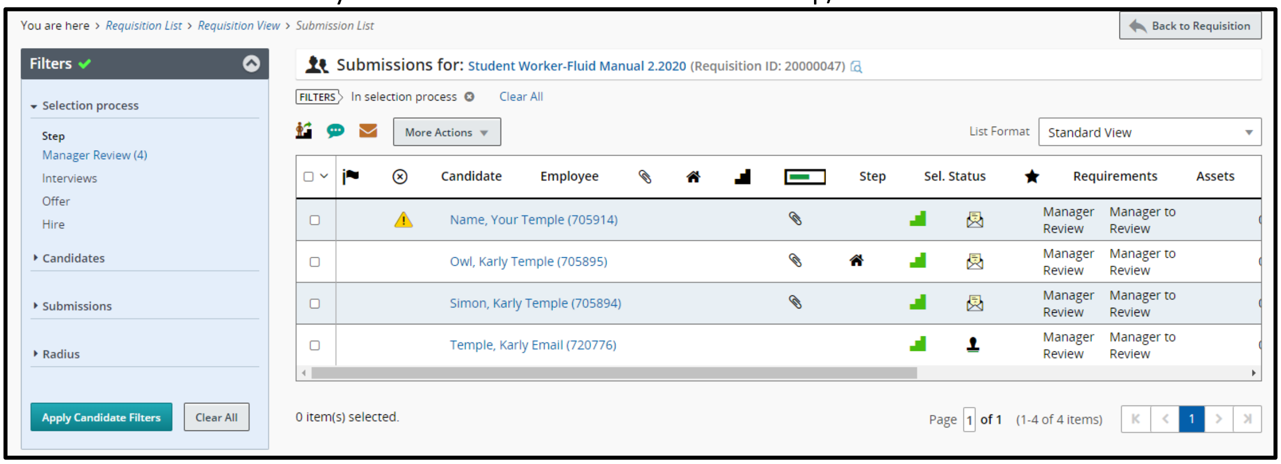
		Requisition Title		Requisition ID	Hiring Manager	Recruiter	Status Detail
		Director Invite Candidates to Apply in Fluid	1	20000049	Simon Karly	Simon Karly	Posted (Ongoing)
		Student Worker-Fluid Manual 2.2020	4	20000047	Simon Karly	Simon Karly	Ready (2/20/20)

Changing Step/Status of Candidates

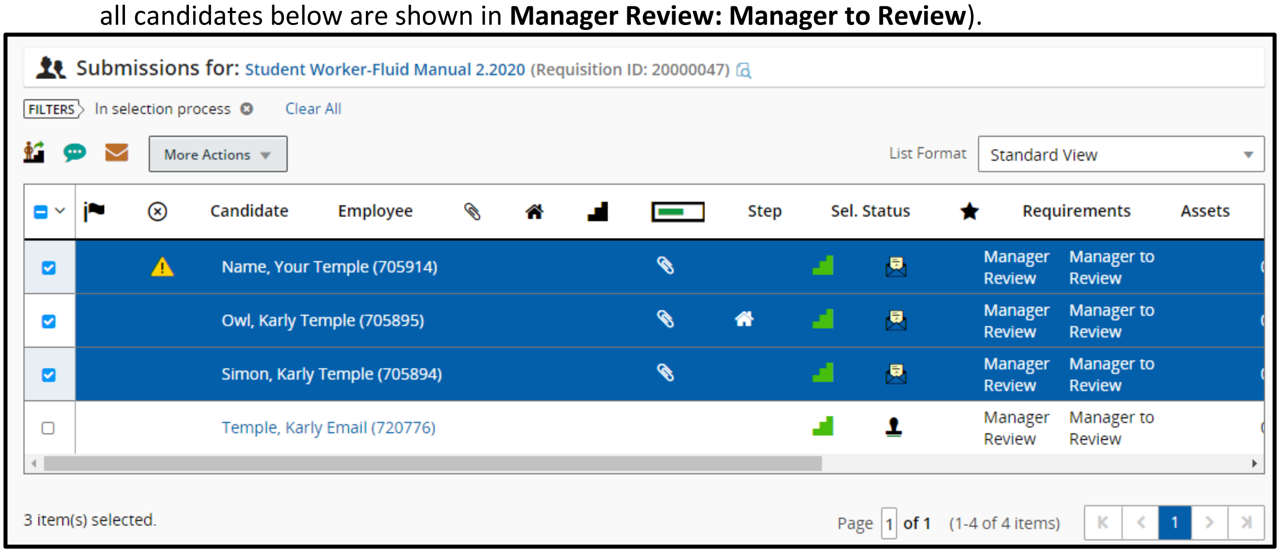
Navigate to your requisition and click on the blue number of candidates to view the candidate list. All new candidates should appear in the Step/Status of **Manager Review: Manager to Review**. You can move candidates through the process in groups or one at a time.

Moving Candidates in Groups

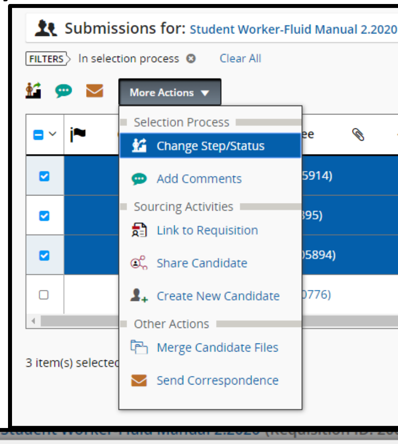
1. For some jobs, the Hiring Manager or Department Recruiter may wish to move multiple candidates at one time. To do so, ensure you are viewing the candidate list for your requisition and the candidates you wish to move are all in the same step/status.

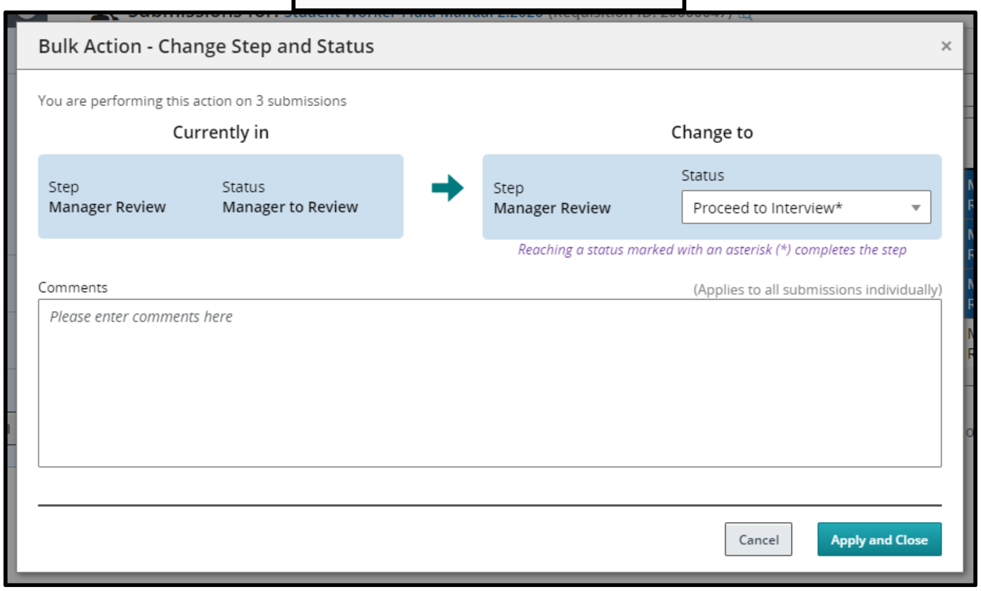


2. Check off all candidates to be moved to the next Step/Status. All candidates chosen will be moved to the same point in the process. Candidates must all start at the same step/status (i.e. all candidates below are shown in **Manager Review: Manager to Review**).

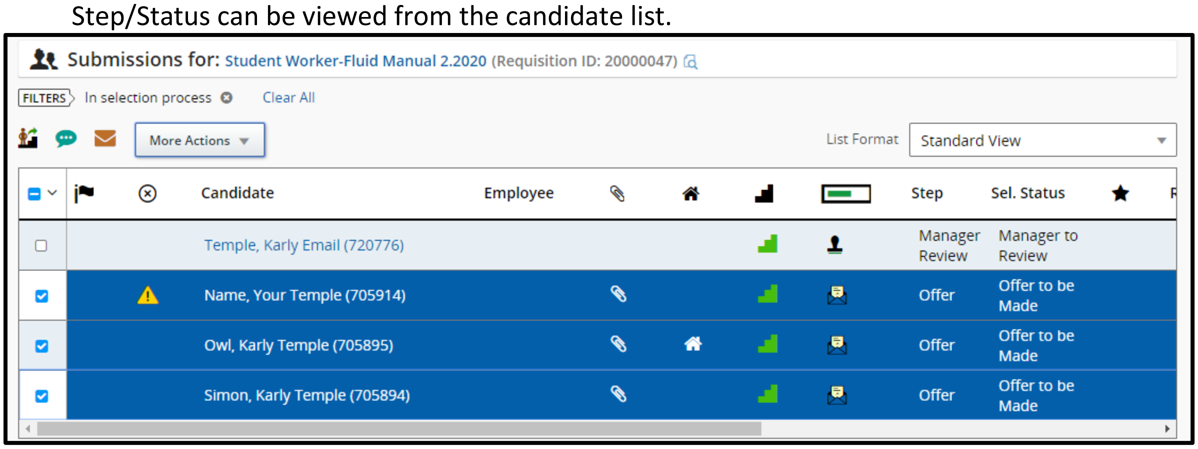


3. Click on the **More Actions** tab to bring up a list of options. Choose the **Change Step/Status** option to bring up a pop-up box. The box will show the current Step/Status and the next move in the process. Select **Apply and Close** to move the candidates.



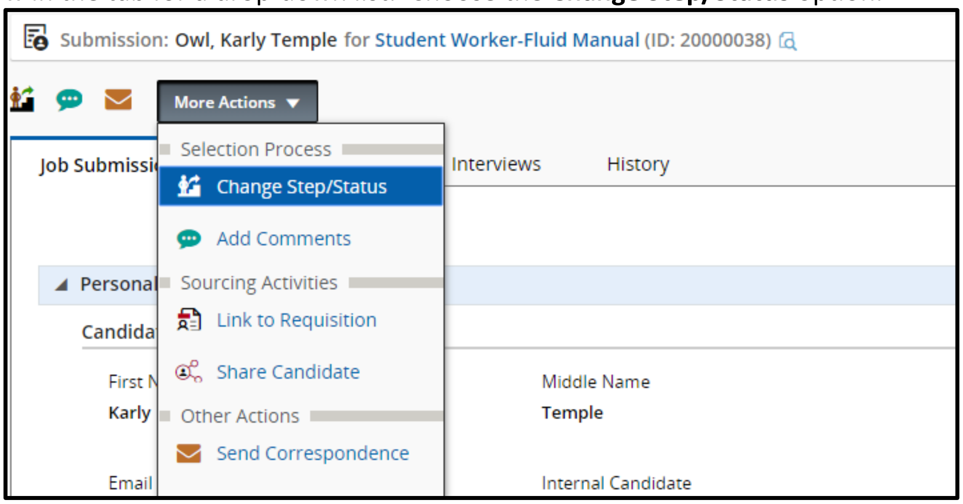


4. The candidates can be moved along the process as far as you wish to take them. You can continue to update the Step/Status up to the Offer stage. Once a candidate is in the Step/Status of **Offer: Offer to be Made**, you will need to stop to create the offer. The Department Recruiter will receive an email indicating that the candidate is ready to receive an offer. Their updated Step/Status can be viewed from the candidate list.

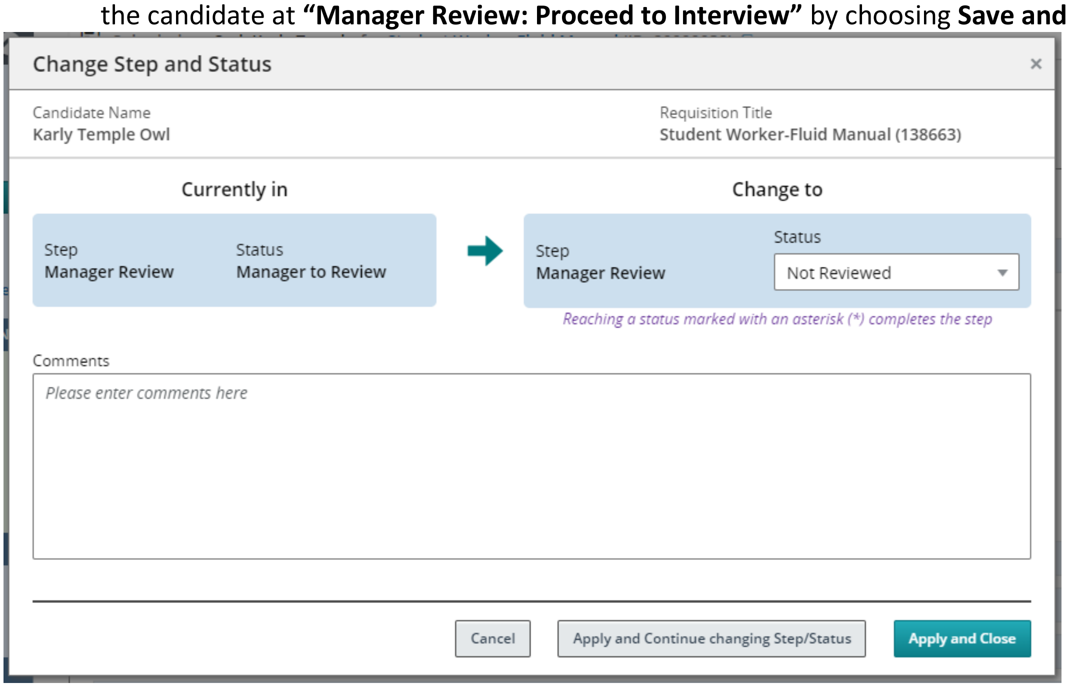


Moving Candidates One at a Time

1. Navigate to the candidate profile either from the **Requisition** or the **Submissions** tab on your dashboard.
2. While in a candidate profile, locate the **More Actions** tab at the top of the page. Click on the arrow in the tab for a drop-down list. Choose the **Change Step/Status** option.



3. A pop-up box will appear, giving options of steps to move the candidate through. The box will show the current Step/Status on the left and the next move in the process. You can review each applicant and change the status accordingly.
   a. If you wish to interview a candidate, you will need to stop changing the step/status of the candidate at **"Manager Review: Proceed to Interview"** by choosing **Save and Close**.



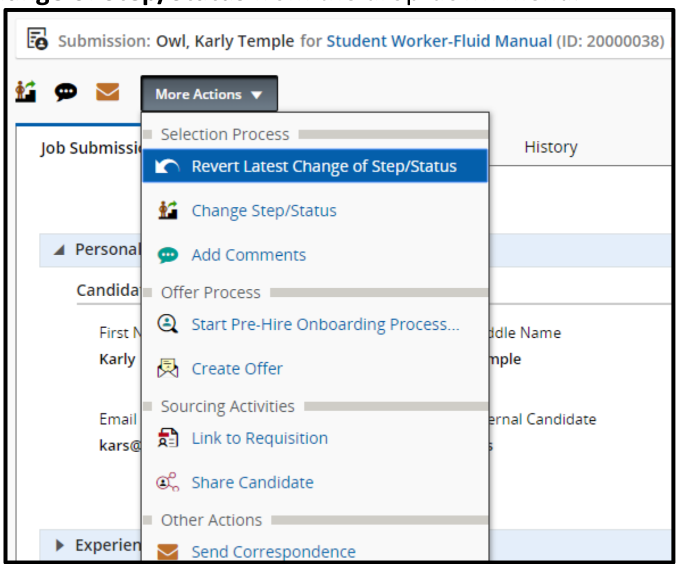
Taleo Tip: In the Change Step/Status box, you have two options:

A. **Apply and Continue changing Step/Status**: By choosing this option, the box will remain open and automatically bring the candidate into the next step or status. Only use this option if you are moving candidates through several steps/statuses at one time.

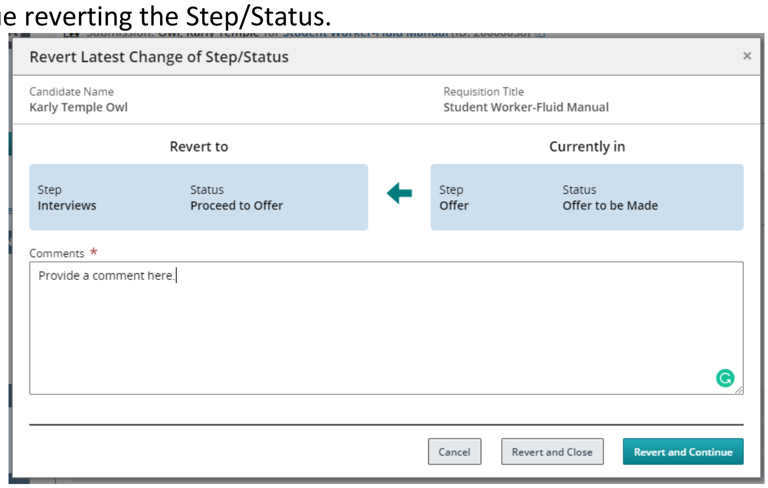
B. **Apply and Close**: By choosing this option, you are moving the candidate one Step/Status at a time. It will save your choice and close the window, bringing you back to the candidate list and showing the updated Step/Status.

4. Continue moving candidates through the Step/Status box to advance them through the process until the **Offer: Offer to be Made** step/status. Here, the Department Recruiter will need to go into the Offer grid to create an offer.

Taleo Tip: If you status an applicant by mistake, you can move back a step. From the **More Actions** tab, choose **Revert Latest Change of Step/Status** from the drop-down menu.

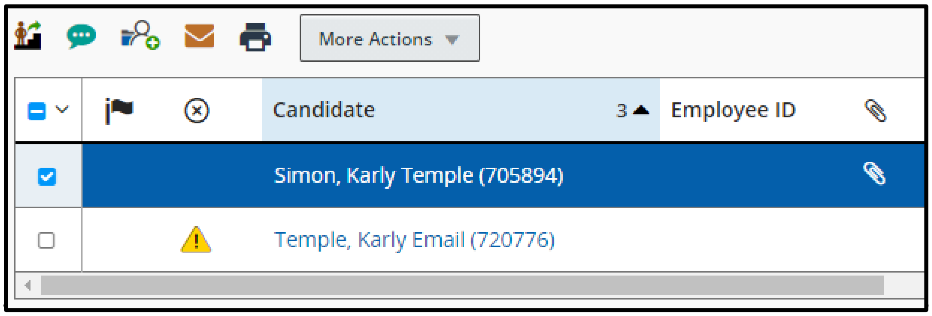


A pop-up box will appear to move the candidate back a step. Comments are required to be included when the **Revert** option is selected. Select **Revert and Close** to move one step/status back or **Revert and Continue** to continue reverting the Step/Status.

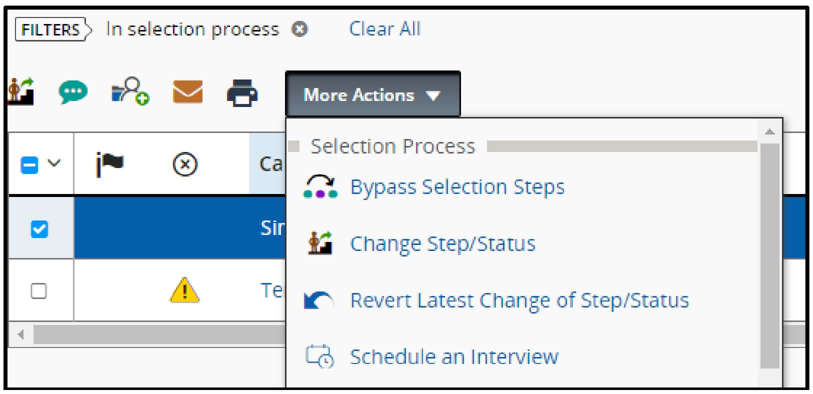


Creating an Interview

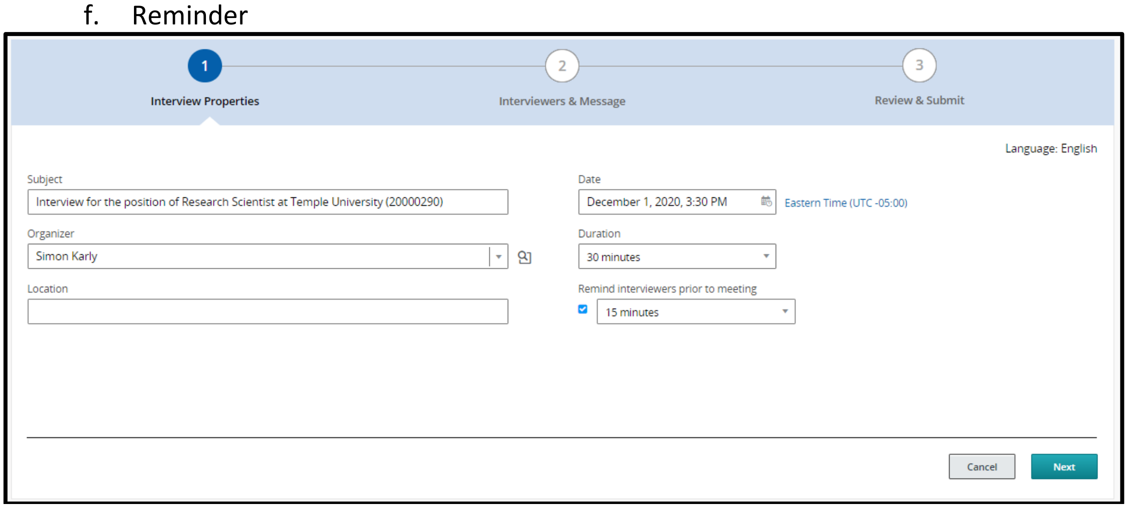
1. Ensure all candidates you wish to bring in for an interview have the Step/Status of **Interviews: Interview Scheduled**.
2. From the candidate list within the requisition, **check off** the candidate you wish to schedule an interview with.



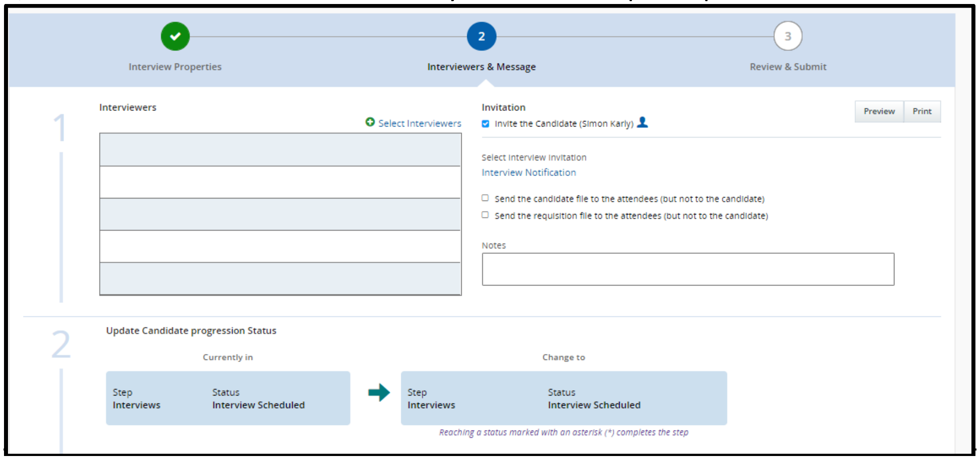
3. Go to **More Actions** and select **Schedule an Interview**.



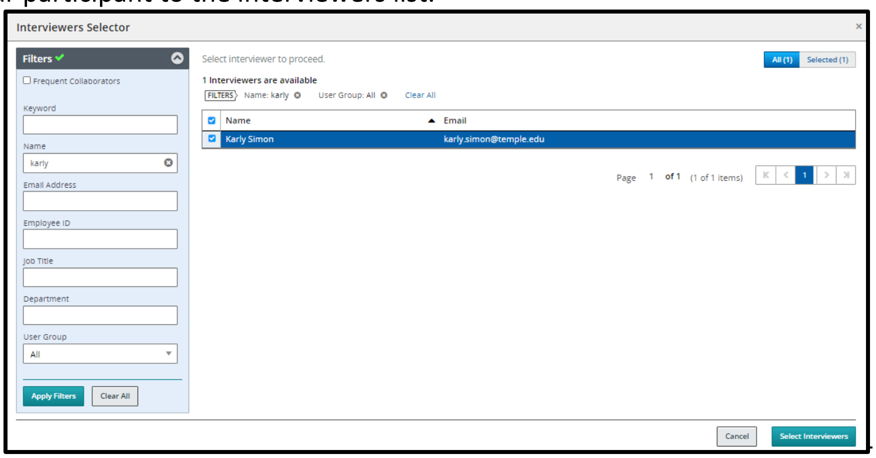
4. Fill in appropriate fields in the new window. Most of these will be auto-populated with information. You can make edits to any field. Select **Next** when done.
   a. Subject
   b. Organizer (this should be left as your own name)
   c. Location
   d. Start and End date and times
   e. Default Time Zone (do not change, should reflect Eastern Time)
   f. Reminder



5. Next, choose **Select Interviewers** to add your interview participants.

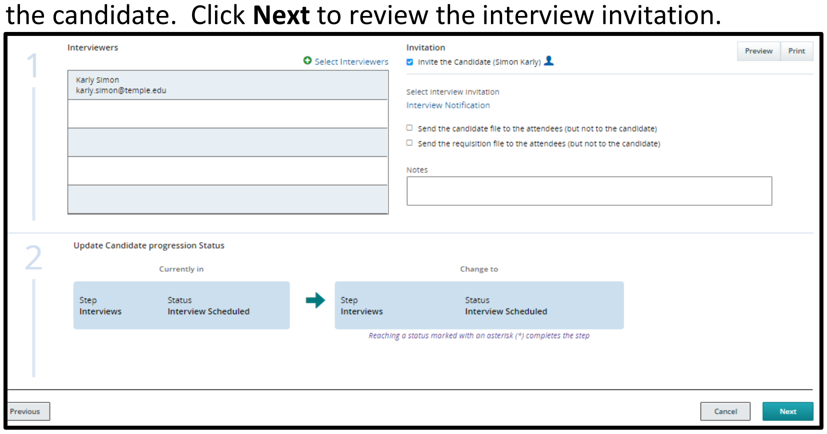


6. The **Filters** on the left-hand side of the window will allow you to jump directly to the name or email address of the person you are searching for. Select the checkbox on the left-hand side of the participant's name. Once your participant has been selected, click **Select Interviewers** to add your participant to the interviewers list.



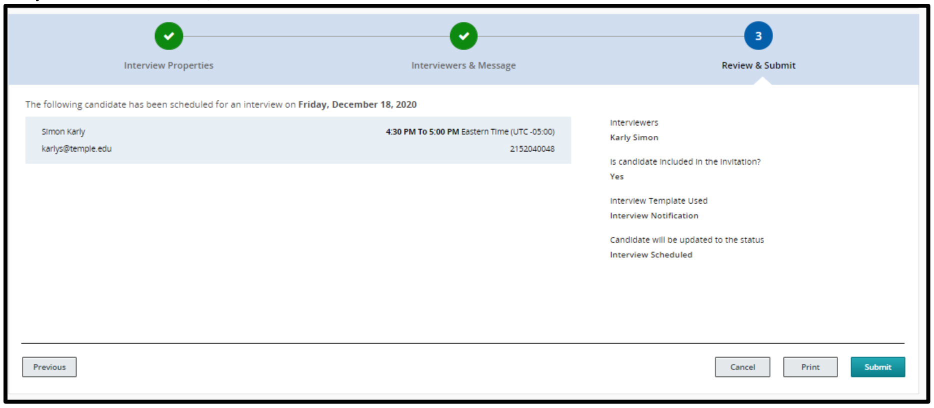
Taleo Tip: Your interviewer must have Taleo access to be added as a participant.

7. You are also able to send a link of the candidate file or the requisition file to attendees, excluding the candidate. Click **Next** to review the interview invitation.

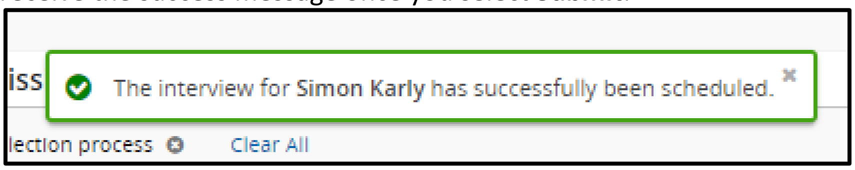


Taleo Tip: Check off the box for sending an invite to the candidate if you want them to receive an email with this information as well. Uncheck the box if you do not want the candidate to receive an email from Taleo.

8. Review your invitation, then select **Submit** to send the invitation.



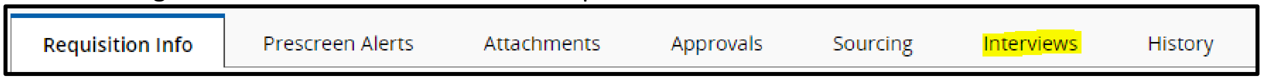
9. You will receive the success message once you select **Submit**.



10. Once the interviews are completed, interview evaluation forms should be completed.

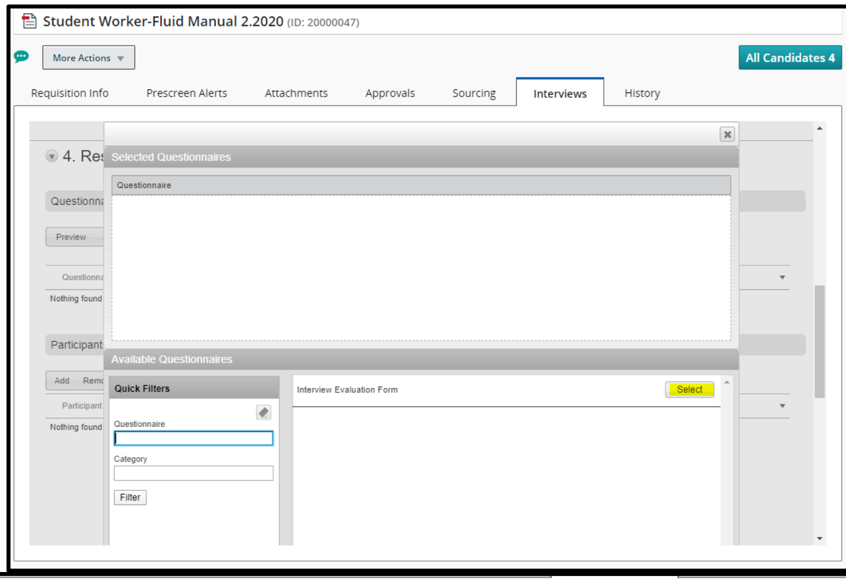
Creating an Interview Evaluation

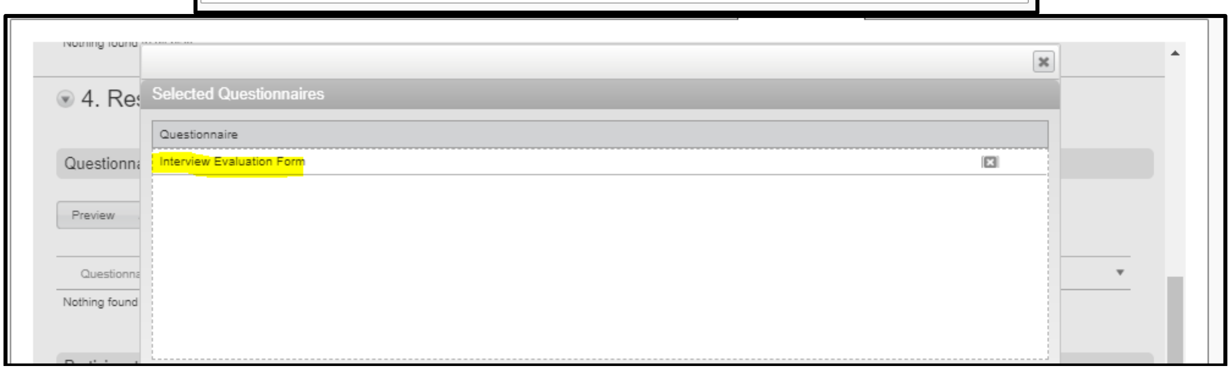
1. Navigate to the **Interviews** tab of the requisition.



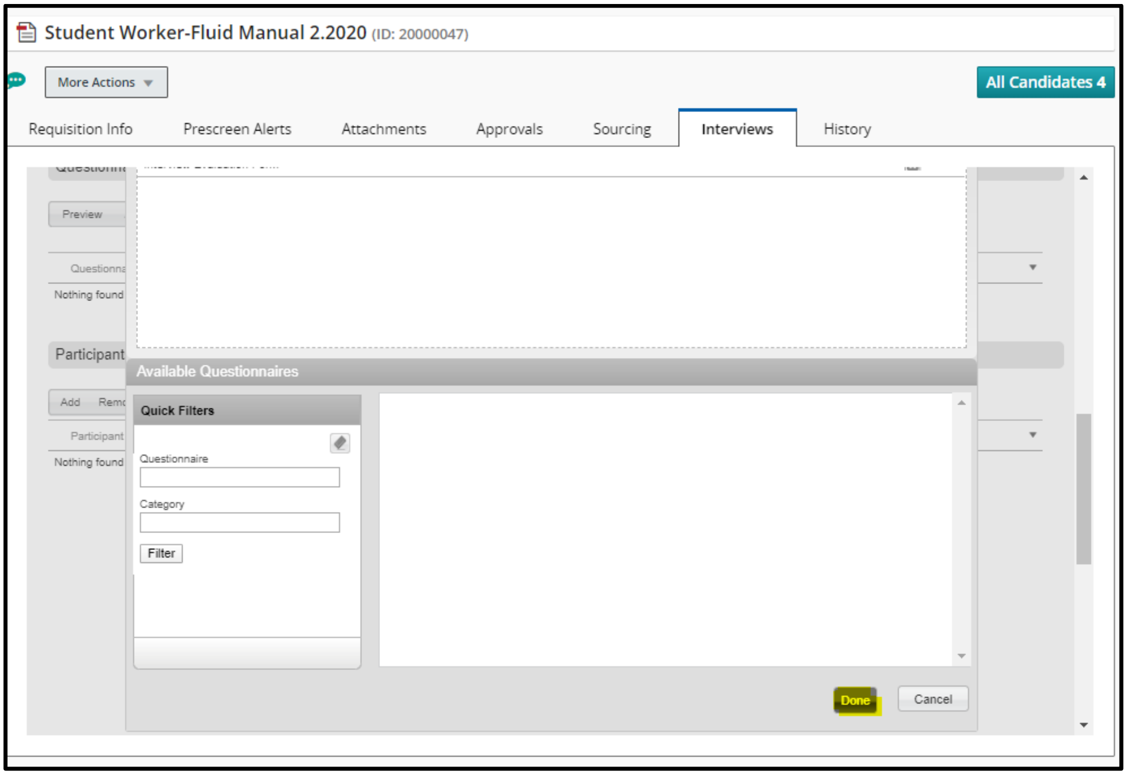
2. Under section **4. Resources** select **Add** below **Questionnaires Attached to Requisition**.

3. Select the **Interview Evaluation Form** to add the form to the **Questionnaire** section.

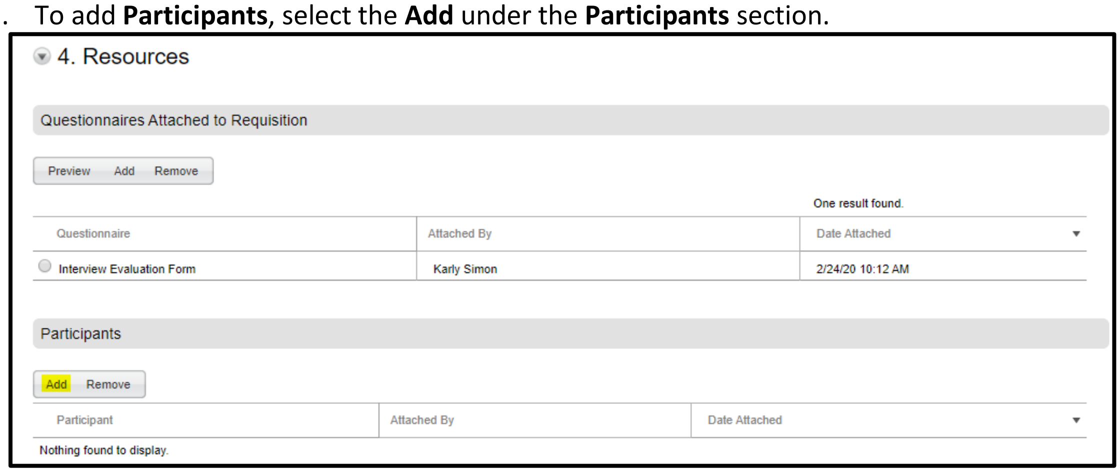




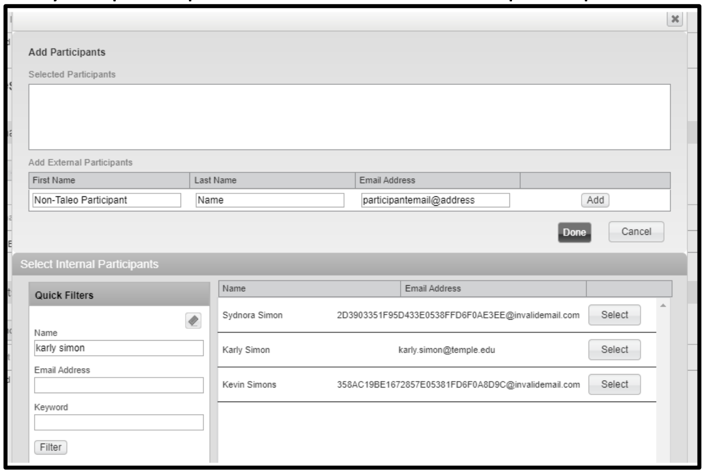
4. Scroll to the bottom of the window to select **Done.**



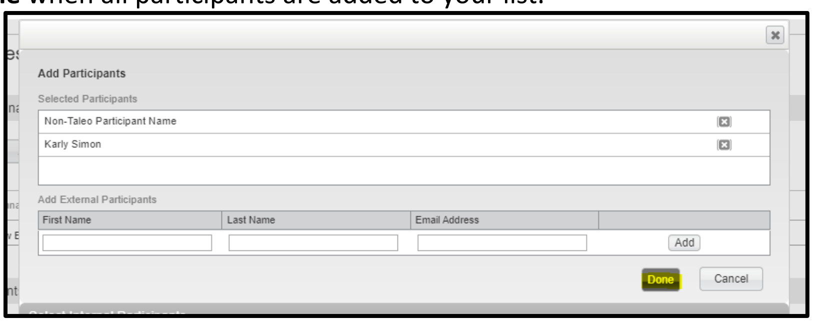
5. To add **Participants**, select the **Add** under the **Participants** section.



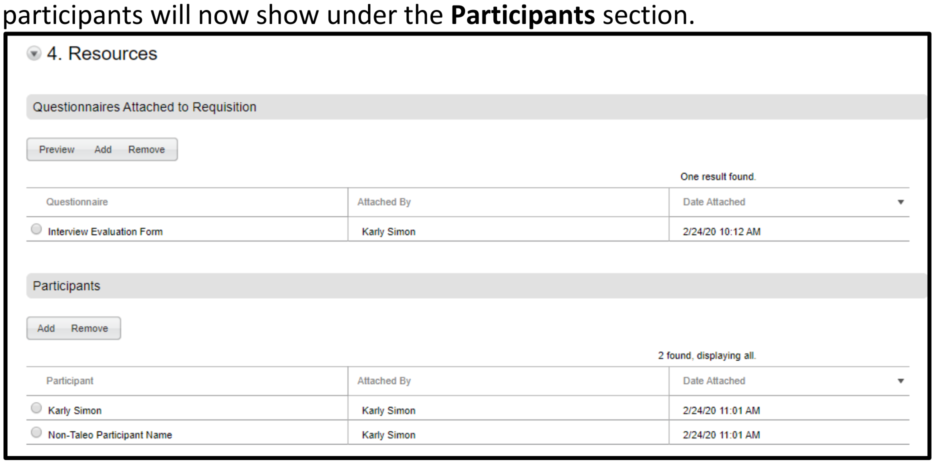
6. Participants to receive an Interview Evaluation form can be added from this window. The upper section can be used to add people who are not users of Taleo. The lower section can be used to add participants who have access to Taleo.
    a. For the upper section, manually type in the first and last name and the email address of your participant. Select **Add** when names are entered.
    b. For the lower section, use the Quick Filters function to jump to the name or email address of your participant. Click **Select** to add a participant to the list.



7. Select **Done** when all participants are added to your list.

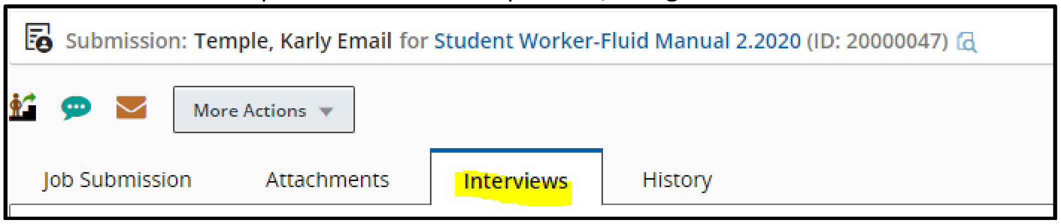


8. Your participants will now show under the **Participants** section.

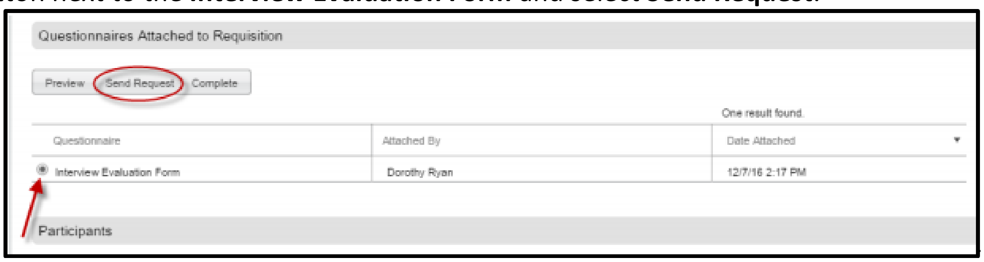


Sending out and Reviewing Interview Evaluations

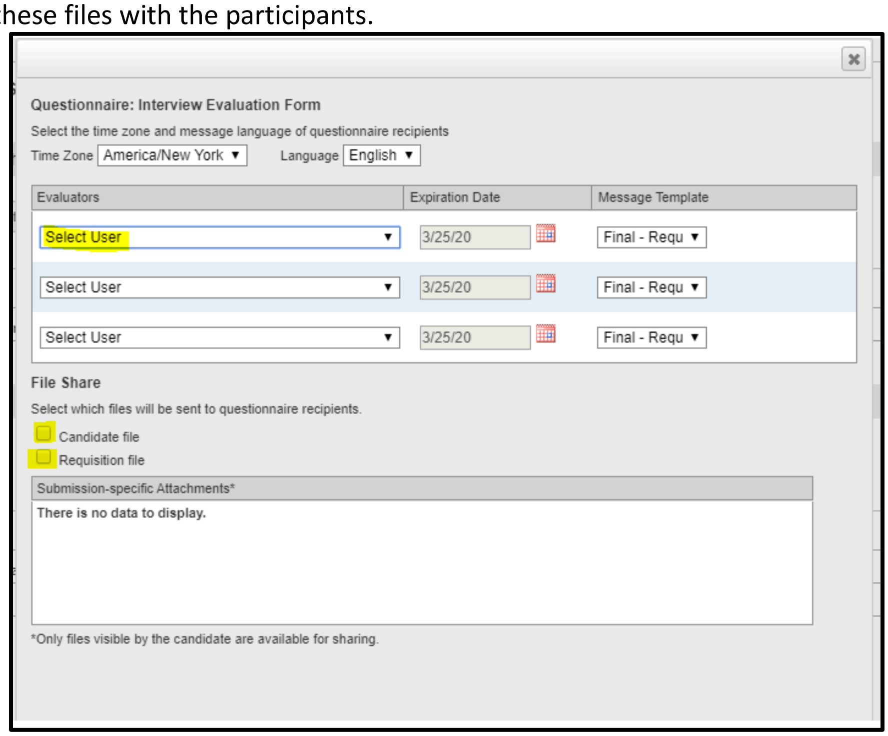
1. From the candidate's profile within the requisition, navigate to the **Interviews** tab.



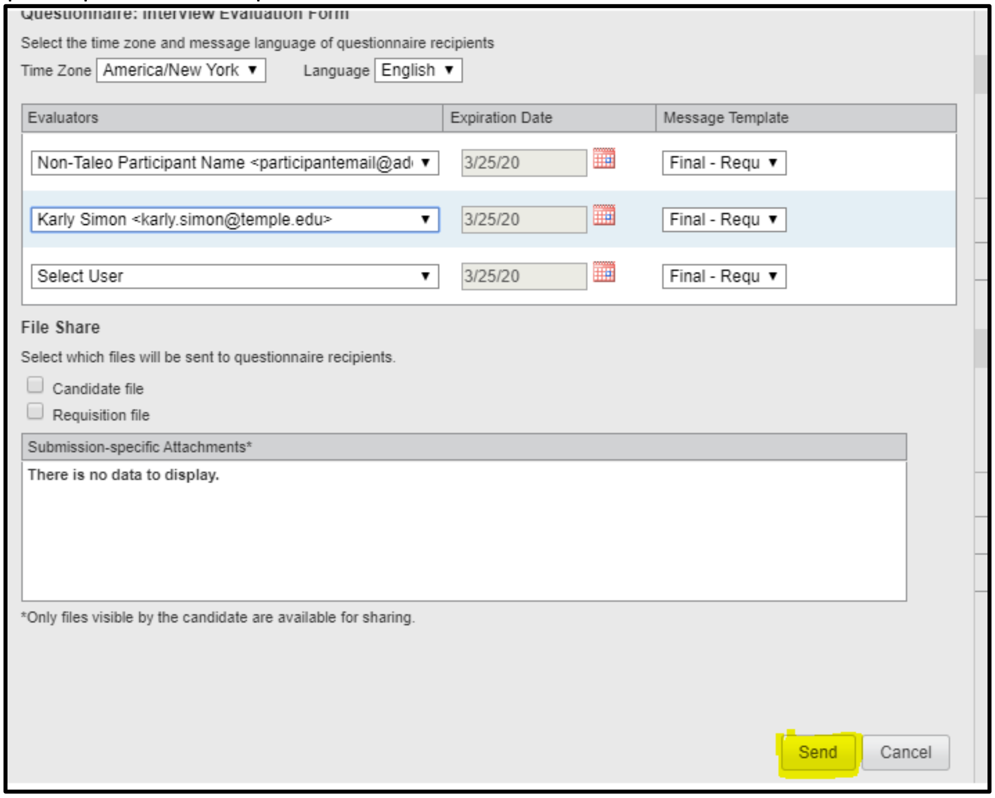
2. Scroll to section **4. Resources** to see **Questionnaires Attached to Requisition**. Select the radio button next to the **Interview Evaluation Form** and select **Send Request**.



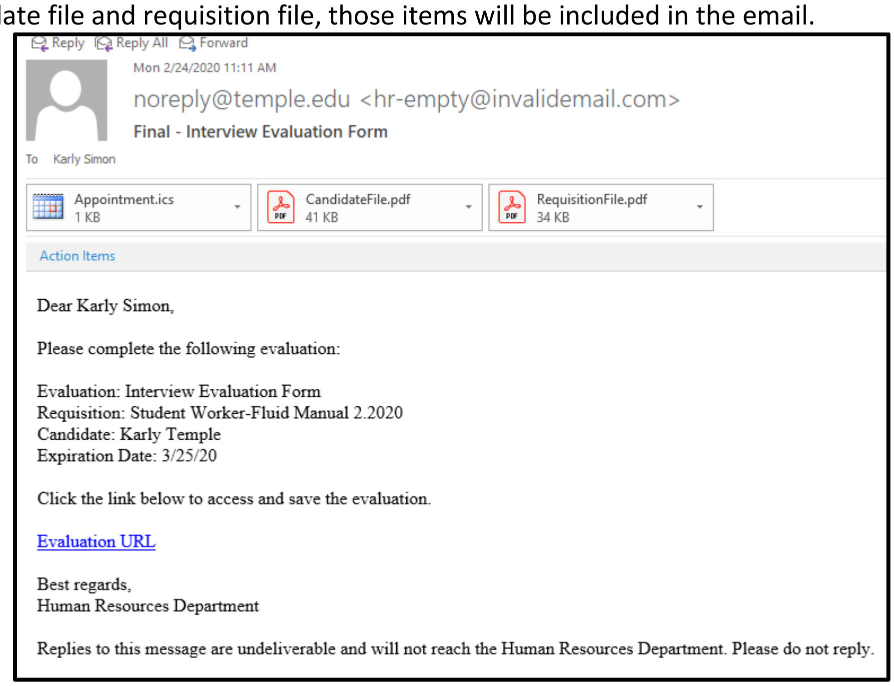
3. In the new window, select the dropdown **Select User** to choose participants to send the evaluation to. You may also check off **Candidate file** and **Requisition file** below if you wish to share these files with the participants.



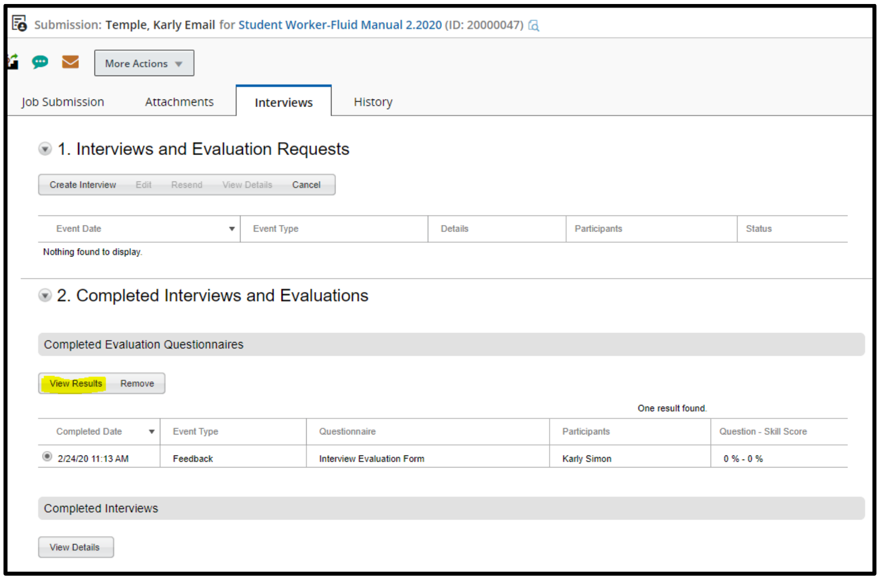
4. Select **Send** when done. An email will be sent to all participants with a link to the interview URL. All participants can complete the evaluation and submit it to Taleo.



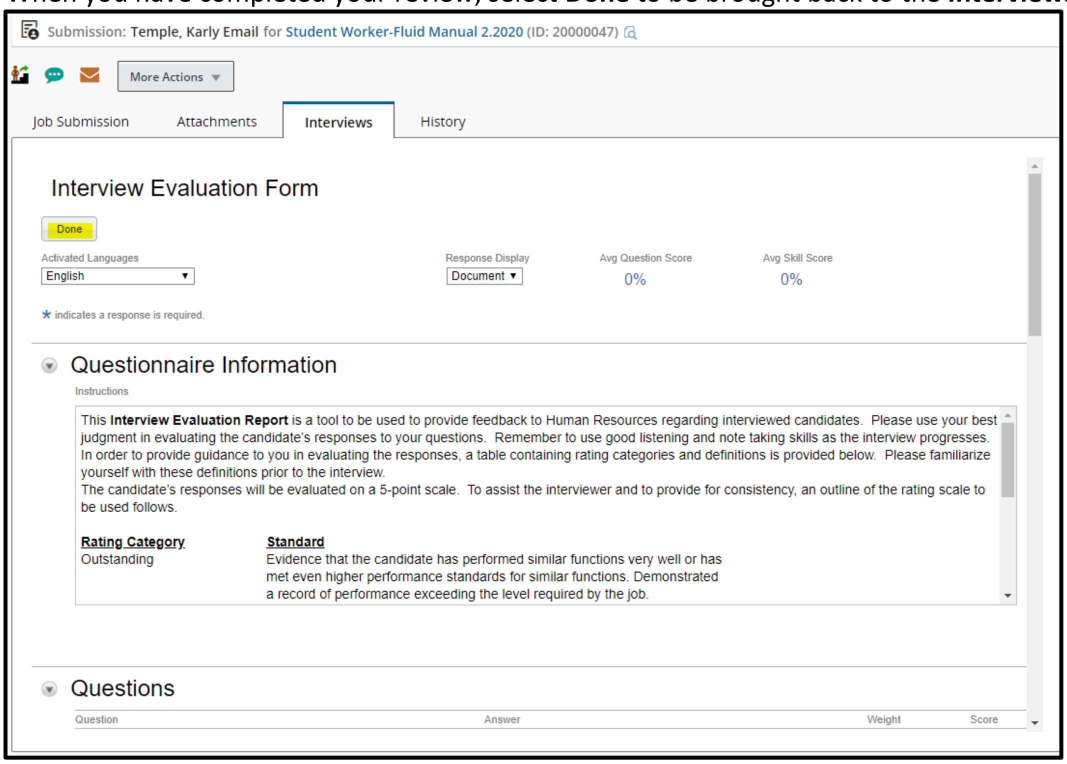
5. Participants will receive an email with a link to complete the evaluation. If you attached the candidate file and requisition file, those items will be included in the email.



6. To view completed evaluations, navigate to your candidate's profile within the requisition. Select the **Interviews** tab and scroll to section **2. Completed Interviews and Evaluations**. You will see a list of all completed evaluations. Select the radio button of the evaluation you wish to review and select **View Results**.

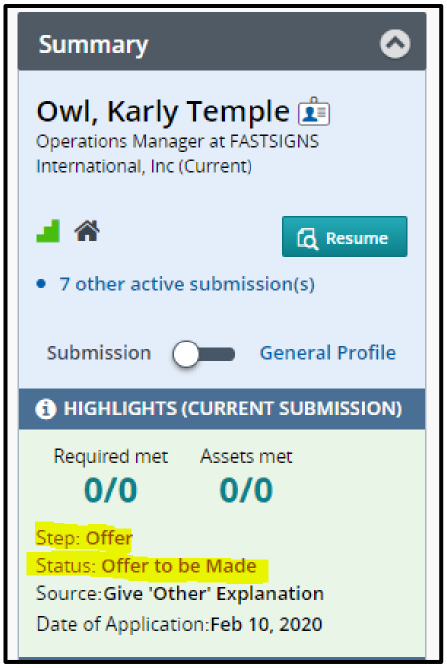


7. When you have completed your review, select **Done** to be brought back to the **Interviews** tab.

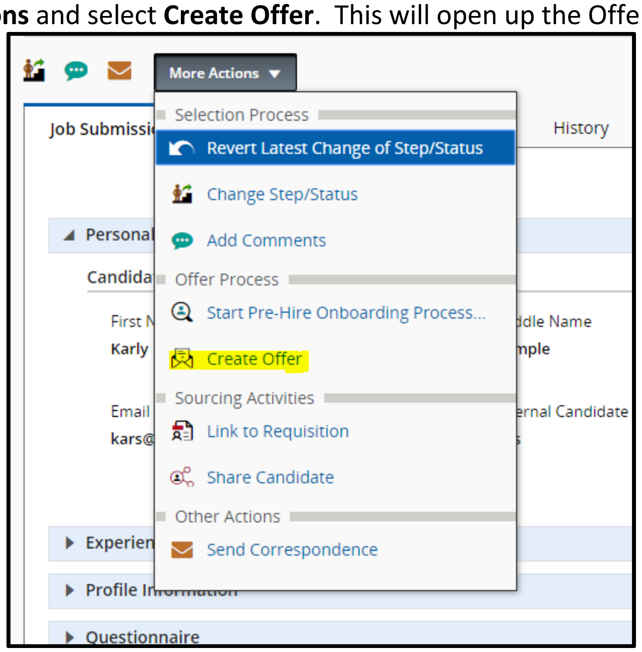


Creating and Extending an Offer – Student Worker

1. Navigate to your requisition, select the blue number to open your candidate list, and select your candidate. You must be in the candidate's profile to create the offer. Ensure the candidate is in the **Step/Status** of **Offer/Offer to be Made**.



2. Go to **More Actions** and select **Create Offer**. This will open up the Offer grid.



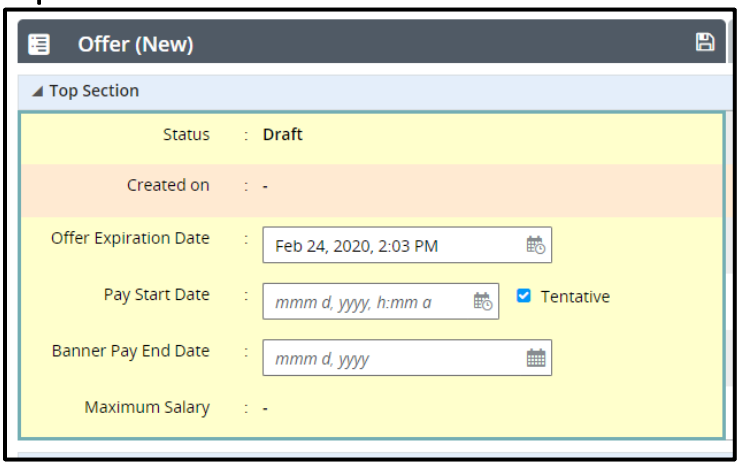
Offer Grid

Top Section

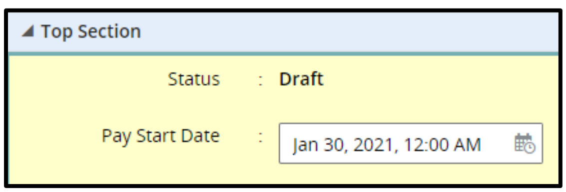
1. Enter:
    a. **Pay Start Date**—the date of the student's first day of work

Payroll Tip: It is best practice to start a student worker at the beginning of the pay period. This gives the system time to get the information in for payroll, otherwise hiring in the middle of the pay period may result in delays in processing.

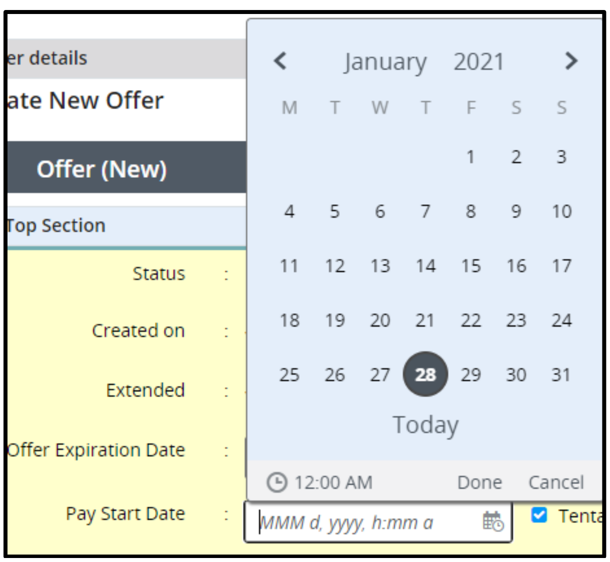
    b. **Pay End Date**—enter a date only if the position has a defined end date
    c. **Offer Expiration Date**—field will autofill



Taleo Tip: You may type in a date for all date fields. Your Pay Start Date if typed in will show a defaulted time of 12:00 AM.

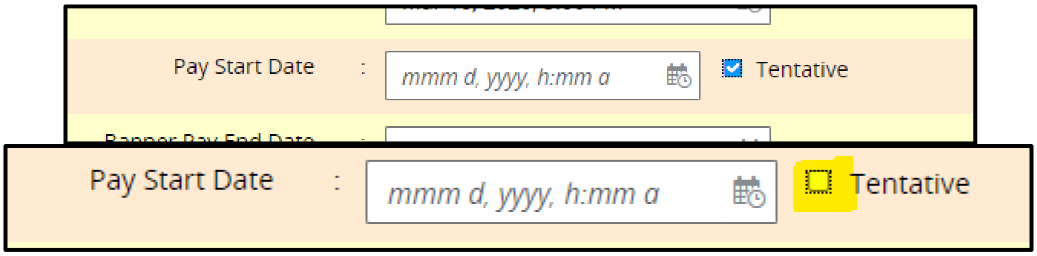


Or you can select the calendar function for the Pay Start Date field. Once you have selected your date, select **Done**.



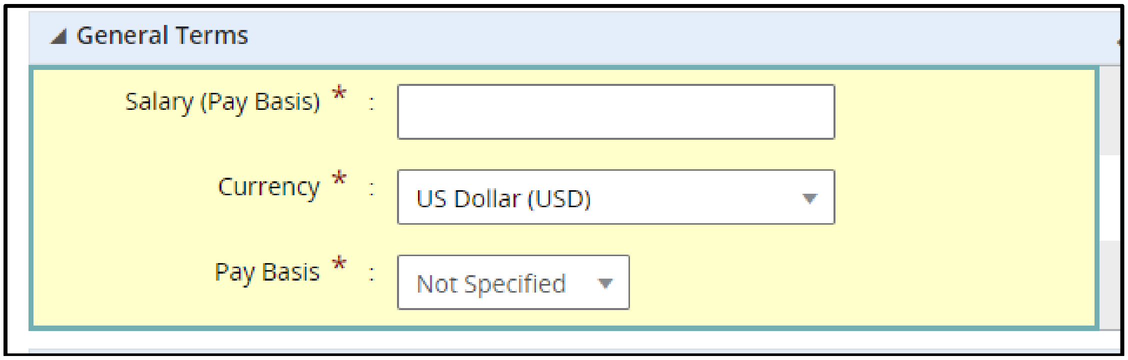
Taleo Tip: Calendars in Taleo Fluid have a format of Mon-Sun versus Sun-Sat.

Taleo Tip: By default, the box labeled **Tentative** is checked.   This means that the job start date is tentative.   For student workers, <u>**uncheck this box**</u>. If left checked you will need to update the start date to hire the student worker.



General Terms

1. Next enter the **hourly rate** and the **pay basis**. Be sure to select **Hourly** from the **Pay Basis** drop-down menu.

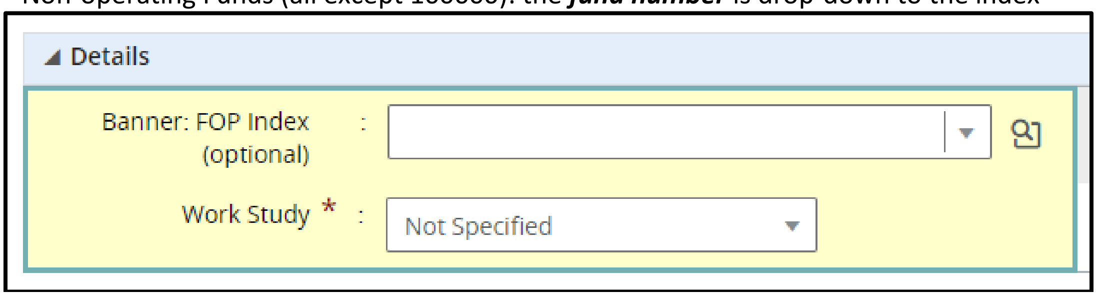


Details

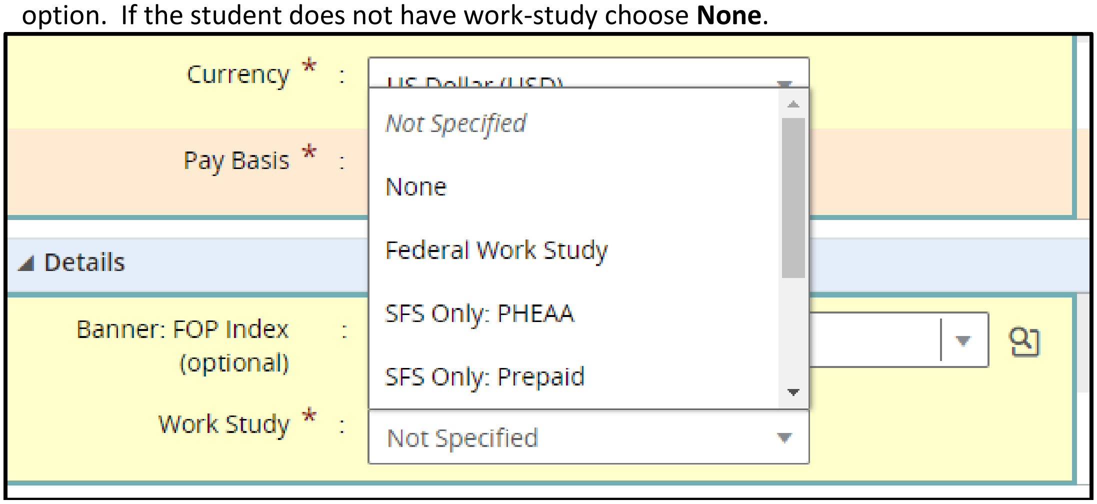
1. If needed, the **FOP index** is available. This is to be used if you do not want the default FOP from Banner Position Control Number (PCN) to default into the job.

Taleo Tip: If you need to look up the **FOP Index**, please sign in to TUPortal and go to the Banner tab, Finance Channel.

- Operating Funds (100000): the corresponding ***org*** is equal to the index
- Non-operating Funds (all except 100000): the ***fund number*** is drop-down to the index

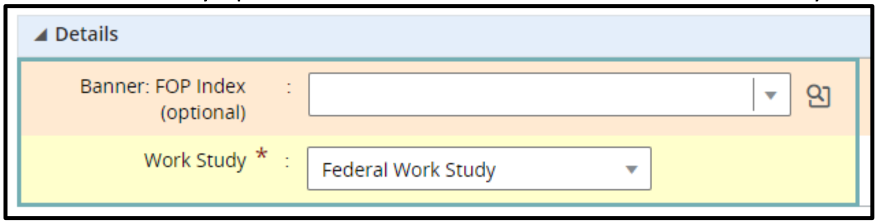


2. Next, select a value for Work-Study. **Not Specified** is the default, but is not recognized as an option. If the student does not have work-study choose **None**.



3. Unless PHEAA, Prepaid, America Reads, On Campus PHEAA, or Special – Off Campus, select Federal Work-Study to label the student worker to be paid with Federal Work-Study at any time during their term of employment.

4. If you are not sure if a student was awarded Work-Study, select the **Federal Work-Study** option. Banner will automatically update if the student was not awarded work-study funds.

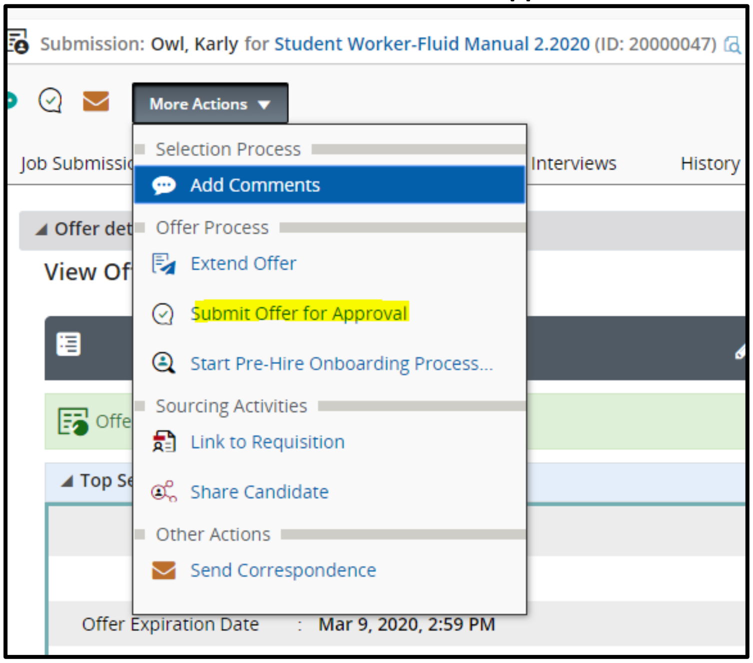


5. Select **Save and Close** when you are done. If you are missing any fields, an error message will appear. After you save the offer, an edit button will appear so that you may make revisions if necessary.

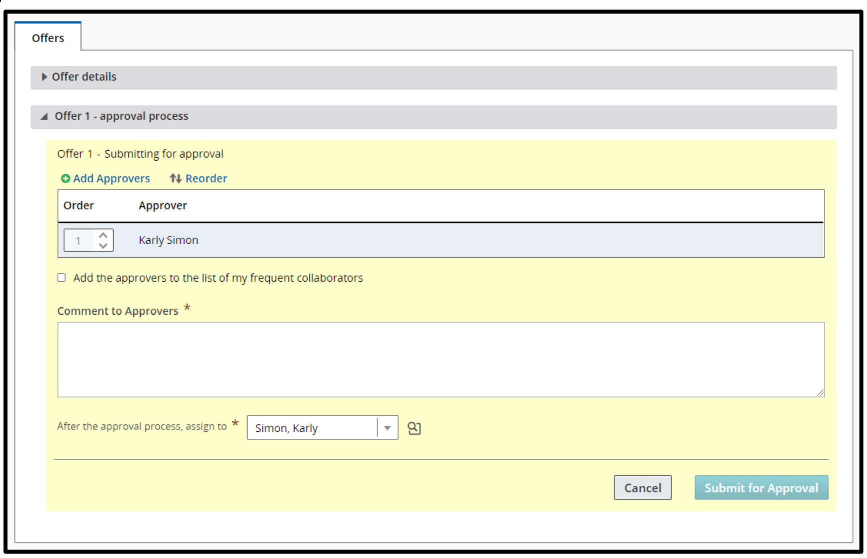
6. If needed, you can now route the offer for Approval to others in the department. Recruiters with proper authority may extend the offer without needing additional approval.

Route for Approval

1. From the **More Actions** menu select **Submit Offer for Approval**.

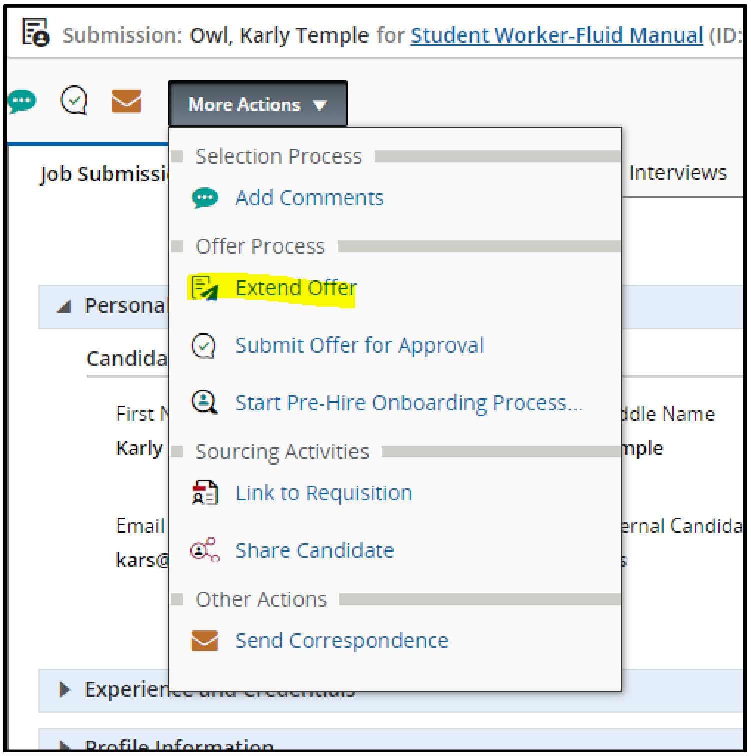


2. To add approvers, click on **Add Approvers** on the bottom left. You can search for approvers in the new window to add to your list.
3. When you are ready to request approval, add a comment in the comment box (required) then select **Submit for Approval**. An email will be sent to the **Approver** alerting them that action is needed.

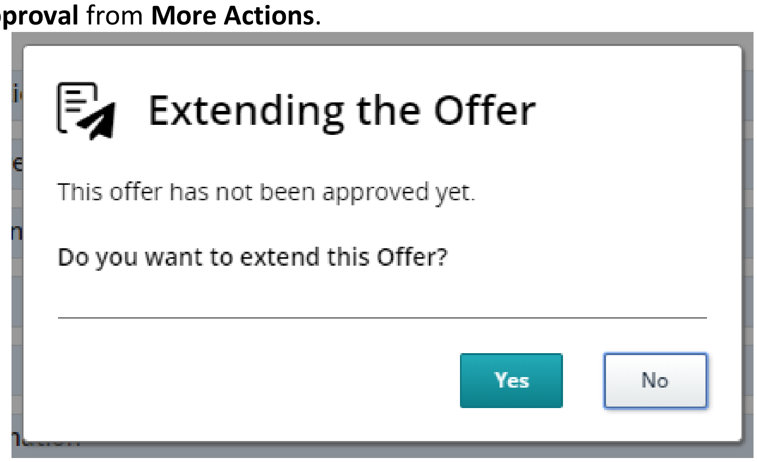


Extend the Offer

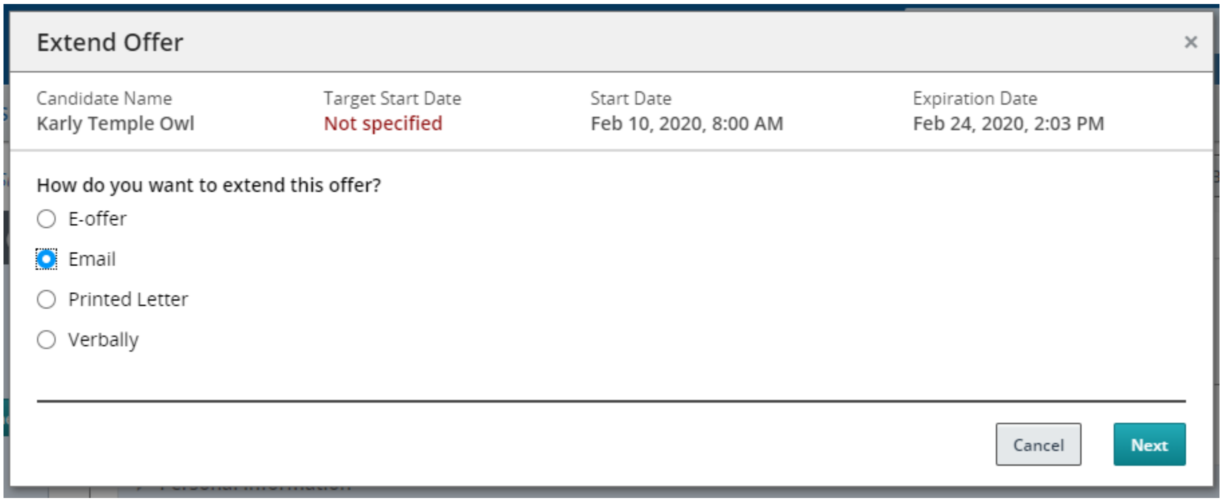
1. Click on the candidate's name in your requisition to open their profile.
2. Go to **More Actions** and select **Extend Offer**.



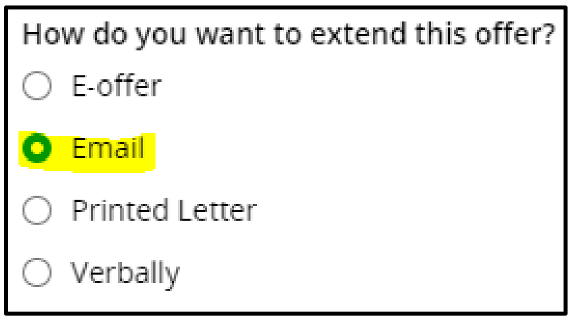
3. Recruiters will see the following pop-up warning box. If you have the proper authority, you may click **Yes** to self-approve the offer. Otherwise, you must route for approval by selecting **Submit Offer for Approval** from **More Actions**.



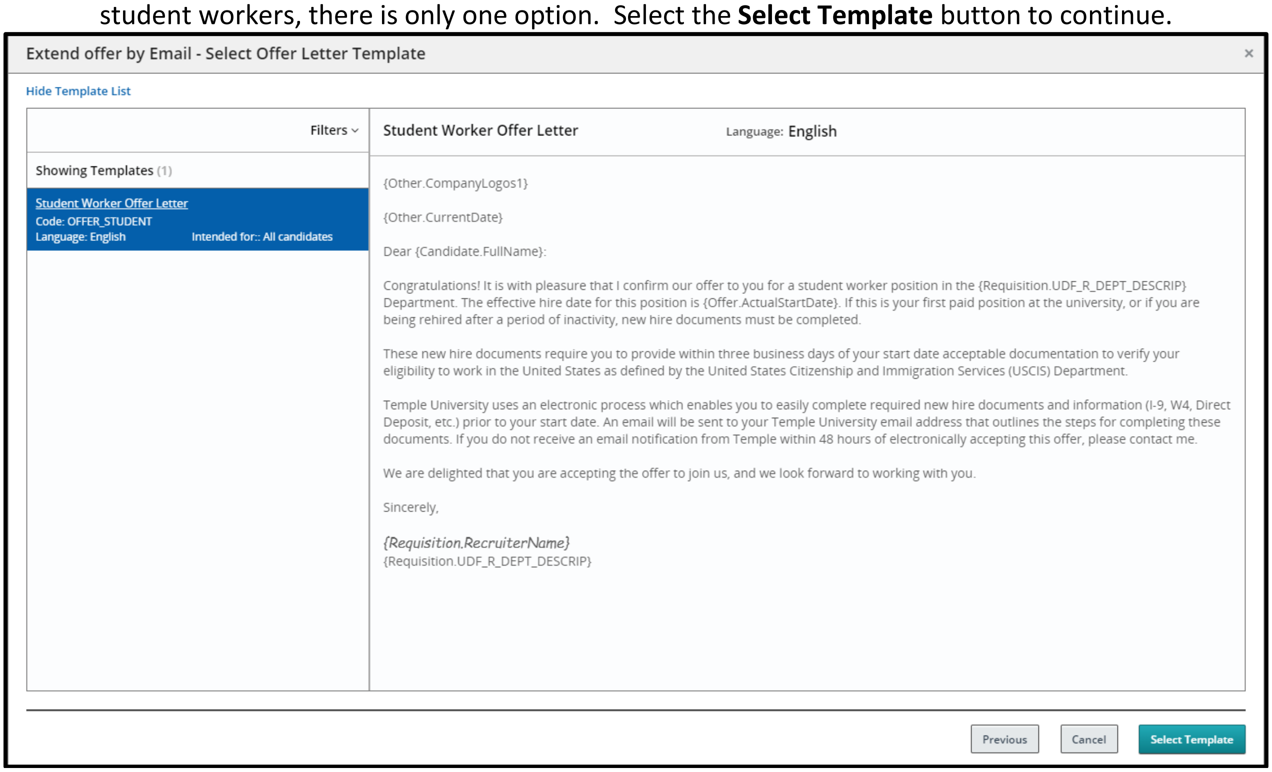
4. An **Extend Offer** dialogue box will appear. Select **E-Mail** in the dialogue box. Then select Next. This is specific to student workers only.



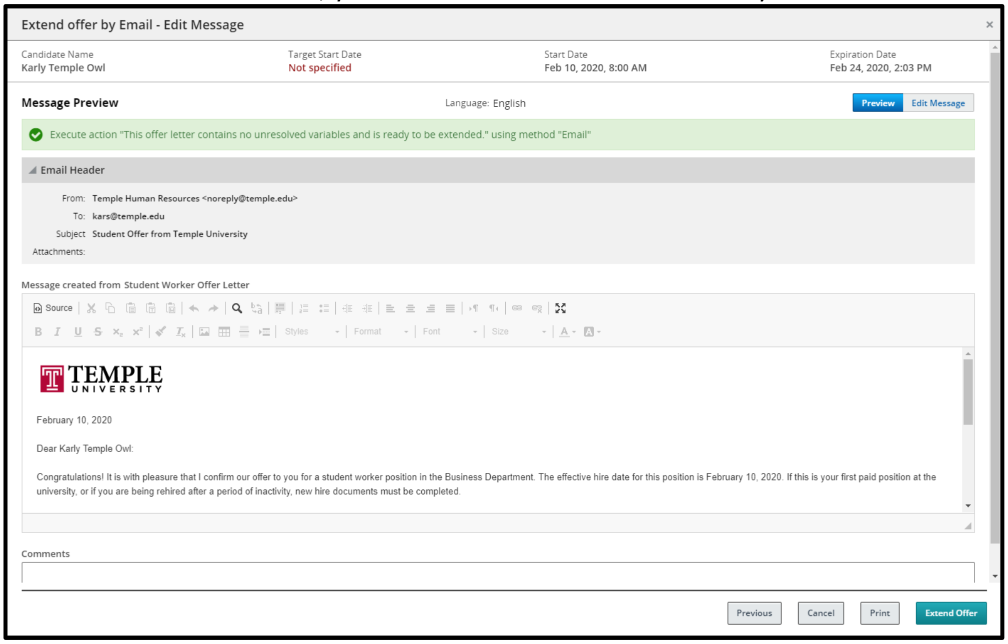
Taleo Tip: Do not select **e-offer** for student workers. This confuses the student worker. **Only select Email.**



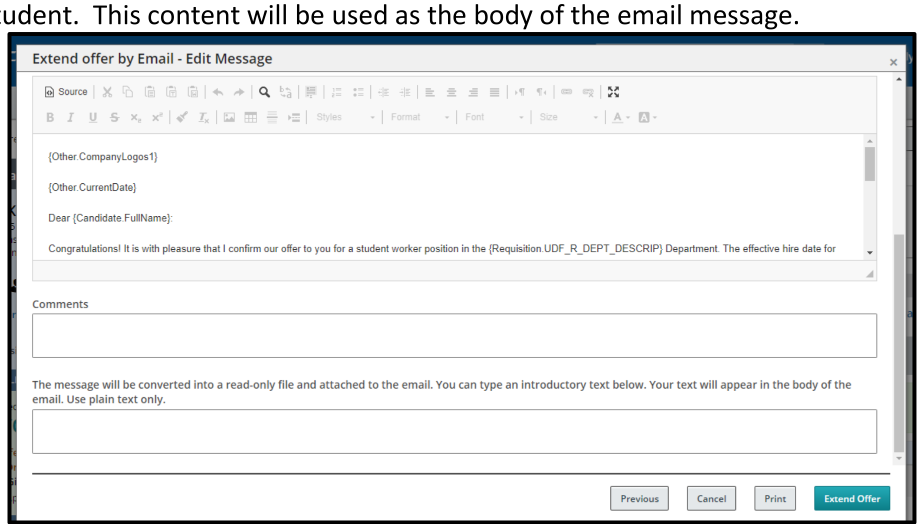
5. To select the Student Worker Offer Letter template, **Select** the template for the offer letter. For student workers, there is only one option. Select the **Select Template** button to continue.



6. You can review the message. You can **Edit Message** to correct **errors** in the email offer letter if needed. If **0** errors are listed, you do not need to review or modify the email offer letter.



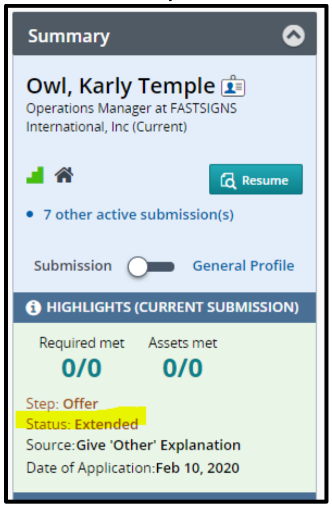
7. After reviewing the letter, scroll to the bottom of the open window. In the box below "**The message will be converted into a read-only**…"– NOT THE COMMENT BOX – enter a message to the student. This content will be used as the body of the email message.



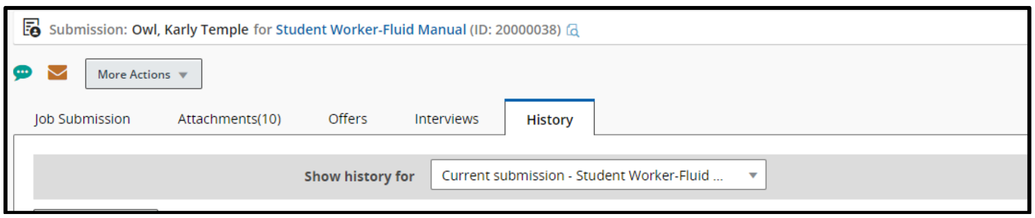
Taleo Tip: The body of the email is a great place to welcome the student to your team, enter any your contact information if the student has any questions about the new hire process, and/or next steps in the process.

8. Then select **Extend Offer** to send your message. You will receive a notification that the offer was sent.

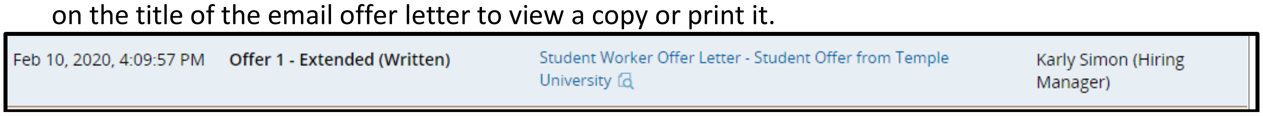
9. The Status on the Candidate record will be updated to **Offer Extended**.



10. To access a copy of the student's email offer letter, click on the **History** tab in the candidate's profile.

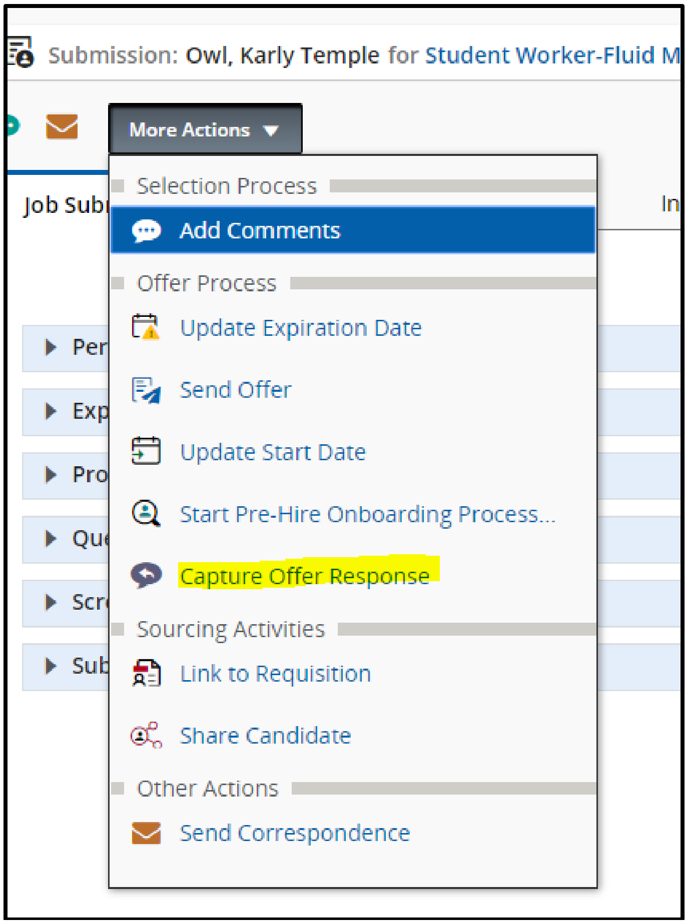


11. You will see the title of the email offer letter in the **History** tab highlighted in blue. You can click on the title of the email offer letter to view a copy or print it.

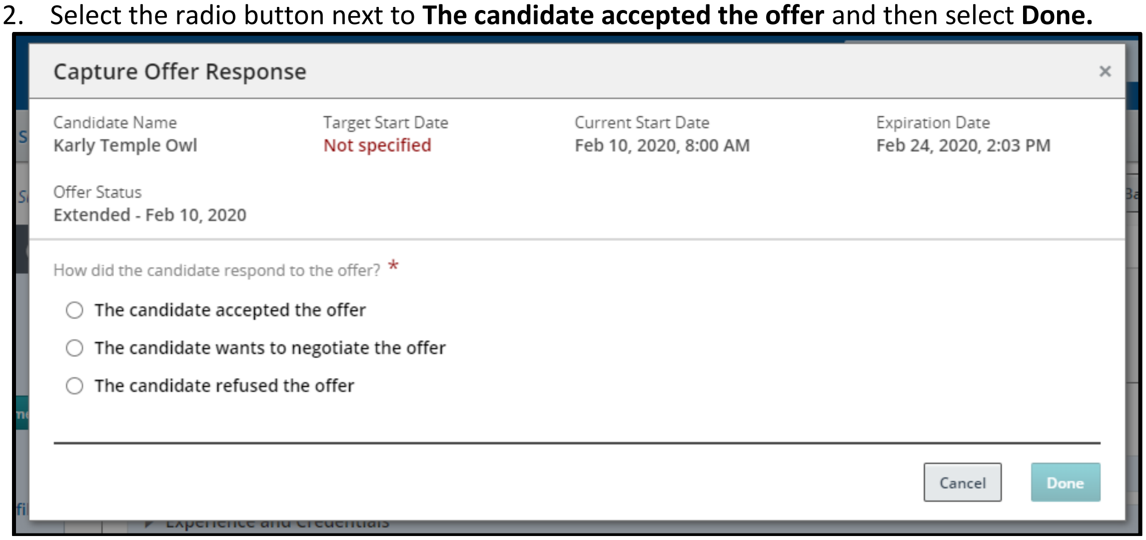


<u>Hiring – Student Worker</u>

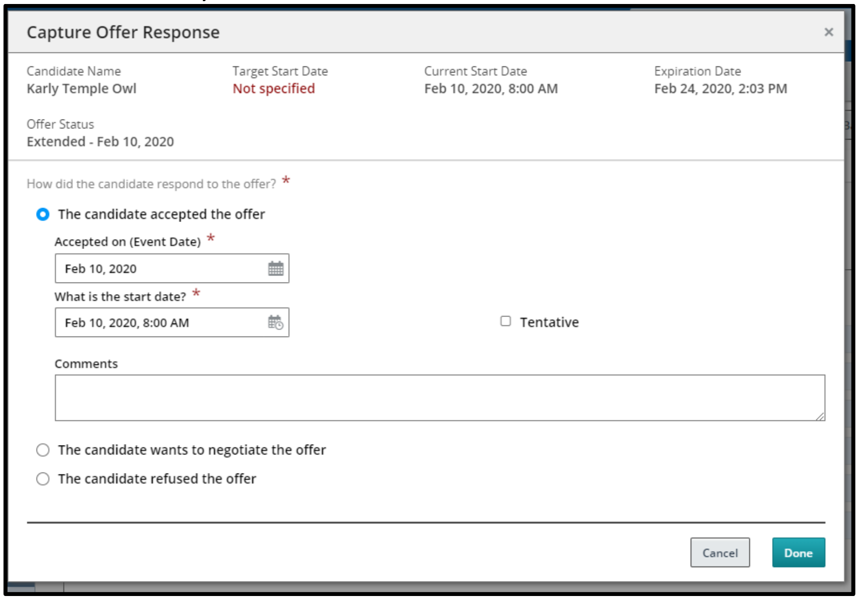
1. Student Workers are not required to respond to the e-mail. They do not accept offers in Taleo. Therefore, assume that they accept the job. Go to **More Actions** and choose **Capture Offer Response**.



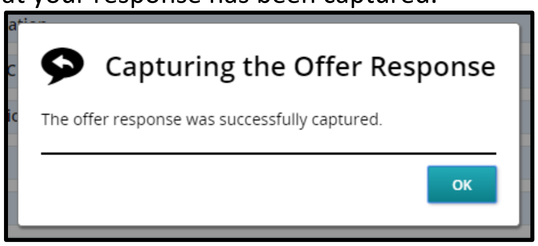
2. Select the radio button next to **The candidate accepted the offer** and then select **Done.**



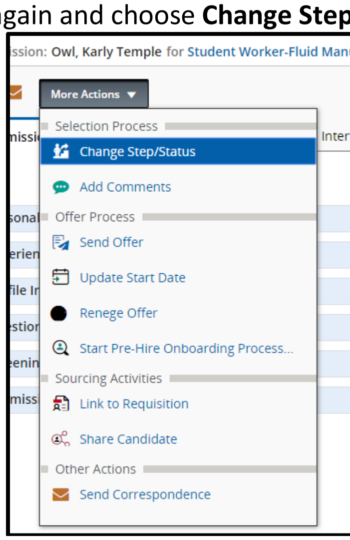
3. You will be asked to verify the start date. Uncheck **Tentative** if it is checked. Select **Done**.



4. You will be notified that your response has been captured.

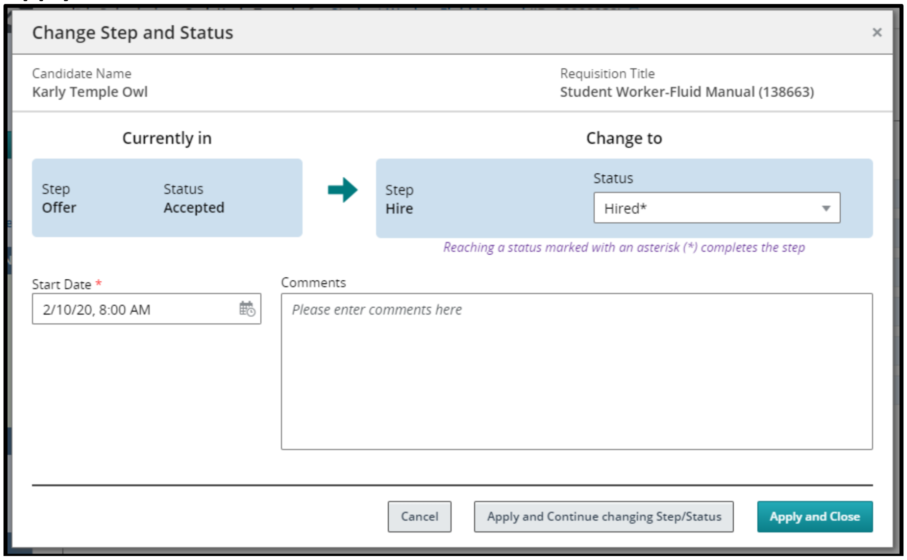


5. Next, click on **More Actions** again and choose **Change Step/Status**.

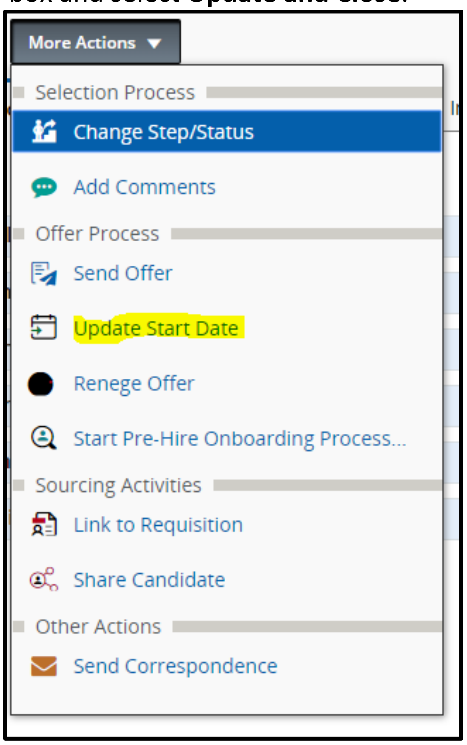


6. The step and status will automatically update to **Hire/Hired**. The update of status to Hired will update Banner overnight. You do not have to change anything in this box.

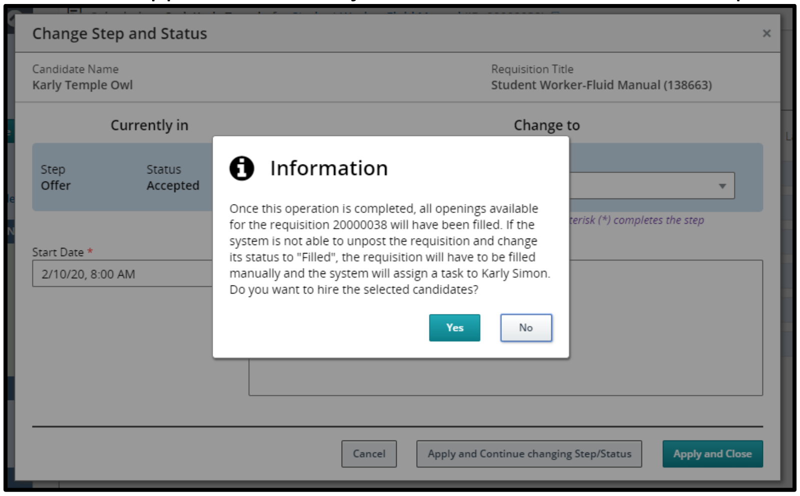
7. Select **Apply and Close** to finalize the hire.



Taleo Tip: If you are not receiving the option of **Change Step/Status**, you may still have the **Tentative** box from the offer grid marked. To change this, go to **More Actions**, then select **Update Start Date**. Uncheck **Tentative** in the pop-up box and select **Update and Close**.



8. If the hire is the last opening on the requisition, a warning will appear notifying you that the hire action will fill the requisition. Filling the requisition will automatically remove the opening from the career site and all applicants on this job will be able to view that the position is filled.



9. Once a requisition is filled, either through the final hire or manually from **More Actions**, all remaining candidates in the **Manager Review** or **Interview** steps will be automatically be sent rejection emails.

Candidate Facing Material – Student Worker

1. This is the e-mail that the student worker receives for the job offer.

Reply Reply All Forward

Mon 2/10/2020 4:10 PM

Temple Human Resources <noreply@temple.edu>

Student Offer from Temple University

To [redacted]

attachment.pdf
6 KB

The details of this message can be viewed by opening the enclosed attachment using Adobe® Reader®. To download this free software, not reply.

2. When the student clicks on the attachment, they can view the offer letter.

TEMPLE UNIVERSITY

February 10, 2020

Dear Karly Temple Owl:

Congratulations! It is with pleasure that I confirm our offer to you for a student worker position in the Business Department. The effective hire date for this position is February 10, 2020. If this is your first paid position at the university, or if you are being rehired after a period of inactivity, new hire documents must be completed.

These new hire documents require you to provide within three business days of your start date acceptable documentation to verify your eligibility to work in the United States as defined by the United States Citizenship and Immigration Services (USCIS) Department.

Temple University uses an electronic process which enables you to easily complete required new hire documents and information (I–9, W4, Direct Deposit, etc.) prior to your start date. An email will be sent to your Temple University email address that outlines the steps for completing these documents. If you do not receive an email notification from Temple within 48 hours of electronically accepting this offer, please contact me.

We are delighted that you are accepting the offer to join us, and we look forward to working with you.

Sincerely,

Karly Simon
Business