

# Taleo Talent Management Training



May, 2016

# Agenda

- Foundation Data Explained (SmartOrg)
- Taleo Overview and Navigation
- Requisition Management
- ACE Prescreening
- Posting and Sourcing
- Candidate Experience
- Candidate Files

# Agenda - Continued

- Candidate Management
- Candidate Search
- Candidate Selection Workflow
- Pre-Hire Process
- Embedded Reports
- Offer Management
- Hire a Candidate
- Transitions (Onboarding)

# TALEO OVERVIEW AND NAVIGATION

# Lesson Goals

- Examine the Concept of SmartOrg Data Structure (OLF)
- Navigate through the Recruiting Center
- My Setup
- Review Important Browser Settings

# SmartOrg

Your Organization Defined



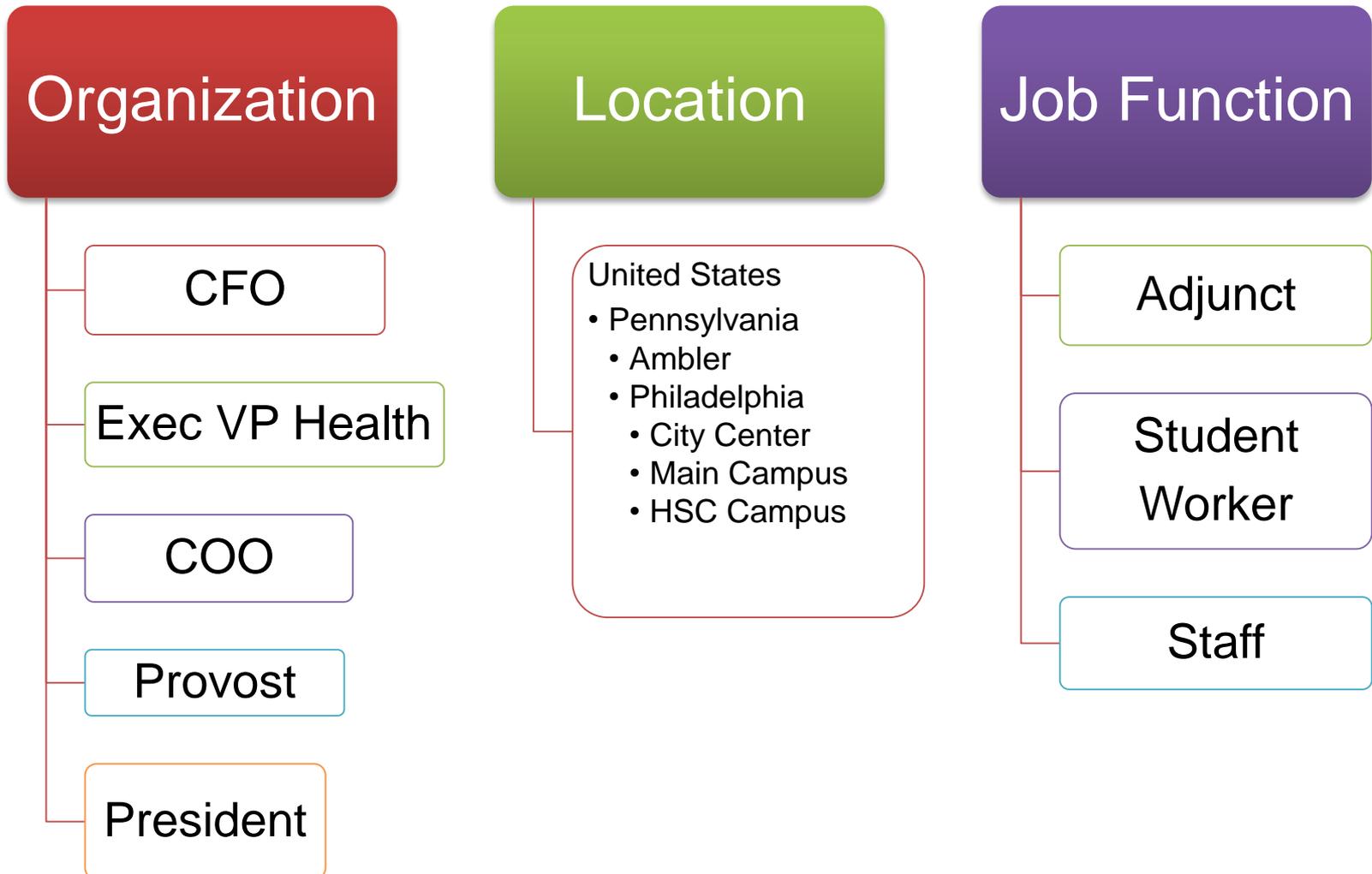
**O**rganizational  
Structure

**L**ocations

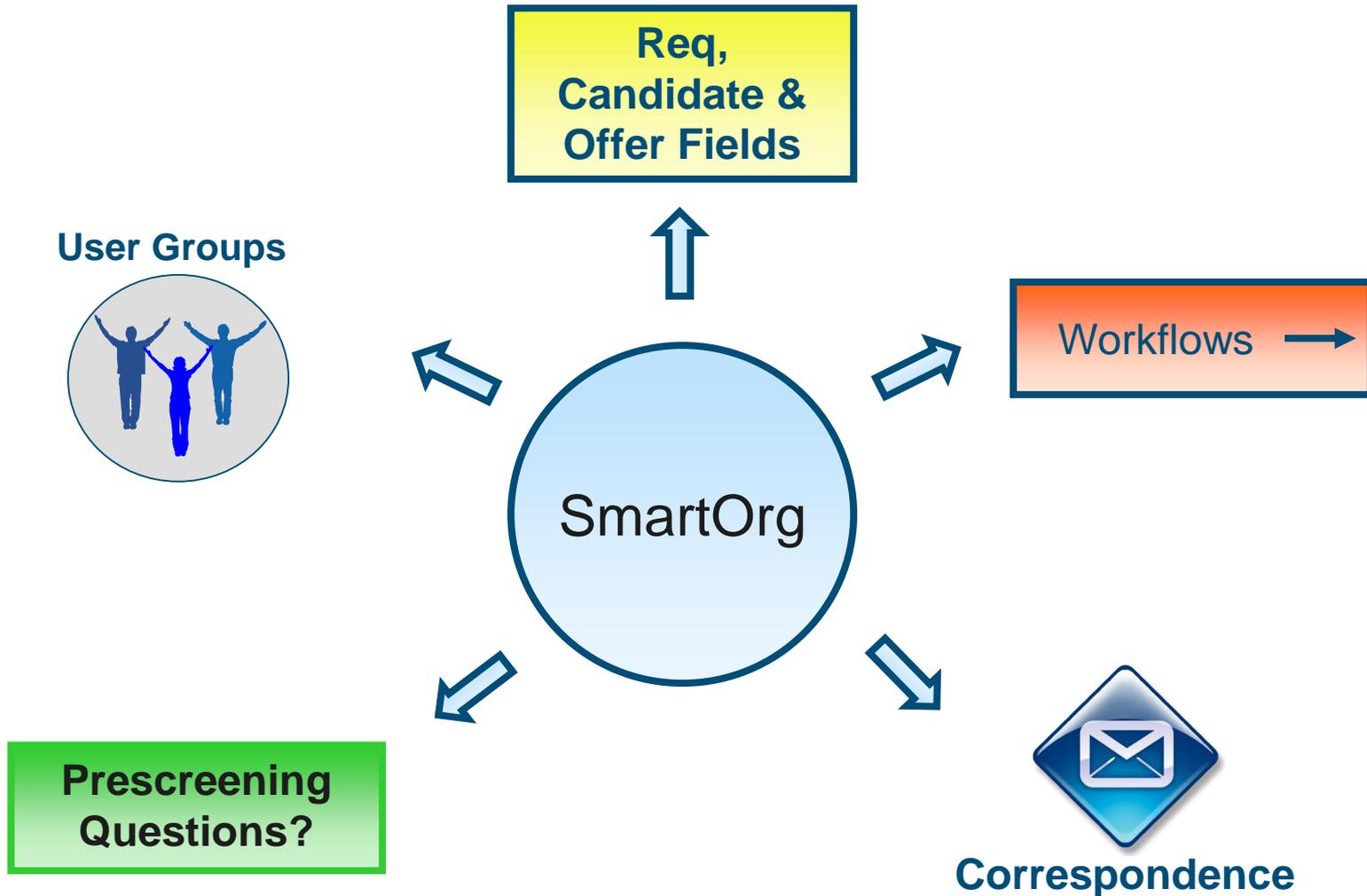
**J**ob **F**unctions

*“contextualization”*

# SmartOrg at Work - OLF



# SmartOrg at Work



# Welcome Page



Access Recruiting  
Center from here...

Rhonda Recruiter | [Home](#) | [Resources](#) | [Talent Grid](#) | [Sign Out](#)

 **Recruiting** Oracle Business Intelligence Configuration

## Centers

**Recruiting**

Oracle Business Intelligence  
Configuration

## Quick Access

Onboarding (Transitions)  
Requisitions  
Candidates

...or here

## Welcome to your Talent Management suite!

This is your Welcome Center. To navigate to an application, click the corresponding tab in the menu bar above or the corresponding link in the Centers section on the left. You can also jump directly to related processes by clicking the Quick Access links on the left.

Additional resources are available in the top right corner of the screen.

As you navigate through the Talent Management suite, remember that you can always click "Home" at the top of the screen in order to return to the Welcome Center.

# Center Stage

To return to the Welcome Center or Table of Contents, click either the Home graphic/link.

Recruiting | **Tasks** | Requisitions | Candidates | Offers | Reports

Search Candidate [ ] [ ] Advanced Search Search Queries

The Search area allows you to perform various types of searches for both candidates and requisitions.

The Navigation Bar can access the primary areas of the Recruiting Center.

The Refresh button is used to update the information in Channels

Communications

- Customer Support
  - Need help? Contact [taleohelp@temple.edu](mailto:taleohelp@temple.edu)
- Documentation Center
  - Links to the latest Taleo Recruiting Release Notes and the Taleo Knowledge Exchange web site. [Documentation](#)
- Resource Center
  - Informational links within the hiring cycle, articles, research content, and more. [Resource Center](#)

## Welcome Rhonda Recruiter

Welcome to the Recruiting Center.

Show information for requisitions:

I own

### Requisitions

Create Requisition...

	▲	Total
Job Requisitions		
Draft	1	2
Pending	0	1
Open	8	19
Canceled (Since Nov 1, 2015)	0	2
Filled (Since Nov 1, 2015)	0	14

### Tasks

	▲	Total
Recruiting		
Tasks assigned to me	17	18
All staffing tasks	17	32
Requisitions		
To be completed	0	2
Approve Requisition	1	1
Ready for sourcing	1	3
Candidates		
Confirm Employee Presence	1	4
Duplicate Check	14	21
Offers		
Approve Offer	0	1
Onboarding (Transitions)		
Due Today		0
Overdue		
My Opened Tasks		

### Candidates

Create Candidate...

	▲	Total
In Selection Process	33	49
- ACE	8	16
- New	8	10
- Manually Matched	15	18

The Attention Flag will indicate a count of new or modified records.

Channels give you quick views and links to perform a wide range of recruiting activities

The Communications panel contains information and links to training and documents.

# Hiring Manager View



**TEMPLE**  
UNIVERSITY

Mike Manager | [Home](#) | [Resources](#) | [Sign Out](#)





Home
Recruiting
Tasks
Requisitions
Candidates
Offers
Libraries

## Welcome Mike Manager

Welcome to the Recruiting Center.

Show information for requisitions:  
 ↻



**Create a Requisition**  
Create a requisition for your job opening using a template or from scratch.



**View Requisitions**  
View detailed information about your requisitions.



**View Candidates**  
View detailed information about your candidates.

### Tasks ≡

Recruiting	🚩	Total
<a href="#">Tasks assigned to me</a>	1	1
<a href="#">All staffing tasks</a>	1	19
<b>Requisitions</b>		
<a href="#">To be completed</a>	0	3
<a href="#">Approve Requisition</a>	0	2
<a href="#">Ready for sourcing</a>	0	4
<b>Candidates</b>		
<a href="#">Confirm Employee Presence</a>	0	2
<a href="#">Duplicate Check</a>	0	7
<b>Offers</b>		
<a href="#">Approve Offer</a>	1	1

☰
🗨️
📄
?

### Communications

▼ Customer Support

Need help? Contact [taleohelp@temple.edu](mailto:taleohelp@temple.edu)

▼ Documentation Center

Links to the latest Taleo Recruiting Release Notes and the Taleo Knowledge Exchange web site.  
[Documentation](#)

▼ Resource Center

Informational links within the hiring cycle, articles, research content, and more.  
[Resource Center](#)

Note that a more simple Center Stage is configured for Hiring Managers



11

# Lists and Quick Filters

Recruiting Tasks Requisitions Candidates Offers Reports Libraries

**Requisitions**

Create Requisition...

Click any column header to sort the list. You will see a sort number and up or down arrow indicating the selected sort column.

Quick Filters

Show requisitions:  
I own

Include inactive requisitions

▼ Status

Draft

Pending

Open

On Hold

Primary Location

Job Field

Organization

Posting Title

Advanced Filters

The Quick Filters are always in the same place, but change depending on what list you are viewing.

Advanced Filters option which will allow you to apply additional filtering criteria to your list.

	Title	ID	1	Status	Status Detail	Recruiter	Hiring Manager
0	Staff Job Function Test	HUM000001		Open	Approved (Ready)	Tellez Alex	Manager Mike
0	Academic Advisor I - at	16000294		Open	Approved (Ready)	Recruiter Rhonda	Manager Mike
2	Adjunct Faculty - at	16000027		Open	Expired (2/11/16, 11:59 PM)	Recruiter Rhonda	Manager Mike
2	Evening Supv BR	16000024		Open	Posted (Ongoing)	Reeder Bonny	Manager Bonny
3	Academic Advisor	16000022		Open	Posted (Ongoing)	Recruiter Lisa	Manager Lisa
				Open	Posted (Ongoing)	Recruiter Marion	Manager Marion
				Open	Posted (Ongoing)	Recruiter Rhonda	Manager Mike
				Open	Posted (Ongoing)	Recruiter Rhonda	Manager Mike
				Open	Posted (Ongoing)	Recruiter Laurie	Manager Laurie
3	Nurse Practitioner- KW	15000044		Open	Expired (2/29/16, 11:59 PM)	Recruiter Karen	Manager Karen
0	Adjunct Faculty -ldb2	15000042		Draft	-	Recruiter Laurie	Manager Laurie
4	manager	15000041		Open	Expired (4/1/16, 11:59 PM)	Recruiter Kimberly	Manager Kimberly
				Open	Posted (Ongoing)	Recruiter Greg	Manager Greg
				Open	Expired (12/2/15,	Manager Sunaniax	Recruiter Sunaina

1 to 22 out of 22 requisitions

# Show information for Filter

Welcome Rhonda Recruiter

Welcome to the Recruiting Center.

Show information for requisitions:

I own

I collaborate on

I own or collaborate on

In my coverage area, I own or collaborate on

Main Group

All requisitions

Pending

Open

Create Requisition

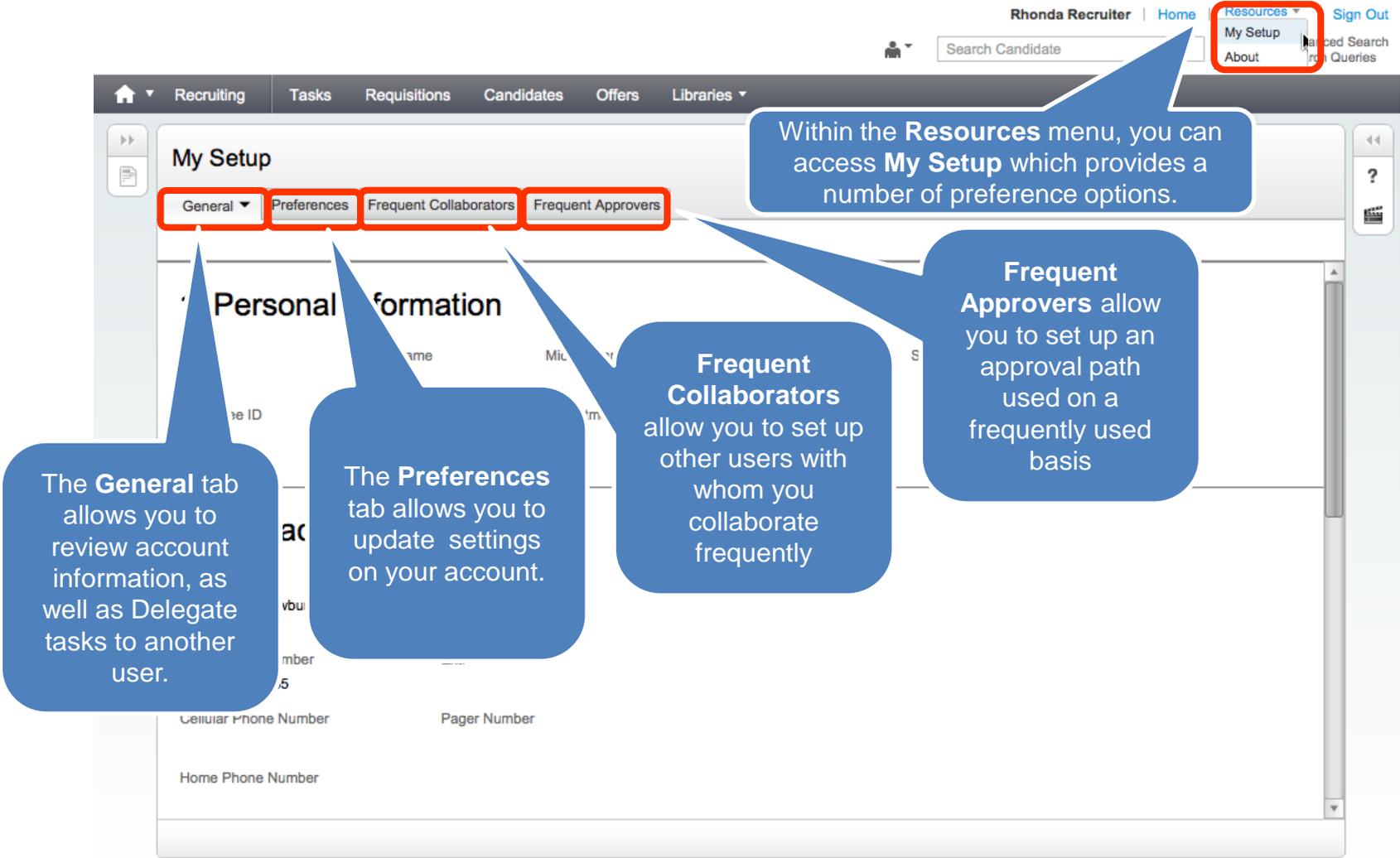
1	2
0	1
8	

This filter is on various screens.

Coverage Area = All in your Organization(s), Job Function(s), and Location(s)

ALL = See all you have permission to view.

# My Setup



The screenshot shows the 'My Setup' page in a web application. At the top right, the user is identified as 'Rhonda Recruiter' with a 'Home' link and a 'Resources' dropdown menu. The 'Resources' menu is open, showing 'My Setup' and 'About' options. Below this is a search bar for 'Search Candidate' and a 'Sign Out' link. A navigation bar contains links for 'Recruiting', 'Tasks', 'Requisitions', 'Candidates', 'Offers', and 'Libraries'. The main content area is titled 'My Setup' and has four tabs: 'General', 'Preferences', 'Frequent Collaborators', and 'Frequent Approvers'. The 'General' tab is selected, showing 'Personal Information' with fields for 'Name', 'Middle Name', 'Email', 'Phone Number', 'Cellular Phone Number', 'Pager Number', and 'Home Phone Number'. Four blue callout boxes provide details about each tab: 'General' (review account info and delegate tasks), 'Preferences' (update account settings), 'Frequent Collaborators' (set up other users for frequent collaboration), and 'Frequent Approvers' (set up an approval path).

Within the **Resources** menu, you can access **My Setup** which provides a number of preference options.

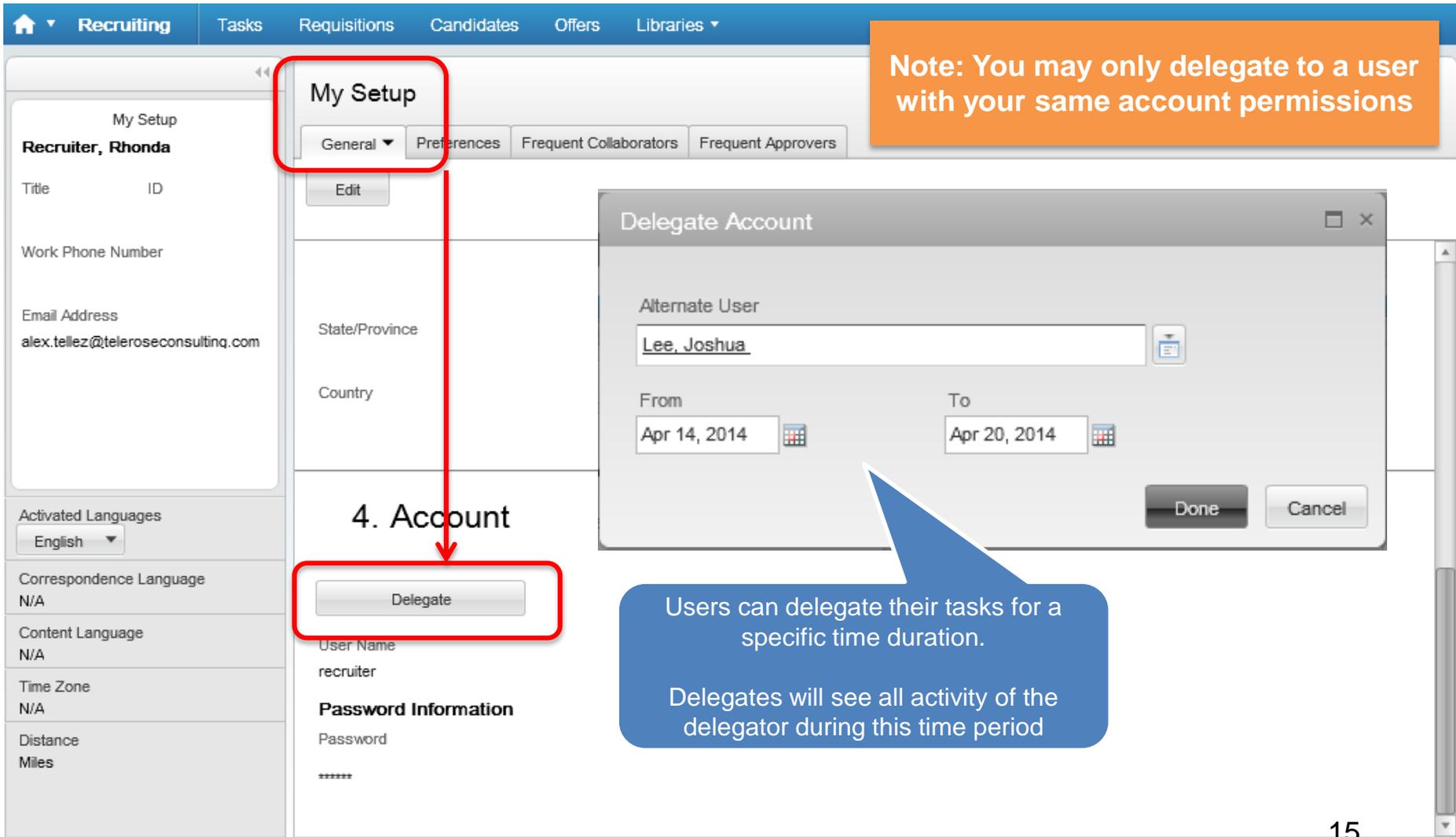
The **General** tab allows you to review account information, as well as Delegate tasks to another user.

The **Preferences** tab allows you to update settings on your account.

**Frequent Collaborators** allow you to set up other users with whom you collaborate frequently

**Frequent Approvers** allow you to set up an approval path used on a frequently used basis

# Delegate



**Recruiting** Tasks Requisitions Candidates Offers Libraries

**My Setup**  
Recruiter, Rhonda  
Title ID  
Work Phone Number  
Email Address alex.tellez@telroseconsulting.com  
State/Province  
Country

Activated Languages English  
Correspondence Language N/A  
Content Language N/A  
Time Zone N/A  
Distance Miles

4. Account  
Delegate

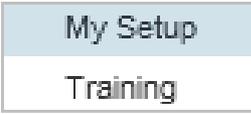
User Name recruiter  
**Password Information**  
Password \*\*\*\*\*

**Note: You may only delegate to a user with your same account permissions**

**Delegate Account**  
Alternate User Lee, Joshua  
From Apr 14, 2014 To Apr 20, 2014  
Done Cancel

Users can delegate their tasks for a specific time duration.  
Delegates will see all activity of the delegator during this time period

# Navigation Tips

	<p>Don't use the Back and Forward buttons in your browser</p>
	<p>Don't use the browser's Refresh or Stop buttons</p>
	<p>When pointing to most options your selection will be colored or darkened in some way prior to clicking on it.</p>
	<p>Access tooltips by pointing to a button, icon, tab etc. for more information.</p>
	<p>Always log out of the system before closing the browser window</p>

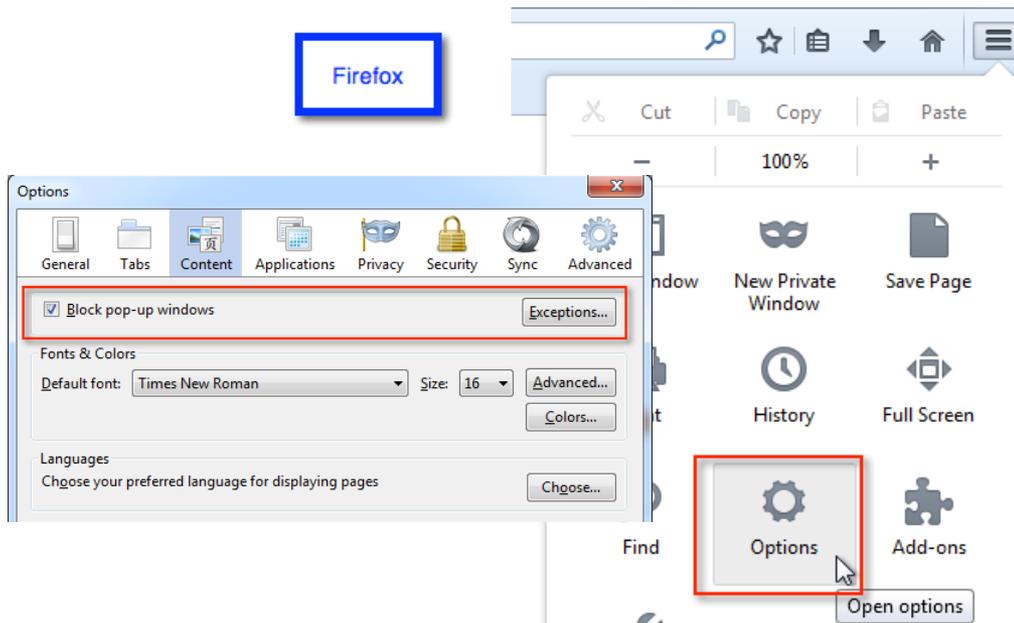
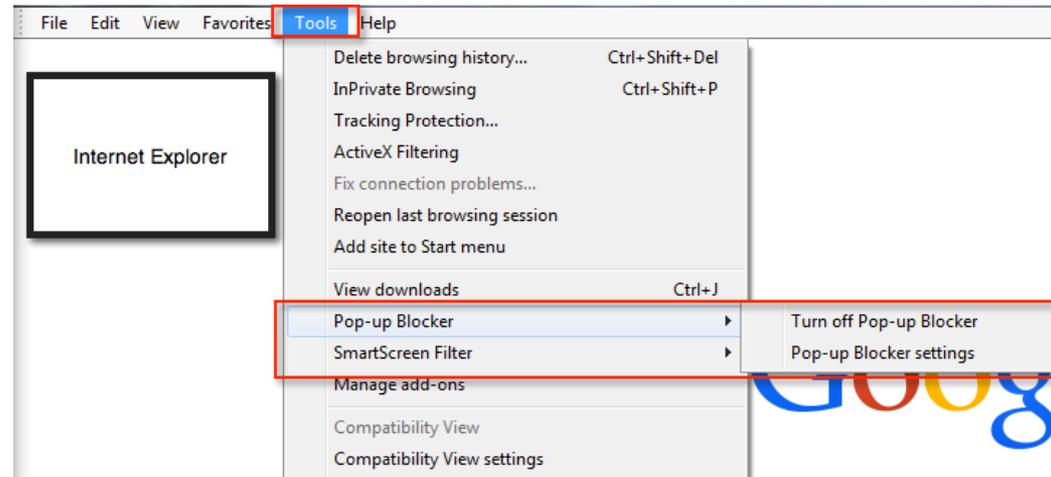


# Browser Settings

- **Zoom Level:** Make sure your zoom level is at 100%
- **Full Screen:** You may, at times, want to view Taleo in Full Screen Mode by using F11 on most web browsers
- **Cache Settings:** Taleo will load faster AFTER your 1<sup>st</sup> session if you change your cache settings to 250 to 500 MB:
  - Internet Explorer:  
Internet Options>General>Browsing History>Settings>Disk Space
  - Firefox:  
Options>Advanced>Network>Override automatic cache management
  - Chrome:  
N/A

# Pop-up Blocker

Ensure to either disable pop-up blockers or allow (Temple.taleo.net in Production)



# Getting Started

- System Access:
  - Sign into TUportal
  - Under TUapplications
  - [Taleo Talent Management System](#)

# REQUISITION MANAGEMENT

# Lesson Goals

## Manage Requisitions

- Create Requisitions
- Requisitions Approval
- View Requisition Components
- View and Filter Requisition Lists

# Create Requisition

Welcome Rhonda Recruiter

Welcome to the Recruiting Center.

Show information for requisitions:

I own

## Requisitions

Create Requisition...

Job Requisitions

		Total
Draft	1	2
Pending	0	1
Open	8	19
Canceled (Since Nov 1, 2015)	0	2
Filled (Since Nov 1, 2015)	0	14

## Candidates

HR/Recruiters

Welcome Mike Manager

Welcome to the Recruiting Center.

Show information for requisitions:

I own or collaborate on

Create a Requisition

Create a requisition for your job opening using a template or from scratch.

View Requisitions

View detailed information about your requisitions

Hiring Managers

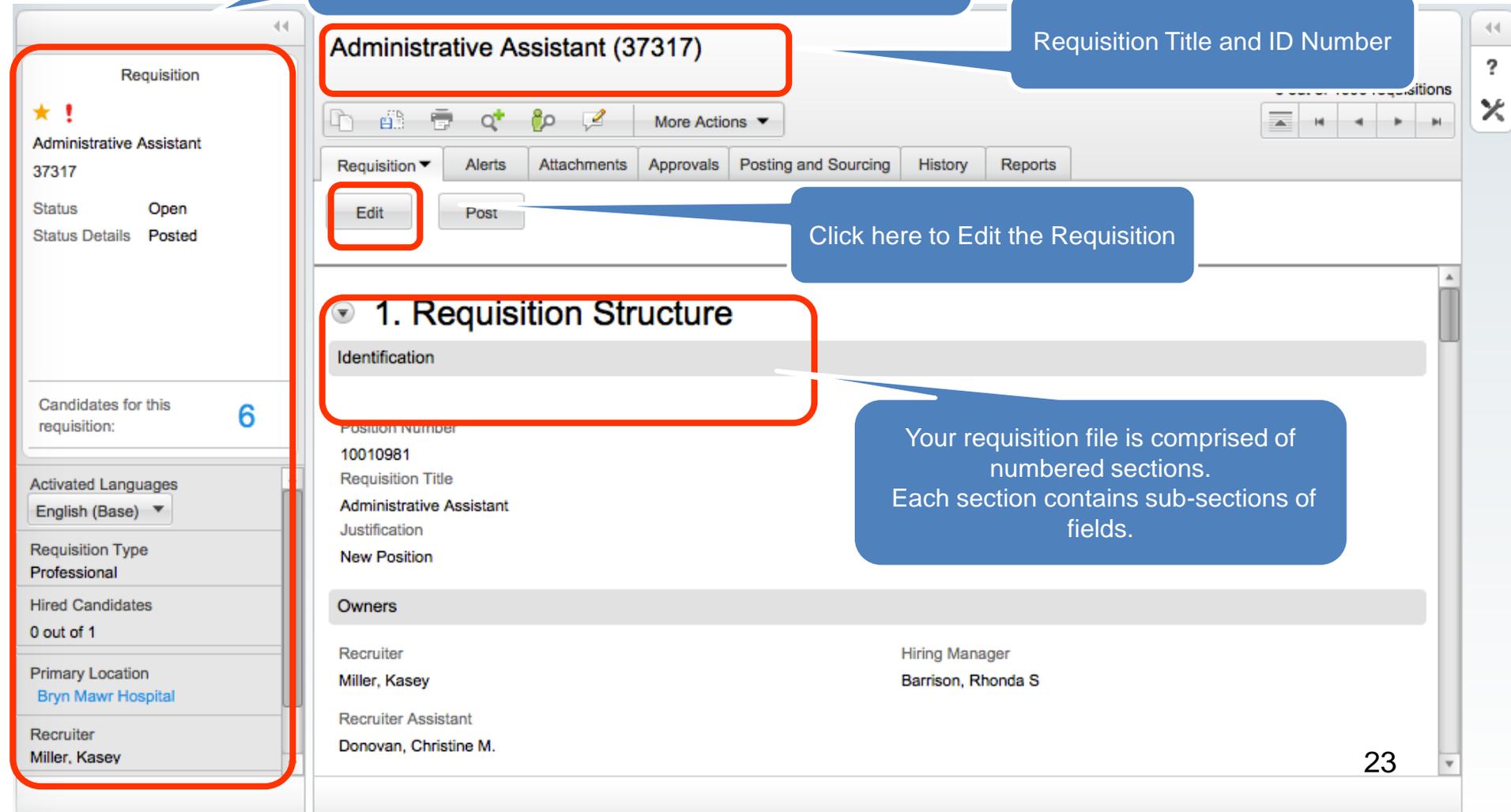
# Requisition File – View Mode

Summary, including the current status, the number, and the link to candidates attached to the requisition, departments, and location, etc.

Requisition Title and ID Number

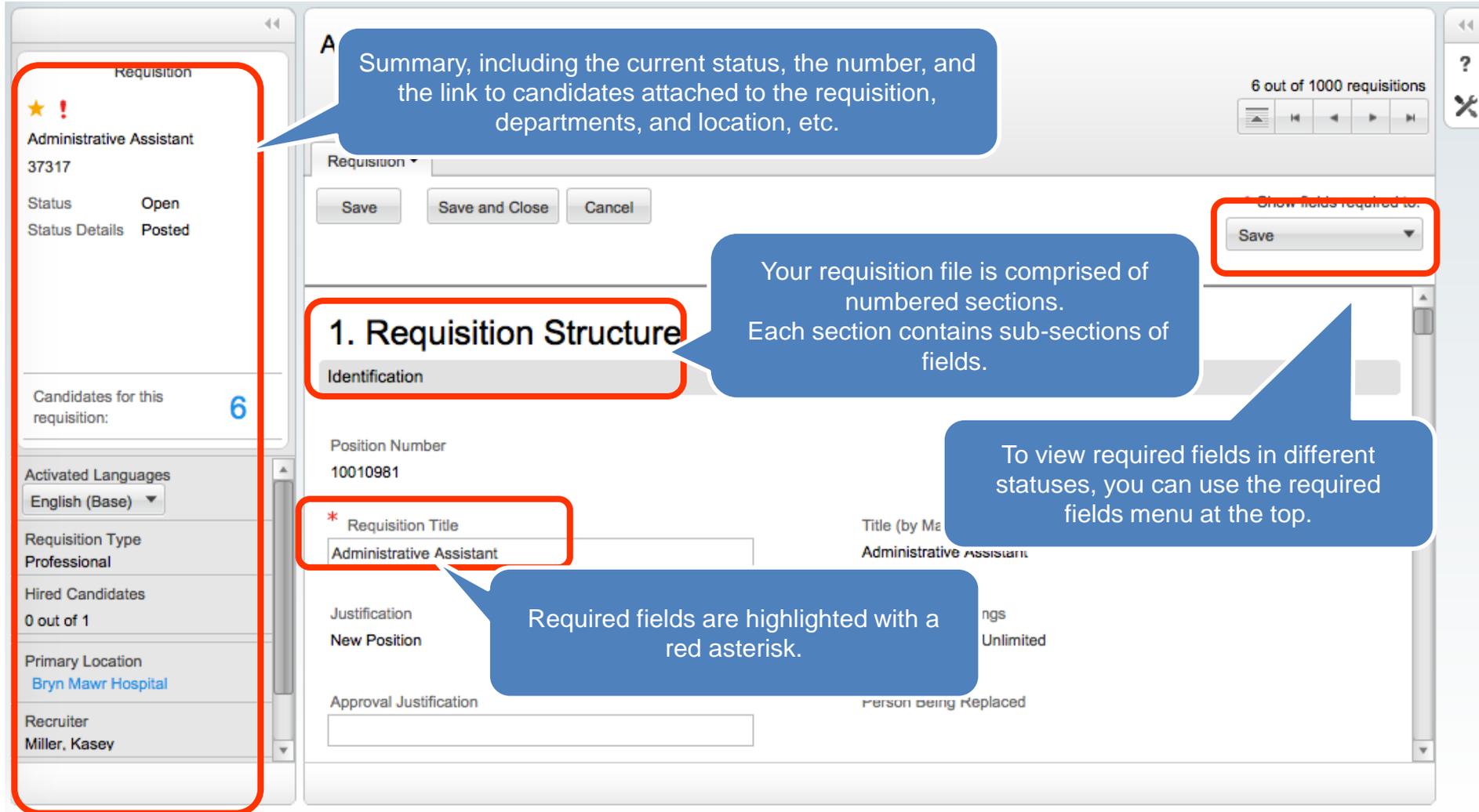
Click here to Edit the Requisition

Your requisition file is comprised of numbered sections. Each section contains sub-sections of fields.



The screenshot shows a web interface for viewing a requisition file. On the left is a sidebar with a 'Requisition' section containing a star icon, a warning icon, and the title 'Administrative Assistant 37317'. Below this are status indicators for 'Open' and 'Posted', and a 'Candidates for this requisition' count of 6. The main content area displays the title 'Administrative Assistant (37317)' in a red-bordered box. Below the title is a toolbar with icons for document, calendar, printer, search, people, and edit, along with a 'More Actions' dropdown. A navigation bar contains tabs for 'Requisition', 'Alerts', 'Attachments', 'Approvals', 'Posting and Sourcing', 'History', and 'Reports'. Below the tabs are 'Edit' and 'Post' buttons, with the 'Edit' button highlighted in a red-bordered box. The main content area is divided into sections: '1. Requisition Structure' (highlighted in a red-bordered box), 'Identification', and 'Owners'. The 'Identification' section lists fields: Position Number (10010981), Requisition Title (Administrative Assistant), Justification (New Position), and Recruiters (Miller, Kasey and Donovan, Christine M.). The 'Owners' section lists Hiring Manager (Barrison, Rhonda S).

# Requisition File - Edit Mode



**Requisition**  
 Administrative Assistant  
 37317  
 Status: Open  
 Status Details: Posted

6 out of 1000 requisitions

Save Save and Close Cancel

Show fields required to: Save

**1. Requisition Structure**  
 Identification

Candidates for this requisition: 6

Activated Languages: English (Base)

Requisition Type: Professional

Hired Candidates: 0 out of 1

Primary Location: Bryn Mawr Hospital

Recruiter: Miller, Kasey

Position Number: 10010981

\* Requisition Title: Administrative Assistant

Title (by Manager): Administrative Assistant

Justification: New Position

Approval Justification: Person being replaced

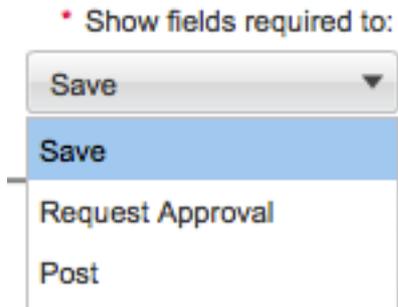
Required fields are highlighted with a red asterisk.

Your requisition file is comprised of numbered sections. Each section contains sub-sections of fields.

To view required fields in different statuses, you can use the required fields menu at the top.

Summary, including the current status, the number, and the link to candidates attached to the requisition, departments, and location, etc.

# Required Fields



This filter will allow you to see which fields are required for different statuses of the Requisition process

**Save:** Required for you to save the requisition in Draft Status

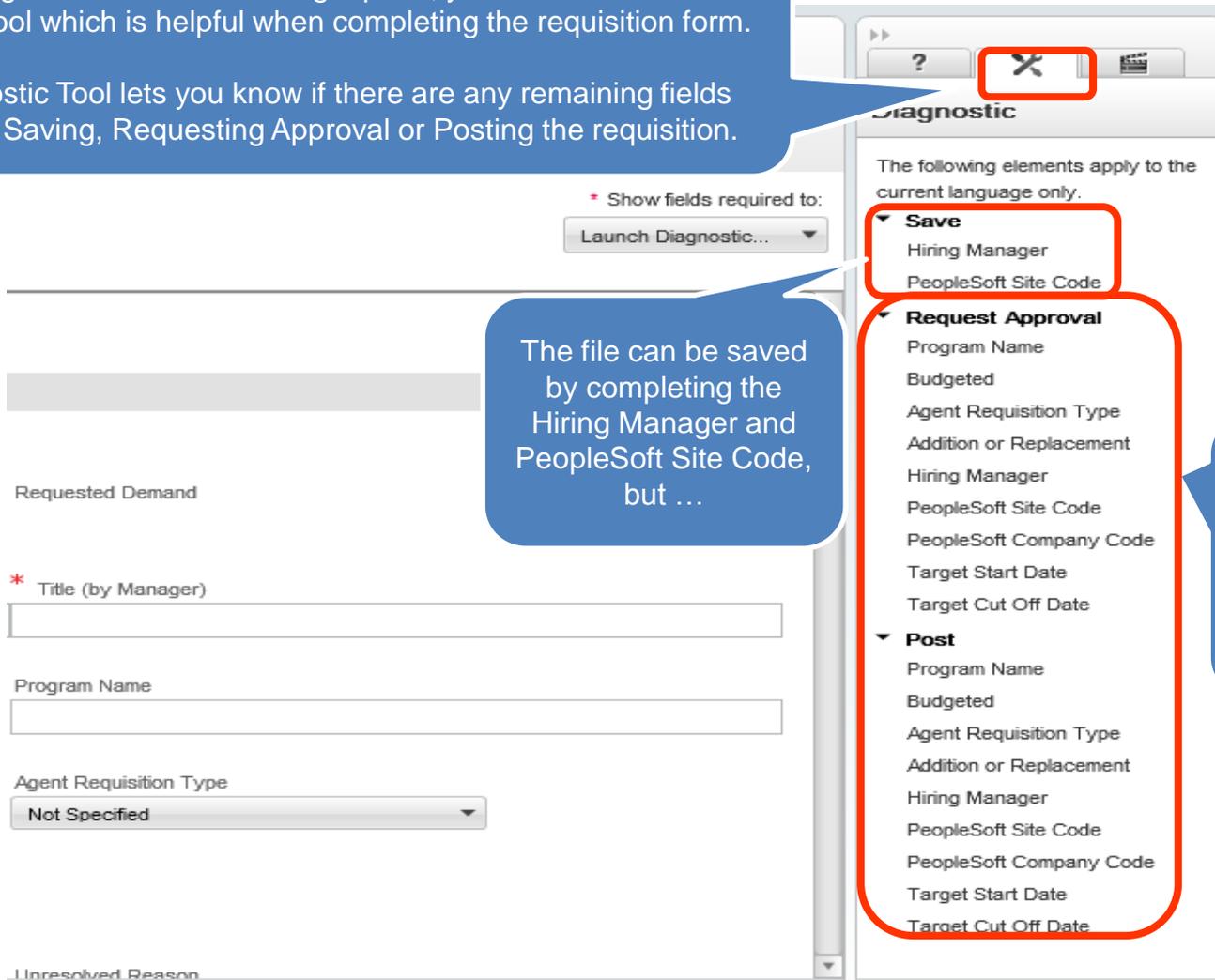
**Request Approval:** Required to open or route the Requisition for approval

**Post:** Required to post the requisition to career sections

# Diagnostic Tool

By clicking the Tools tab on the right pane, you can access the Diagnostic Tool which is helpful when completing the requisition form.

The Diagnostic Tool lets you know if there are any remaining fields required for Saving, Requesting Approval or Posting the requisition.

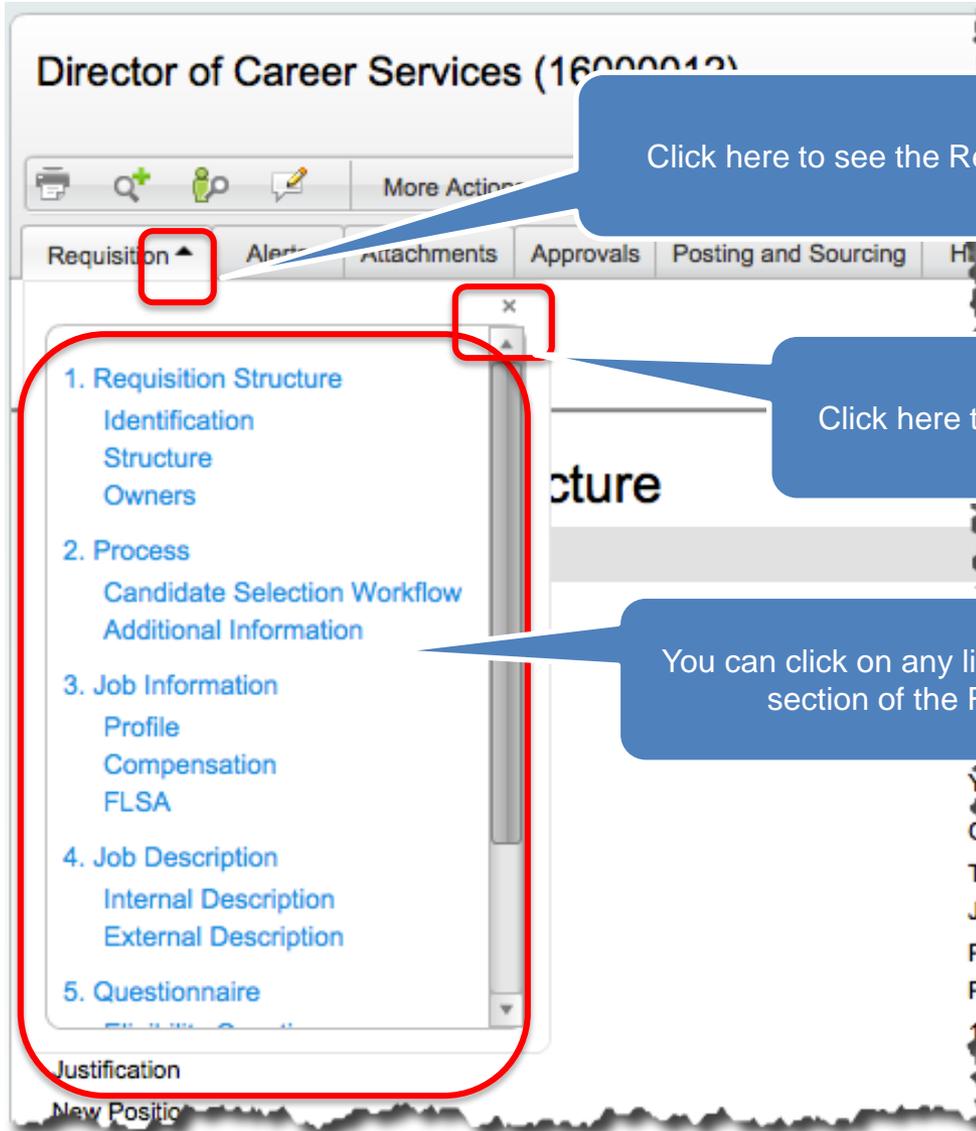


The screenshot shows a web interface with a 'Diagnostic' tool window. The tool lists required fields for three actions: Save, Request Approval, and Post. The 'Save' section is highlighted with a red box and includes 'Hiring Manager' and 'PeopleSoft Site Code'. The 'Request Approval' and 'Post' sections are also highlighted with a red box and include a list of fields: Program Name, Budgeted, Agent Requisition Type, Addition or Replacement, Hiring Manager, PeopleSoft Site Code, PeopleSoft Company Code, Target Start Date, and Target Cut Off Date. A 'Launch Diagnostic...' button is visible in the interface.

The file can be saved by completing the Hiring Manager and PeopleSoft Site Code, but ...

... several other fields must be completed before it can be routed for approval or posted.

# Requisition Table of Contents



Director of Career Services (16000012)

More Actions

Requisition Alerts Attachments Approvals Posting and Sourcing

- 1. Requisition Structure
  - Identification
  - Structure
  - Owners
- 2. Process
  - Candidate Selection Workflow
  - Additional Information
- 3. Job Information
  - Profile
  - Compensation
  - FLSA
- 4. Job Description
  - Internal Description
  - External Description
- 5. Questionnaire

Justification

New Position

Click here to see the Requisition Table of Content

Click here to hide the Table of Contents

You can click on any link to direct to that section of the Requisition

# Large Selection Fields

Primary Location



Large Selection Fields can be identified when you see the Selector Button to the right of the field

Primary Location

sea

You may type 3 or more characters to leverage Taleo's Suggestive Text features – OR –

- United States > California > Seal Beach
- United States > Maryland > Seabrook
- United States > Oregon > Seaside
- United States > Washington > SeaTac
- United States > Washington > Seattle



You may click the Selector Button to use Taleo's filtering features

Location Selector

Location Selector

Country: All

Quick Filters

Country:

State/Province:

City:

Keyword:

Address:

Country	State/Province	City	
United States	Washington	Quincy	Select
United States	Washington	Redmond	Select
United States	Washington	Renton	Select
United States	Washington	SeaTac	Select
United States	Washington	Seattle	Select
United States	Washington	Spokane	Select
United States	Washington	Stevenson	Select
United States	Washington	Sumas	Select
United States	Washington	Tacoma	Select
United States	Washington	Tukwila	Select
United States	Washington	Yessoupe	Select

30 locations available

# Owners and Collaborators

## Owners

\* Bus.Partner/Dept.Recruiter

Recruiter, Rhonda

Hiring Manager

Manager, Mike

Talent Acquisition Specialist

Tellez, Alex

Owners typically have primary responsibility to view and manage requisition and candidates

## Collaborators

Modify

Add Frequent Collaborators

User can add/remove Collaborators or add Frequent Collaborators created in My Setup

First Name

Last Name

Email

Title

Calvin

Hare

calvin\_hare@newburyconsulting.com

Collaborators are other system users that may play a role in viewing and/or managing requisition and candidates.

Permissions determine what users can see and do when they are an Owner vs. a Collaborator

# Job Description

- Paste: Works well from a source of plain text
- Paste as Text: Equivalent of pasting from MS Notepad
- Paste from Word: Useful if trying to paste from MS Word and would like to keep some minor formatting, such as bold or bullets

\* Description - External

The image shows a screenshot of a rich text editor toolbar. Several features are highlighted with red boxes and callouts:

- Source:** A callout points to the 'Source' button, stating: "Reveals HTML/CSS code. Administrator may make HTML/CSS edits".
- Paste Options:** A callout points to the 'Paste', 'Paste as Text', and 'Paste from Word' buttons, containing the text: "Paste: Works well from a source of plain text", "Paste as Text: Equivalent of pasting from MS Notepad", and "Paste from Word: Useful if trying to paste from MS Word and would like to keep some minor formatting, such as bold or bullets".
- Font Settings:** A callout points to the 'Font' dropdown (set to 'Arial') and the 'Size' dropdown, stating: "Font Type, Size, Color and Background Color".
- Hyperlinks:** A callout points to the 'Add, Modify or Remove Hyperlinks' button, stating: "Add, Modify or Remove Hyperlinks".
- Enlarged View:** A callout points to the 'Enlarged View' button, stating: "Click the Enlarged View button for more toolbars and larger text space".

# Add Evaluations to Requisition

Vacation Counselor (SAL00001E)

More Actions

Requisition Alerts Attachments Approvals Posting and Sourcing History **Interviews**

1. Interviews and Evaluation Requests

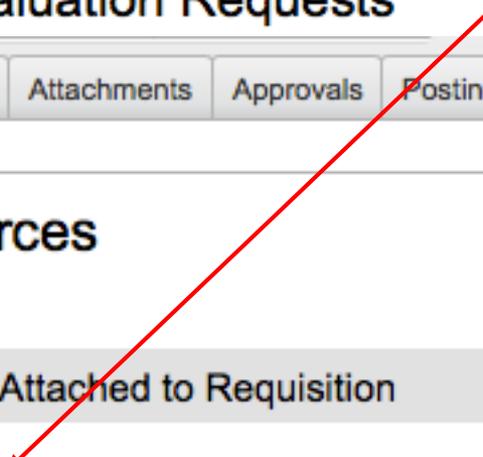
Edit Interview Requisition Alerts Attachments Approvals Posting and Sourcing History Interviews

4. Resources

Questionnaires Attached to Requisition

Preview **Add** Remove

Questionnaire	Attached By
Nothing found to display.	



# Add Evaluations to Requisition

Available Questionnaires

**Quick Filters**

Questionnaire

Category

Interview Evaluation Form

Select all evaluations that may be used for applicants on this requisition

## Questionnaires Attached to Requisition

One result found.

Questionnaire	Attached By	Date Attached
<input type="radio"/> Interview Evaluation Form	Rhonda Recruiter	5/5/16 11:58 PM

All evaluations listed here can be used for applicants of this requisition

We will review how to use Evaluations in a later lesson

# Request Requisition Approval - Manager

Account Coordinator CR2 (RES00000E)

Requisition ▾

Save Save and Close Cancel

Approval is pre-defined based on your approval matrix.

Request Approval

Message Details

From  
Alex Tellez

For Requisition  
Accountant (1400021)

Send me an email with my decision

Order	Approver	Decision
1 ▾	Mike Manager	Pending ▾
2 ▾	Gina Consalvo	Pending ▾

After Approval

\* Assign the next task to  
 

Add the approvers to the list of collaborators defined for this requisition

Add the approvers to the list of my frequent collaborators

\* Comments

Add Approvers

Done Cancel

Assigns task to post the requisition once approved. Defaults to the Recruiter

Check boxes to...

- Add approvers as Collaborators for this Req
- Add approvers to your list of Frequent Collaborators

Click here to add approvers

# Request Requisition Approval – HR/Recruiter

More Actions ▾

- Save as Open
- Delete
- Request Contribution
- Put on Hold
- Prevent Posting
- Cancel Requisition
- Request Approval**

Approval is pre-defined based on your approval matrix.

**Request Approval**

Message Details

From: Alex Tellez

For Requisition: Accountant (1400021)

Send me an email with my decision

Order	Approver	Decision
1 ▾	Mike Manager	Pending ▾
2 ▾	Gina Consalvo	Pending ▾

After Approval

\* Assign the next task to:

Add the approvers to the list of collaborators defined for this requisition

Add the approvers to the list of my frequent collaborators

\* Comments:

Assigns task to post the requisition once approved. Defaults to the Recruiter

Check boxes to...

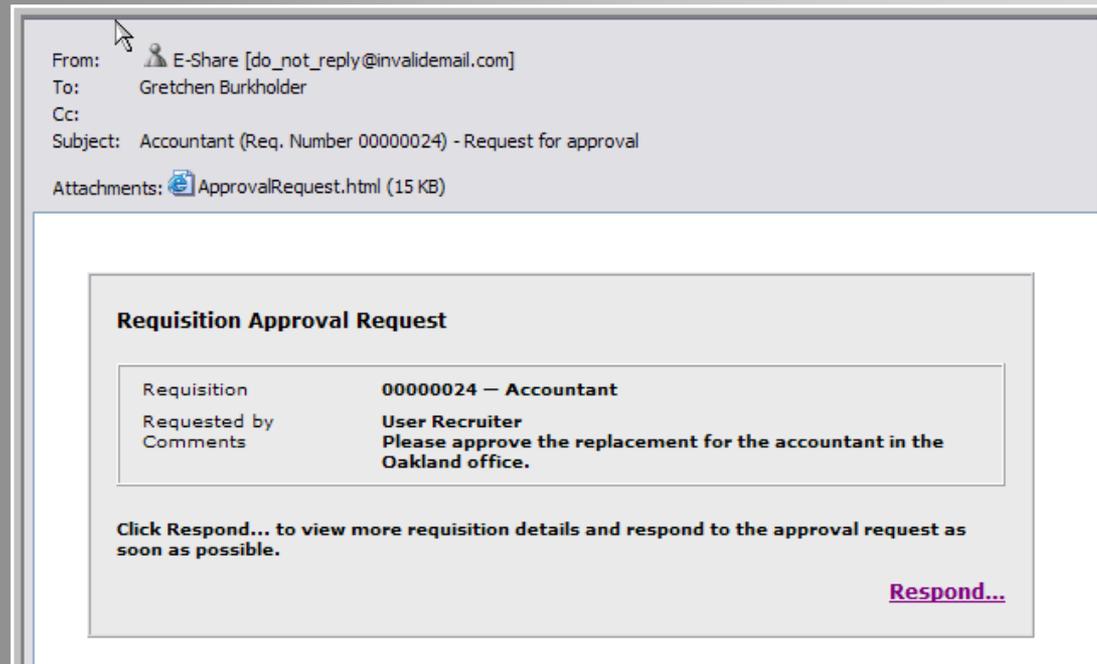
- Add approvers as Collaborators for this Req
- Add approvers to your list of Frequent Collaborators

Click here to add approvers

# eShare Approval Response Center

## eShare Response Center

### ■ Approvers



The screenshot shows an email interface with the following details:

**From:** E-Share [do\_not\_reply@invalidemail.com]  
**To:** Gretchen Burkholder  
**Cc:**  
**Subject:** Accountant (Req. Number 00000024) - Request for approval  
**Attachments:** ApprovalRequest.html (15 KB)

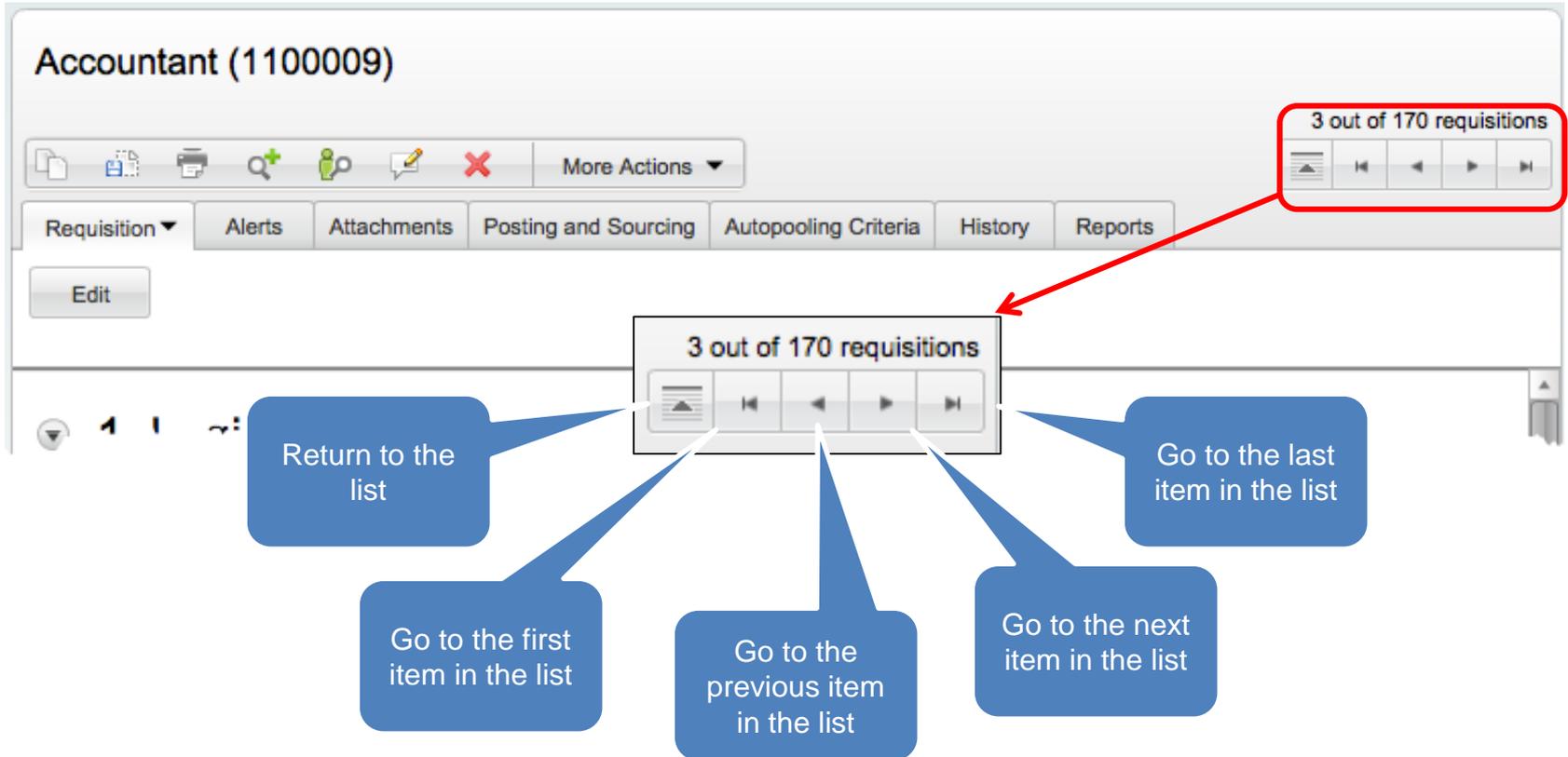
The main content of the email is a "Requisition Approval Request" box containing the following information:

Requisition	<b>00000024 — Accountant</b>
Requested by	<b>User Recruiter</b>
Comments	<b>Please approve the replacement for the accountant in the Oakland office.</b>

Click **Respond...** to view more requisition details and respond to the approval request as soon as possible.

[Respond...](#)

# Navigation Tools



Accountant (1100009)

3 out of 170 requisitions

3 out of 170 requisitions

Return to the list

Go to the first item in the list

Go to the previous item in the list

Go to the next item in the list

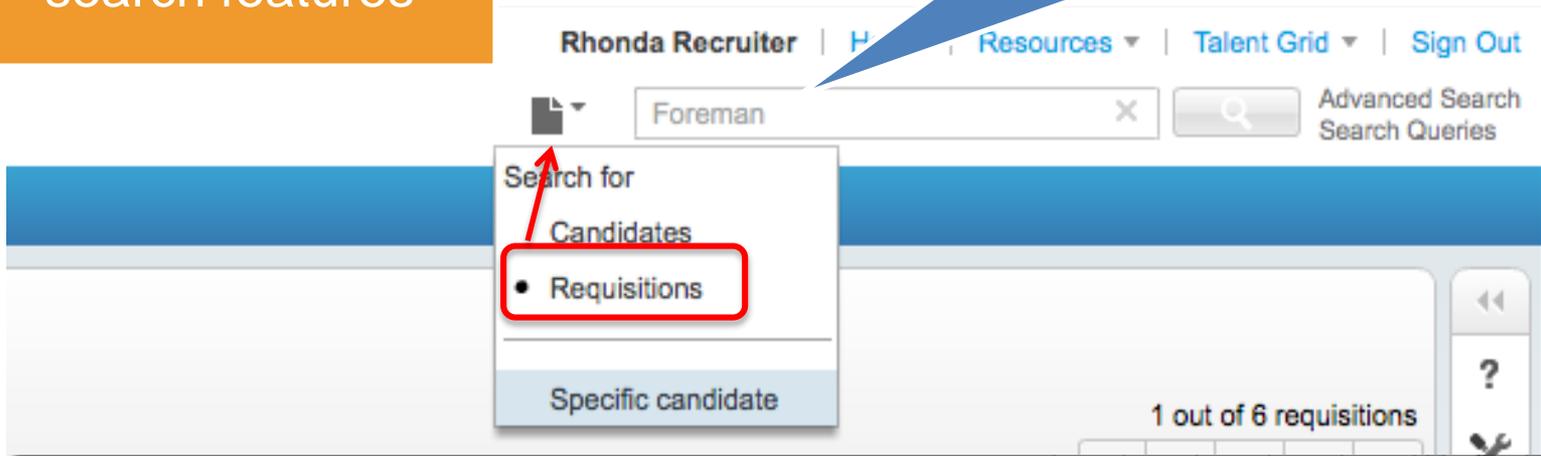
Go to the last item in the list

Note: Do NOT use your web browsers navigation tools with Taleo.  
Always use the built-in navigation features

# Requisition Quick Search

The asterisk ( \* )  
Is a Wildcard  
character in Taleo  
search features

Keyword will search against all text related  
data on the requisition, including Job  
Descriptions. Search by Requisition Number  
is the Best Practice



The screenshot shows the Taleo Requisition Quick Search interface. At the top, the user is logged in as "Rhonda Recruiter". The search bar contains the text "Foreman". A dropdown menu is open, showing "Search for" with options: "Candidates", "Requisitions" (highlighted with a red box), and "Specific candidate". A red arrow points from the "Requisitions" option to the search bar. The search bar also includes a search icon and the text "Advanced Search Search Queries". At the bottom right, it displays "1 out of 6 requisitions".

# Requisition List Formats

**Requisitions**

Create Requisition... 

Selected Criteria  
 Requisition Type included in [ Professional , Hourly , Campus , Contingent , Executives ] 

					Title	ID	Status	Status Detail	Hiring Manager	Recruiter
10					Consultant - Concess...	MAS-AMERICAS-	Open	Posted (Ongoing)	Adams Gretchen	Hire Anita
30					Technical Sales - Honolulu, HI					

**Standard Requisition List Format**

Click here to customize the list format

List Formats  
 Select a requisition list format.

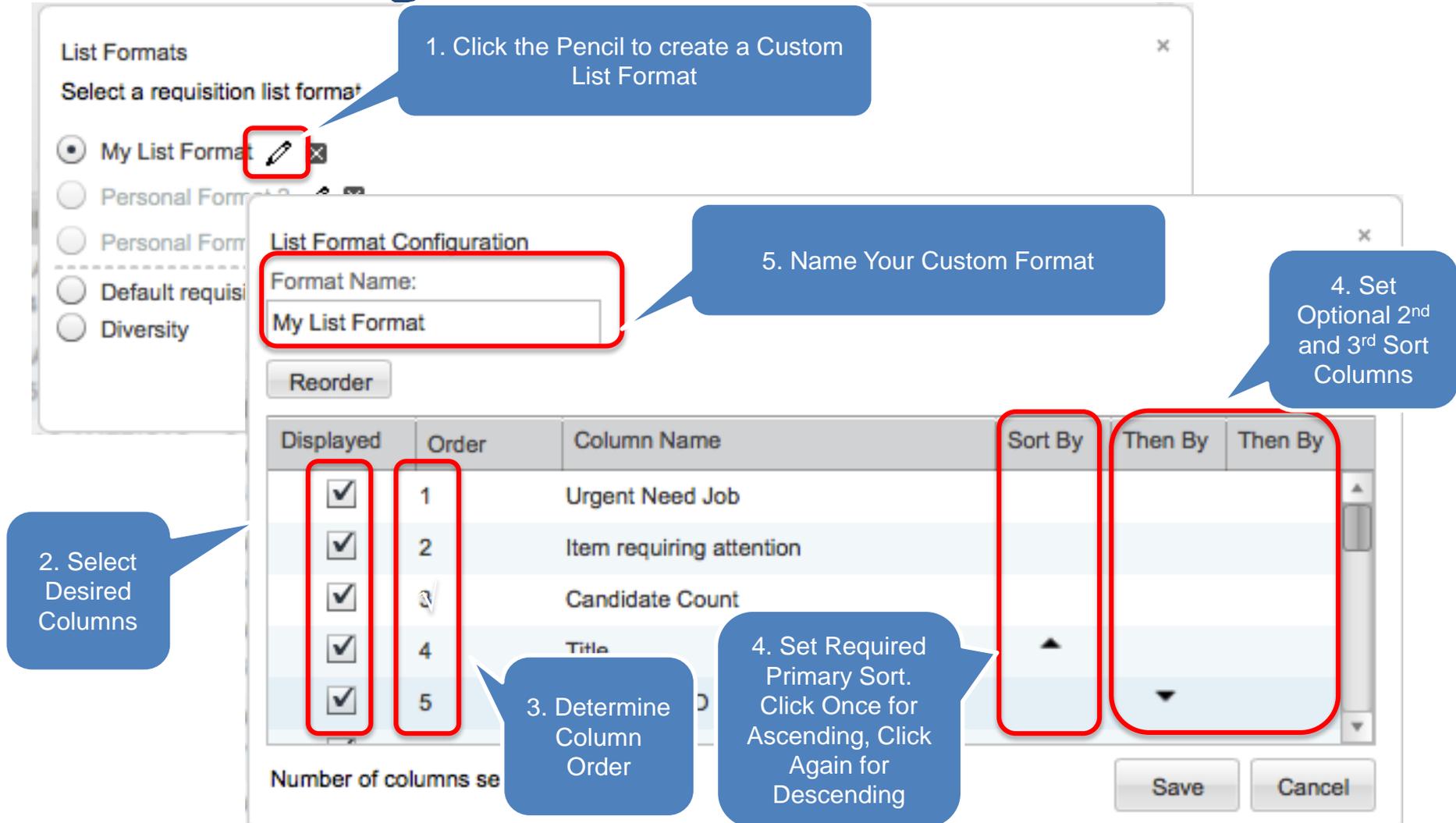
- My List Format  
- Personal Format 2  
- Personal Format 3  
- Default requisition list format
- Diversity

Create a Custom List Format ...

... or select a Pre-Defined List Format

Apply Cancel

# Configure Custom List Formats



1. Click the Pencil to create a Custom List Format

2. Select Desired Columns

3. Determine Column Order

4. Set Required Primary Sort. Click Once for Ascending, Click Again for Descending

5. Name Your Custom Format

4. Set Optional 2<sup>nd</sup> and 3<sup>rd</sup> Sort Columns

Displayed	Order	Column Name	Sort By	Then By	Then By
<input checked="" type="checkbox"/>	1	Urgent Need Job			
<input checked="" type="checkbox"/>	2	Item requiring attention			
<input checked="" type="checkbox"/>	3	Candidate Count			
<input checked="" type="checkbox"/>	4	Title	▲		
<input checked="" type="checkbox"/>	5			▼	

**Note: Use this same procedure for custom Candidate Lists**

# Requisition Statuses

Status	Status Details	Description
<b>Draft</b>	(none)	Requisition creation is in progress, but not yet complete.
<b>Pending</b>	To Be Approved	Requisition is in approval cycle with one or more approvals that still need to be obtained.
<b>Open</b>	Approved	Requisition is active and all approvals have been obtained.
	Posted	Requisition is posted on one or more career sections and job boards.
<b>On Hold</b>	(none)	Requisition is unposted and on hold. Reactivating returns the status to Open.
<b>Filled</b>	(none)	All open positions on requisition have been hired and requisition is no longer active.
<b>Canceled</b>	(none)	Requisition is no longer valid or active.
<b>Deleted</b>	(none)	Requisition that was once in the draft status is now deleted. Note that Open and Pending requisitions cannot be deleted.

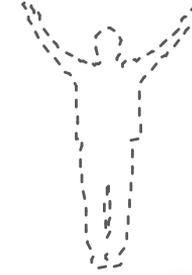
# PRESCREENING

# Lesson Goals

- Overview of ACE Prescreening
  - The Taleo System Administrator will manage the ACE Question Library.
  - Hiring Managers and Recruiters will be able to select questions from the library to add to their requisitions.
  - If you need a question added to library please email the question to [taleohelp@temple.edu](mailto:taleohelp@temple.edu)
- Work with Questions
  - Add Questions
  - Set Requirements and Assets
- Work with Competencies

# The Problem

1. Not enough qualified candidates



2. Too many resumes



3. Not enough time...



# Questions Section

Requisition ▾

Save Save and Close Cancel

Job Related Questions

**+ Add** ✖ Remove ↕ Reorder

Question	Answer	Required/Asset
<input type="checkbox"/> 1 Please indicate the highest level of education you have received. • Global • Code: HighestLevelEducation • Type: Single Answer	High School / GED	Not Applic... ▾
	Some College	Not Applic... ▾
	Associates Degree	Required ▾
	Bachelors Degree	Required ▾
	Masters Degree	Required ▾
	Doctorate	Required ▾
	None of the above	Not Applic... ▾

Total for Competencies and Questions: **Weight** 10

Users can set Requirements and Assets

# Types of Questions

Single answer

- None
- More than 1 year and less than 3 years
- More than 3 years and less than 5 years
- More than 5 years

Multiple answer

- None
- Microsoft Word
- Powerpoint
- Excel

Text Answer

Fluent in Spanish

# Adding questions to requisitions

1. Action button to add questions from the questions library

Job Related Questions

This requisition uses 0 of the 0 questions from the corresponding prescreening model.

Question	Answer	Required/Asset	Weight	
<input type="checkbox"/> 1 Please indicate the highest level of education you have completed.	High School Diploma or GED	Required	0	(0%)

Available Questions

Hide Details

Location

Region A/

Quick Filters

Visible by

All

Question

drill

Possible Answers

Code

Keyword

Code	Question	Visible by	
ExpLogDrill...	How many years of experience do you have delivering Logging while Drilling services at the well site? <i>Type: Single Answer</i> None Less than 1 year More than 1 years but less than 3 years More than 3 years but less than 5 years More than 5 years but less than 10 years More than 10 years	All Candidates	<input type="button" value="Select"/>
ExpDirDriller	Please indicate the number of years experience you have as a Direct Driller. <i>Type: Single Answer</i>		<input type="button" value="Select"/>

2. Quick Filters to search questions library

3. Selecting to add questions to the requisition

# Requirements, Assets

Question	Answer	Required/Asset
1 Please indicate the highest level of education you have completed.	High School Diploma or GED	Not Applicable
	Associate's or 2 year degree/certificate	Not Applicable
	Bachelor's degree	Required
	Master's or advanced degree	Required
	PhD / JD	Required
	None of the above	Not Applicable
2 Please indicate if you have an intermediate level of proficiency (requiring minimal supervision) in interpreting the following. Please select all that apply:	Blueprints	Required
	Wiring Diagrams	Required
	Assembly Prints	Asset
	Parts Lists	Asset
	None of the Above	Not Applicable

**Required:** Think “Meets Requirements”. Does the answer to the question meet the requirements for this role?

**Assets:** Includes “Strongly Preferred” and “Nice-to-Have” qualifications.

# Using Requirements and Assets

**Single answer questions:** Use all Requirements OR all Assets, not both

High School Diploma or GED	Not Applicable
Associate's or 2 year degree/certificate	Not Applicable
Bachelor's degree	Required
Master's or advanced degree	Required
PhD / JD	Required
None of the above	Not Applicable

In this example, a Bachelor's degree is the minimum requirement.

Therefore, both a Master's degree and a PhD/JD also meet the minimum requirement.

The above example will give candidates credit for *MEETING A REQUIREMENT* if they answer 'yes' to a Bachelor's, Master's or PhD.

# Using Requirements and Assets

**Multiple Answers questions:** May use both Requirements and Assets

Blueprints	Required ▼
Wiring Diagrams	Required ▼
Assembly Prints	Asset ▼
Parts Lists	Asset ▼
None of the Above	Not Applicable ▼

In this example, Blueprints and Wiring Diagrams are required. Assembly Prints and Parts Lists are preferred.

The above example will give candidates credit for *MEETING TWO REQUIREMENTS* if they answer ‘yes’ to Blueprints and Wiring Diagrams.

If an answer to either of these is ‘no’, the candidate will not meet the requirement, even if they answered ‘yes’ to any Assets

# Requisition list showing ACE alerts

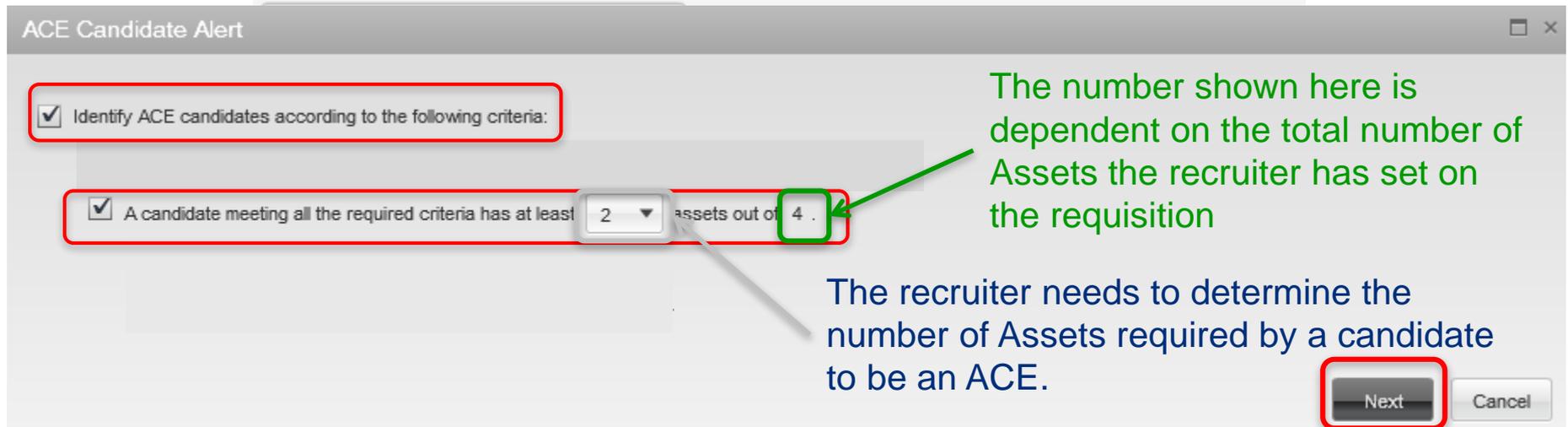
Recruiters may use ACE alerts to easily identify ACE candidates.

*Note: only set alerts when ACE questions are on the requisition*

	Title	ID	Langu	Hiring Manager	Recruiter	Status	Status Detail	Location
0	ACCOUNTANT I	1203761		HENDRICKS ANTHONY	CHRISMAN KYLE	Open	Approved (Ready)	NORTH AMERICA > UNITED STATES > Colorado > DENVER > US51-US-CO -DENVER 1030
0	ACCOUNTANT I	1203760		HENDRICKS ANTHONY	CHRISMAN KYLE	Open	Approved (Ready)	NORTH AMERICA > UNITED STATES > Colorado > DENVER > US51-US-CO -DENVER 1030
1	ACCOUNTANT I	1203749	en	TELLEZ ALEX	00 Recruiter	Open	Unposted (8/11/12, 1:00 AM)	MIDDLE EAST > U.A.E. > U.A.E. > DUBAI > AE11-AE-XXX-DUBAI 1030

The graphic above shows requisitions with active ACE alerts

# Setting ACE Alerts



ACE Candidate Alert

Identify ACE candidates according to the following criteria:

A candidate meeting all the required criteria has at least 2 assets out of 4 .

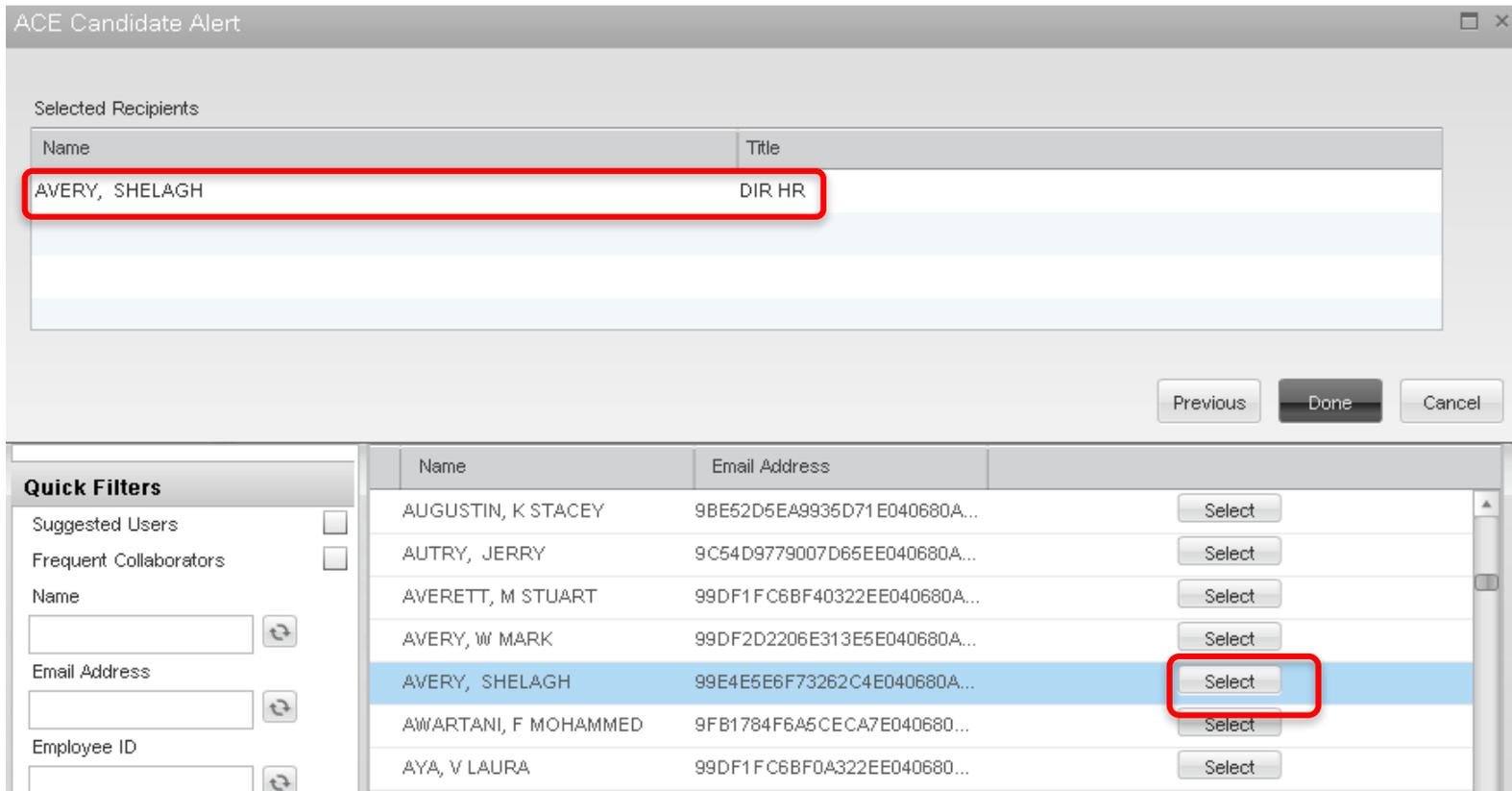
The number shown here is dependent on the total number of Assets the recruiter has set on the requisition

The recruiter needs to determine the number of Assets required by a candidate to be an ACE.

Next Cancel

1. The ACE alert must be checked for a requisition with ACE questions.  
**Candidates must meet ALL REQUIREMENTS to be considered an ACE**
2. Next, you must select a minimum Asset threshold.

# Instructions for setting ACE alerts



The screenshot shows the 'ACE Candidate Alert' window. At the top, there is a section for 'Selected Recipients' with a table containing one entry: 'AVERY, SHELAGH' with the title 'DIR HR'. Below this is a 'Quick Filters' sidebar with checkboxes for 'Suggested Users' and 'Frequent Collaborators', and input fields for 'Name', 'Email Address', and 'Employee ID'. The main area displays a list of suggested users with columns for 'Name', 'Email Address', and a 'Select' button. The entry for 'AVERY, SHELAGH' is highlighted, and its 'Select' button is circled in red. At the bottom right, there are 'Previous', 'Done', and 'Cancel' buttons.

Name	Title
AVERY, SHELAGH	DIR HR

Name	Email Address	Select
AUGUSTIN, K STACEY	9BE52D5EA9935D71E040680A...	Select
AUTRY, JERRY	9C54D9779007D65EE040680A...	Select
AVERETT, M STUART	99DF1FC6BF40322EE040680A...	Select
AVERY, W MARK	99DF2D2206E313E5E040680A...	Select
AVERY, SHELAGH	99E4E5E6F73262C4E040680A...	Select
AWARTANI, F MOHAMMED	9FB1784F6A5CECA7E040680...	Select
AYA, V LAURA	99DF1FC6BF0A322EE040680...	Select

- Determine people to receive an email alert once an ACE candidate applies to the requisition (you may select more than one)

**IT IS NOT NECESSARY TO SET AN EMAIL ALERT. THIS SHOULD ONLY BE SET FOR EXTREMELY HARD TO FILL POSITIONS**

# ACE Candidate List

ACE Candidate Alert

Identify ACE candidates according to the following criteria:

A candidate meeting all the required criteria has at least **3** assets out of 4 .

Identify a candidate as an ACE when **either** condition is met.

Identify a candidate as an ACE when **both** conditions are met.

Candidate	Submission Completed	Selection Status	Requirements 2	Assets 3
Simo, Herve (657442)		Added to Requisition	★ 3 / 3	4 / 4
Kasivajula, Sai Sourya (657442)		Added to Requisition	★ 3 / 3	4 / 4
Niggemyer, Cody (65996)		Added to Requisition	★ 3 / 3	3 / 4
Wang, Belinda (657876)		Added to Requisition	★ 3 / 3	3 / 4
Jokodola, Mayowa Ayoc (657876)		Added to Requisition	★ 3 / 3	3 / 4
Garcia, Juan (656167)		Added to Requisition	3 / 3	2 / 4
Loper II, William (659639)		Added to Requisition	3 / 3	2 / 4
Hendricks, James E (657535)		Added to Requisition	3 / 3	2 / 4
Lopez, Josue A (657535)		Added to Requisition	3 / 3	2 / 4
Basilio, Gómez (657535)		Added to Requisition	2 / 3	4 / 4
Abdelgadir, Ahr (657535)		Added to Requisition	2 / 3	4 / 4
Sahni, Ankush (659701)		Added to Requisition	2 / 3	4 / 4

Meets ALL Requirements and have desired Assets to be considered an ACE candidate

Meets ALL Requirements but does not meet Assets threshold to be considered an ACE candidate

Does NOT meet all requirements. Recruiter may 'Reject' candidates.  
Future Enhancement – system to auto-reject these candidates



MAYBE



NO

# POSTING & SOURCING

# Lesson Goals

- Post to a Requisition to Taleo Career Sections
  - **Only HR Employment can post Staff Requisitions to Career Sections**

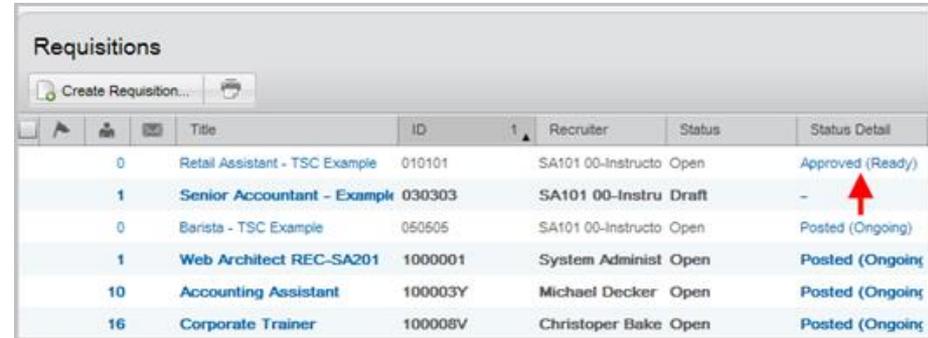
# Accessing Posting & Sourcing

Center Stage: Tasks Channel



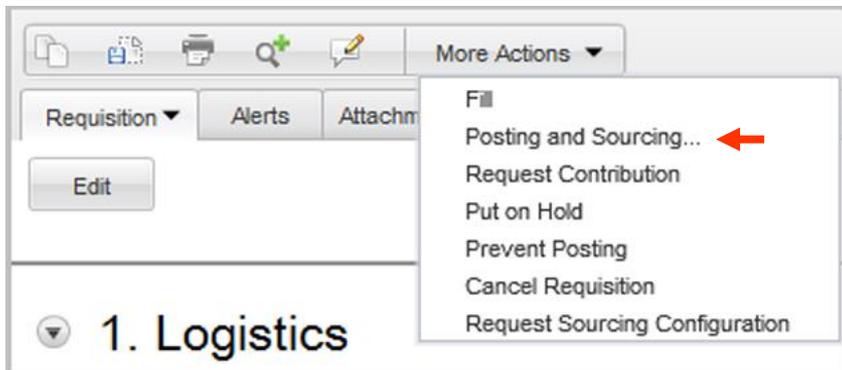
	Count	Total
Tasks assigned to me	1	5
All staffing tasks	1	5
<b>Requisitions</b>		
Ready for sourcing	1	2
<b>Self-assigned Tasks</b>		
Open	0	3
- Overdue	0	3

Req. List: Status Details column



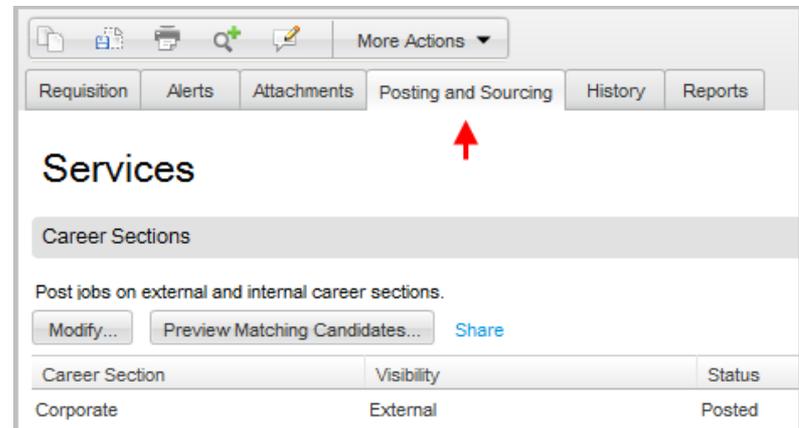
ID	Title	ID	Recruiter	Status	Status Detail
0	Retail Assistant - TSC Example	010101	SA101 00-Instructo	Open	Approved (Ready)
1	Senior Accountant - Exampk	030303	SA101 00-Instru	Draft	-
0	Barista - TSC Example	050505	SA101 00-Instructo	Open	Posted (Ongoing)
1	Web Architect REC-SA201	1000001	System Administ	Open	Posted (Ongoing)
10	Accounting Assistant	100003Y	Michael Decker	Open	Posted (Ongoing)
16	Corporate Trainer	100008V	Christopher Bake	Open	Posted (Ongoing)

Req. File: More Actions menu



- Fill
- Posting and Sourcing...
- Request Contribution
- Put on Hold
- Prevent Posting
- Cancel Requisition
- Request Sourcing Configuration

Req. File: Posting and Sourcing tab



Requisition | Alerts | Attachments | **Posting and Sourcing** | History | Reports

## Services

Career Sections

Post jobs on external and internal career sections.

Modify... | Preview Matching Candidates... | Share

Career Section	Visibility	Status
Corporate	External	Posted

# Posting & Sourcing

Account Development Coord (United States) (14000029)

5 out of 94 requisitions

 More Actions ▾



Requisition Attachments Approvals Posting and Sourcing Autopooling Criteria History

## Services

### Career Sections

Post jobs on external and internal career sections.

Modify...

Click here to Post to Taleo Career Sections

Career Section	Display Type	Status	Start Date	End Date

# Posting a Requisition to Career Sections

List of Career Sections available

Posting start and end date

## Posting Requisitions

### Posting Requisitions

Career Section	Visibility	Display Type	Sequence	Start Date	End Date	Posting Status	<input checked="" type="checkbox"/>
External	External	Private	1	Today 	Ongoing 	To be posted	<input checked="" type="checkbox"/>
Internal	Intranet	Private	3	Today 	Ongoing 	To be posted	<input checked="" type="checkbox"/>

Click here to send to candidates whose profile match this requisition AND have opted in for alerts

**IMPORTANT:** In order for candidates to receive matching profile alerts, both of the below actions must be performed:

1. The candidate must opt-in for alerts
2. The recruiter must opt to email the alert

Post as "Urgent Need" job

Email this job posting to matching candidates (0)

Note: Emails might be sent at a later time, over the next 24 hours, to increase system performance.

Done

Cancel

# ONLY FOR HR STAFF: Posting to Broadbean

You may post to 3<sup>rd</sup> Party Job Board via the Broadbean Job Distribution Service

Requisition Alerts Attachments Posting and Sourcing History Reports Interviews

Job Boards

Distribute job postings to job boards through an external job posting distributor

Supplier Account

Broadbean Kimberly Woods **Post...**

Refresh Status Unpost All

Supplier Account **Back** Sign Out

Click here to post

Complete instructions on the Broadbean page

Click here to return to Taleo

This posting will cost at least \$300.00

All Sites Below

 <p>Broadbean Test Board</p> <p>(Free)</p> <p>Cost per post: \$300.00</p>	 <p>CareerBuilder (North America Only)</p>	 <p>LinkedIn</p>
--------------------------------------------------------------------------------------------------------------------------------------------------------------	---------------------------------------------------------------------------------------------------------------------------------	-------------------------------------------------------------------------------------------------------

# CANDIDATE EXPERIENCE

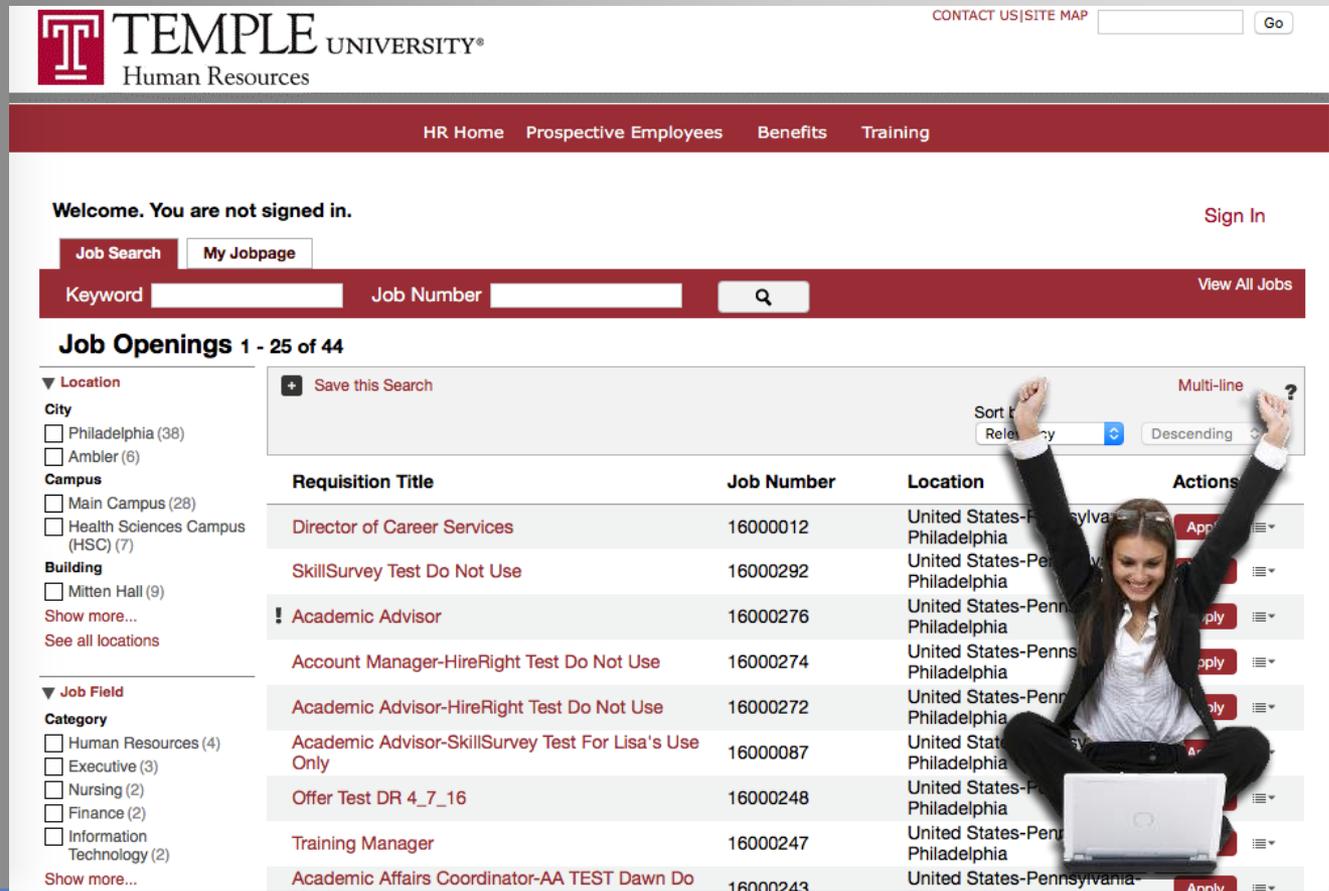
# Lesson Goals

- Review the Candidate Experience
- Apply to a Posted Requisition on a Career Section

# Taleo Enterprise: Career Sections

## Career Sections

- Candidates
- Employees



**TEMPLE UNIVERSITY**  
 Human Resources

[CONTACT US](#) | [SITE MAP](#)

[HR Home](#) | [Prospective Employees](#) | [Benefits](#) | [Training](#)

Welcome. You are not signed in. [Sign In](#)

Keyword  Job Number   [View All Jobs](#)

**Job Openings 1 - 25 of 44**

▼ **Location**

**City**

Philadelphia (38)

Ambler (6)

**Campus**

Main Campus (28)

Health Sciences Campus (HSC) (7)

**Building**

Mitten Hall (9)

[Show more...](#)

[See all locations](#)

▼ **Job Field**

**Category**

Human Resources (4)

Executive (3)

Nursing (2)

Finance (2)

Information Technology (2)

[Show more...](#)

[Multi-line](#) ?

Sort by

Requisition Title	Job Number	Location	Actions
Director of Career Services	16000012	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
SkillSurvey Test Do Not Use	16000292	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
! Academic Advisor	16000276	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Account Manager-HireRight Test Do Not Use	16000274	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Academic Advisor-HireRight Test Do Not Use	16000272	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Academic Advisor-SkillSurvey Test For Lisa's Use Only	16000087	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Offer Test DR 4_7_16	16000248	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Training Manager	16000247	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>
Academic Affairs Coordinator-AA TEST Dawn Do	16000243	United States-Pennsylvania Philadelphia	<input type="button" value="Apply"/>

# CANDIDATE FILES

# Lesson Goals

- Access Candidates
- View Candidate Actions
- Candidates on Multiple Submissions
- Review Indicators

# Candidate List via Requisition

## Requisition List - Candidate column

Requisitions									
<input type="button" value="Create Requisition..."/>									
<input type="checkbox"/>				Title	ID	Hiring Manager	Status	Status Detail	Location
<input type="checkbox"/>				Help Desk Manager	10002VK	Manager Hourly	Open	Posted (Ongoing)	US > Oregon

## Requisition File - Left Pane

Requisition

**Help Desk Manager**

10002VK

Status: Open

Status Details: Posted

---

Candidates for this requisition: 12

### Help Desk Manager (10002VK)

More Actions ▾

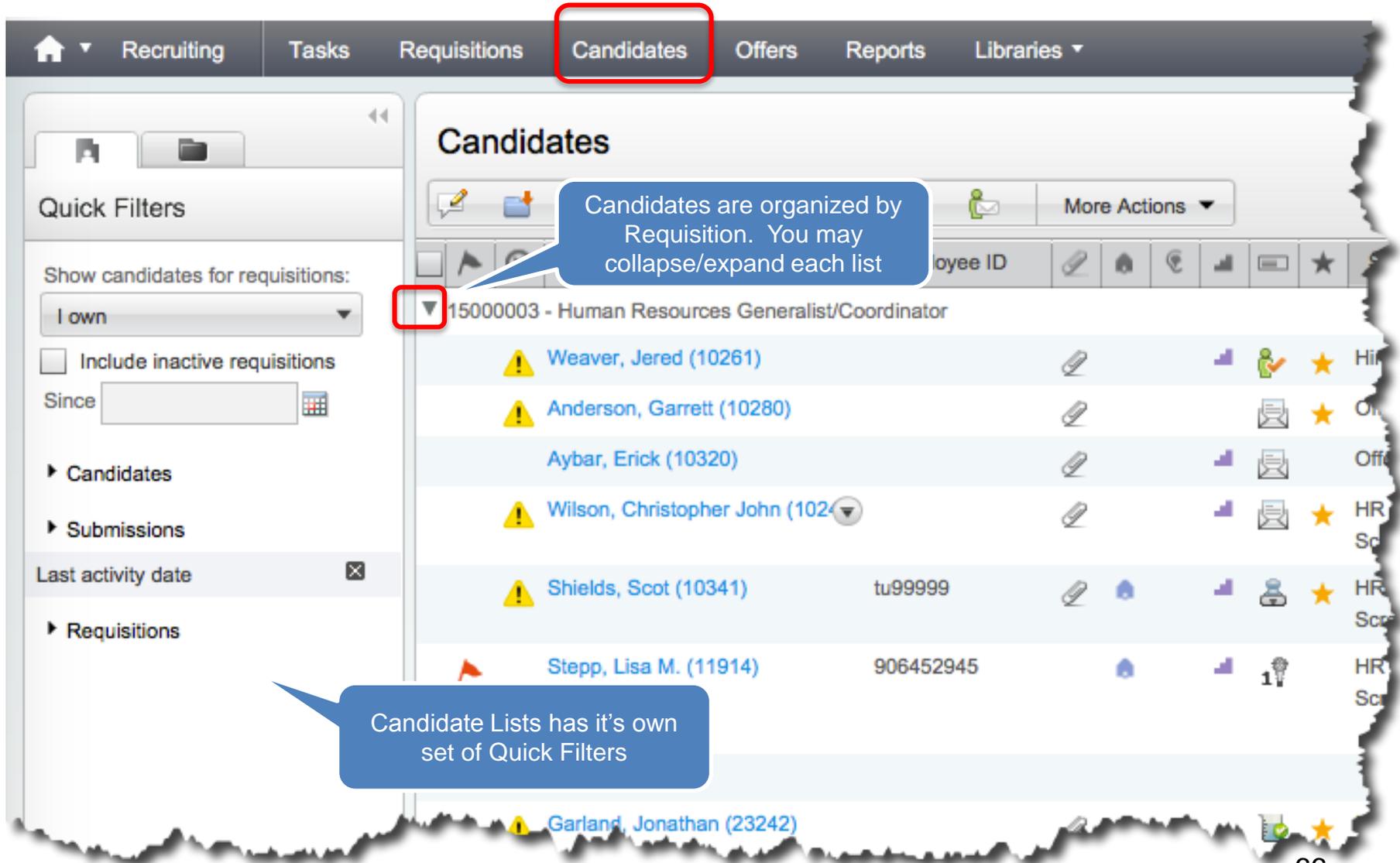
Requisition ▾
Alerts
Attachments
Posting and Sourcing
History
Reports

▼ 1. Logistics

Identification

Justification

# Candidate List via Candidate Menu



Recruiting Tasks Requisitions **Candidates** Offers Reports Libraries

## Candidates

Quick Filters

Show candidates for requisitions:  
I own

Include inactive requisitions

Since

► Candidates

► Submissions

Last activity date

► Requisitions

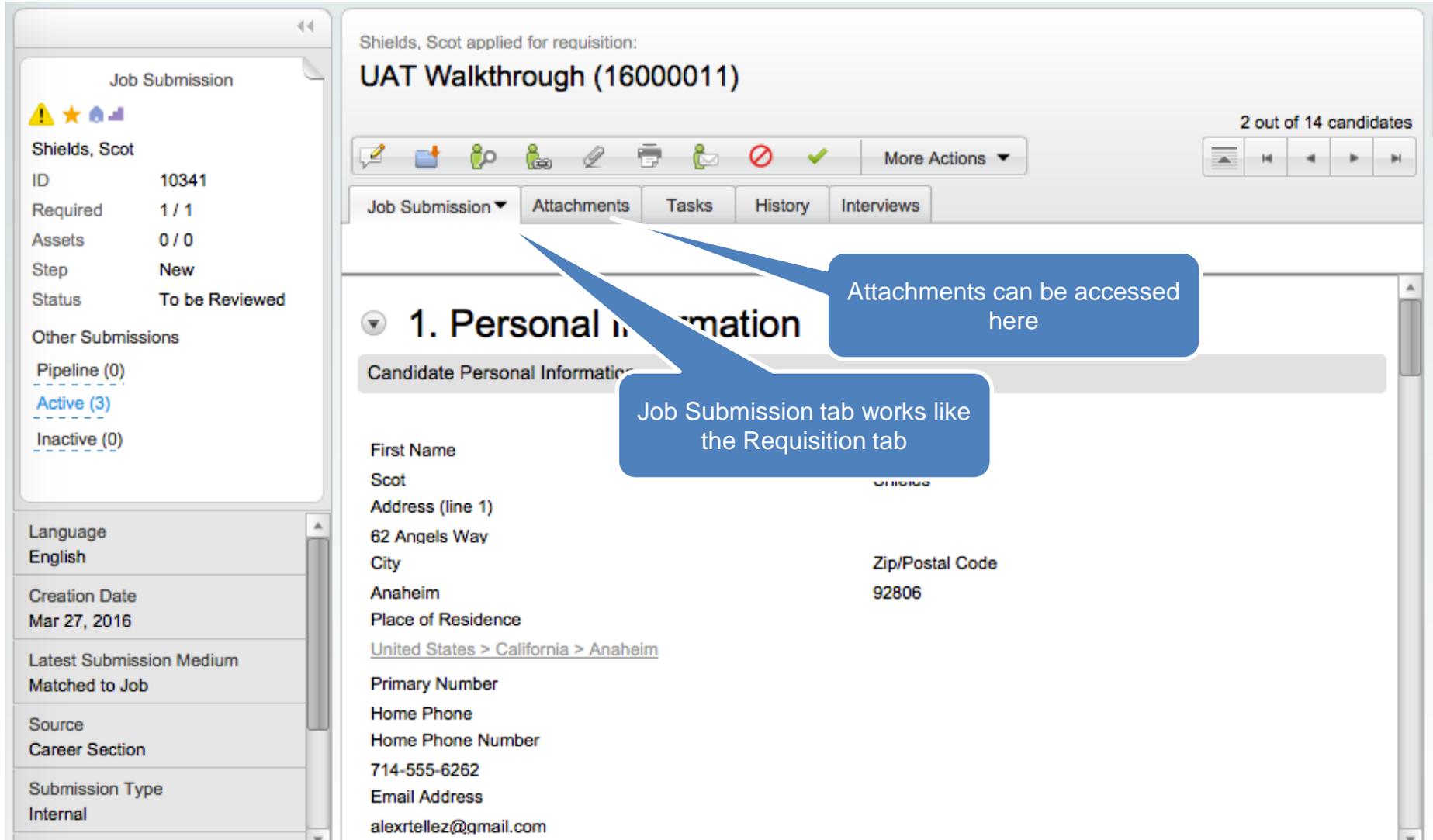
Candidates are organized by Requisition. You may collapse/expand each list

15000003 - Human Resources Generalist/Coordinator

Employee ID	Name (ID)	Employee ID	Actions
	⚠ Weaver, Jared (10261)		[Edit] [Chart] [Person] [Star]
	⚠ Anderson, Garrett (10280)		[Edit] [Envelope] [Star]
	Aybar, Erick (10320)		[Edit] [Chart] [Envelope]
	⚠ Wilson, Christopher John (102...)		[Edit] [Chart] [Envelope] [Star]
	⚠ Shields, Scot (10341)	tu99999	[Edit] [Home] [Chart] [Person] [Star]
	🚩 Stepp, Lisa M. (11914)	906452945	[Home] [Chart] [Lightbulb]
	⚠ Garland, Jonathan (23242)		[Edit] [Checkmark] [Star]

Candidate Lists has it's own set of Quick Filters

# Candidate File



The screenshot shows a web application interface for a candidate file. On the left is a sidebar with a 'Job Submission' section containing a warning icon, a star, and a house icon. Below this, the candidate's name 'Shields, Scot' is listed with various details: ID 10341, Required 1 / 1, Assets 0 / 0, Step New, and Status To be Reviewed. There are also links for 'Other Submissions' categorized by Pipeline (0), Active (3), and Inactive (0). At the bottom of the sidebar, there are fields for Language (English), Creation Date (Mar 27, 2016), Latest Submission Medium (Matched to Job), Source (Career Section), and Submission Type (Internal).

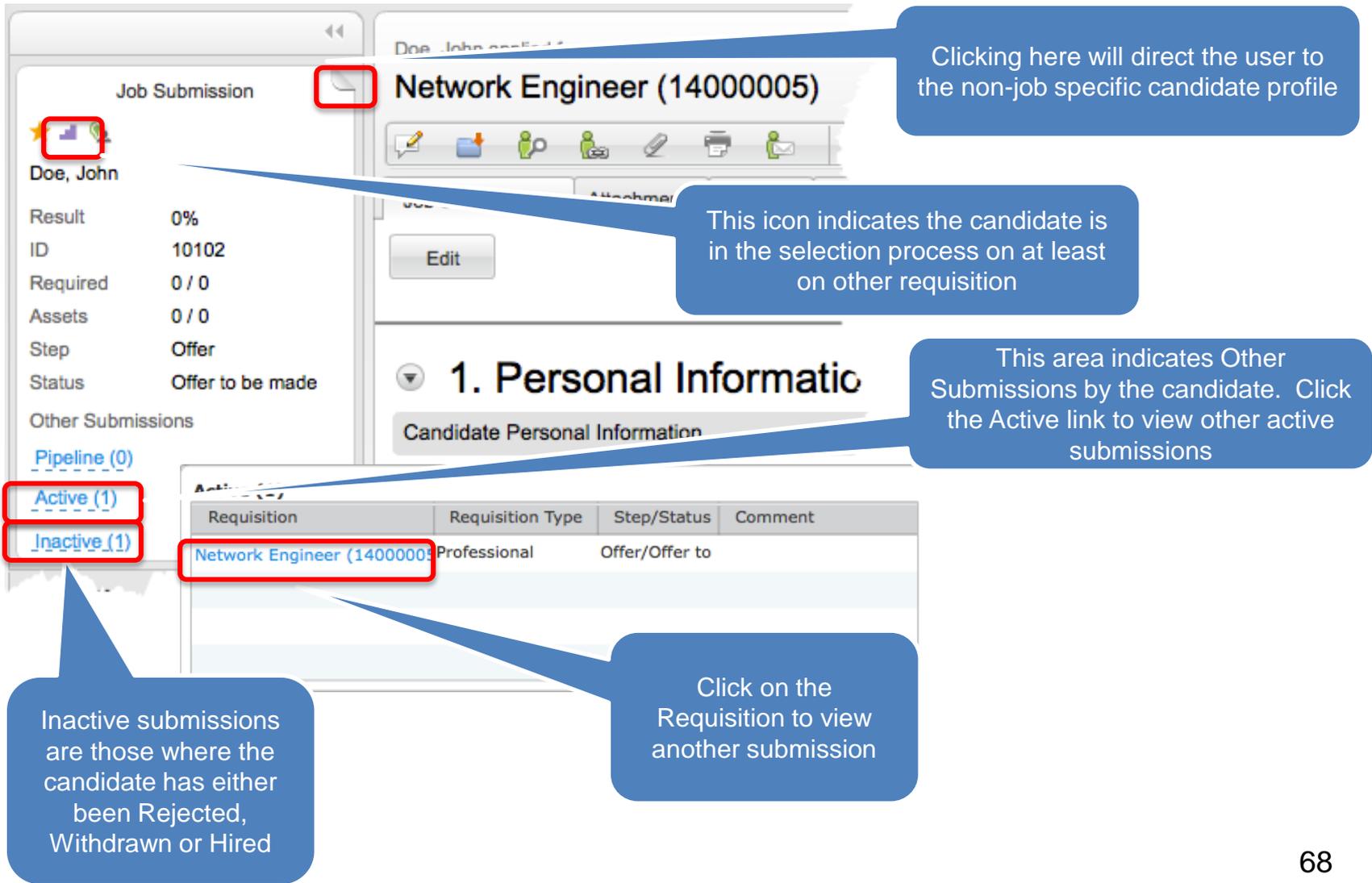
The main content area at the top shows 'Shields, Scot applied for requisition: UAT Walkthrough (16000011)'. It includes a toolbar with icons for editing, adding, deleting, and other actions, along with a 'More Actions' dropdown. On the right, it indicates '2 out of 14 candidates' and has navigation controls. Below the toolbar is a tabbed interface with 'Job Submission', 'Attachments', 'Tasks', 'History', and 'Interviews'. The 'Job Submission' tab is selected.

The main content area displays '1. Personal Information' and 'Candidate Personal Information'. The candidate's details are as follows:

First Name	Scot		
Address (line 1)	62 Angels Way		
City	Anaheim	Zip/Postal Code	92806
Place of Residence	<a href="#">United States &gt; California &gt; Anaheim</a>		
Primary Number	Home Phone		
Home Phone Number	714-555-6262		
Email Address	alexrtellez@gmail.com		

Two blue callout boxes provide additional information: one points to the 'Attachments' tab with the text 'Attachments can be accessed here', and another points to the 'Job Submission' tab with the text 'Job Submission tab works like the Requisition tab'.

# View Candidates on Multiple Requisitions



**Job Submission** Network Engineer (14000005)

**Doe, John**

Result: 0%  
ID: 10102  
Required: 0 / 0  
Assets: 0 / 0  
Step: Offer  
Status: Offer to be made

Other Submissions

[Pipeline \(0\)](#)

[Active \(1\)](#)

[Inactive \(1\)](#)

**1. Personal Informatic**

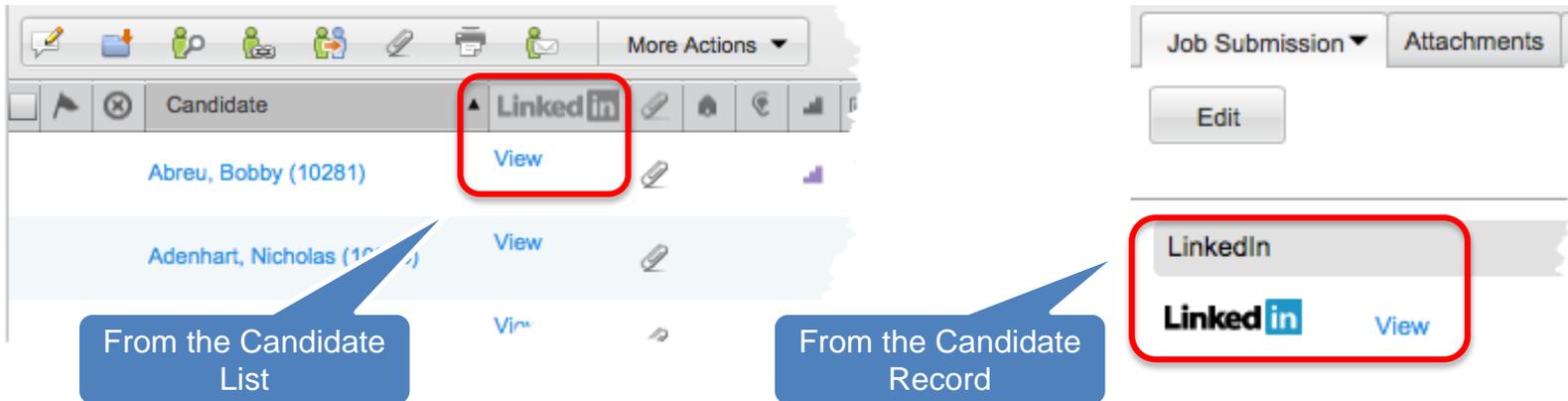
Candidate Personal Information

Requisition	Requisition Type	Step/Status	Comment
<a href="#">Network Engineer (14000005)</a>	Professional	Offer/Offer to	

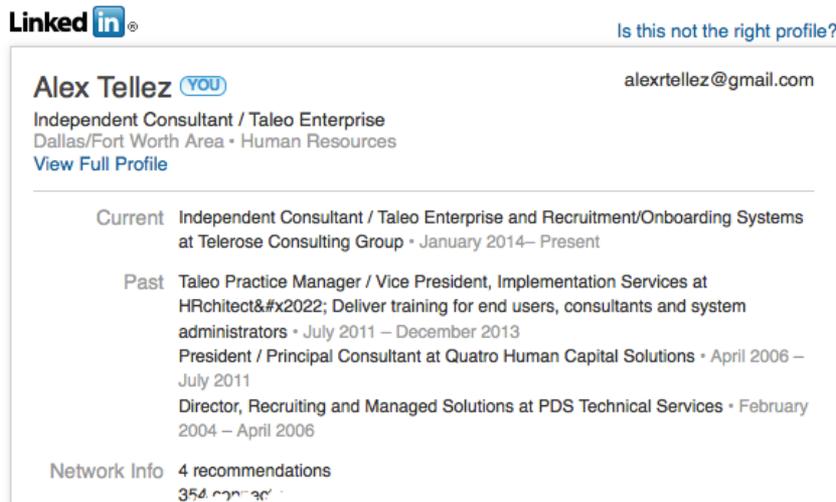
**Callouts:**

- Clicking here will direct the user to the non-job specific candidate profile
- This icon indicates the candidate is in the selection process on at least on other requisition
- This area indicates Other Submissions by the candidate. Click the Active link to view other active submissions
- Inactive submissions are those where the candidate has either been Rejected, Withdrawn or Hired
- Click on the Requisition to view another submission

# LinkedIn Profile Preview



The image shows two screenshots from a recruitment system. The left screenshot shows a 'Candidate List' with a 'LinkedIn' button highlighted in a red box next to the candidate 'Abreu, Bobby (10281)'. A blue callout bubble points to this button with the text 'From the Candidate List'. The right screenshot shows a 'Candidate Record' with a 'LinkedIn' button highlighted in a red box. A blue callout bubble points to this button with the text 'From the Candidate Record'. Above the 'LinkedIn' button in the record view are 'Job Submission' and 'Attachments' dropdown menus, and an 'Edit' button.



LinkedIn  Is this not the right profile?

**Alex Tellez** (YOU) alexrtellez@gmail.com

Independent Consultant / Taleo Enterprise  
Dallas/Fort Worth Area • Human Resources  
[View Full Profile](#)

---

**Current** Independent Consultant / Taleo Enterprise and Recruitment/Onboarding Systems at Telerose Consulting Group • January 2014– Present

**Past** Taleo Practice Manager / Vice President, Implementation Services at HRchitect&#x2022; Deliver training for end users, consultants and system administrators • July 2011 – December 2013  
President / Principal Consultant at Quatro Human Capital Solutions • April 2006 – July 2011  
Director, Recruiting and Managed Solutions at PDS Technical Services • February 2004 – April 2006

**Network Info** 4 recommendations  
354 connections

You must have a LinkedIn account to use this feature

# Candidate Indicators

	Internal Candidate
	Referred candidate
	New candidate or candidate has been modified since last viewed
	Disqualified Candidate
	Disqualification information to be verified

# Candidate Indicators

	Candidate in Selection Process on another Requisition
	Most Advanced Progression Status: Contact (not on a req.)
	Most Advanced Progression Status: New
	Most Advanced Progression Status: Reviewed
	Most Advanced Progression Status: Interview (1 <sup>st</sup> , 2 <sup>nd</sup> , 3 <sup>rd</sup> )
	Most Advanced Progression Status: Offer
	Most Advanced Progression Status: Testing
	Most Advanced Progression Status: Hired

# CANDIDATE SEARCH

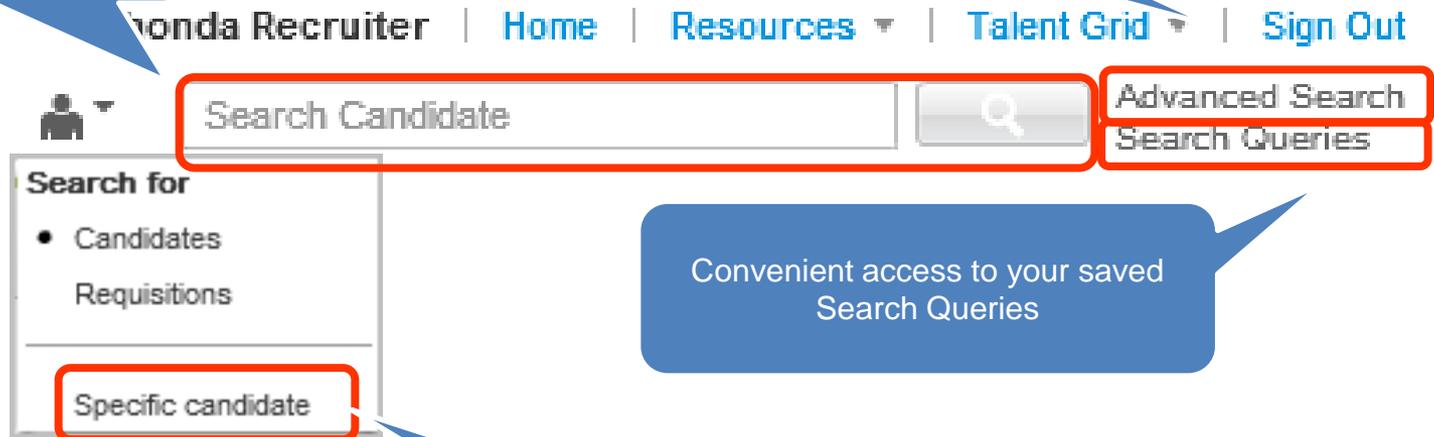
# Lesson Goals

- Run a Quick Search
- Run Keyword Advanced Search
- Save Search Queries

# Search Tools

Quick Search is for quickly finding a specific candidate by name, email address or candidate ID

Build simple or complex searches to source candidates out of your database



The screenshot shows a navigation bar with 'Honda Recruiter', 'Home', 'Resources', 'Talent Grid', and 'Sign Out'. Below the navigation bar is a search area with a 'Search Candidate' input field, a search button, and links for 'Advanced Search' and 'Search Queries'. A dropdown menu is open under 'Search for', showing 'Candidates' (selected), 'Requisitions', and 'Specific candidate'. Red boxes highlight the search input field, the search button, the 'Advanced Search' and 'Search Queries' links, and the 'Specific candidate' option in the dropdown.

Convenient access to your saved Search Queries

Specific candidate allows you target the first name, last name, email and ID fields

# Wild Card in Quick Search

- Taleo uses the asterisk \* as a wild card to assist in finding records 
- The wild card can be used at the end of a string  
(Example: johns\* will return Johnson and Johnston)
- The wild card can be used at the beginning of a string  
(Example: \*@gmail.com will return all records with an Gmail domain)
- The wild card can be used in the middle of a string  
(Example: Al\* Smith will return Alan Smith, Alex Smith, Al Smith, etc...)

# Advanced Search Form

**New Search Query**

**Customize...**

**Advanced Candidate Search**

**Keywords**

Type or paste text here

Exact Term  
 Related Terms  
 Conceptual

**Last Update**

Does Not Matter

is between  and

**External / Internal Candidate**

Does Not Matter  
 External  
 Internal

**Place of Residence**

Location

Exclude Disqualified Candidate  
 Exclude candidates owned by agencies

**Requisition Number / Title**

Customize your own form by adding additional fields

Standard Default Search Fields

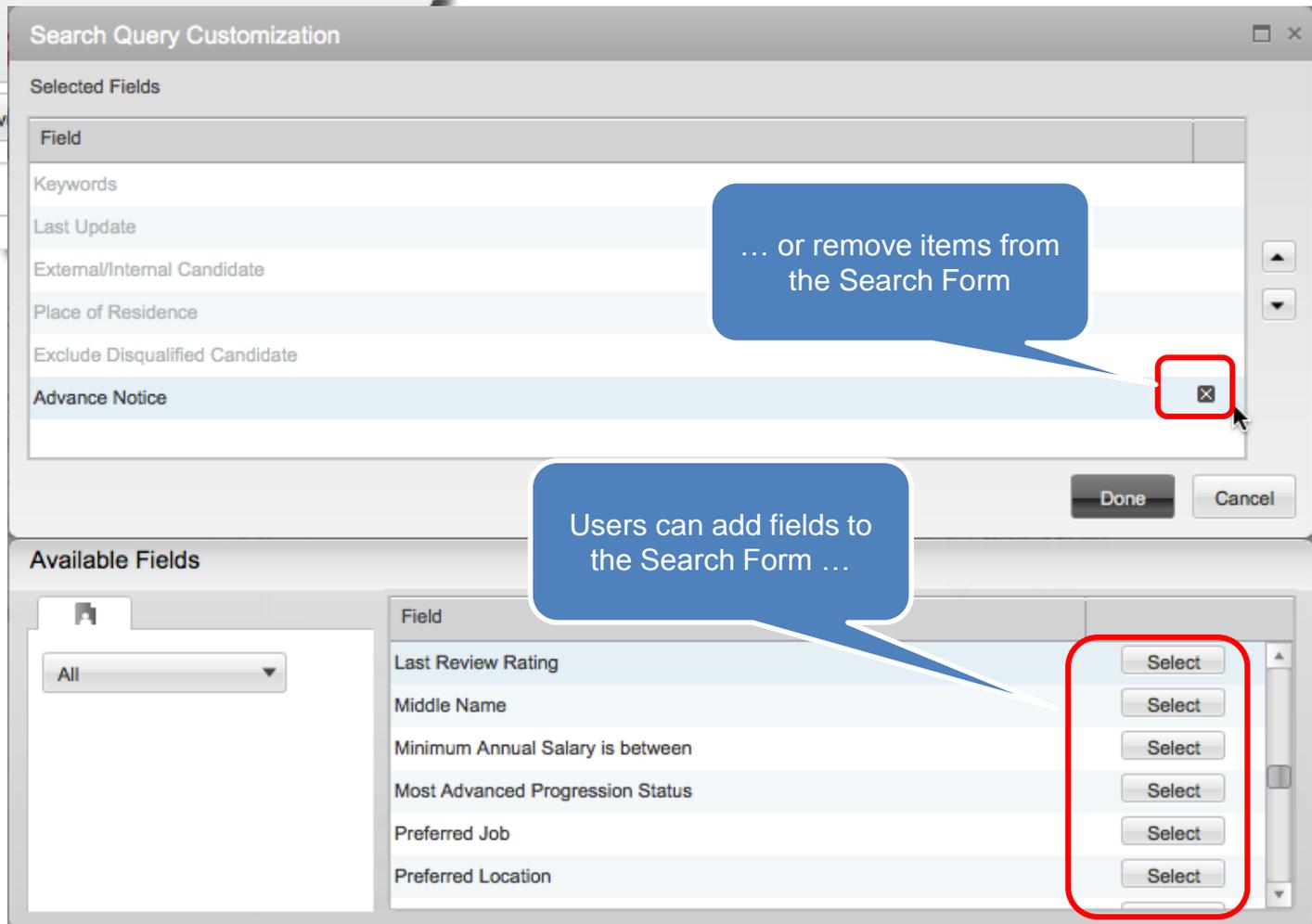
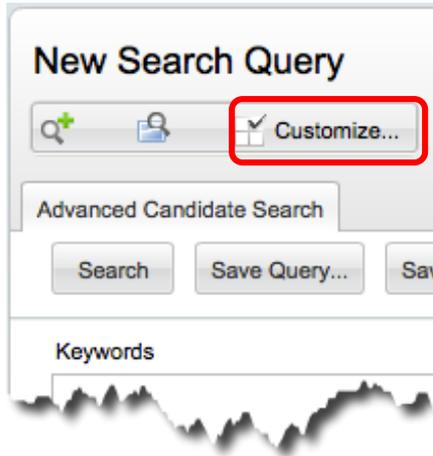
Range of dates Candidate File was last updated

Choose distance radius around a city or postal code

Search through candidates on a specific requisition

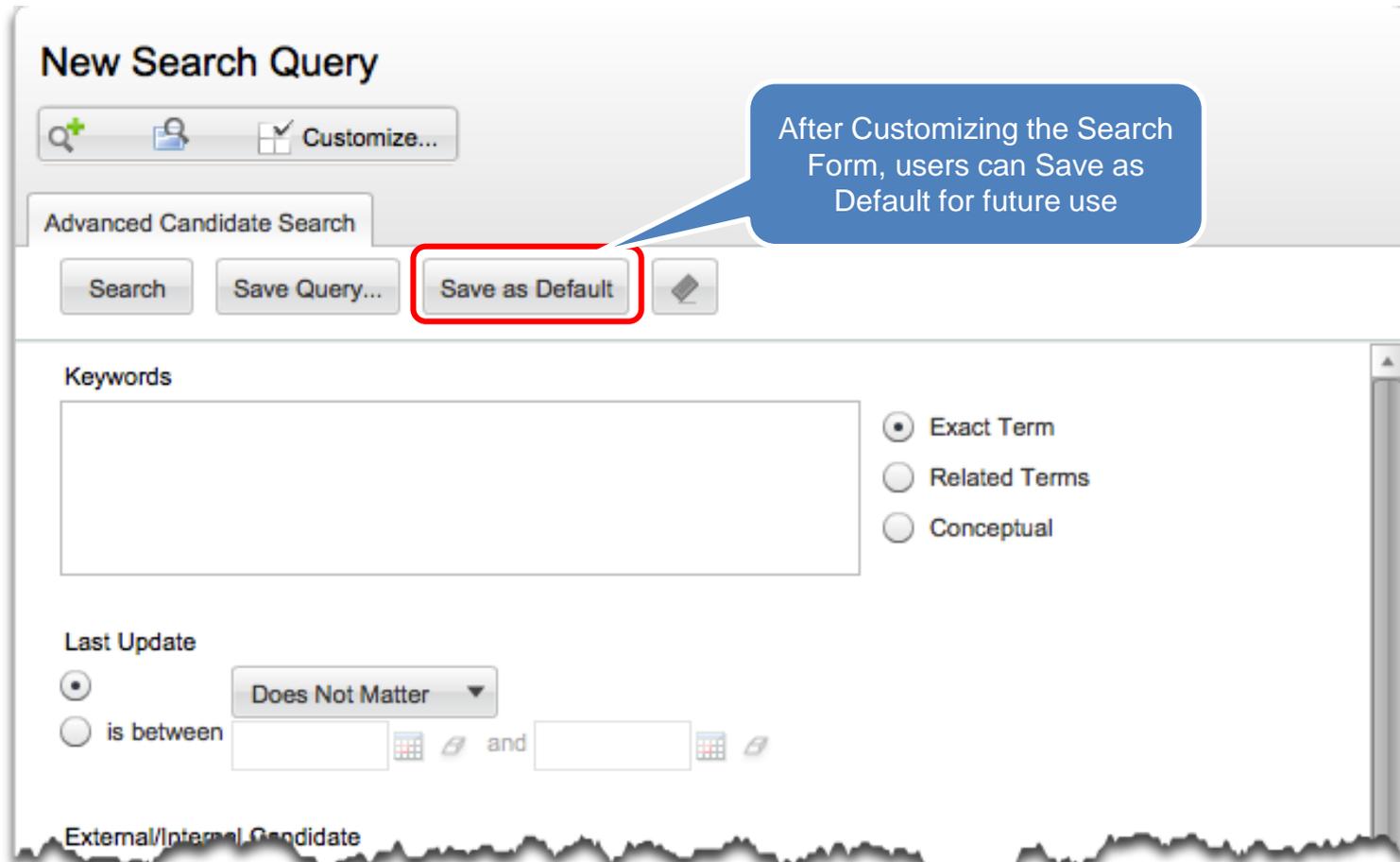
Paste in whole sections of text from a resume or job description to construct a search

# Customize Search Form



**NOTE:**  
Available Search  
Fields are  
configured by a  
system  
administrator

# Search Form – Save as Default



**New Search Query**

Advanced Candidate Search

Search Save Query... **Save as Default**

Keywords

Exact Term  
 Related Terms  
 Conceptual

Last Update

Does Not Matter  
 is between [ ] and [ ]

External/Internal Candidate

After Customizing the Search Form, users can Save as Default for future use

# Advanced Search Keyword Field Tools

Keyword Format Tools	Examples	Results in Candidates with keywords in Candidate Files:
Wild card	program*	program; programming; programmer, etc.
Boolean operators <b>AND OR NOT</b>	president OR vice president NOT regional	president OR vice president, but no files with the word "regional"
Parentheses	(retail or store) accountant	retail and accountant OR store and accountant
Space between words = <b>AND</b>	Java JavaScript	Java and JavaScript
Quotes	"project manager"	project manager (words must appear in exact order with a literal space)

# Highlight Keywords

## General Profile - Trout, Mike

1 out of 2 candidates



General Profile Attachments Tasks Referral History

### All Attachments

+ Add Edit

File Name	Resume	Converted File	Date	Size	Comments
trout, mike.doc	Yes	trout, mike.html	Oct 25, 2014, 3:40:41 PM	32 kb	

Taleo automatically creates an HTML version for all attached documents

## Attached file converted to HTML

Close

Trout, Mike

Original File Name

trout, mike.doc

Date

Oct 25, 2014

### Mike Trout

27 Angels Way

Anaheim, CA 92806

(714) 555-2727

mtrout@quatrohcs.com

### **WEB DEVELOPER**

### **PROFESSIONAL SUMMARY**

MSc and BSc in Computer Science.

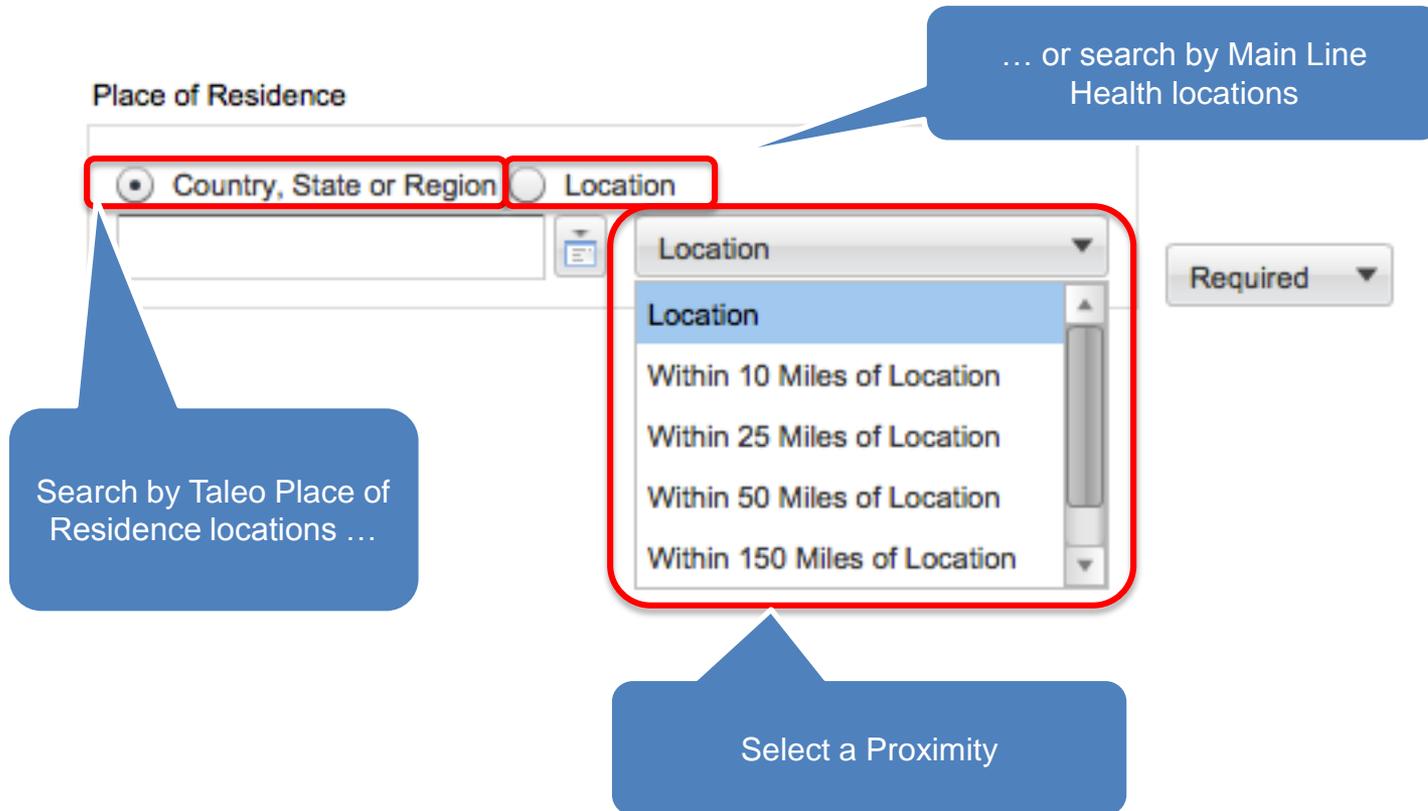
5 years of application development experience on various platforms and environments.

Extensive working experience in C, C++, VC++, STL, Java, **J2EE**, J2ME.

Strong in PL/SQL and Embedded SQL using Pro C.

Keywords from an Advanced Search are highlighted on the HTML document

# Location Proximity Search



The screenshot shows a web form titled "Place of Residence". It features two radio buttons: "Country, State or Region" (selected) and "Location". A dropdown menu is open under the "Location" radio button, showing options: "Location", "Within 10 Miles of Location", "Within 25 Miles of Location", "Within 50 Miles of Location", and "Within 150 Miles of Location". A "Required" dropdown is also visible to the right. Three blue callout boxes provide additional information:

- Top right: "... or search by Main Line Health locations" (pointing to the "Location" radio button).
- Left: "Search by Taleo Place of Residence locations ..." (pointing to the "Country, State or Region" radio button).
- Bottom: "Select a Proximity" (pointing to the dropdown menu).

# Required, Desired or Excluded

Users can set most search criteria to be Required, Desired or Excluded

Place of Residence

Location

Required  
Required  
Desired  
Excluded

**Required:** Criteria is required to be returned in search results

**Desired:** Not required to be returned in search results, but will rank higher in relevance

**Excluded:** Candidates with this criteria will be excluded from search results

# Search Queries

**New Search Query**

Advanced Candidate Search

Search Save Query... Save as Default This query has not been saved.

**Keywords**  
engineer and construction

Exact Term  
 Related Terms  
 Conceptual

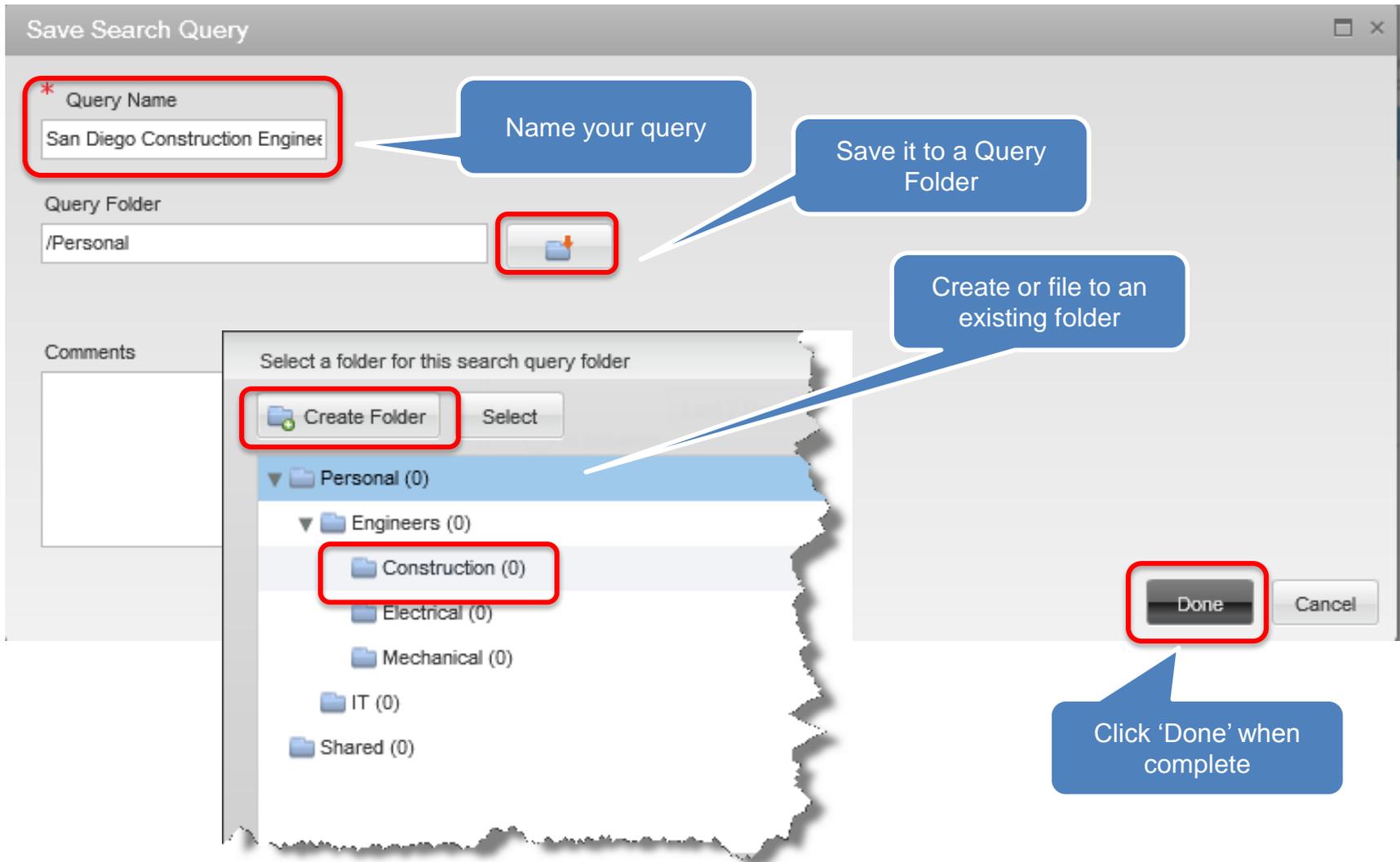
**Last Update**  
 Last 7 Days  
 is between [ ] and [ ]

**External/Internal Candidate**  
 Does Not Matter  
 External  
 Internal

**Place of Residence**  
Location: United States > California > San Diego  
Desired

You may save this query so you and others may run it again without having to recreate it.

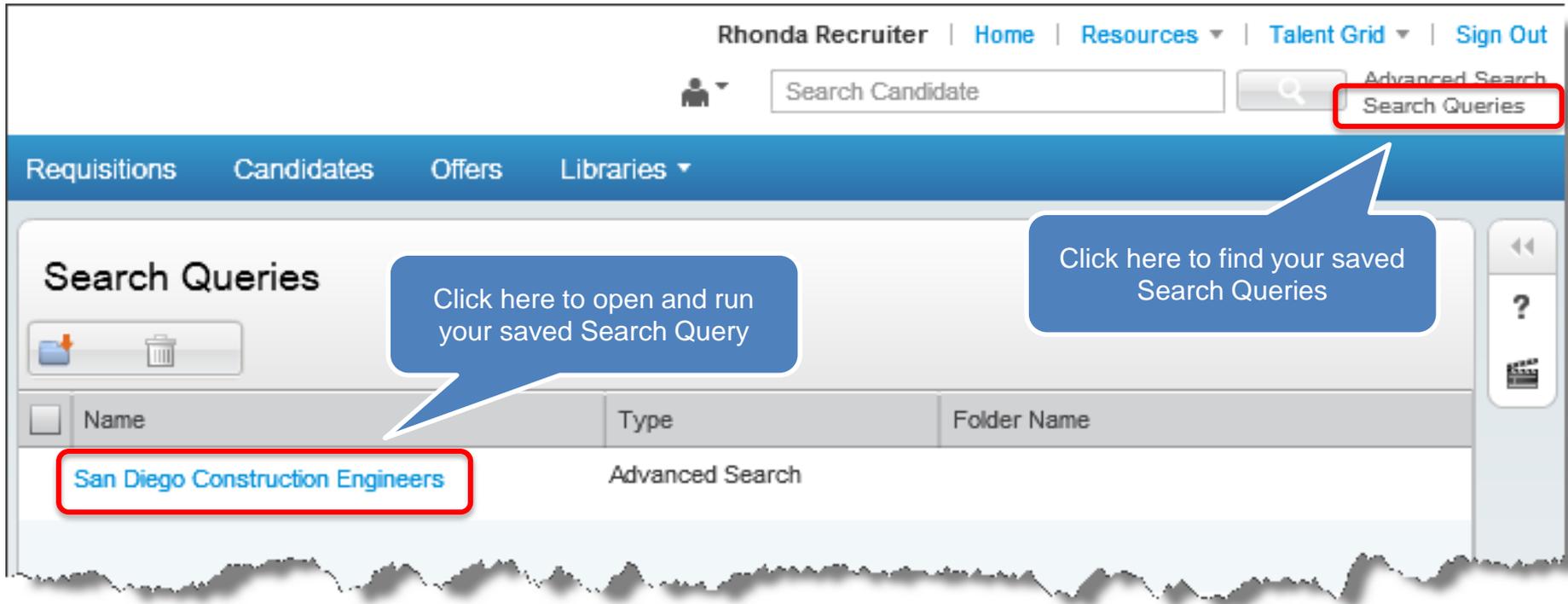
# Search Queries



The screenshot shows the 'Save Search Query' dialog box with the following elements and callouts:

- Query Name:** A text field containing 'San Diego Construction Engineer' is highlighted with a red box. A callout bubble points to it with the text 'Name your query'.
- Query Folder:** A text field containing '/Personal' is shown. To its right is a folder icon with a plus sign, highlighted with a red box. A callout bubble points to it with the text 'Save it to a Query Folder'.
- Folder Selection:** A dialog titled 'Select a folder for this search query folder' is shown. It contains a 'Create Folder' button (highlighted with a red box) and a 'Select' button. Below is a tree view of folders: 'Personal (0)', 'Engineers (0)', 'Construction (0)', 'Electrical (0)', 'Mechanical (0)', 'IT (0)', and 'Shared (0)'. The 'Construction (0)' folder is highlighted with a red box. A callout bubble points to it with the text 'Create or file to an existing folder'.
- Buttons:** At the bottom right of the dialog are 'Done' and 'Cancel' buttons. The 'Done' button is highlighted with a red box. A callout bubble points to it with the text 'Click 'Done' when complete'.

# Search Queries



The screenshot shows a web application interface for managing search queries. At the top, the user is identified as 'Rhonda Recruiter' with navigation links for 'Home', 'Resources', 'Talent Grid', and 'Sign Out'. A search bar labeled 'Search Candidate' is present, along with a 'Search Queries' button highlighted by a red box. Below this is a blue navigation bar with 'Requisitions', 'Candidates', 'Offers', and 'Libraries'. The main content area is titled 'Search Queries' and includes a table with columns for 'Name', 'Type', and 'Folder Name'. A callout points to the 'San Diego Construction Engineers' entry in the 'Name' column. Another callout points to the 'Search Queries' button in the top right. A third callout points to the 'San Diego Construction Engineers' entry, indicating it can be opened and run.

Rhonda Recruiter | Home | Resources | Talent Grid | Sign Out

Search Candidate [Search] **Search Queries**

Requisitions Candidates Offers Libraries

### Search Queries

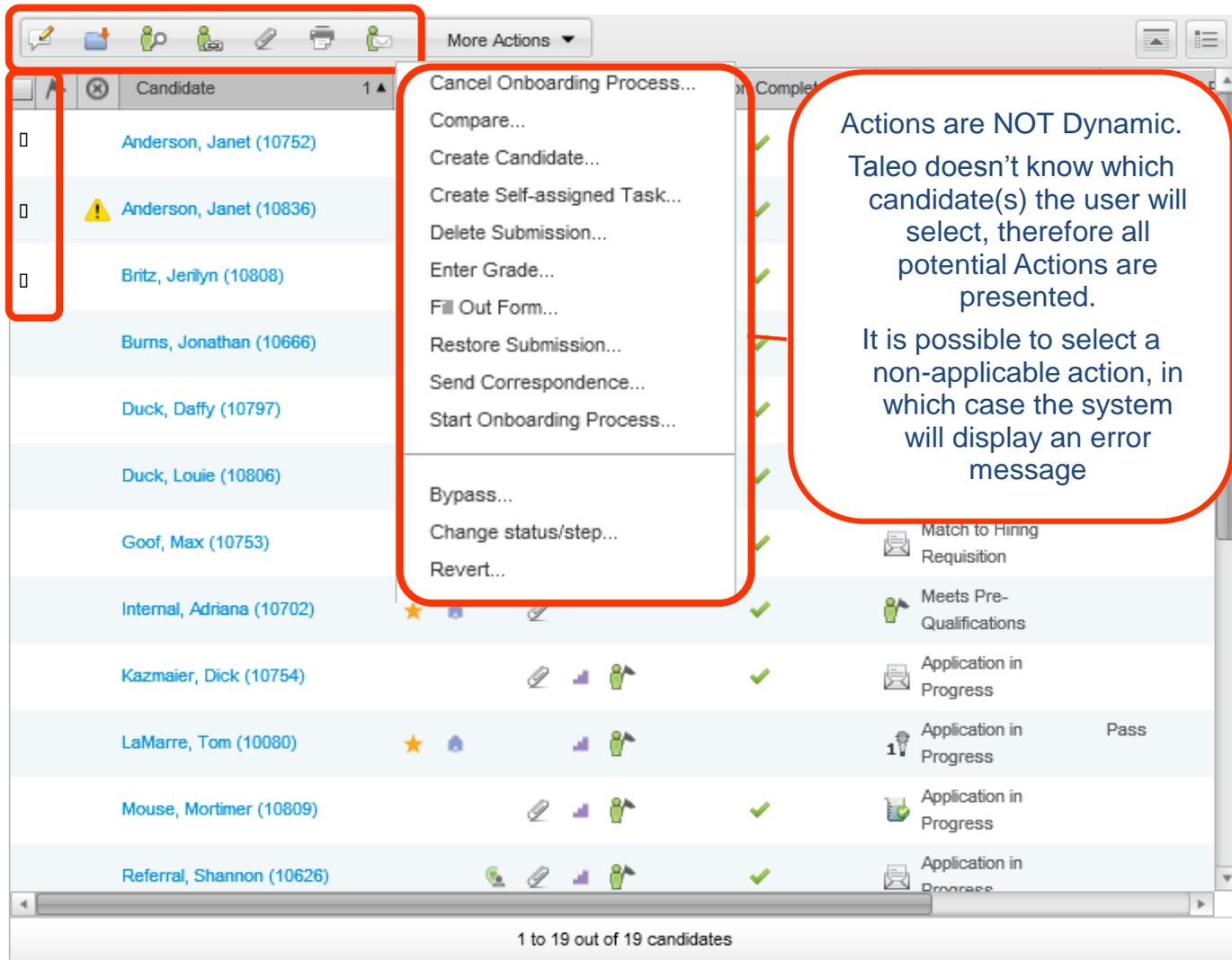
Click here to open and run your saved Search Query

Click here to find your saved Search Queries

Name	Type	Folder Name
<b>San Diego Construction Engineers</b>	Advanced Search	

# CANDIDATE MANAGEMENT

# Take Actions from the Candidate List



More Actions ▾

- Cancel Onboarding Process...
- Compare...
- Create Candidate...
- Create Self-assigned Task...
- Delete Submission...
- Enter Grade...
- Fill Out Form...
- Restore Submission...
- Send Correspondence...
- Start Onboarding Process...

Bypass...

Change status/step...

Revert...

Match to Hiring Requisition

Meets Pre-Qualifications

Application in Progress

Application in Progress Pass

Application in Progress

Application in Progress

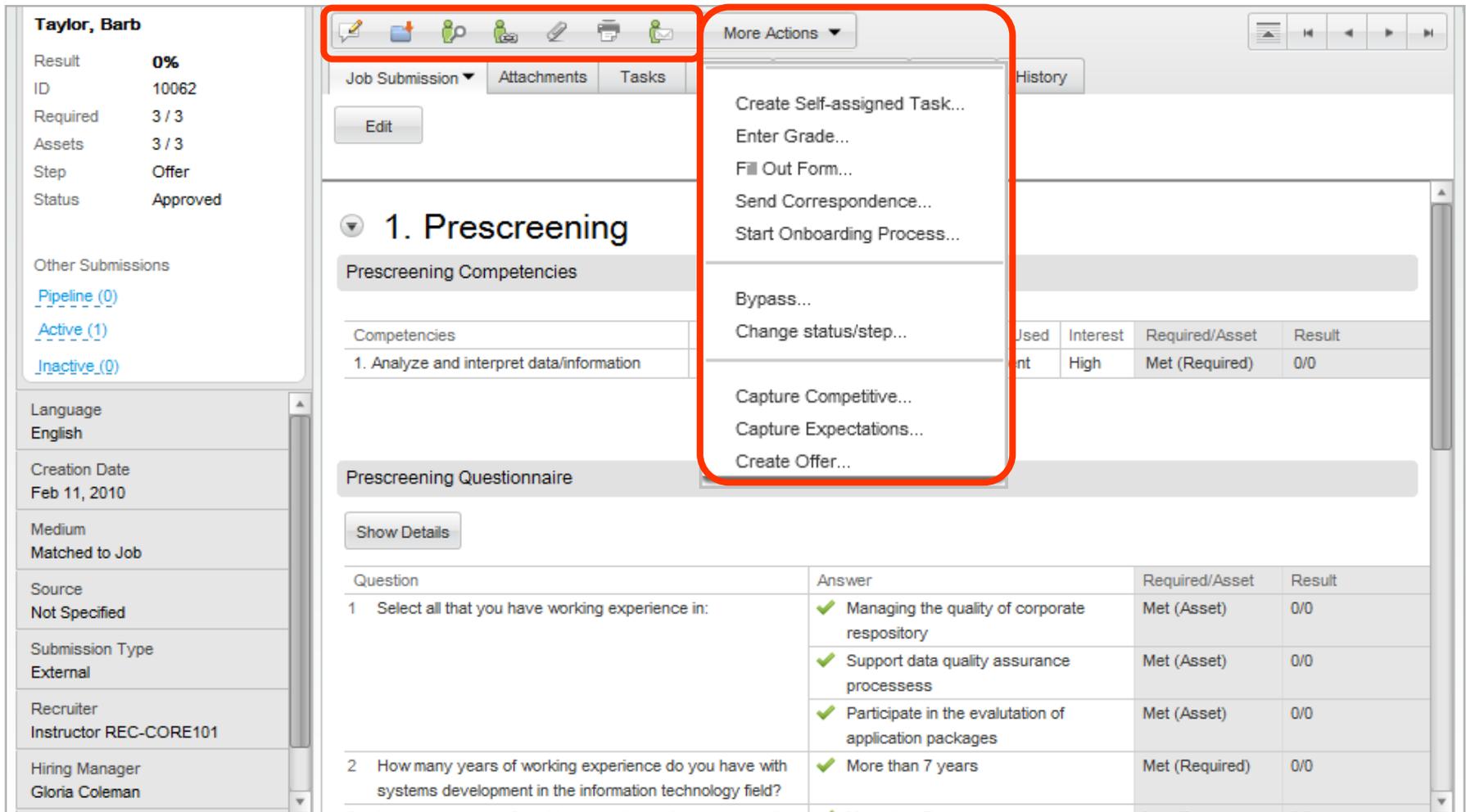
1 to 19 out of 19 candidates

Actions are NOT Dynamic. Taleo doesn't know which candidate(s) the user will select, therefore all potential Actions are presented.

It is possible to select a non-applicable action, in which case the system will display an error message

# Take Actions from the Candidate File

Actions ARE Dynamic from the Candidate File



**Taylor, Barb**

Result **0%**  
 ID 10062  
 Required 3 / 3  
 Assets 3 / 3  
 Step Offer  
 Status Approved

Other Submissions  
[Pipeline \(0\)](#)  
[Active \(1\)](#)  
[Inactive \(0\)](#)

Language  
 English

Creation Date  
 Feb 11, 2010

Medium  
 Matched to Job

Source  
 Not Specified

Submission Type  
 External

Recruiter  
 Instructor REC-CORE101

Hiring Manager  
 Gloria Coleman

**1. Prescreening**

Prescreening Competencies

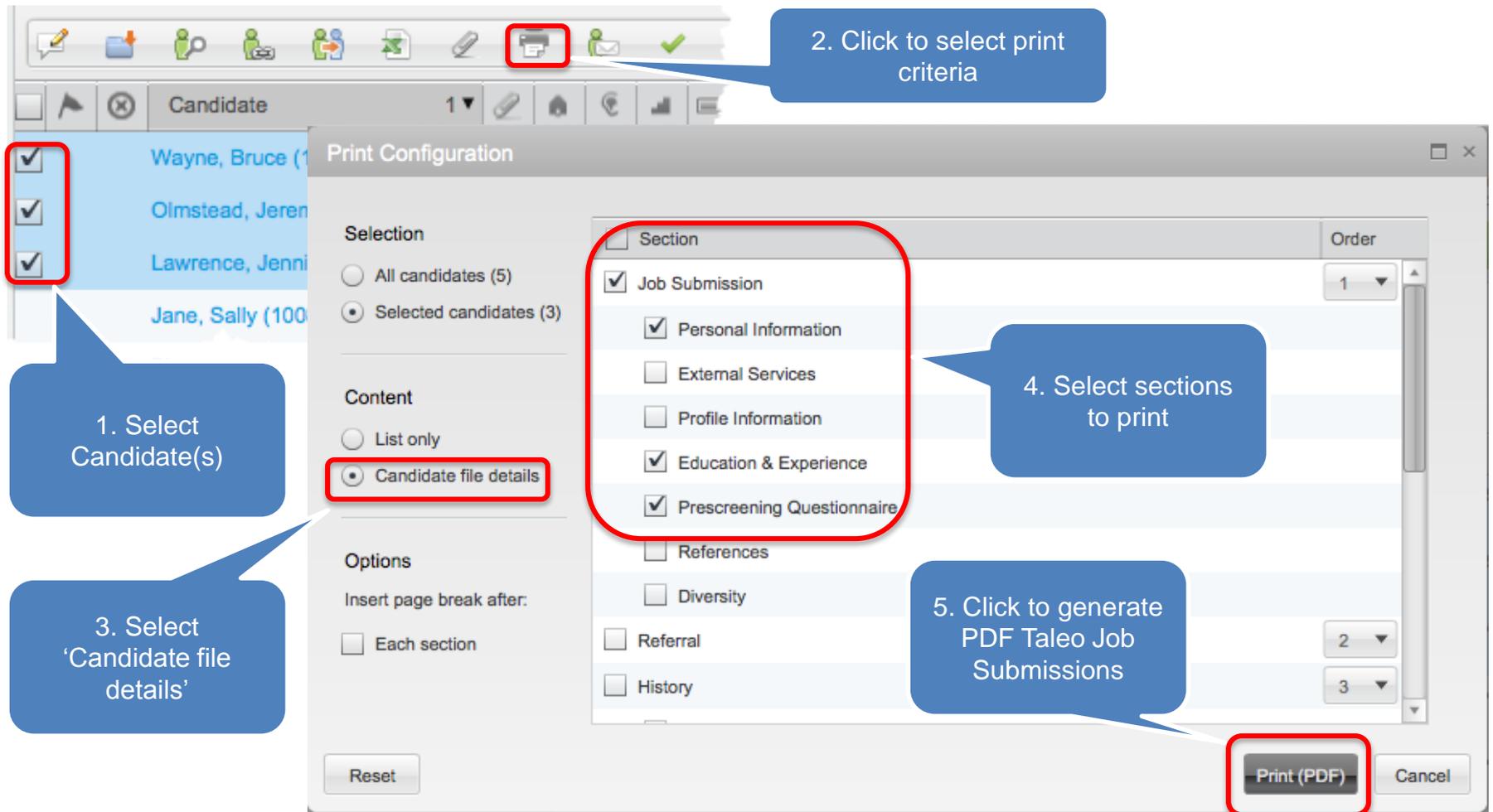
Competencies	Used	Interest	Required/Asset	Result
1. Analyze and interpret data/information	nt	High	Met (Required)	0/0

Prescreening Questionnaire

Show Details

Question	Answer	Required/Asset	Result
1 Select all that you have working experience in:	✓ Managing the quality of corporate repository	Met (Asset)	0/0
	✓ Support data quality assurance processess	Met (Asset)	0/0
	✓ Participate in the evaluation of application packages	Met (Asset)	0/0
2 How many years of working experience do you have with systems development in the information technology field?	✓ More than 7 years	Met (Required)	0/0

# Print Job Submission(s)



1. Select Candidate(s)

2. Click to select print criteria

3. Select 'Candidate file details'

4. Select sections to print

5. Click to generate PDF Taleo Job Submissions

Print Configuration

Selection

- All candidates (5)
- Selected candidates (3)

Content

- List only
- Candidate file details

Options

Insert page break after:

- Each section

Section

Section	Order
<input checked="" type="checkbox"/> Job Submission	1
<input checked="" type="checkbox"/> Personal Information	
<input type="checkbox"/> External Services	
<input type="checkbox"/> Profile Information	
<input checked="" type="checkbox"/> Education & Experience	
<input checked="" type="checkbox"/> Prescreening Questionnaire	
<input type="checkbox"/> References	
<input type="checkbox"/> Diversity	
<input type="checkbox"/> Referral	2
<input type="checkbox"/> History	3

Print (PDF) Cancel

# Print Job Submission(s)

Candidate Name	Wayne, Bruce (170001)	Job Title	JT Joint Union Progr Admin Mgr K (1400000555)
----------------	-----------------------	-----------	-----------------------------------------------

---

Wayne, Bruce (170001) applied for job: JT Joint Union Progr Admin Mgr K (1400000555)

Step	Medium	Recruiter
HM Screen	Online	Janet Thomas
Status	Source	Hiring Manager
To be Reviewed	Not Specified	Dante Bernardini
Creation Date	Submission Type	
May 20, 2014	External	

### Personal Information

Internal Candidate

First Name	Last Name
Bruce	Wayne
Address (line 1)	
P.O. Box 3352	
City	Zip/Postal Code
Summerville	29484-3352
Place of Residence	
United States > South Carolina > Charleston	
Email Address	

Multiple records will be condensed into one PDF file

# Share Candidate

										
<input type="checkbox"/>	<input type="checkbox"/>	Candidate	2 ▲	Relevance 1 ▼					View	Education Level
<input checked="" type="checkbox"/>		Stevenson, Ellie (12220)		100				1	View	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>		Chambless, Micah (11233)		80					View	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>		Donaldson, Matthew (11232)		80					View	Bachelor's Degree (±16 years)
		Esurone, Esttone (21788)		80					View	-
		Humphrey, Rob (11004)		80					View	Doctorate Degree (over 19 years)
		Marmot, Mukmuknine (21265)		80					View	-
				70					View	Bachelor's Degree (±16 years)

# Share Candidate

Share Candidate

Recipients

Name	Email
Manager, Mike	alexrtellez@gmail.com

... or type the email address of a non-system user

Share with External Recipients

Email address (use a comma to separate email addresses)

samsupervisor@invalidemail.com

Next Cancel

Quick Filters

Frequent Collaborators

Name

Mike Manager

Email Address

Employee ID

Name	Email Address	Select
Manager, Mike	alexrtellez@gmail.com	Select

Use Quick Filters to find a system user ...

# Share Candidate

Share Candidate

Options

Insert page break after:

Each section

<input type="checkbox"/> Section	Order
<input checked="" type="checkbox"/> General Profile	1
<input checked="" type="checkbox"/> Resume	
<input checked="" type="checkbox"/> Profile	
<input checked="" type="checkbox"/> Prescreening	
<input type="checkbox"/> Screening	
<input type="checkbox"/> Referral	2
<input type="checkbox"/> History	3

Comments

Reset Preview

Previous **Share** Cancel

Determine sections to include/exclude

Multiple records will be condensed into one PDF file

General Profile - Smith, Alice (13624)

Medium Online	Source Dice.com	Source Type Job Board
Creation Date Apr 1, 2010	Submission Type Internal	

Resume

Anonymous job submission

First Name  
Alice

Last Name  
Smith

Email Address  
alicesmith@invalidemail.com

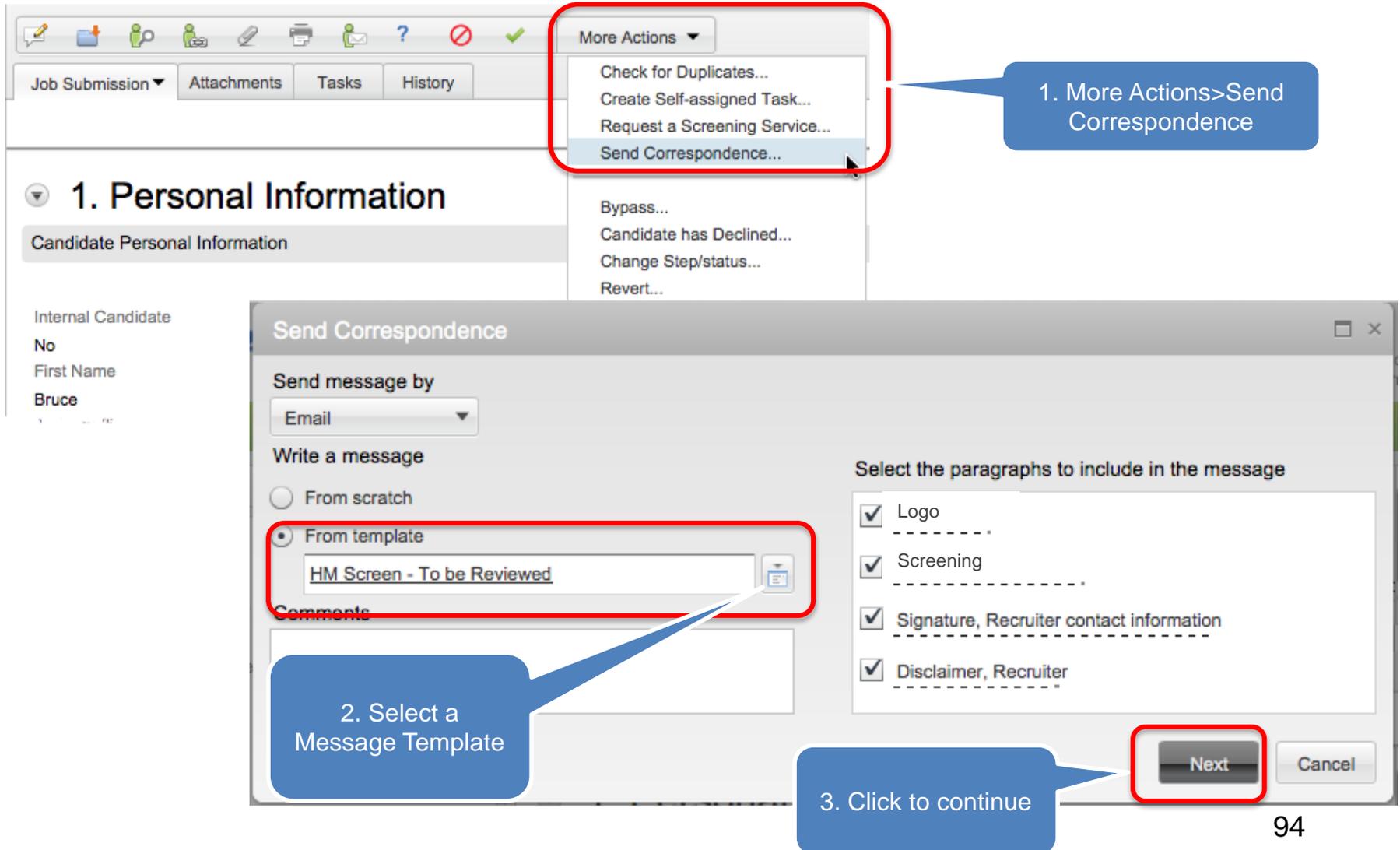
Place of Residence  
Bermuda > Bermuda Islands > Devonshire Parish

Home Phone Number  
333334444

Profile

Recipients will receive PDF candidate profile and any attachments via email

# Send Correspondence



1. More Actions>Send Correspondence

2. Select a Message Template

3. Click to continue

Internal Candidate  
No  
First Name  
Bruce

1. Personal Information  
Candidate Personal Information

More Actions

- Check for Duplicates...
- Create Self-assigned Task...
- Request a Screening Service...
- Send Correspondence...
- Bypass...
- Candidate has Declined...
- Change Step/status...
- Revert...

Send Correspondence

Send message by  
Email

Write a message

From scratch

From template

HM Screen - To be Reviewed

Comments

Select the paragraphs to include in the message

- Logo
- Screening
- Signature, Recruiter contact information
- Disclaimer, Recruiter

Next Cancel

# Send Correspondence

Send Correspondence □ ×

Message Preview 1 recipients selected

Reviewing the message template in: English ▼

From Boeing Careers <jobs@jobs.careersatboeing.com>  
To {RequisitionHeader.HmgrEmail}  
Cc {RequisitionHeader.HmgrAsstEmail}  
Subject Candidate Ready for HM Screen Review

Attachments  
Message

{Other.CompanyLogos1}

Dear {Requisition.HmgrName},

There is at least one applicant ready for your review for the position of {Requisition.JobTitle}, requisition {Requisition.Number}.

Please note: Now that the first applicant has been submitted for your feedback, you will not receive future notifications for new applicants on this requisition. To review current applicant activity, you will need to go to the [Careers Welcome Suite](#).

For questions, please contact {Requisition.RecruiterName} at {Requisition.RecruiterPhone} or via e-mail at {Requisition.RecruiterEmail}.

Edit Review All Previous **Send** Cancel

Preview  
Message. Click  
'Send' to  
deliver

# Check for Duplicates

General Profile - Candidate, Kathy







 More Actions ▾

General Profile ▾
 Attachments
 Tasks
 **Check for Duplicates...**
 Create Self-assigned Task...
 Send Correspondence...

Edit

Duplicate Check Results





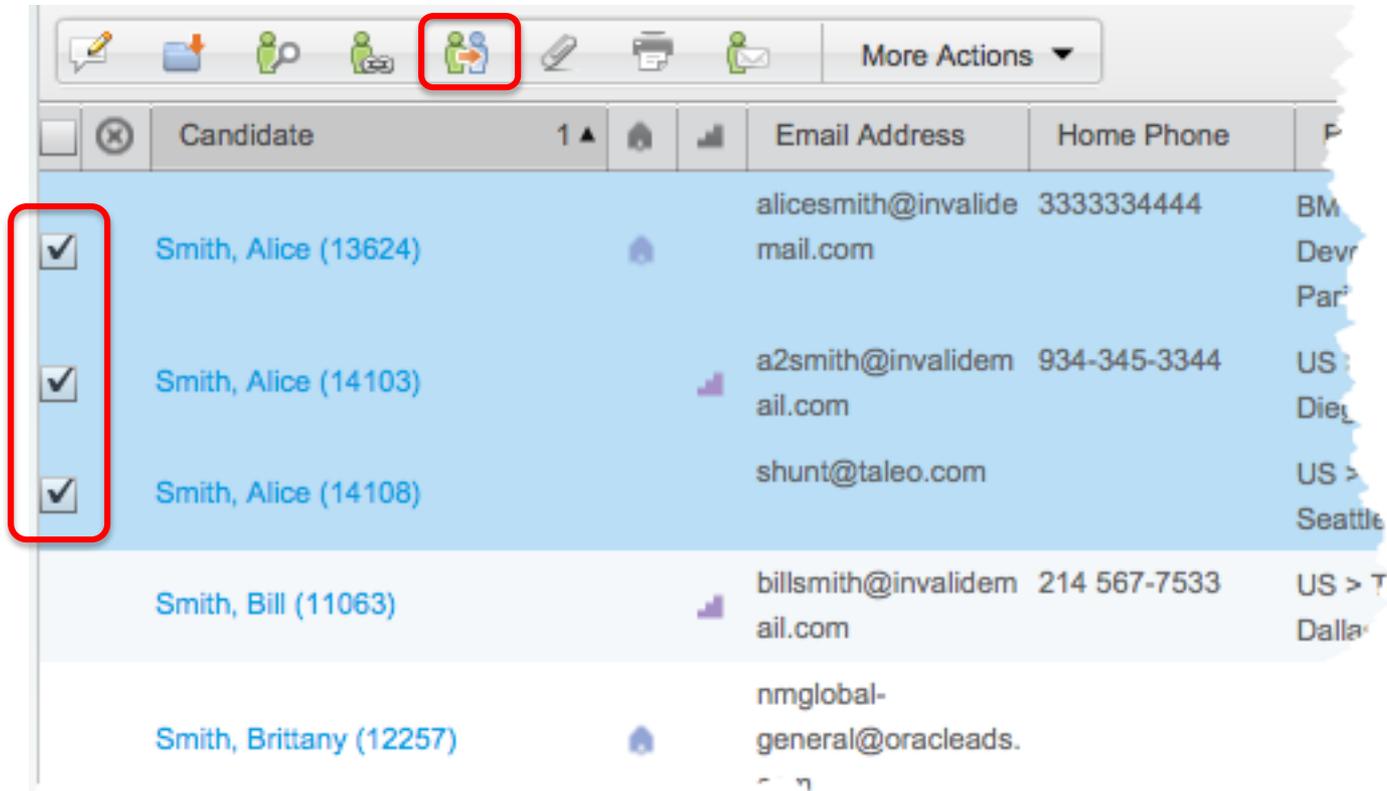


 More Actions ▾

<input type="checkbox"/>	Candidate					Last Activity 1 ▾	No Rehire	Submission Updated	Cellular Number	Home Phone	SSN
<input type="checkbox"/>	Candidate, Kathy (19066)					Apr 10, 2015		Apr 10, 2015		941-555-0202	550-555-5013
<input type="checkbox"/>	PRICE, KATHERINE E (13623) ▾					Apr 4, 2015		Mar 21, 2015		941-749-5850	591507563

Taleo will check the following fields for duplicates:  
Name, Phone Numbers, Email Address

# Merge Duplicate Records



	Candidate	Email Address	Home Phone
<input checked="" type="checkbox"/>	Smith, Alice (13624)	alicesmith@invalidem mail.com	3333334444
<input checked="" type="checkbox"/>	Smith, Alice (14103)	a2smith@invalidem ail.com	934-345-3344
<input checked="" type="checkbox"/>	Smith, Alice (14108)	shunt@taleo.com	
	Smith, Bill (11063)	billsmith@invalidem ail.com	214 567-7533
	Smith, Brittany (12257)	nmglobal- general@oracleads. com	

# Merge Duplicate Records

Merge Candidate Files

Select the master candidate file that will be enhanced with the content of the other candidate files. Other candidate files will be deleted.

Note: The system chooses the master candidate file by selecting the candidate file that contains the most up-to-date information or the candidate file that was first referred in the case of a referral.

↓↑ Reorder

Order	Name	Email	Referred By	Creation Date
Master	Smith, Alice (13624)	alicesmith@invalidemail.com	-	Apr 1, 2010, 3:53:17 PM
2	Smith, Alice (14103)	a2smith@invalidemail.com	-	May 17, 2007, 10:20:22 AM

Indicate the Master Record, All other records will be merged into the Master. All candidate history for all merged records will be applied to the Master

Check here to alert the candidate

Comments

Send an email notification to the master candidate or the agent to inform them that candidate files were merged.

Done Cancel

# Match Candidate

**Advanced Candidate Search Results**








 More Actions ▾

<input type="checkbox"/>	<input type="checkbox"/>	Candidate	2 ▲	Relevance 1 ▼					Linked 	Education Level
<input checked="" type="checkbox"/>		Stevenson, Ellie (12220)	100					 1	<a href="#">View</a>	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>		Chambless, Micah (11233)	80						<a href="#">View</a>	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>		Donaldson, Matthew (11232)	80						<a href="#">View</a>	Bachelor's Degree (±16 years)
		Esurone, Esttone (21788)	80						<a href="#">View</a>	-
		Humphrey, Rob (11004)	80						<a href="#">View</a>	Doctorate Degree (over 19 years)
		Marmot, Mukmuknine (21265)	80						<a href="#">View</a>	-
			70						<a href="#">View</a>	Bachelor's Degree (±16 years)

# Match Candidate

Match Candidates to Requisitions

Selected Requisitions

ID	Langua..	Title	Recruiter	Status
RD0001	en	Senior Design Engineer	Baker, Mary	Approved

Done Cancel

Recruiters may opt out of sending the candidate an email notification to apply.

Requisition Selector

Job Field

Category: All

Quick Filters

ID:

Title:

Ownership: All

Status: Approved or Sourcing

Requisition Type: All

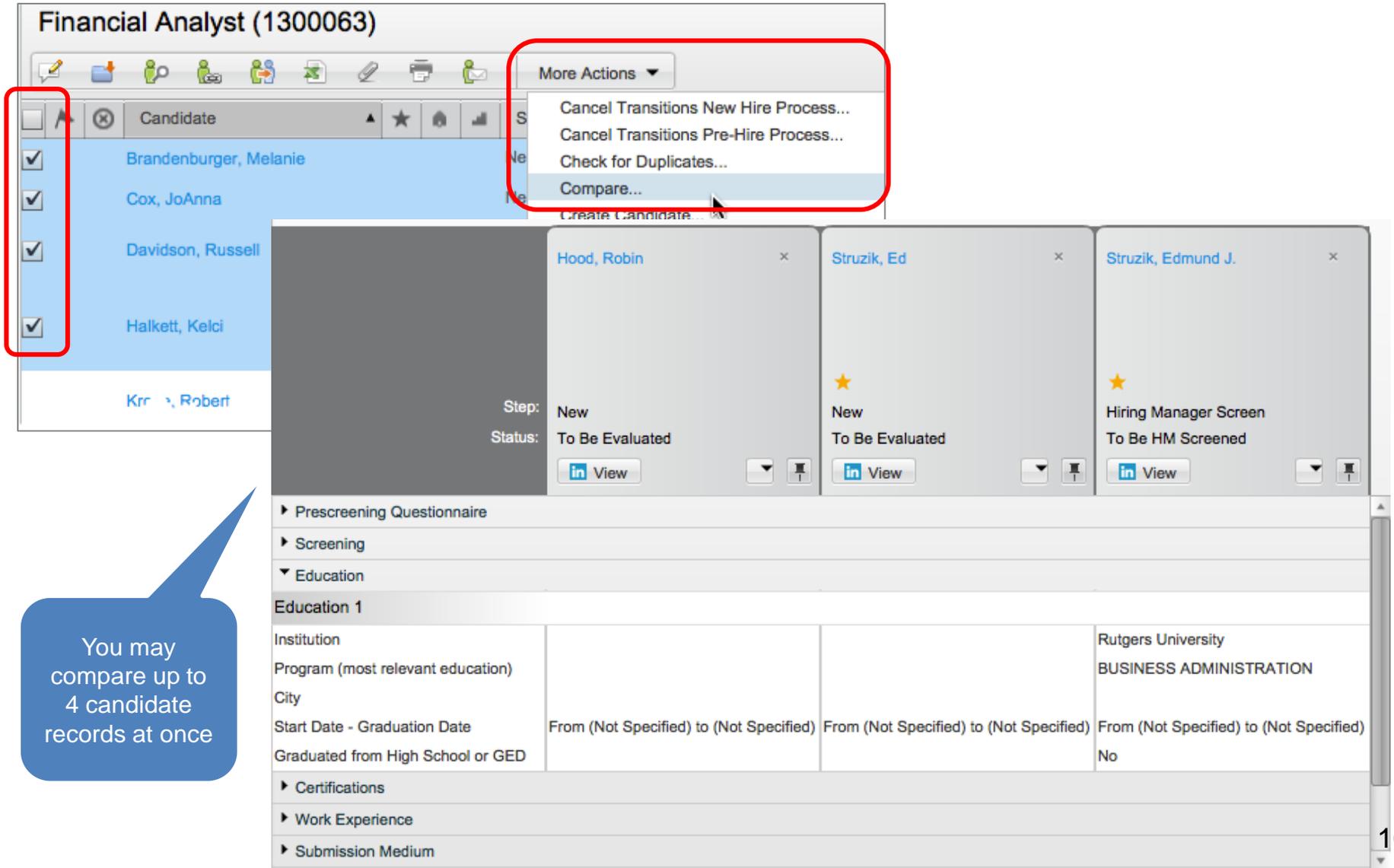
Matching Requisitions

ID	Langl	Title	Recruiter	Status	Select
RD0001	en	Senior Design Engineer	Baker, Mary	Approved	Select
HRI001...	en	HRIS Administrator	Vanaria, Robert	Sourcing	Select
DAT00...	en	Database Administrator	Vanaria, Robert	Sourcing	Select
NON00...	en	Sales Floor Associate	Vanaria, Robert	Sourcing	Select
CUS00...	en	Customer Service Representative	Vanaria, Robert	Sourcing	Select
CUS00...	en	Customer Service Representative	Vanaria, Robert	Sourcing	Select
OPE00...	en	Teller	Baker, Mary	Approved	Select
ACC00...	en	Accountant	Swan, Jeff	Approved	Select
NON00...	en	Warehouse Worker - San Franci...	Liggins, Kevin	Sourcing	Select
NET00...	en	Network Administrator	Prahl, Chuck	Approved	Select
SAN-02...	en	Nurse	Recruiter, Nurse	Approved	Select
UND00...	en	Texas Christian University - Date...	Prahl, Chuck	Sourcing	Select
UND00...	en	Texas A&M University - Dates o...	Prahl, Chuck	Sourcing	Select
UND00...	en	University of Texas - Dates on C...	Prahl, Chuck	Sourcing	Select
SEC00...	en	Driver Pool - Region A	Prahl, Chuck	Sourcing	Select

Click 'Done'

Select requisition(s)

# Compare



**Financial Analyst (1300063)**

More Actions

- Cancel Transitions New Hire Process...
- Cancel Transitions Pre-Hire Process...
- Check for Duplicates...
- Compare...**
- Create Candidate...

Candidate

- Brandenburger, Melanie
- Cox, JoAnna
- Davidson, Russell
- Halkett, Kelci
- Krr, Robert

Step:	New	New	Hiring Manager Screen
Status:	To Be Evaluated	To Be Evaluated	To Be HM Screened
<ul style="list-style-type: none"> <li>▶ Prescreening Questionnaire</li> <li>▶ Screening</li> <li>▼ Education</li> </ul>			
<b>Education 1</b>			
Institution			Rutgers University
Program (most relevant education)			BUSINESS ADMINISTRATION
City			
Start Date - Graduation Date	From (Not Specified) to (Not Specified)	From (Not Specified) to (Not Specified)	From (Not Specified) to (Not Specified)
Graduated from High School or GED			No
<ul style="list-style-type: none"> <li>▶ Certifications</li> <li>▶ Work Experience</li> <li>▶ Submission Medium</li> </ul>			

You may compare up to 4 candidate records at once

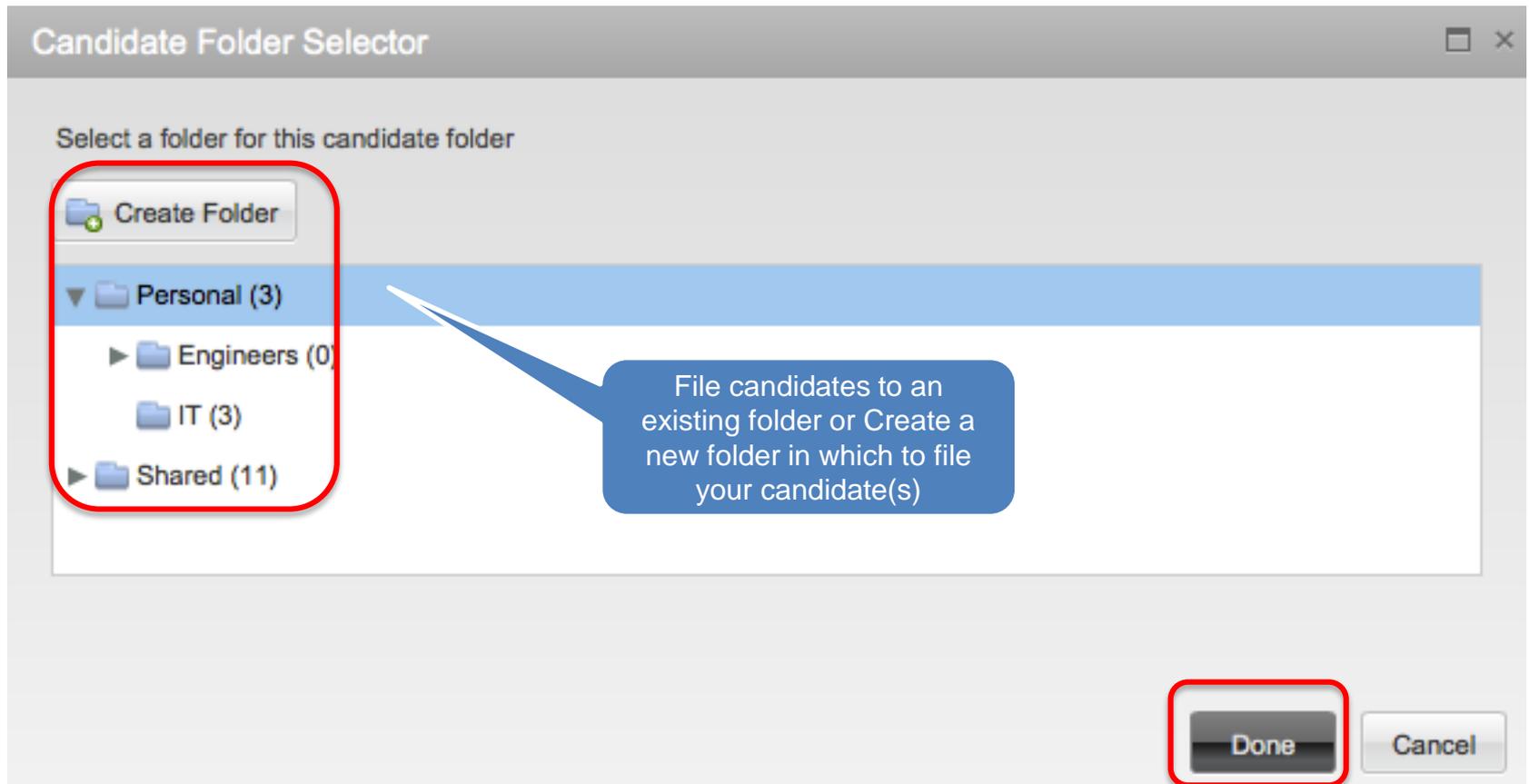
# File Candidates to a Folder

Advanced Candidate Search Results

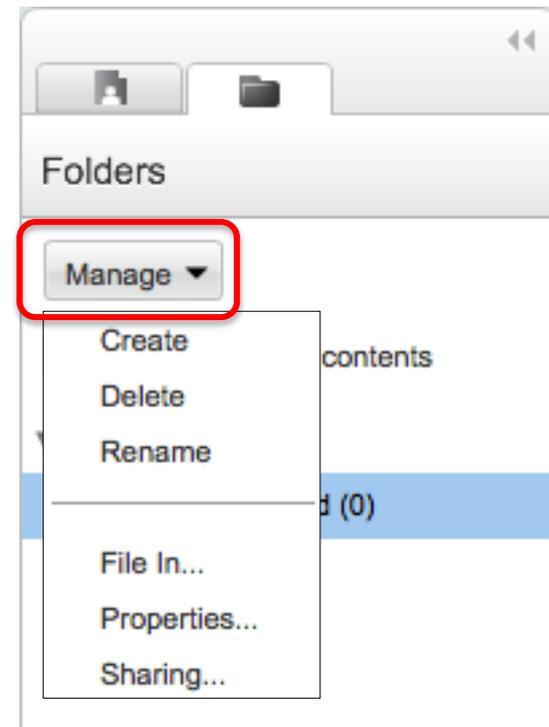
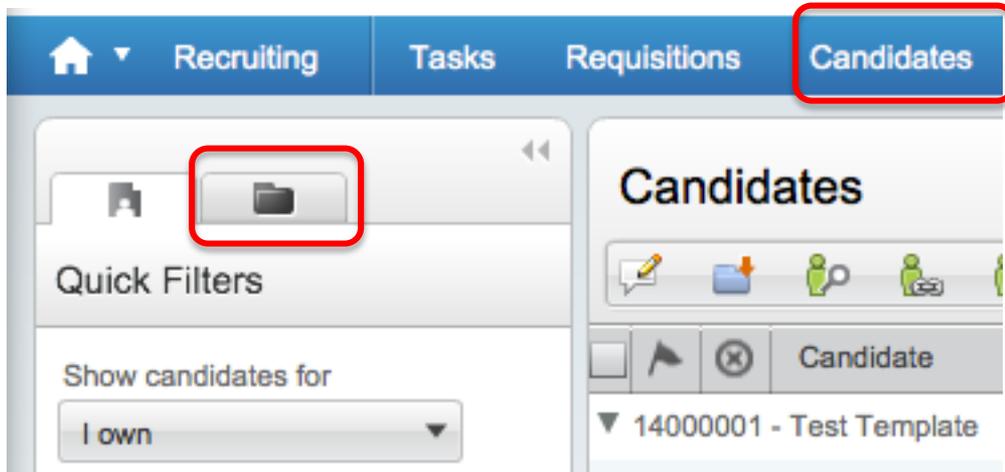
      More Actions ▾

<input type="checkbox"/>	Candidate	2 ▲	Relevance 1 ▼					Linked 	Education Level
<input checked="" type="checkbox"/>	Stevenson, Ellie (12220)	100					1 	<a href="#">View</a>	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>	Chambless, Micah (11233)	80						<a href="#">View</a>	Bachelor's Degree (±16 years)
<input checked="" type="checkbox"/>	Donaldson, Matthew (11232)	80						<a href="#">View</a>	Bachelor's Degree (±16 years)
	Esurone, Esttone (21788)	80						<a href="#">View</a>	-
	Humphrey, Rob (11004)	80						<a href="#">View</a>	Doctorate Degree (over 19 years)
	Marmot, Mukmuknine (21265)	80						<a href="#">View</a>	-
		70						<a href="#">View</a>	Bachelor's Degree (±16 years)

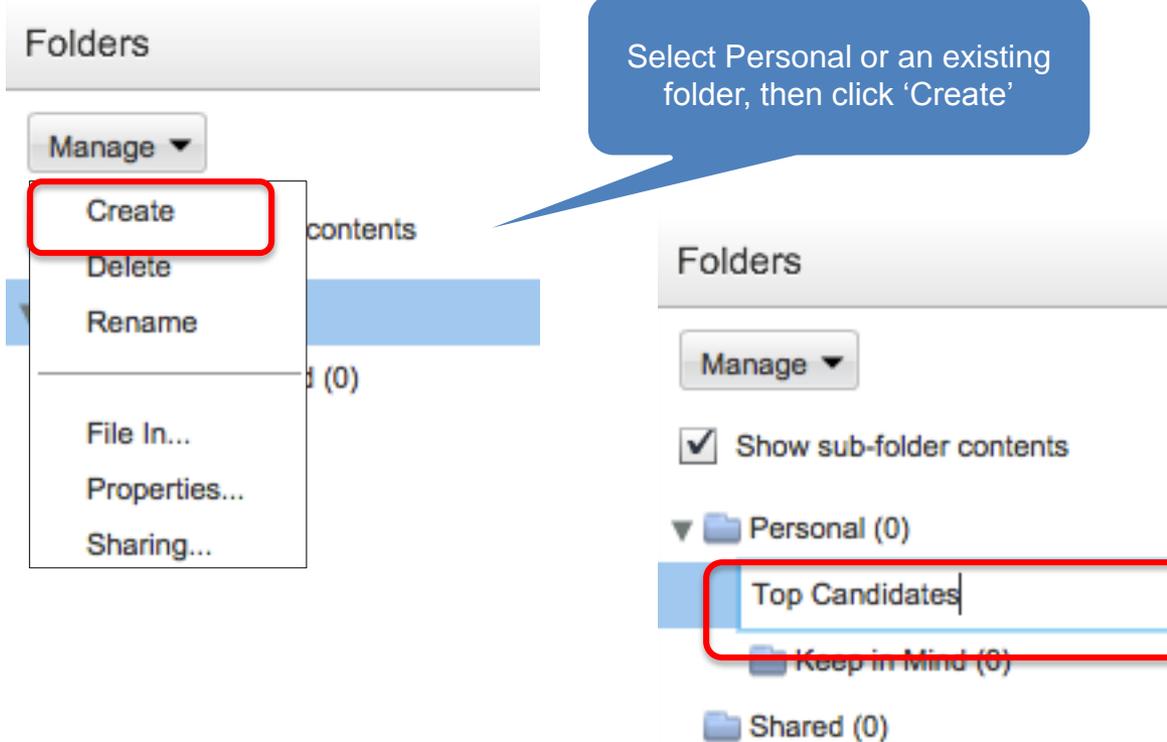
# File Candidates to a Folder



# Create and Manage Folders



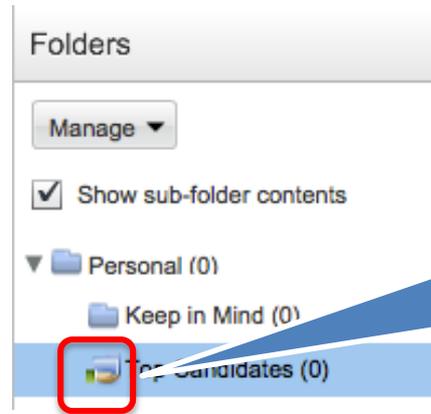
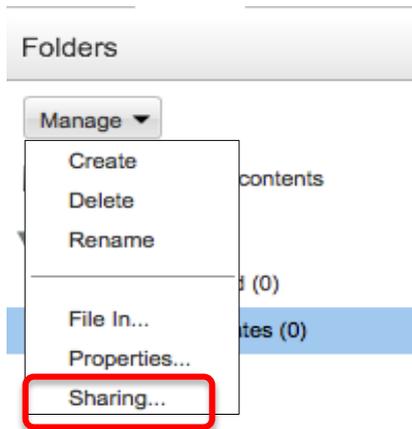
# Create Folder



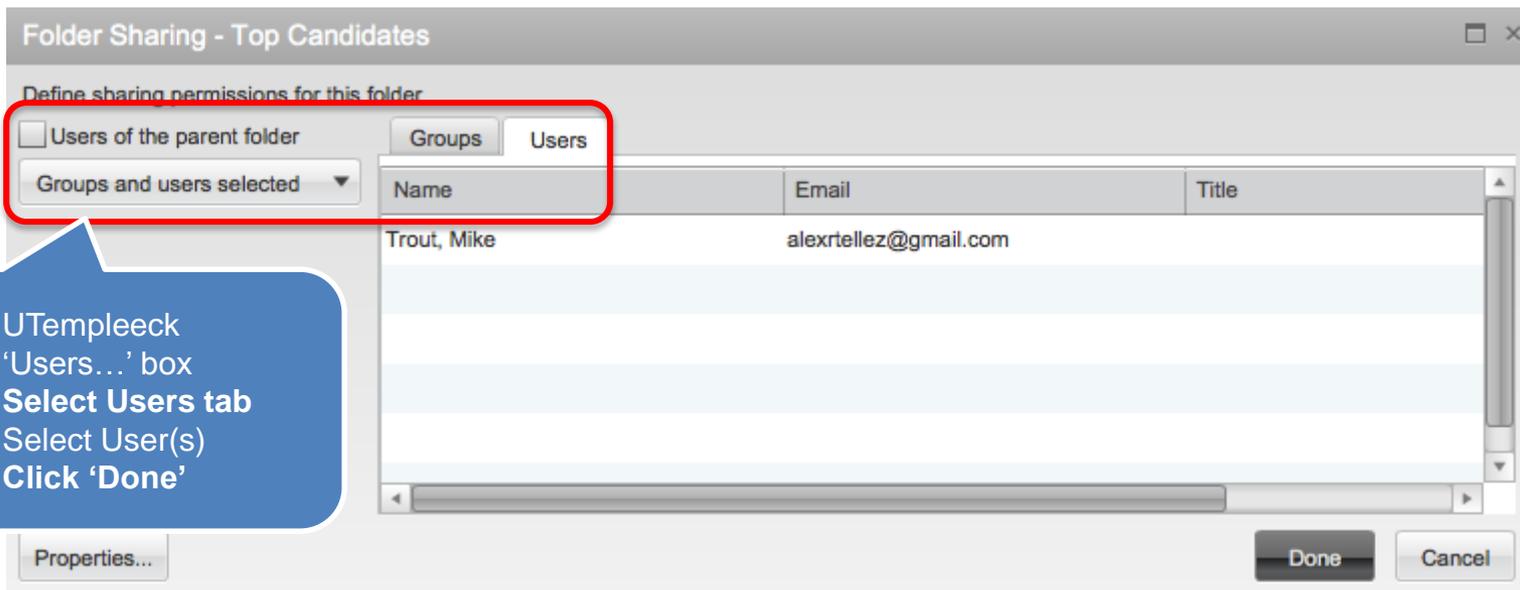
The image shows two screenshots of a folder management interface. The left screenshot shows a 'Manage' dropdown menu with 'Create' highlighted in a red box. A blue callout bubble points to the 'Create' option with the text: "Select Personal or an existing folder, then click 'Create'". The right screenshot shows the same interface with a folder named 'Top Candidates' highlighted in a red box. A blue callout bubble points to the folder name with the text: "Name your folder".

You may create a 4-level deep hierarchy of Candidate Folders

# Share Folder



Icon indicates your folder is being shared



- UTempleck 'Users...' box
- **Select Users tab**
- Select User(s)
- **Click 'Done'**

# Icons for Additional Common Actions

	Add Comments (comments appear in History Tab)
	Add an Attachment to Candidate File(s)
	Find More Candidates Like This One (Conceptual Search)

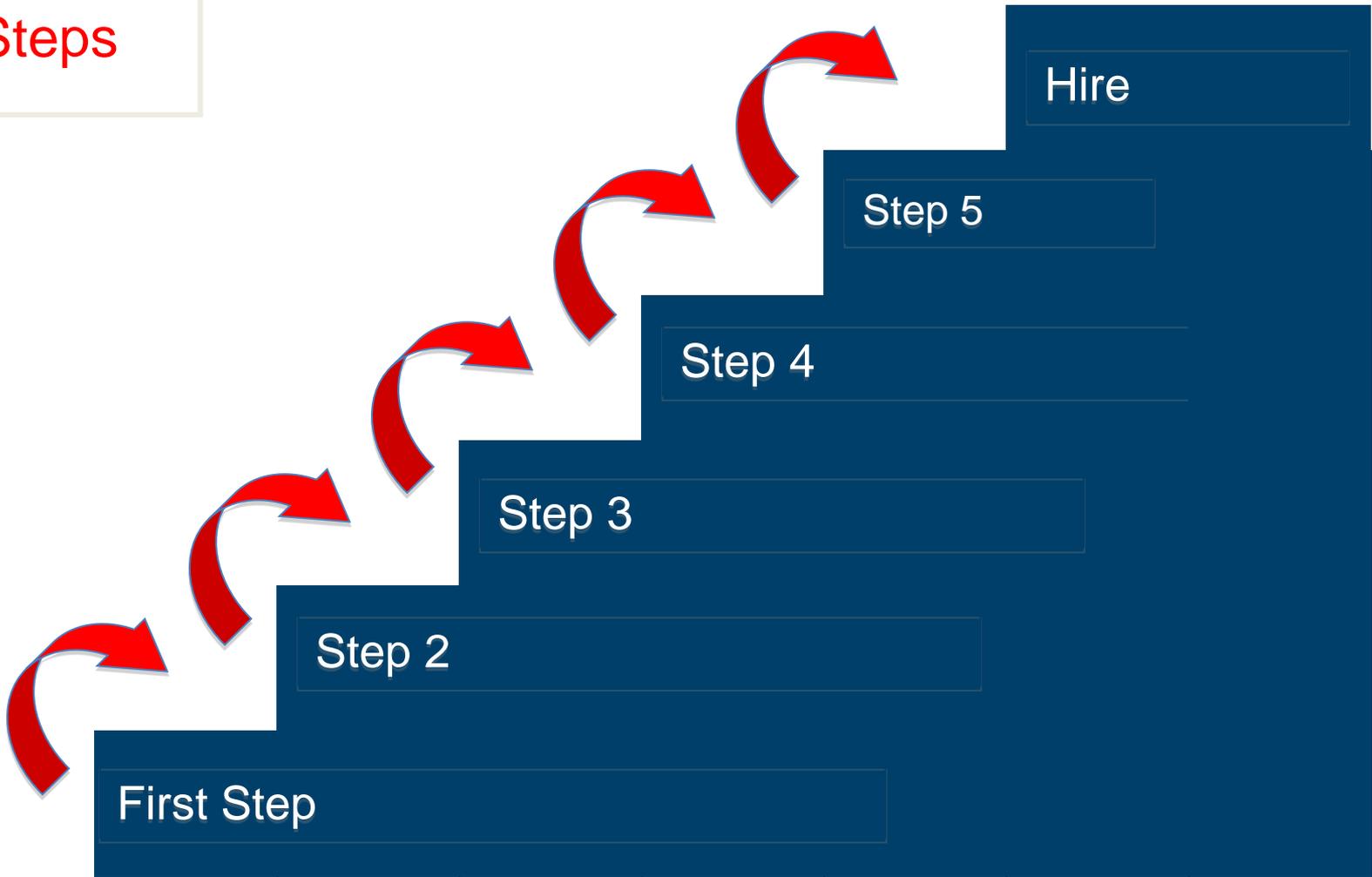
# CANDIDATE SELECTION WORKFLOW

# Lesson Goals

- Define the Candidate Selection Workflow
- Move Candidates through the Hiring Process
- Move Candidates using Shortcut Buttons
- Reject a Candidate
- Revert a Candidate

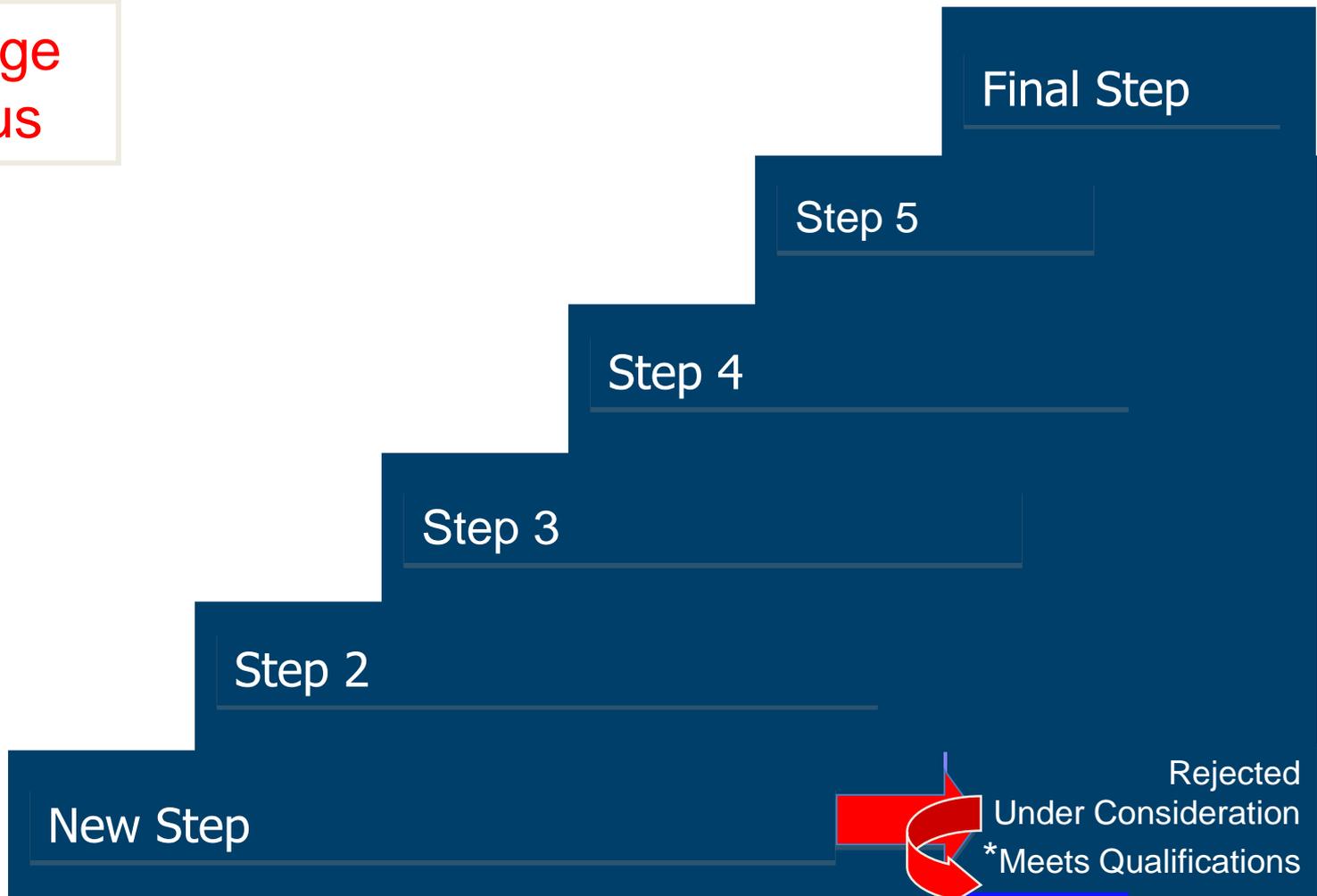
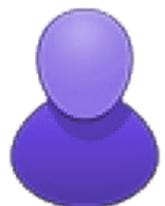
# Candidate Selection Workflow (CSW)

Steps



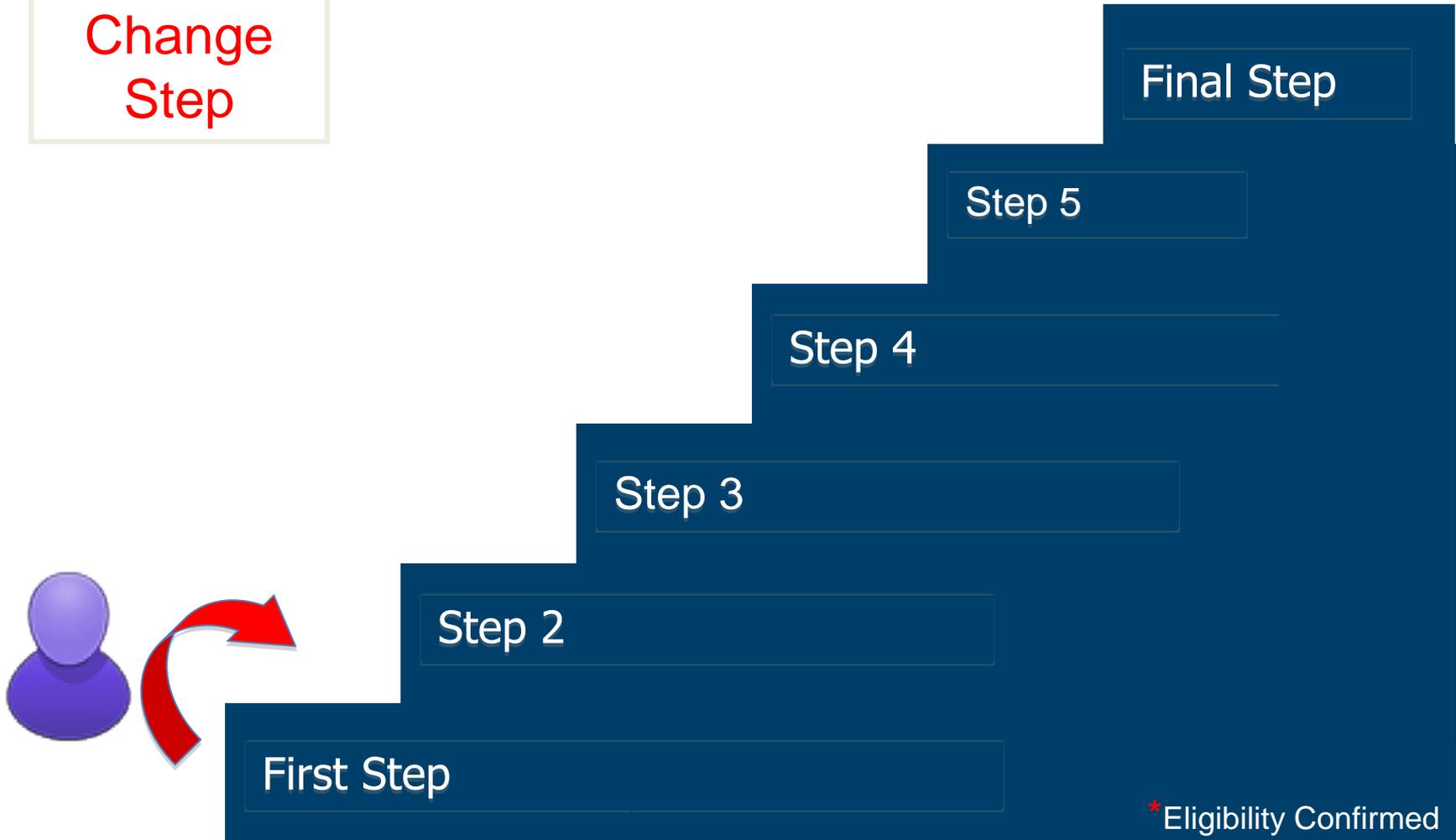
# CSW - Change Status

Change  
Status



# CSW - Change Step

Change  
Step



\*Eligibility Confirmed

# STAFF Candidate Selection Workflow

## Temple Candidate Selection Workflow - Staff

Steps	New	Prescreen	Manager Review	Interviews	Offer	Pre-Employment	Hire
Reference Model	New	Reviewed	Reviewed	1st Interview	Offer	Testing	Hired
Restricted?	Restricted	Restricted	Not Restricted	Not Restricted	Not Restricted	Not Restricted	Not Restricted
Step Requirement	Mandatory	Mandatory	Mandatory	Mandatory	Mandatory	Optional	Mandatory
Code	NEW 2	HM REVIEW	HM REVIEW	INTERVIEWS	RSOFFER	POST OFFER	HIRE 3
Legend	Statuses						
Initial Status	To be Reviewed	To Be Reviewed 	Manager to Review 	Interview Scheduled 	Offer to be made 	Ready for Pre-Employment Screening 	Hired 
In Progress	Meets Qualifications 	Not Reviewed	Under Consideration 	Under Consideration 	<ul style="list-style-type: none"> <li>- Draft</li> <li>- Canceled</li> <li>- Approval In Progress</li> <li>- Approval Rejected</li> <li>- Approved</li> <li>- Extended</li> <li>- Rescinded</li> <li>- In Negotiation</li> <li>- Refused</li> </ul>	Pre-Employment Screening in Progress 	
Completion Status	Rejected (All require disposition, comments optional) 	Under Consideration 	Proceed to Interview 	Additional Interview(s)		Pre-Employment Screening Successful 	
Unsuccessful	Applicant Withdrew	Ready for Manager Review 	Rejected 	Assessment		Rejected 	
		Rejected 	Applicant Withdrew	Proceed to Offer 	Accepted	Applicant Withdrew	
		Applicant Withdrew		Rejected 	Rejected 		
				Applicant Withdrew	Applicant Withdrew		

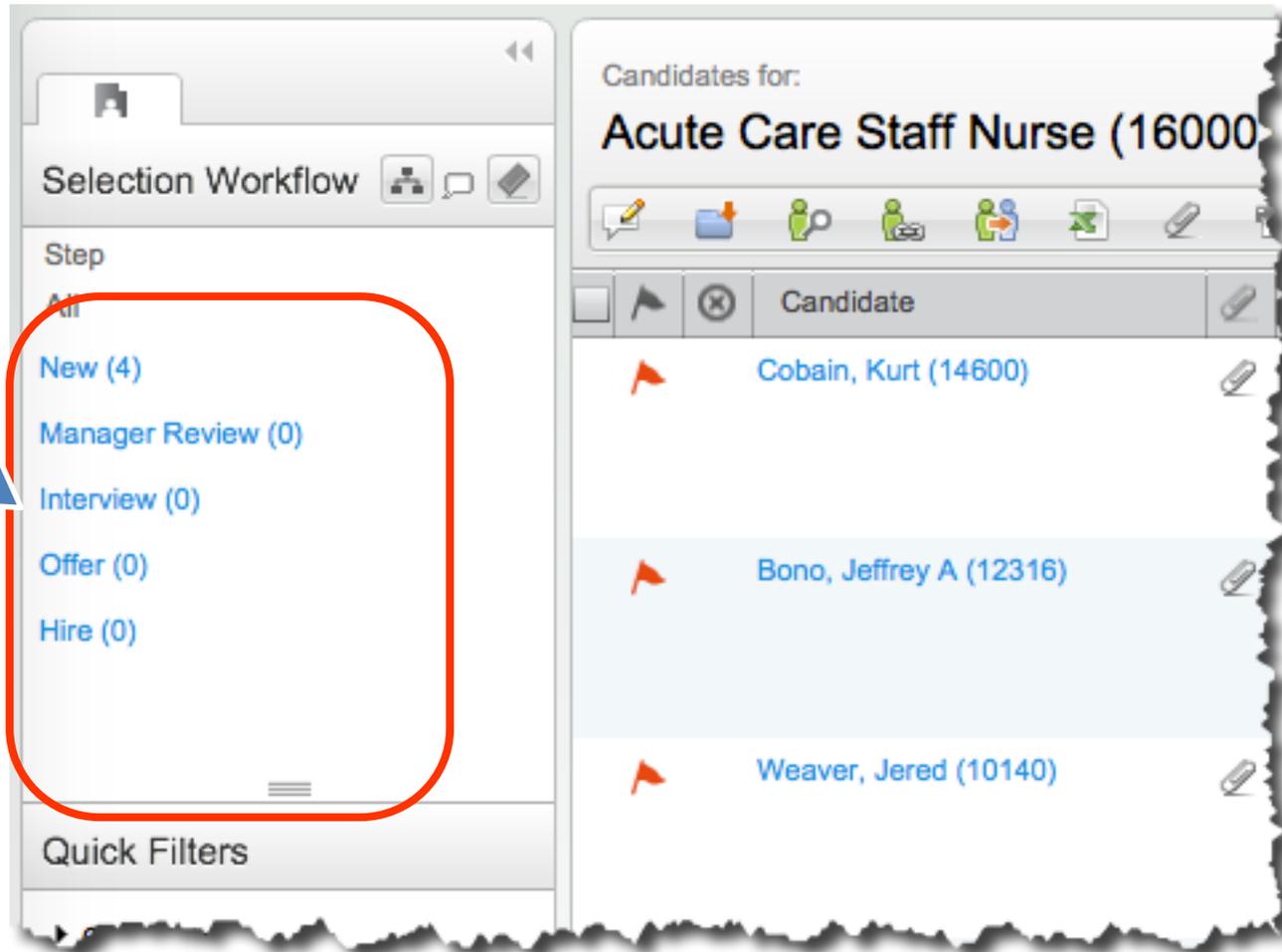
# Adjunct/Student Candidate Selection Workflow

ORACLE®

## Temple Candidate Selection Workflow - Adjunct/Student

Steps	Manager Review	Interviews	Offer	Hire
Restricted?	Not Restricted	Not Restricted	Not Restricted	Not Restricted
Step Requirement	Mandatory	Mandatory	Mandatory	Mandatory
Legend				
Initial Status	Manager to Review 	Interview Scheduled 	Offer to be made 	Hired 
In Progress	Not Reviewed	Under Consideration 	<ul style="list-style-type: none"> <li>- Draft</li> <li>- Canceled</li> <li>- Approval In Progress</li> <li>- Approval Rejected</li> <li>- Approved</li> <li>- Extended</li> <li>- Rescinded</li> <li>- In Negotiation</li> <li>- Refused</li> </ul>	Rejected 
Completion Status	Under Consideration 	Additional Interview(s)		Applicant Withdrawn
Unsuccessful	Proceed to Interview 	Assessment		
	Rejected 	Proceed to Offer 	Accepted	
	Applicant Withdrawn	Rejected 	Rejected 	
		Applicant Withdrawn	Applicant Withdrawn	

# Workflow Steps on Requisition



Selection Workflow

Step

- All
- New (4)
- Manager Review (0)
- Interview (0)
- Offer (0)
- Hire (0)

Quick Filters

Candidates for:  
**Acute Care Staff Nurse (16000)**

	Candidate	
	Cobain, Kurt (14600)	
	Bono, Jeffrey A (12316)	
	Weaver, Jered (10140)	

Click to filter the candidate list by Step

# Change status/step – More Actions

Submissions for job:  
**Sr. Financial Analyst**

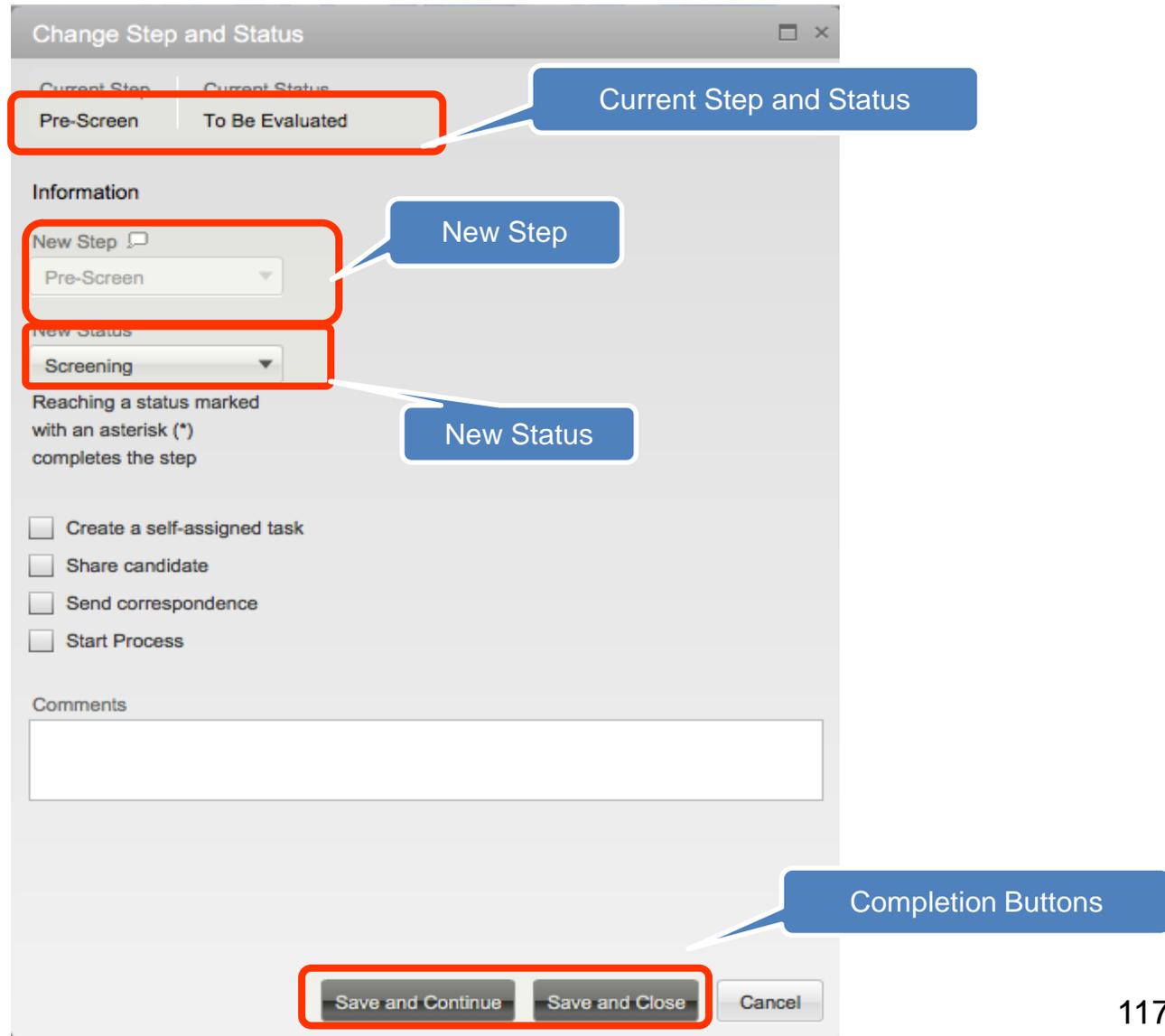
More Actions

Candidate	Status	Requirements	Assets	Result
Barillari, Janie (63893)	Completed	6 / 7	5 / 8	67 %
Robinson, Pat (42773)	Completed	0 / 7	5 / 8	33 %
Bialk, Robert (29329)	Completed	0 / 7	0 / 8	
Cortlandt, Robert (39986)	Completed			
Burns, Maria L. (40269)	Completed			
Mulvoy, Maria (61213)	Completed			
Morin, Robert (64233)	Completed			
Allen, Russell (38891)	Completed	0 / 7	0 / 8	
Ace, Edward (59353)	Completed	0 / 7	0 / 8	
Evans, Robert (61813)	Completed	0 / 7	0 / 8	
Sanders, Maria (65108)	Completed	0 / 7	0 / 8	
Thomas-Horan, Tricia (65502)	Completed	0 / 7	0 / 8	

1 to 20 out of 20 candidates

Access Change Step/status window

# Change Step/status window



The screenshot shows a window titled "Change Step and Status" with a close button (X) in the top right corner. The window is divided into several sections:

- Current Step and Status:** A horizontal bar at the top with two tabs: "Pre-Screen" and "To Be Evaluated". A blue callout box labeled "Current Step and Status" points to this bar.
- Information:** A section containing two dropdown menus. The first is labeled "New Step" and has "Pre-Screen" selected. The second is labeled "New Status" and has "Screening" selected. Blue callout boxes labeled "New Step" and "New Status" point to these dropdowns respectively.
- Completion Options:** A section with the text "Reaching a status marked with an asterisk (\*) completes the step" and four checkboxes: "Create a self-assigned task", "Share candidate", "Send correspondence", and "Start Process".
- Comments:** A large empty text area for entering comments.
- Completion Buttons:** A row of three buttons at the bottom: "Save and Continue", "Save and Close", and "Cancel". A blue callout box labeled "Completion Buttons" points to this row.

# Change Status/Step with Shortcut Buttons



Candidates for:  
**Sales and Service Rep II - [Your Initials] (000178)**

Selection toolbar: [edit] [add] [search] [print] [refresh] [question mark] [move] [check] [no] [More Actions]

	Candidate	Submission Completed	Selection Status	HA Overall Pas
<input checked="" type="checkbox"/>	Candidate, Adrienne (11450)	<input checked="" type="checkbox"/>	Screened For Next Step	
<input checked="" type="checkbox"/>	Candidate, Alex (11448)	<input checked="" type="checkbox"/>	Under Consideration	
	Candidate, Ann (11447)	<input checked="" type="checkbox"/>	Application in Progress	
	Candidate, Bradley (11451)	<input checked="" type="checkbox"/>	Disqualified	

# Reject / Withdraw Candidates

New Step 

New

New Status

Rejected\*

Reaching a status marked with an asterisk (\*) completes the step

Create a self-assigned task

Share candidate

Send correspondence

Additional Information

Details or Disposition

Level of experience does not match role

Lack of relevant skills / aptitudes / experience

Does not meet education requirements for the role

Application received too late

Send Correspondence

Send message by

Email

Write a message

From scratch

From template

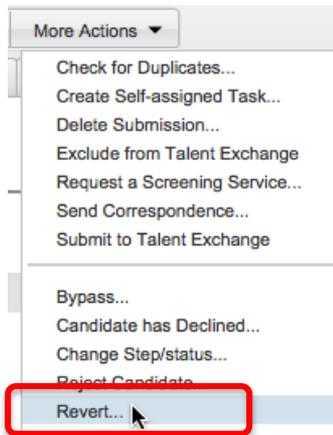
Rejection Letter

\* Comments

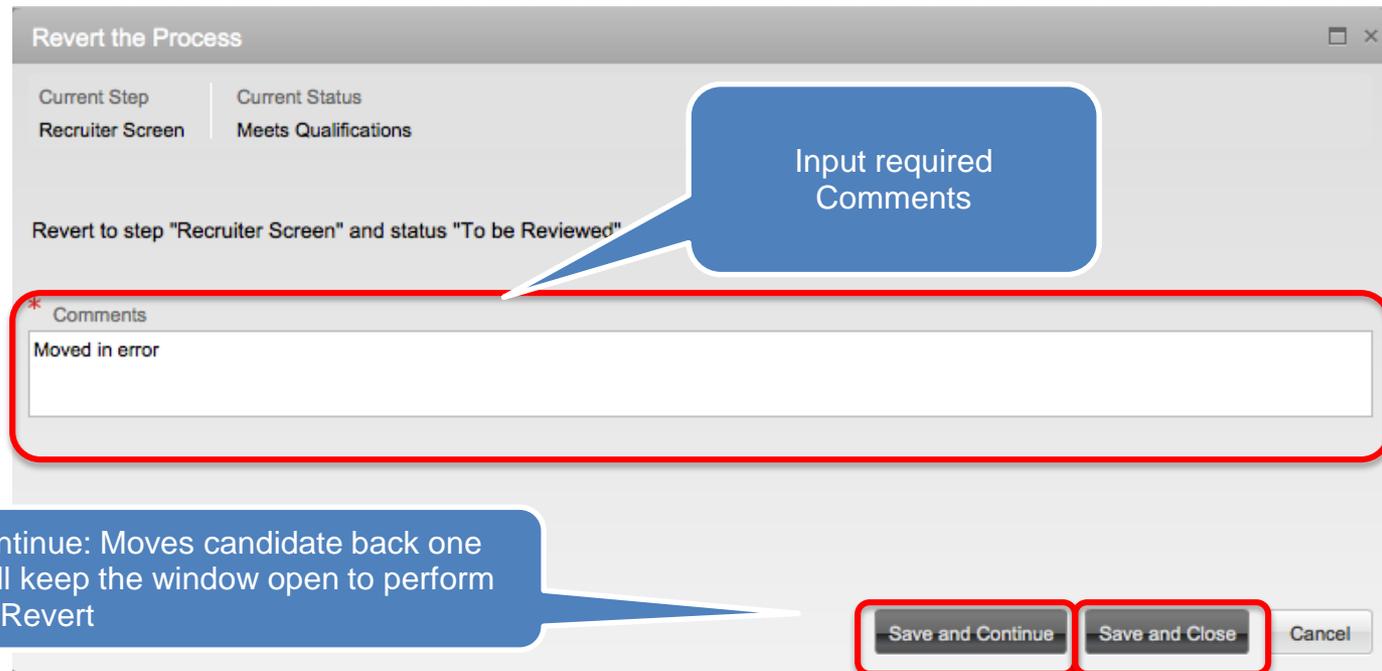
Reject letter

Comments

# Revert Candidate



Click Revert to move the candidate backwards in the CSW



Revert the Process

Current Step	Current Status
Recruiter Screen	Meets Qualifications

Revert to step "Recruiter Screen" and status "To be Reviewed"

\* Comments

Moved in error

Save and Continue Save and Close Cancel

Input required Comments

- Save and Continue: Moves candidate back one status and will keep the window open to perform an additional Revert

- Save and Close: Performs the Revert action and closes the window

# EVALUATION MANAGEMENT

# Lesson Goals

- Understand how to schedule an interview
- Understand how to request an Interview Evaluation

# Schedule Interview

Herzog, Susan applied for requisition:  
**Account Executive (MASUSSALES)**

More Actions ▾

Job Submission Attachments Tasks Referral History **Interviews**

1. Interviews and Evaluation Requests

Create Interview Edit Resend View Details Cancel

Event Date	Event Type	Details
for		

Indicate the number of interviews

Select Interview Type

What type of interview would you like to coordinate?

One-on-One  
 Panel

Select predefined data, if relevant  
This information can be modified on subsequent screens.

How many participants would you like to include in this interview?

2 ▾

Create Cancel

123

# Schedule Interview

Job Submission Attachments Tasks Referral History Interviews

Save & Close Cancel

**1. Interview Properties**

Add Interview **Add Participants** Modify All Dates Modify All Locations

**Add Interview Participants**

... or External Participants (Non-Taleo Users)

First Name	Last Name	Email Address	
Paul	Jones	paul.jones@invalidemail.com	Add

Done Cancel

**Select Internal Participants**

**Quick Filters**

Name

Email Address

Keyword

Filter

Name	Email Address	
Bob Smith	nmglobal-general@oracleads.com	Select
Pam Smith	nmglobal-general@oracleads.com	Select
Jamie Smith	goracleads.com	Select
Janice Smythe	@oracleads.com	Select
Raley Sohi	nmglobal-general@oracleads.com	Select

**Select Internal Participants (Taleo Users) ...**

# Schedule Interview

## 1. Interview Properties

Interview	Participants	Date	Time	Questionnaires
Tonya Williams Interview 1	Bob Smith <nmglobal- >	10/26/2015	Start: 2 PM :00 End: 3 PM :00 Time Zone: America/Los Angeles	<input checked="" type="checkbox"/> Interview Feedback <input type="checkbox"/> Recommended Questions and Feedback <input type="checkbox"/> Prescreen Questionnaire

Location: Main Conference Room

Select Participant(s)

Indicate Date, Time, and Time Zone

Include Evaluation Questionnaire (optional)

Indicate Interview Location

Correspondence Language  
English

Notes for Participants

Candidate needs to leave building no later than 3:30 pm.

Input Optional Note to Participant(s)

## 2. File Sharing

Select which files will be sent to participants.

- Candidate file
- Requisition file

Submission-specific Attachments*	
<input checked="" type="checkbox"/>	All
<input checked="" type="checkbox"/>	Demo_Candidate_Resume.docx

Include Requisition & Candidate File, as well as Candidate Attachments

# Participant Interview Confirmation

Invitation to participate in Christopher Wilson Interview 1 interview fo...



Human Resources  
Saturday, October 10, 2015 at 5:40 AM  
To: Alex Tellez

Dear Mike Manager,

You have been invited to participate in an interview:

Interview: Christopher Wilson Interview 1  
Requisition: Human Resources Coordinator - Resort - 1500  
Candidate: Christopher Wilson - 10060  
Date: 10/10/15  
Time: 2:00 PM America/Los\_Angeles  
Location: WebEx  
Notes:

Please click the link below and indicate your availability to

[Interview URL](#)

Best regards,  
Human Resources Department

Replies to this message are undeliverable and will not reach  
reply.

Participant receives  
email confirmation.  
Clicks here to  
confirm

## Christopher Wilson Interview 1

### Interview Information

Proposed Date and Time October 10, 2015 2:00 PM - 3:00 PM PST	Candidate Christopher Wilson	Requisition Human Resources Coordinator - Resort	Interview Coordinator Rhonda Recruiter
Interviewers Mike Manager	Location WebEx		

Notes to Participants

Candidate File, Req  
File, & Candidate  
Attachments  
available

Files Shared  
Candidate file  
Requisition file

Documents Shared  
wilson, cj.doc

### Interviewer Response

- Accept  
 Decline  
 Request Reschedule
- Comments

Participant provides  
response

Recruiter receive  
email response

# Review Completed Evaluations

Job Submission | Attachments | Tasks | Referral | History | Interviews

## 2. Completed Interviews and Evaluations

### Completed Evaluation Questionnaires

[View Results](#) [Remove](#)

3 found, displaying all.

Completed Date	Event Type	Questionnaire	Participants	Question - Skill Score
<input type="radio"/> 5/10/13 4:55 PM	Feedback	Manager Recommended Questions	Peter Campbell	0 % - 0 %
<input type="radio"/> 5/10/13 4:54 PM	Feedback	Recommended Questions and Feedback	Hannah Skillman	70 % - 0 %
<input checked="" type="radio"/> 5/10/13 4:51 PM	Feedback	Interview Feedback	Sue Peters	100 % - 0 %

### Questions

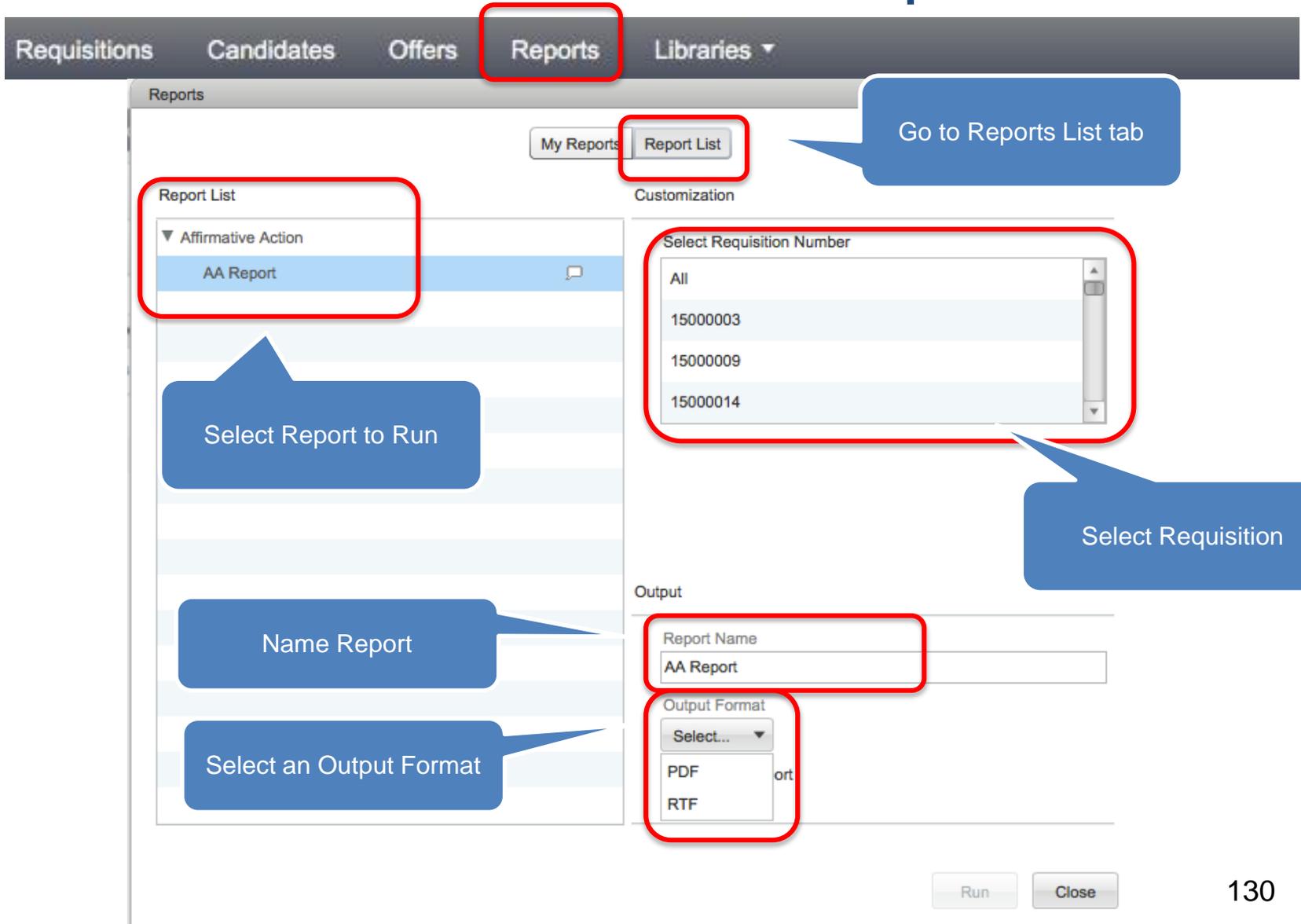
Question	Answer
1. What did you feel this candidates strengths were?	Josh came across as excited about his work. He talked a lot about his peers. He answered questions well about the technologies he's research about our company and some of the projects we have going on.
2. What do you consider your strongest assets?	Problem Solving, Collaboration, Creativity
3. During my interview the candidate expressed sentiments that support they have skills in the following areas:	<ul style="list-style-type: none"> <li>✓ Teamwork</li> <li>✓ Leadership</li> <li>✓ Problem Solving Skills</li> <li>✓ Communication Skills</li> </ul>
4. How would you rate this candidate as a fit for this role?	<p>Poor Fit</p> <p>Partial Fit</p> <p>Good Fit</p>

# EMBEDDED REPORTS

# Lesson Goals

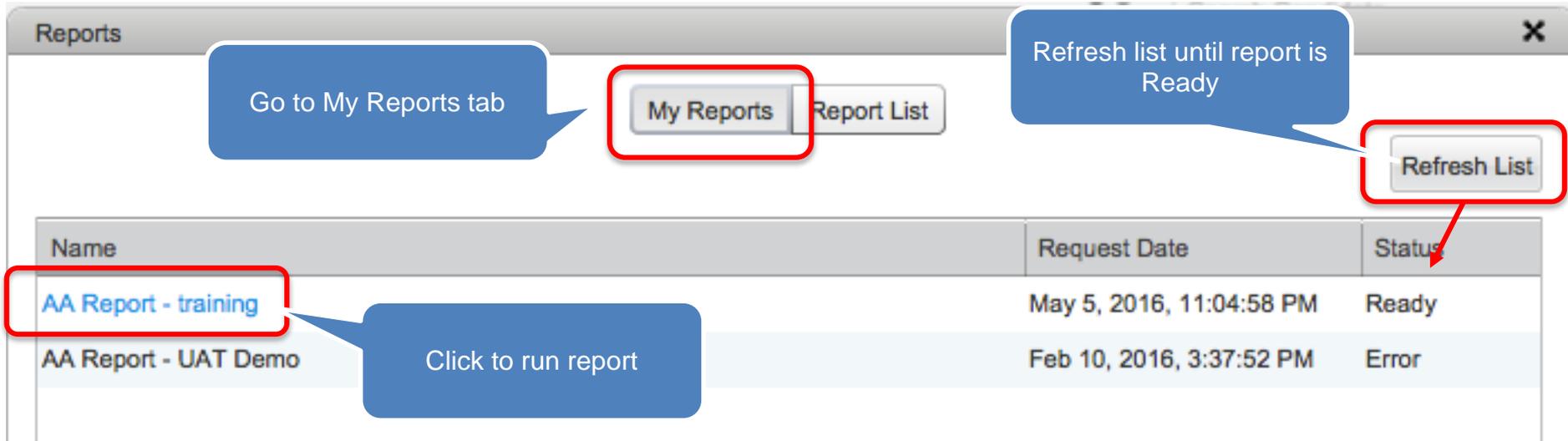
- Run an Embedded Report
  - **FOR HR STAFF ONLY**

# Access and Run Reports



The screenshot shows the 'Reports' section of a software application. The navigation bar at the top includes 'Requisitions', 'Candidates', 'Offers', 'Reports', and 'Libraries'. The 'Reports' tab is highlighted with a red box and a callout bubble that says 'Go to Reports List tab'. Below the navigation bar, there are two tabs: 'My Reports' and 'Report List', with 'Report List' selected and highlighted with a red box. The main content area is divided into two columns. The left column, titled 'Report List', shows a tree view under 'Affirmative Action' with 'AA Report' selected, highlighted with a red box and a callout bubble that says 'Select Report to Run'. The right column, titled 'Customization', contains three sections: 'Select Requisition Number' with a list box containing 'All', '15000003', '15000009', and '15000014', highlighted with a red box and a callout bubble that says 'Select Requisition'; 'Output' with a text field for 'Report Name' containing 'AA Report', highlighted with a red box and a callout bubble that says 'Name Report'; and 'Output Format' with a dropdown menu showing 'PDF' and 'RTF', highlighted with a red box and a callout bubble that says 'Select an Output Format'. At the bottom right, there are 'Run' and 'Close' buttons.

# View Report



Reports

Go to My Reports tab

My Reports Report List

Refresh list until report is Ready

Refresh List

Name	Request Date	Status
AA Report - training	May 5, 2016, 11:04:58 PM	Ready
AA Report - UAT Demo	Feb 10, 2016, 3:37:52 PM	Error

Click to run report

# OFFER MANAGEMENT

# Lesson Goals

- Capture Candidate Expectations and Competitive Offer Information
- Create an Offer
  - Hiring Managers cannot create offers.
  - **Only Recruiters can create and extend offers.**
- Extend the Offer, Capture the Candidate's Response

# Capture Information for Offer

Escobar, Kelvim applied for requisition:

Foreman, Electrical (14000008)



Job Submission ▾ Attachments Tasks Referral History

More Actions ▾

Check for Duplicates...  
Create Self-assigned Task...  
Request a Screening Service...  
Send Correspondence...

Candidate has Declined...  
Change Step/status...  
Reject Candidate...  
Revert...

Capture Competitive...  
Capture Expectations...

## 1. Personal Information

Candidate Personal Information

Internal Candidate

No

First Name

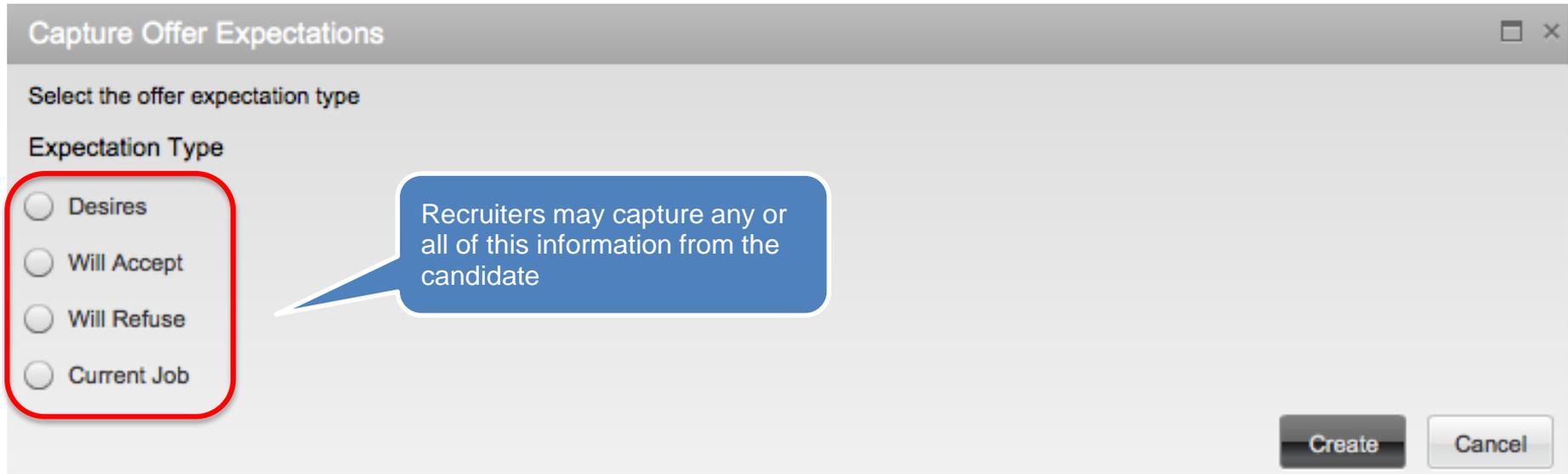
Kelvim

Last Name

These actions can be taken during any Step of the CSW

Ken

# Capture Offer Expectations



Capture Offer Expectations

Select the offer expectation type

Expectation Type

- Desires
- Will Accept
- Will Refuse
- Current Job

Recruiters may capture any or all of this information from the candidate

Create Cancel

Capturing this information will be helpful for either you or other recruiters when it is time to extend an offer to the candidate

# Capture Offer Expectations

<b>Will Accept (New)</b>	Requisition
	Apr 4, 2015 116,265.00
105,000.00	
US Dollar (USD)	US Dollar (USD)
Yearly	Yearly
105,000.00	85,495.00 / 116,265.00

Capture any helpful / relevant information

You may repeat this process to Capture Desires, Will Refuse, and Current Job parameters

# Create Offer

Escobar, Kelvim applied for requisition:  
**Foreman, Electrical (14000008)**

Job Submission ▾ Attachments Tasks

More Actions ▾

- Check for Duplicates...
- Create Self-assigned Task...
- Request a Screening Service...
- Schedule an Interview...
- Send Correspondence...
- Start Transitions Pre-Hire Process...
- Candidate has Declined...
- Change Step/status...
- Reject Candidate...
- Revert...
- Capture Competitive...
- Capture Expectations...
- Create Offer...**

1. Personal Information

Candidate Personal Information

Internal Candidate  
No  
First Name  
Kelvim  
Last Name

These actions can only be taken on or after the Offer Step

# Offer Grid

Offer (New)

Start Date: Oct 26, 2015, 8:00 AM

Tentative

Currency: US Dollar (USD)

Pay Basis: Weekly

Annualized Salary: 57,000.00

Maximum Salary:

Salary (Pay Basis): 1,096.15

Requisition	Will Accept
US Dollar (USD)	US Dollar (USD)
Yearly	Weekly
60,000.00	55,000.00
50,000.00 / 60,000.00	1,057.69

Input Required and Optional Information in the Offer Grid

View related Requisition Information and Candidate Expectations

# Request Offer Approval

Escobar, Kelvim applied for requisition:  
**Foreman, Electrical (14000008)**

More Actions ▾

- Check for Duplicates...
- Create Self-assigned Task...
- Request a Screening Service...
- Send Correspondence...
- Start Transitions Pre-Hire Process...

---

- Cancel Offer...
- Capture Competitive...
- Capture Expectations...
- Extend Offer...
- Request Approval...**

Job Submission Attachments Tasks Offer

Offer 1 (Current)

Edit

Status	Draft
Start Date	Apr 5, 2014, 8:00 AM
	<input checked="" type="checkbox"/> Tentative
Expiration Date	Apr 14, 2014
Created on	Apr 5, 2014
Maximum Pay	50.00
Location	San Diego

# Request Offer Approval

Offer Approval Matrix  
Presented

Request Approval

**Message Details**

From  
Alex Tellez

For Requisition  
Accountant (1400021)

Send me an email with my decision

**After Approval**

\* Assign the next task to

Order	Approver	Decision
1	Mike Manager	Pending
2	Gina Consalvo	Pending

Add the approvers to the list of collaborators defined for this requisition

Add the approvers to the list of my frequent collaborators

\* Comments

- Check boxes to...
- Add approvers as Collaborators for this Req
  - Add approvers to your list of Frequent Collaborators

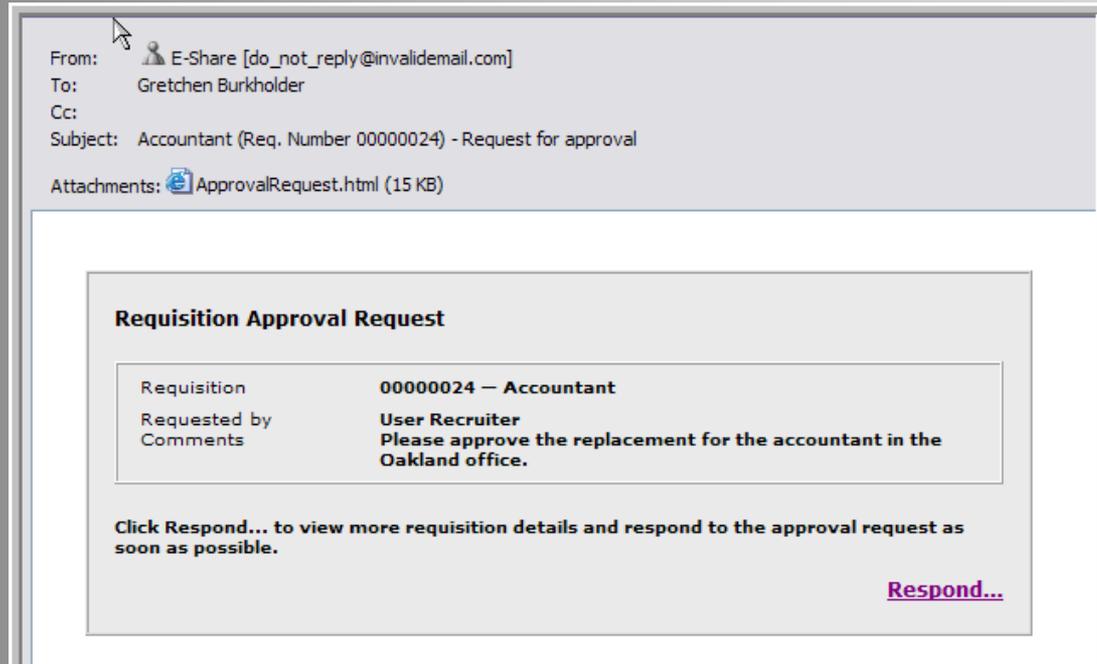
Click here to add  
approvers

140

# eShare Response Center

## eShare Response Center

- Hiring Managers
- Approvers



From:  E-Share [do\_not\_reply@invalidemail.com]  
To: Gretchen Burkholder  
Cc:  
Subject: Accountant (Req. Number 00000024) - Request for approval  
Attachments:  ApprovalRequest.html (15 KB)

**Requisition Approval Request**

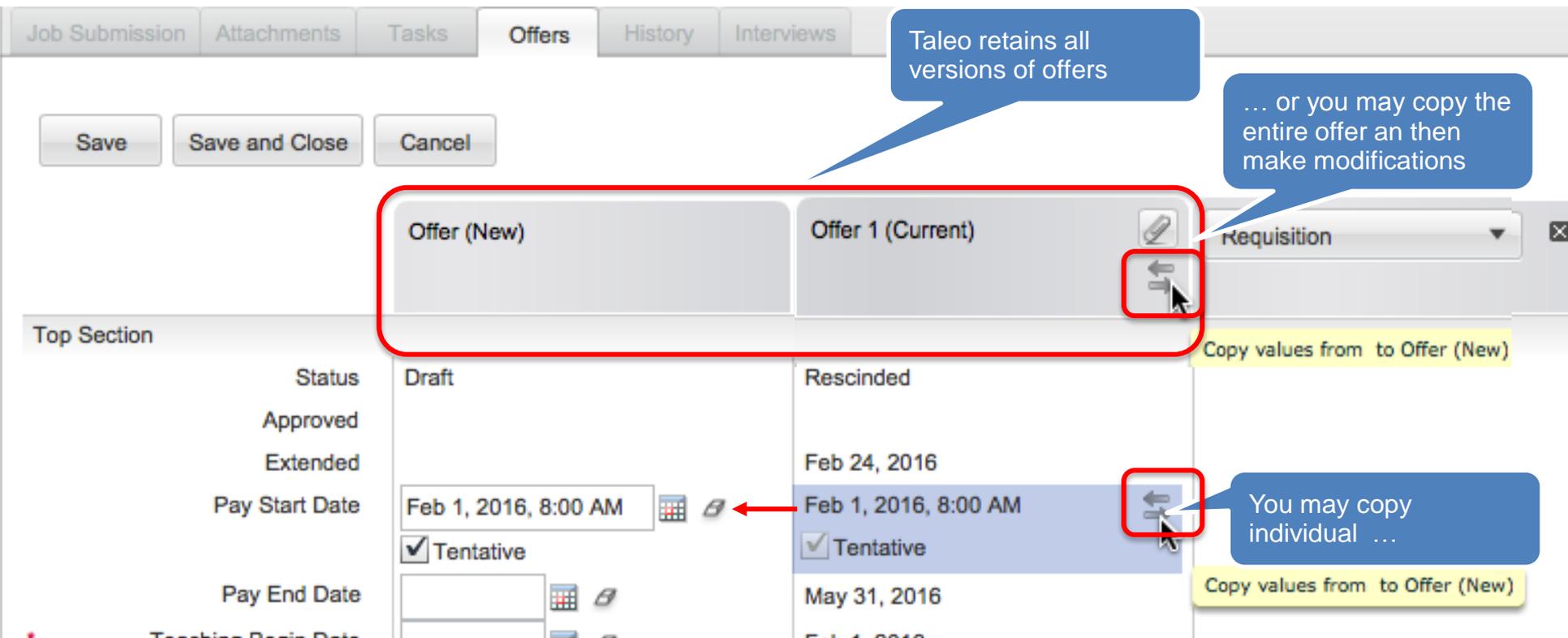
Requisition	<b>00000024 — Accountant</b>
Requested by	<b>User Recruiter</b>
Comments	<b>Please approve the replacement for the accountant in the Oakland office.</b>

Click **Respond...** to view more requisition details and respond to the approval request as soon as possible.

[Respond...](#)

# Additional Offers / Copy Feature

If an offer is Refused Approval, Refused by the Candidate, Rescinded, etc... you may not edit the offer. Instead you will create a new version of the offer.



Job Submission Attachments Tasks **Offers** History Interviews

Save Save and Close Cancel

Offer (New) Offer 1 (Current) Requisition

Top Section

Status	Draft	Rescinded
Approved		
Extended		
Pay Start Date	Feb 1, 2016, 8:00 AM	Feb 24, 2016
	<input checked="" type="checkbox"/> Tentative	Feb 1, 2016, 8:00 AM
Pay End Date		May 31, 2016

Copy values from to Offer (New)

Copy values from to Offer (New)

Taleo retains all versions of offers

... or you may copy the entire offer and then make modifications

You may copy individual ...

# Extend Offer

Escobar, Kelvim applied for requisition:  
**Foreman, Electrical (14000008)**

Job Submission Attachments Tasks Offer

More Actions ▾

- Check for Duplicates...
- Create Self-assigned Task...
- Request a Screening Service...
- Send Correspondence...
- Start Transitions Pre-Hire Process...

---

- Cancel Offer...
- Capture Competitive...
- Capture Expectations...
- Extend Offer...**
- Update Expiration Date...
- Update Start Date...

Status	Approved
Approved	Apr 5, 2014
Start Date	Apr 5, 2014 8
	<input checked="" type="checkbox"/> Tentative
Expiration Date	Apr 14, 2014

# eOffer

Extend Offer

Expiration Date Not Specified  
Start Date Dec 30, 2010, 4:53 PM  
Target Start Date Not Specified

How do you want to extend this offer?

Extend in writing

Extend verbally on Apr 5, 2014

Capture candidate response

Comments

Done Cancel

Extend offer in writing

Select / De-select applicable paragraphs

Ensure to select E-Offer

Select your Offer Letter Template

Send Offer Letter

Send message by  
E-Offer

Write a message

From template  
Offer Letter - External

Comments

Select the paragraphs to include in the message

- Header
- Opening
- Bonus - Lump Sum
- Bonus - 2 Installments

Next Cancel

# Candidate eOffer Acceptance

Jered Weaver, you are signed in. | [My Account Options](#)

 [My Job Cart \(0 items\)](#) | [Sign Out](#)

- [Job Search](#)
- [My Jobpage](#)
- Tasks**

[Back to All Tasks](#)

0 of 1 Tasks Completed

## Offer of Employment

Due Date: May 10, 2016

## Job: UAT Walkthrough

Offer of Employment : Temple University  
Mandatory fields are marked with a red indicator.



### Human Resources

May 5, 2016

Jered Weaver  
36 Angels Way  
Philadelphia, Pennsylvania 92806

Dear Mr. Weaver:

Welcome to Temple University!

It is with pleasure that I confirm our offer to you for the position of UAT Walkthrough, in the Accounting

Candidate's CSW Status  
will automatically update to  
Offer/Accept or  
Offer/Refused accordingly

### Offer Response

Do Not E-Sign Until You Have Read The Above Offer

Accept the offer

Refuse the offer

\*Full Name

\*Unique Identifier

Submit

Cancel

# REQUEST A SCREENING SERVICE

# Lesson Goals

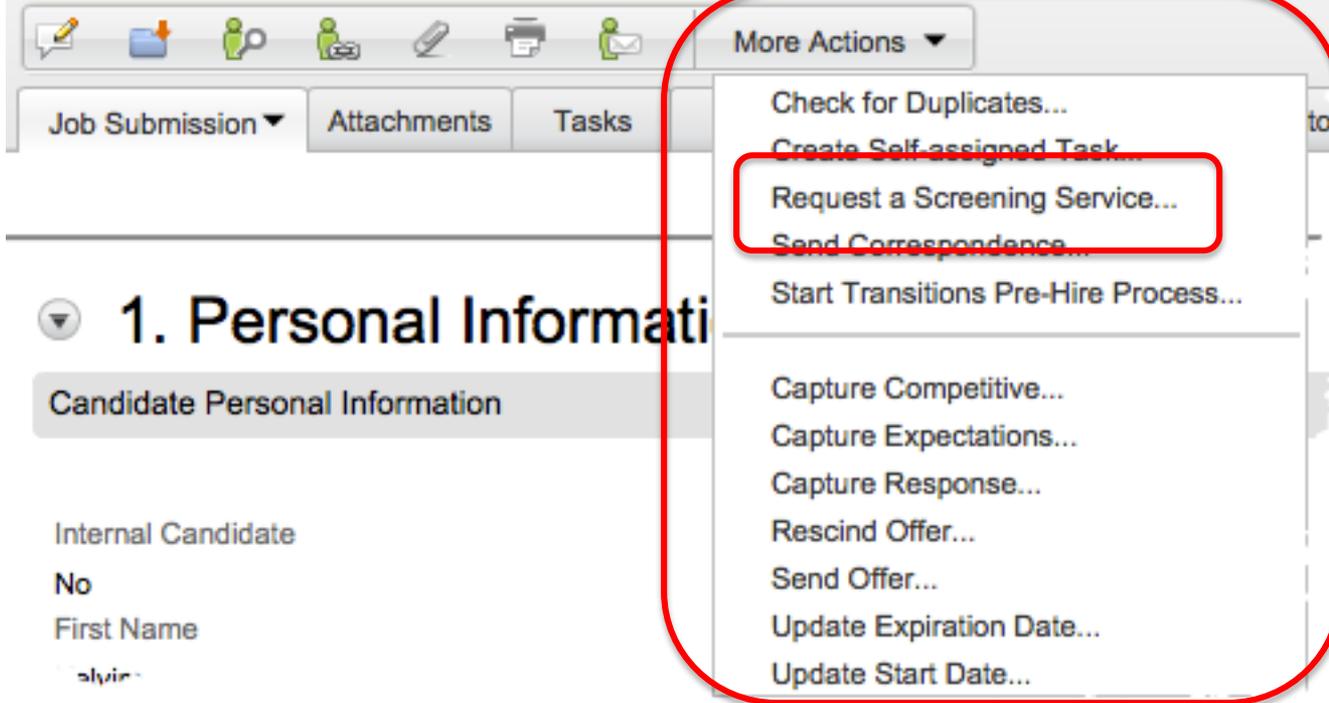
## **– THIS IS FOR HR STAFF ONLY**

- Request a Screening Service  
(Background Check and Reference Check)
- Review Results

# Request a Screening Service

Escobar, Kelvim applied for requisition:

**Foreman, Electrical (14000008)**



The screenshot shows a recruitment system interface. At the top, it displays the candidate's name and the requisition title. Below this is a toolbar with various icons for editing, adding attachments, and viewing tasks. A 'More Actions' dropdown menu is open, listing several options. The option 'Request a Screening Service...' is highlighted with a red box. Below the menu, the '1. Personal Information' section is visible, with a sub-section for 'Candidate Personal Information'.

Job Submission ▾ Attachments Tasks

More Actions ▾

- Check for Duplicates...
- Create Self assigned Task...
- Request a Screening Service...**
- Send Correspondence...
- Start Transitions Pre-Hire Process...

---

1. Personal Information

Candidate Personal Information

Internal Candidate  
No  
First Name  
Kelvin

# Request a Screening Service

Request Screening Service

Services already requested in relation to this application

Service	Provider	Status
---------	----------	--------

Select the service you want to request

Available Services

Employment Screening, provided by HireRight

Comments

Done Cancel

# Review Screening Results

- Job Submission ▾
- Attachments
- Tasks
- Offers
- Offer Approvals
- Referral
- History

9. Do you have a non-competition ("non-compete") agreement with a current or former employer that would interfere with your Boeir

Yes

10. At any time within the last three (3) years from today's date, have you been employed, full-time or part-time by Deloitte, LLP?

Yes

Post Offer Check Results	
Background Check Result	Background Check Result Date
Cleared for Hire	Apr 25, 2014
Credit Check Result	Credit Check Result Date
Cleared for Hire	Apr 29, 2014
Federal Drug Test Result	Federal Drug Test Result Received Date
passed	Apr 30, 2014
	Federal Drug Test Result Expiration Date
	Apr 30, 2014
Forensic Drug Test Result	Forensic Drug Test Result Received Date
prior failed	Apr 29, 2014
	Forensic Drug Test Result Expiration Date
	Apr 29, 2014

# HIRING A CANDIDATE

# Lesson Goals

- Update Start Date
  - Applies to Staff positions
- Hire a Candidate
  - You need the Recruiter Role to 'Hire'.

# Update Start Date

Tasks		
	▲	Total
Tasks assigned to me	0	4
All staffing tasks	0	9
<b>Requisitions</b>		
To be completed	0	5
<b>Offers</b>		
Finalize Start Date	0	1

More Actions ▼

- Check for Duplicates...
- Create Self-assigned Task...
- Enter Grade...
- Fill Out Form...
- Send Correspondence...
- Start Onboarding Process...

---

- Bypass...
- Change Step/status...

---

- Capture Competitive...
- Capture Expectations...
- Reneg Offer...
- Rescind Offer...
- Send Offer...
- Update Start Date...

Must be in the Candidate File

# Update Start Date

 **Tasks**

		Total
Tasks assigned to me	0	4
All staffing tasks	0	9
Requisitions		
To be completed	0	5
Offers		
Finalize Start Date	0	1

Access Action in Tasks Channel...

... or Access from Candidate File

More Actions ▾

- Check for Duplicates...
- Create Self-assigned Task...
- Enter Grade...
- Fill Out Form...
- Send Correspondence...
- Start Onboarding Process...

---

- Bypass...
- Change Step/status...

---

- Capture Competitive...
- Capture Expectations...
- Reneg Offer...
- Rescind Offer...
- Send Offer
- Update Start Date...

**New Start Date**

Target Start Date  
Mar 30, 2014

Start Date  
Apr 5, 2014, 8:00 AM  

Tentative

Comments

Done Cancel

Remove the Tentative Flag

# Automatic Transactions for Filled Requisitions

Requisition is Marked as "Filled"

Status **Filled**

Requisition is Unposted from active Career Sections

Unpost All

Any candidates not already dispositioned will be disqualified from the requisition

Disqualified\*

Hired Candidate may be marked as Withdrawn from all other active submissions



Hired

Hired External Candidate changes to Internal  
*(either via integration with HRMS or Taleo Setting)*

March, Sarah A (65635) 

# TALEO ONBOARDING (TRANSITIONS)

# Objectives

- Review the benefits of on boarding with Taleo Transitions
- Review Example on boarding process flows
- View the different Transitions Interfaces and Tasks Types
- Understand Task Management
- Understand Process Monitoring and Management

# Benefits of Onboarding

Effective on boarding benefits your organization by:

- Streamlining distribution of printed materials to the new hire by providing documents and correspondence electronically
- Allowing different users to manage the Processes from a centralized dashboard, the Transitions Center
- Ensuring legal and policy compliance

# Benefits of Onboarding

Effective on boarding benefits new hires by:

- Optimizing time-to-productivity
- Creating an inspiring experience for new hires
- Increasing new hire engagement and satisfaction
- Creating a consistent experience for all on boarding participants

# Launch Onboarding (Transitions)

More Actions ▾

- Check for Duplicates...
- Create Self-assigned Task...
- Send Correspondence...
- Start Onboarding (Transitions) New Hire Process...
- Start Onboarding (Transitions) Pre-Hire Process...**

Pre-Hire Process:  
Criminal History  
Disclosure

### Change Step and Status

New Step ▾  
Hire

New Status ▾  
Hired\*

Reaching a status marked with an asterisk (\*) completes the step

Create a self-assigned task

Share candidate

Send correspondence

Process already started

Pre-Hire: Criminal History Disclosure

Start Process

Type      Select a process

New Hire      **Onboarding**

Additional Information

- Medical Faculty Pre-Hire
- Onboarding**

\* Pay Start Date      May 23, 2016 8:00 AM

New Hire Process as part of the Hire process:

- Onboarding
- Medical Faculty

Start Process

Type      Select a process

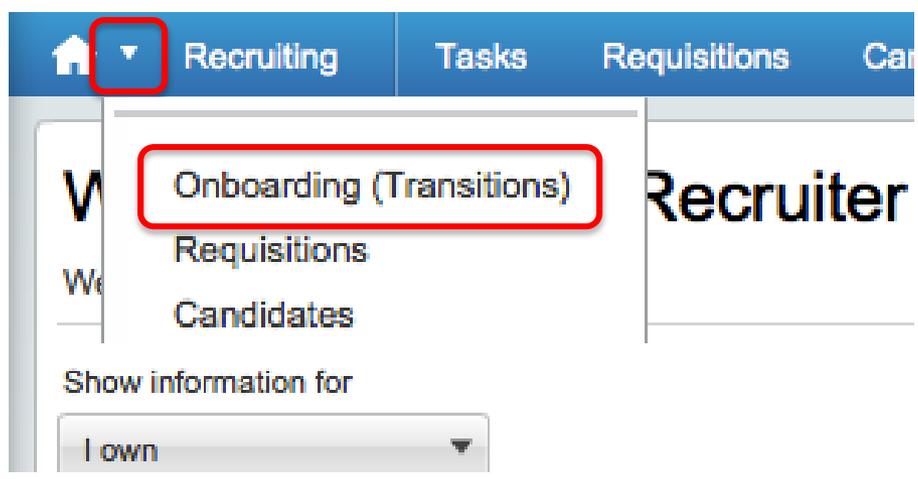
New Hire      **Onboarding**

Additional Information

- Medical Faculty Pre-Hire
- Onboarding**

\* Pay Start Date      May 23, 2016 8:00 AM

# Access Onboarding (Transitions)



# Onboarding (Transitions) Center

## Tasks | [Create](#)

Refine by

My Tasks

Refresh

Tasks Assigned to you

1-3 out of 3 |



Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
<a href="#">Confirm Drug Test Initiated</a>	Jun 2, 2014	Ryan, Nolan	Normal	Completed	Recruiter, Rhonda	Recruiter, Rhonda	
<a href="#">Post Offer Invitation to Self Identify PDF</a>	Jun 2, 2014	Ryan, Nolan	Normal	Completed	Recruiter, Rhonda	Recruiter, Rhonda	
<a href="#">Veteran Self Identify PDF</a>	Jun 2, 2014	Ryan, Nolan	Normal	Completed	Recruiter, Rhonda	Recruiter, Rhonda	

## Processes

Process Type

All

Refine by

In Progress

Refresh

Processes to Monitor and Manage

61-75 out of 308 |



Candidate/Employee ▲	Process	Job Title	Start Date	Status	Progression
<a href="#">Cooper Bradley</a>	New Hire 2014 v03.1 (w/ HMCs)	PROTOTYPING_SOFTWARE ENGINEER 4	—	In progress	 88%
<a href="#">Cowin Elliot</a>	Advanced EOffer 2014 v0.07.0	I-Network Security Splcst 3	Jun 30, 2014	In progress	 33%

# Five Types of Tasks

- **Fill-in Form**
  - Fill out an online form
- **Manual**
  - Non-electronic Task outside Taleo, but marked Completed in the system
- **Open PDF**
  - Receive and open a PDF form
- **Send Correspondence**
  - Automatic email sent. No action required.
- **Content Page**
  - For candidates only. Can present rich text, images, documents and URLs.

# Execute Tasks - Forms

Tasks | [Create](#)

Refine by

My Opened Tasks

1-2 out of 2 |   1

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
<a href="#">I-9 Manager PDF</a>	Oct 23, 2013	Weber, John William	Normal	In progress	Tellez, Alex	Adams, Carla	<a href="#">Execute</a> <a href="#">Reassign</a>
<a href="#">New Hire Information Form</a>	Feb 24, 2014	Candidate, Calvin	Normal	In progress	Tellez, Alex	Adams, Carla	<a href="#">Execute</a> <a href="#">Reassign</a>

**\*Hardware Required**

Not Specified  
Not applicable  
Desktop  
Laptop  
Tablet (Ipad)

Other Hardware

**\*Mobility**

Not Specified  
Not applicable  
Cell Phone  
Smartphone  
Pager

Other Mobility

Complete requested information and Submit

# Execute Tasks – Open PDF

## Tasks | Create

Refine by

My Opened Tasks Refresh

1-3 out of 3 | Navigation icons

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
Export Control Compliance Verification Form Boeing eSig	Apr 25, 2014	Cooper, Bradley	Normal	In progress	Tellez, Alex	Recruiter, Prototype	<a href="#">Execute</a> <a href="#">Reassign</a>
Finalize Start Date						User, System	<a href="#">Reassign</a>
Post Office						Tellez, Alex	<a href="#">Execute</a> <a href="#">Reassign</a>

Find

Please fill out the following form. If you are a form author, choose Distribute Form in the Forms menu to send it to your recipients. Highlight Fields

**Voluntary Self-Identification of Disability**

Form CC-305  
OMB Control Number 1250-0005  
Expires

**Why are you being asked to complete this form?**

Because we do business with the government, we must reach out to, hire, and provide equal opportunity to qualified people with disabilities.<sup>1</sup> To help us measure how well we are doing, we are asking you to tell us if you have a disability or if you ever had a disability. Completing this form is voluntary, but we hope that you will choose to fill it out. If you are applying for a job, any answer you give will be kept private and will not be used against you in any way.

If you already work for us, your answer will not be used against you in any way. Because a person may become disabled at any time, we are required to ask all of our employees to update their information every five years. You may voluntarily self-identify as having a disability on this form without fear of any punishment because you did not identify as having a disability earlier.

**How do I know if I have a disability?**

# Execute Tasks - Manual

## Tasks | [Create](#)

Refine by

My Opened Tasks

1-3 out of 3 |   1

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
<a href="#">Export Control Compliance Verification Form Boeing eSin</a>	Apr 25, 2014	Cooper, Bradley	Normal	In progress	Tellez, Alex	Recruiter, Prototype	<a href="#">Execute</a> <a href="#">Reassign</a>
<a href="#">Finalize Start Date</a>	-	-	Normal	In progress	Tellez, Alex	User, System	<a href="#">Reassign</a>
<a href="#">Post Offer Invitation to Self Identify PDF</a>	Jun 2, 2014	Eller, Carl	Normal	In	Tellez,	Tellez, Alex	<a href="#">Execute</a> <a href="#">Reassign</a>

## Task - Finalize Start Date

The task view page contains read-only information about the task.

Language

English (Base)  |  [Configure](#)

### Properties

[Edit](#) | [Reassign](#) |

Name

Part 7

# New Hire Experience - Tasks Portal

Jered Weaver, you are signed in. | [My Account Options](#)

 [My Job Cart \(0 items\)](#) | [Sign Out](#)

Candidates/New Hires are directed to the Career Section to complete Tasks

 [Job Search](#)

[My Jobpage](#)

[Tasks](#)

[Back to All Tasks](#)

0 of 4 Tasks Completed

**Welcome to Temple**

Due Date: May 6, 2016

**Acknowledgment of Confidential Information Policy**

Due Date: May 6, 2016

**Acknowledgement of Employee Manual & The Rules of Conduct**

Due Date: May 6, 2016

**Workers Compensation Rights & Responsibilities**

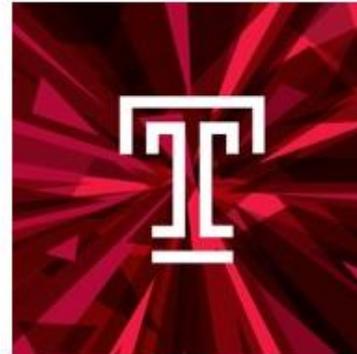
Due Date: May 6, 2016

Tasks are accessed in the left page

Job: UAT Walkthrough 

## Getting Started at Temple University

Welcome to Temple University! We are pleased that you are joining our diverse body of students, faculty and staff!



At Temple University we value our employees and advance our goals through the attraction and retention of a quality workforce. We are committed to attracting, hiring, supporting, developing and recognizing Temple University's most valuable resource, its PEOPLE. We view onboarding as an important part of our initiatives to acclimate new employees into the Temple culture, in addition to being oriented to their specific job tasks and associated work expectations.

Please find links below to offer further assistance:

[About Temple](#)

[Campus Maps & Directions](#)

# New Hire Experience – Fill Forms

[Back to All Tasks](#)

1 of 3 Tasks Completed



**Offer of Employment**  
Completed

**Request For Information**  
Due Date: May 9, 2016

**Hepatitis B Training**  
Due Date: May 9, 2016

Job: UAT Walkthrough

Request For Information : Temple University  
Mandatory fields are marked with a red indicator.

## Request for Information

Please ensure your address is correctly listed below. If incorrect, DO NOT complete this form. Go to the 'My Account Options' located at the top of this page. Once in the 'My Account Options' page, click on the 'Update Personal Information' link. Update your personal information and make the necessary corrections to your address. You must provide a street address, not a P.O. Box. Once corrections are made, click on the Tasks tab to return to this page.

Enter legal first and last name as it appears on official government documents.

*First Name	Middle Name	*Last Name
<input type="text" value="Jered"/>	<input type="text"/>	<input type="text" value="Weaver"/>
Address (line 1)	Address (line 2)	
<input type="text" value="36 Angels Way"/>	<input type="text"/>	
City	State	Zip/Postal Code
<input type="text" value="Philadelphia"/>	<input type="text" value="Pennsylvania"/>	<input type="text" value="92806"/>
*Social Security Number	*Date of Birth	*Gender
<input type="text" value="550555555"/>	<input type="text" value="Mar 8 1987"/>	<input type="text" value="Male"/>

For the initial numbers only, no dashes

# New Hire Experience - Content Page

[Back to All Tasks](#)

0 of 4 Tasks Completed

## Welcome to Temple

Due Date: May 6, 2016

## Acknowledgment of Confidential Information Policy

Due Date: May 6, 2016

## Acknowledgement of Employee Manual & The Rules of Conduct

Due Date: May 6, 2016

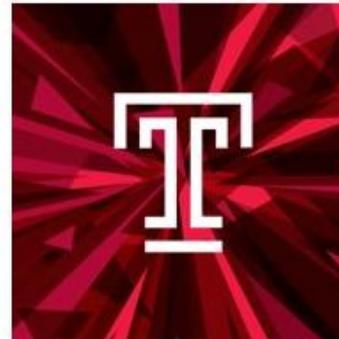
## Workers Compensation Rights & Responsibilities

Due Date: May 6, 2016

Job: UAT Walkthrough ▾

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Please find links below to offer further assistance:

[About Temple](#)  
[Campus Maps & Directions](#)  
[Parking Services](#)  
[State of Art Tech Center](#)

# Review Transitions Process Progress

## Processes

Process Type: **All** | Refine by: **In Progress** | Refresh

61-75 out of 308 | 1 2 3 4 5 6 7

Review Progress:

- Green – no tasks are past due
- Red – tasks are past due

Click to review details

Cowin Elliot

Candidate/Employee	Process	Job Title	Start Date	Status	Progression
Cooper Bradley	New Hire v03.1 (w/ HMGs)	PROTOTYPING_SOFTWARE ENGINEER 4	—	In progress	88%
Cowin Elliot	Advanced EOffer 2014 v0.07.0	I-Network Security Spclst 3	Jun 30, 2014	In progress	22%

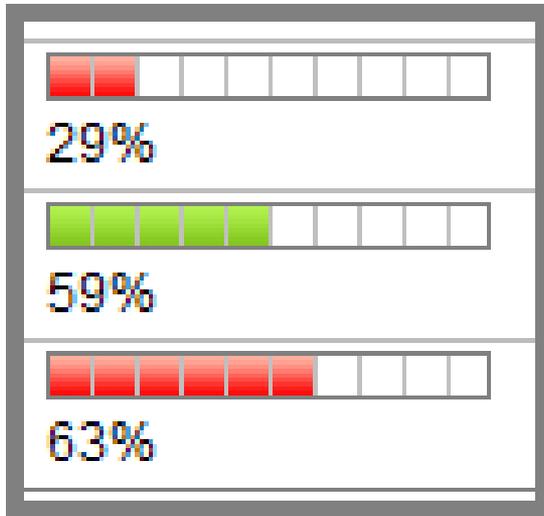
## Steps

Review status of tasks in process

1-15 out of 56 | 1 2 3 4

Name	Start Date	Due Date	Status	Assignees	Actions
EOffer	Apr 8, 2015	Apr 10, 2015	Completed	Wnona Candidate	
EOffer System Task	Apr 9, 2015	Apr 10, 2015	Completed	Jacob Recruiter	
EOffer Response	Apr 9, 2015	Apr 10, 2015	Completed	Jacob Recruiter, Jacob Manager	
Personal Information Request	Apr 9, 2015	Apr 13, 2015	Completed	Wnona Candidate	
I-9, Section 1	Apr 9, 2015	Apr 14, 2015	Completed	Wnona Candidate	
I-9, Section 2	Apr 9, 2015	Apr 13, 2015	Completed	Jacob Recruiter	
Confirm Drug/Physical and Fingerprint Test Results	Apr 9, 2015	Apr 14, 2015	Completed	Jacob Recruiter	
Security, Computer and Email/Network Access Request	Apr 9, 2015	Apr 13, 2015	In progress	Jacob Manager	Terminate
Access Request Notification			Not Started		
Start New Hire Form Collection	Apr 9, 2015	Apr 9, 2015	Completed		
Welcome	Apr 9, 2015	Apr 13, 2015	Completed	Wnona Candidate	

# Progression Bar



- The expected finish date is determined by:
  - ▶ Duration of Tasks within a Process Flow
  - ▶ New Hire Start Date
- Progression Bars are visual cues to the progress of the new hire
- Red Progression Bars indicate the process is behind schedule

# Task Management - Reassign

You may reassign an individual task on an as-needed basis.

**Tasks** | [Create](#)

Refine by  
My Opened Tasks

1-1 out of 1 |

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
<a href="#">Security, Computer and Email/Network Access Request</a>	Apr 13, 2015	Tellez, Alex	Normal	In progress	Tellez, Alex	Tellez, Alex	<a href="#">Execute</a> <a href="#">Reassign</a>

## Reassign a Task - Access\_Request

This page allows you to reassign a task.

---

### Properties

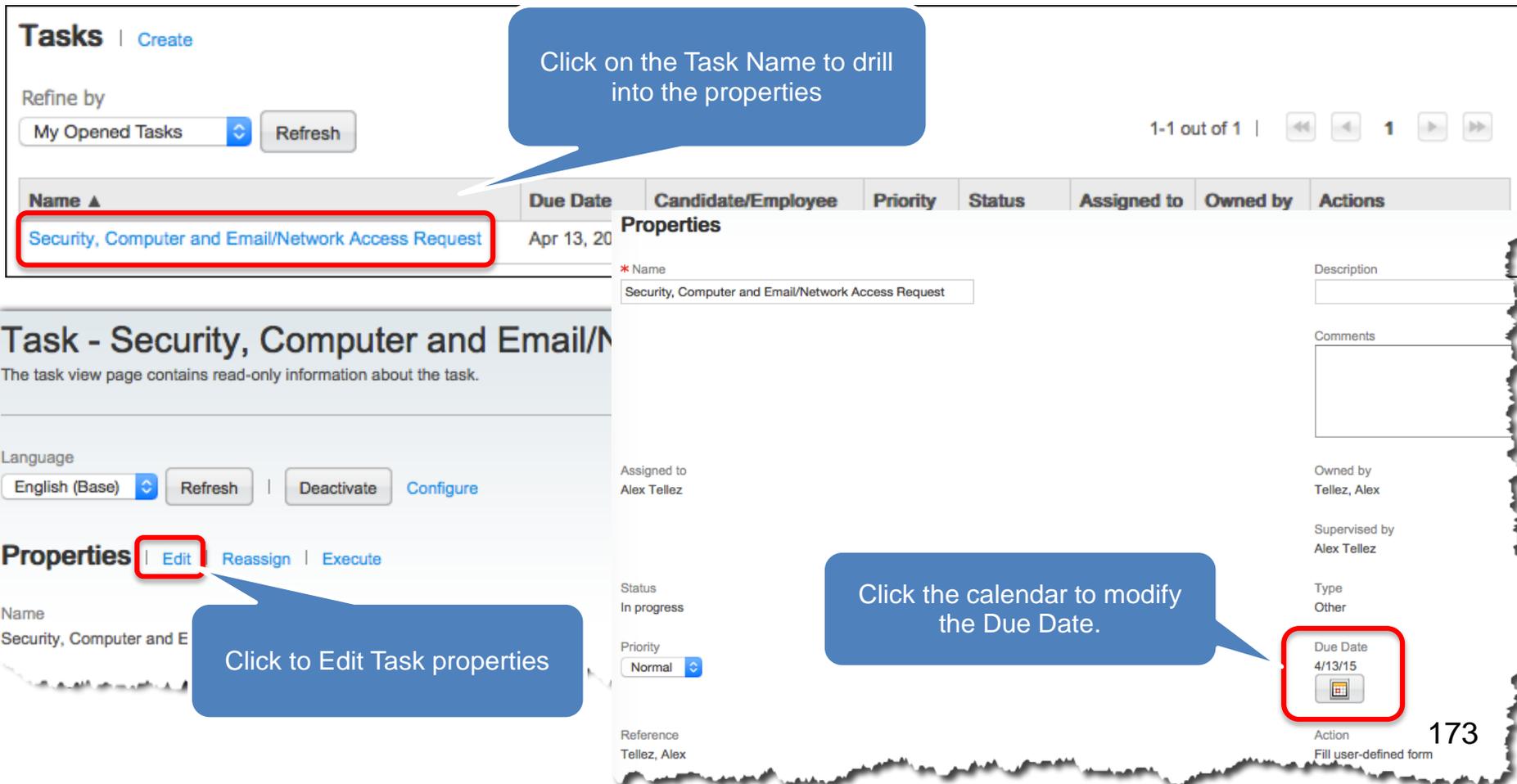
Name  
Security, Computer and Email/Network Access Request

Assigned to

Search for a new system user.  
Once completed, the user will be assigned the task.

# Task Management – Modify Due Date

All tasks are assigned a Due Date. At times, it is necessary to extend the Due Date.



**Tasks** | [Create](#)

Refine by  
My Opened Tasks

1-1 out of 1 |

Name ▲	Due Date	Candidate/Employee	Priority	Status	Assigned to	Owned by	Actions
<a href="#">Security, Computer and Email/Network Access Request</a>	Apr 13, 20						

**Task - Security, Computer and Email/N**  
The task view page contains read-only information about the task.

Language  
English (Base)  |  [Configure](#)

**Properties** | [Edit](#) | [Reassign](#) | [Execute](#)

Name  
Security, Computer and E

**Properties**

- \* Name  
Security, Computer and Email/Network Access Request
- Description
- Comments
- Assigned to  
Alex Tellez
- Status  
In progress
- Priority  
Normal
- Reference  
Tellez, Alex
- Owned by  
Tellez, Alex
- Supervised by  
Alex Tellez
- Type  
Other
- Due Date  
4/13/15
- Action  
Fill user-defined form

Click on the Task Name to drill into the properties

Click to Edit Task properties

Click the calendar to modify the Due Date.

# Process Management - Share

You may Share a process to allow another user access to monitor progress

## Processes

Process Type: All  
Refine by: In Progress

Candidate/Employee ▲	Process
Candidate Beth	EOffer - On
Candidate Debra	EOffer - On
Candidate External	EOffer - On

### Process - Debra Candidate

[Send Correspondence](#)  
This page allows you to see process information related to this candidate/employee. [More info](#)

### General Information

Name: Debra Candidate  
Start Date: Monday, April  
Home Phone Number: 941-555-0202  
Email Address: panagiod@ma  
Job Title: OB Testing - Subs/PT / Payroll Option - DP  
Manager: Debra Manag

**Process** | [Preview](#) | [Share](#) | [Revoke Sharing](#) | [Suspend](#) | [Restart](#) | [Cancel](#)

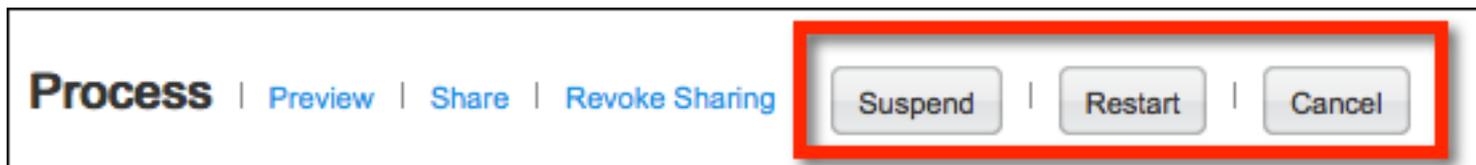
From the Process List, click the new hire's name to manage.

Click the Share link to share with another user(s)

Click the Revoke Sharing link to remove a user(s)

# Process Management – Suspend/Resume/Restart/Cancel

- **Suspend:** Puts the process 'on hold'. All due dates are suspended
- **Resume:** Takes process 'off hold'. Due dates resume from this point.
- **Restart:** Start the process over from the beginning.
- **Cancel:** Cancels the process.



# Send Reminder

If a Task is past due, you may send a reminder to the task assignee.

## Steps

1-15 out of 56 | << < 1 2 3 4 > >>

Name	Start Date	Due Date	Status	Assignees	Actions
<a href="#">EOffer</a>	Apr 12, 2015	Apr 14, 2015	Completed	Christopher John Wilson	
<a href="#">EOffer System Task</a>	Apr 12, 2015	Apr 13, 2015	Completed	Helen HRBP	
<a href="#">EOffer Response</a>	Apr 12, 2015	Apr 13, 2015	Completed	Helen HRBP, Mike Manager	
<a href="#">Personal Information Request</a>	Apr 12, 2015	Apr 14, 2015	Completed	Christopher John Wilson	
<a href="#">I-9, Section 1</a>	Apr 12, 2015	Apr 15, 2015	Completed	Christopher John Wilson	
<a href="#">I-9, Section 2</a>	Apr 12, 2015	Apr 14, 2015	In progress	Helen HRBP	<a href="#">Terminate</a>
<a href="#">Confirm Drug/Physical and Fingerprint Test Results</a>			Started	Mike Manager	
<a href="#">Start New Hire Form Collection</a>					

Click to drill into a Step that is In progress

Reference  
Wilson, Christopher John

Action  
Fill user-defined form

Related Source  
[U.S. Form I-9 Section 2, Exp 3/31/2016](#)

**Notifications** | [Edit](#)

Task Assignment Correspondence (sent to assignees)  
I-9 Section 2 Task Notification

Task Completion Correspondence (sent to owner)  
-

**Reminders** | [Create](#) | [Send Immediate Reminder](#)

Triggering Time	Send Date	Notification Message	Actions
The list of reminders is currently empty.			

**History**

Click Send Immediate Reminder link