Taleo Talent Management System Training

NON-CREDIT INSTRUCTOR HIRING MANUAL

TEMPLE UNIVERSITY
Human Resources
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Navigation

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

The Recruiting Center is the main dashboard screen with a series of Tabs, Channels, Filters and a Search Area to make it easy for you to quickly perform a wide range of essential recruiting tasks. To access the Recruiting Center you will need to select the Recruiting link at the top of the Welcome Center page. You can click on the Recruiting link in the navigation pane on the left side of the page as well.

The Recruiting Center is set up to provide quick access to information on requisitions, candidates, offers and other activated functions. It is also possible to set up preferences and personal information in the My Setup area.

The Recruiting Center Stage page contains links to virtually all of your vital information and tasks. From candidates to requisitions, this page provides time-saving options that will guide you to where you need to be in the system.
It is simple to navigate through the Recruiting Center.

1. **Channels:** Navigate from Center Stage using sections called Channels, which display status-oriented data about your activities. From the links on the Channels, you can access information on your requisitions, candidates, job offers and other tasks. Each Channel contains a list of elements and the number of items associated with each element.

2. **Main Menu:** Access the main menu items to work with your requisitions, candidates, offers, and tasks quickly. Clicking the Channel title of the same name will get the same results.

3. **Resources Link:** Click the Resource link to access options, such as My Setup.

4. **Search:** Use the Search area to find candidates and requisitions quickly. Use the toggle to switch from candidate to requisition search.

5. **Support:** Send an e-mail if you have a question.

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**Taleo Tips:**

1. When you click a link within a Channel, you will be presented with information that you own in the system. However, you can change your dashboard filter to view information on which you collaborate or information within your coverage area. Coverage areas are Temple’s 3 or 5 digit department org.

2. It is recommended to use the buttons, links, and other navigation tools to move around the Recruiting Center instead of using the browser’s Back/Next buttons. The Back/Next buttons do not always yield consistent results.

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Setting up Frequent Collaborators and Frequent Approvers

You can use the Resources menu to access the My Setup, or user preferences, area of the system. This allows you to set up your own User Preferences for different features of the system. One important feature which will assist with Requisition creation and Approvals is the Frequent Collaborators and Frequent Approvers. Setting up a list of frequent collaborators and frequent approvers will allow you to insert these individuals into a requisition or into an approval list with the click of a button.

1. Once in My Setup, you will see the Frequent Collaborators and Frequent Approvers tabs. Select the Frequent Collaborator Tab.

2. Once in the Frequent Collaborators tab, select the Add button to open the User selection window.

3. Once the User Selection window is open, use the Quick Filters in the left pane to search for a frequent collaborator by Name, Email Address, Title or Keyword. Select the Refresh button to populate your results.

4. Once you have found the right User, add them to the list of Selected Collaborators by selecting the Select button to the right of the user in the list.

5. When all of the Users have been added to your list of Selected Collaborators, select Done the button.

6. You can repeat these steps for the Frequent Approvers as well.
Creating a Requisition – Non-Credit Instructor
Both Hiring Managers and Department Recruiters have the ability to create a requisition for Non-Credit Instructors.

1. To start the Requisition, click on the Create Requisition button in the Requisitions Channel.

2. The first step is to select a requisition template. The template is selected by entering the PCN of the position you wish to fill.
   a. A valid PCN is required before you start the requisition. Please check with your Human Resources Business Partner if you have any questions about the title, e-class, or grade associated with the PCN.

The format of the PCN is:
- Non-Credit Artist in Residence (Biweekly)  N followed by the 5 digit org
- Non-Credit/CE Instructor                  N followed by the 5 digit org
- ESL Instructor                           E followed by the 5 digit org
3. You can search for PCN’s by using a Quick Filter. For example, if you enter N then hit refresh, the following displays:

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

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

5. Enter the Hiring Manager. This can be your own name if you are performing that role. Again, you may type in the last name slowly and wait for the field to populate, or you may use the Quick Filter search. The name must appear underlined to be valid. Select Next when all of the data is filled in.
6. Next, you will enter the organization. Start to type your 5 digit Home Org and suggested values will populate. Select the org desired.

7. The next step is to enter the location. Enter the campus and suggested buildings will populate.

Taleo Tip: If your Non-credit instructor is working from home or working remotely, you can select Location INSIDE of PA or Location Outside of PA. If you are hiring multiple Non-credit instructors to one position, the location must apply to all Non-credit instructors.
8. The Job Field will populate from your PCN. **Do not change what is entered in this field.**

9. Select **Create.**
Requisition Structure – Non-Credit Instructor

There are different sections in the Requisition which need to be reviewed and completed. All required fields are marked with a red asterisk *.

**Taleo Tips:**

1. **Change the Show fields required to: Request Approval.** This will display all of the fields required for approval as opposed to just the fields required to Save the requisition. This does not send the requisition for approval.
2. To help determine if there are any remaining fields to complete, use the **Diagnostic Tool**. The right panel will expand automatically when you click on the **Diagnostic Tool** and will display any fields that need to be updated in order to Save or Request Approval.

1. **Requisition Structure**

   **Identification**

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

   1. **Posting Title:** This can be edited to the specific role for the Non-Credit Instructor
   2. **Number of Openings:** This can be edited to be as many positions as needed
   3. **School/College for Appointment Letter:** this will be used in the appointment letter
   4. **Banner Home Org:** same as the organization from previous page
   5. **Department Description for Offer Letter** (department name to populate in the offer letter): same as the organization from previous page
   6. **Banner Check Distribution:** same as the organization from previous page
   7. **Justification for the position:** new position or replacement
      - If this is a replacement, you will need to enter the name of the previous incumbent
   8. **Name and TUid of Supervisor**
<table>
<thead>
<tr>
<th>Identification</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Posting Title</td>
<td></td>
</tr>
<tr>
<td>School/College Appointment Letter</td>
<td></td>
</tr>
<tr>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>Department Description for Offer Letter</td>
<td></td>
</tr>
<tr>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>PCII Position Class</td>
<td></td>
</tr>
<tr>
<td>FAH/HE Educ Support Professional</td>
<td></td>
</tr>
<tr>
<td>PCII Step</td>
<td></td>
</tr>
<tr>
<td>PCII Employee Class</td>
<td></td>
</tr>
<tr>
<td>Ed Educ Support Professional</td>
<td></td>
</tr>
<tr>
<td>Justification</td>
<td></td>
</tr>
<tr>
<td>Not Specified</td>
<td></td>
</tr>
<tr>
<td>Banner Supervisor - Title for Org Chart</td>
<td></td>
</tr>
</tbody>
</table>
The **Supervisor** field is very important as this field will be imported into Banner and feed other systems such as the **Org Chart**. You can start to type a **name** or a **TUId** and the field will start to populate. Make sure the entry is underlined so you know it is valid.

As an alternative, you can hit the **Quick Filter** button. Type in a first name or last name, click the **Refresh** button and you will get an appropriate selection list.

**Owners**

1. You will be entering the name of the **Department Recruiter** for your department. This is the person who will be **creating** and **extending the offer** and **hiring** the employee in the system. If you have the correct access, this could be yourself. Otherwise, this should be someone in your department with **Department Recruiter** access to Taleo.

2. You can start typing in the name of the **Department Recruiter**. Click on the name from the options given by Taleo.

**Collaborators**

1. You may choose to add **Collaborators** to your requisition. Select the individual names by clicking **Modify** to bring up a list of Taleo users. You can also select **Add Frequent Collaborators** if you have set up your personalized list.

2. If one of your **Frequent Collaborators** does not need to be on this requisition, you can use the **Modify** button to adjust the list for this requisition only. Once you are in the **User Selector** screen, hover over the individual’s name. A **gray box with an X** will appear. Select the **X** to remove the individual. Select **Done** when you have completed the edit.
2. Process

This section displays the system workflow being used. There is also a free form comment box where you may enter **Additional Information** if desired. This information is only for internal use – it is not viewed by candidates. Depending on your access to the system, the **Additional Information** section may be located within the Requisition Structure.
3. Job Information

Profile
This section contains data such as shift, targeted start date, and the Compliance questions.

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

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Chemical Right to Know required?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Working for a JCAHO accredited unit?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Handle Purchasing Cards, Cash, Checks or Credit Cards?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Unassorted Access to Radiactive Material Required?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Has direct contact or routine interaction with minors 18 years old or younger?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Working in clinical setting?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Is this an NIH Funded position?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Working with Live Animals?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Hepatitis B Vaccination Required?</td>
<td>Not Specified</td>
</tr>
<tr>
<td>Driving of a Temple owned vehicle required?</td>
<td>Not Specified</td>
</tr>
</tbody>
</table>

**Taleo Tip:** If all of the answers are no, you can save time by navigating to the first question and then typing in N then tab, N then tab, etc. This can also be done using the Y key for Yes answers.
Compensation

1. The Compensation section displays the basis of pay for the non-credit instructor. All non-credit instructor requisitions should reflect a pay basis of Biweekly at the requisition level.

2. DO NOT make any changes to this section.

3. The FLSA section pulls into the requisition from the PCN. This can also be left as is.
Job Description

1. For any requisition created, you need to complete the Internal Job Description field. You must copy and paste using the HTML editor (see 1 below).

2. You have the option to Paste as Plain Text or Paste from Word.

3. If you selected a generic template to create your requisition, you will need to update the Job Description and Qualifications fields.

4. If you are posting a Staff position, you must include the T Grade in the internal job description section.

5. If you need to post the position externally you can use the Copy From function to pull your data from the internal job description into the External job description. Select Done.

6. Once your data is pulled from the internal job description, remove the T Grade in the external job description section.
**Questionnaire**

This section displays questions to be answered by the candidate who is applying to requisitions. The **Eligibility Questions** will be utilized on all requisitions. An applicant’s answers will have a **green checkmark** when completed.

### 5. Questionnaire

<table>
<thead>
<tr>
<th>Questions</th>
<th>Answer</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. Are you under 18 years of age?</td>
<td>Yes</td>
<td>To Be Verified</td>
</tr>
<tr>
<td>- Global</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Code: Under_18</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Type: Single Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visible by: External Candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2. Do you have relatives employed with Temple University?</td>
<td>Yes</td>
<td>To Be Verified</td>
</tr>
<tr>
<td>- Global</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Code: Relatives</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Type: Single Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visible by: External Candidates</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3. Do you have the legal right to work in the United States</td>
<td>Yes</td>
<td>The Candidate Passes</td>
</tr>
<tr>
<td>- Global</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Code: WorkAuto_US</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Type: Single Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>- Visible by: External Candidates</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

1. Additional questions may also be included.

2. **Click Add** under the **Job Related Questions** section.

3. **Use the Quick Filters** on the left to find a question you would to add, then **Select** to add the question to your list.
4. Once the questions are added, choose **Required** for the applicable answer from the drop-down menu on the right-hand side of the page. This will indicate to the system which answer is needed.
Saving a Requisition

All fields should be filled in and the requisition should be ready for approval. At the top of your page, you will have three options.

1. **Save**: can be used throughout creating the requisition to ensure your work is being saved as you complete the fields.
2. **Save and Close**: saves your current work and closes out of editing mode. This can be chosen if you need to stop working on your requisition and return later to continue editing.
3. **Cancel**: exits out of the requisition without saving changes.

**Taleo Tip**: If you save your requisition before it is complete and will need to return to it, you will need to click the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.

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

1. Open the **Diagnostics Tool** on the right-hand side to ensure all fields have been completed. If any field requires information, it will be listed in the **Diagnostics Tool**.

![Diagnotics Tool Image]

2. Since you are in the editing mode, select the specific item that needs to be completed to be brought directly to that section. Once all items have been completed, select **Save** at the top left-hand side of the requisition. Now that the requisition is ready for approval, the **Diagnostics Tool** will read **File ready for approval**.

![Edit Button Image]

3. If you save your requisition before it is complete and will need to return to it, you will need to select the **Edit** button to make changes. Once a requisition is open and approved, the **Edit** button will no longer be available.
Requesting Approval for Requisition

1. If you are a Department Recruiter and have the appropriate authority to approve a requisition, then you can self-approve a requisition by selecting the Request Approval from More Actions.

2. If you are a Hiring Manager, the system will default to your Department Recruiter as the first approver. If the position is grant-funded, then you must add your Research Administration contact as an approver.

3. To add department approvers, click on Add Approvers on the bottom left. You are able to search for approvers in the new window to add to your list. When you are ready to request approval, add a comment in the comment box and select Done. An email will be sent to the Department Recruiter to approve the requisition, starting the approval chain.

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

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

### Email

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

   **Requisition Approval Request**

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

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

   **Respond**

   Best regards,
   Human Resources Department
   Temple University

   Replies to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.
2. The requisition title, ID number, and comments will be visible in the body of the email, along with the name of the person requesting approval.

3. Select **Respond** in the body of the email.

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

5. After reviewing the requisition details, go to the dropdown menu in the middle of the page to choose the appropriate response.
6. Finally, provide a comment if necessary for other requisition approvers and requisition owners to view. Select Done to submit your response.
Taleo System

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

1. To access Taleo, select the Taleo Talent Management System link in TU Portal, under TU Applications. Then select Recruiting to open your main page of Taleo.

2. Once you are logged in, select View Requisitions to be taken to a list of the requisitions you have access to.
3. Select the title of the requisition you need to approve, which will show with a status of Pending.

![Requisitions Table]

<table>
<thead>
<tr>
<th>Title</th>
<th>ID</th>
<th>Status</th>
<th>Status Detail</th>
</tr>
</thead>
<tbody>
<tr>
<td>Student Worker</td>
<td>18000998</td>
<td>Open</td>
<td>Posted (11/28/18, 11:59 PM)</td>
</tr>
<tr>
<td>Director-Collaborator Test</td>
<td>18000996</td>
<td>Pending</td>
<td>To Be Approved</td>
</tr>
</tbody>
</table>

4. When the requisition opens, you can review the requisition information. After reviewing the requisition, go to More Actions and choose to Decide on Approval.

![Decision on Approval]

- Decide on Approval
- Request Approval/Path Amendment

1. Requisition Structure

   - Posting Title: Director-Collaborator Test
   - Banner Home Org: 46020 - HR Employment
   - Department Description for Offer Letter: HR Employment
   - PCN Position Class: PCN Grade
   - SG127 Director: T29
   - PCN Step: PCN Job Family
   - Professional Services

   [Details of posting title and related fields]
5. In the new window, use the dropdown menu to choose your **Decision** for approval. You then have the option to include a comment for other approvers. Select **Done** on the bottom, right-hand side to submit your response.
Post and Unpost a Job

Posting a Position
This is an optional step for Adjuncts and Student Workers if you do not wish to post the job, this can be skipped and candidates can be matched to the requisition by the Hiring Manager or Department Recruiter.

1. Navigate to your approved requisition and open it. From the gray tabs across the top of the page, choose Posting and Sourcing.

2. Once in Posting and Sourcing, locate Career Services at the top of the page. Select the Modify button. A pop-up box titled Posting Requisitions will appear with posting options.

3. In this pop-up box, you will choose which Career Section you want to post the requisition on Temple’s website. You can choose when to post the requisition Start Date and when it should be taken down End Date. Use the drop-down menus to pick from a range of timeframes or use the calendar icon next to each drop-down to pick a specific date.

4. Adjunct positions can be posted to sites for Internal and External applicants. Student Worker positions can only be posted to Internal job boards. Ensure that the boxes under Posting Status are marked for each location you wish. When you are finished, select Done to post the requisition. The window will close out. A list will be shown in the Posting and Sourcing tab to
indicate the timeframes you chose for the job posting.

5. If you wish to only post the job internally, you can **uncheck** the external options.

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

1. To unpost a position and remove it from the job site, you can use the Modify button to open the Posting Requisitions window. Uncheck the box on the far right side of the window. Select Done to unpost the job.

2. After a job has been unposted, you are able to use the Modify button to repost the job if needed. Follow the directions as indicated above to post a job to the career site.
Match a Candidate to a Requisition

1. Navigate to your approved requisition from your dashboard. On the top, right-hand side of the screen, you will see a search box.

2. In this search box, enter the name of the candidate or TUid you are searching for. Select the button with the magnifying glass to the right, or hit Enter to search for that person.
   a. The search function is specific, you will need proper spelling of names.

3. The name you searched will return results. If there is more than one profile for your candidate, all names will appear. First, check off the box that appears on the left-hand side of the candidate list for the candidate you wish to match to your requisition. Then, select the icon of the green figure with a chain link at the top of the list.

4. Internal candidates will be shown with a purple house icon. All students or internal employees should have an internal symbol.
5. After selecting the icon with a green figure with a chain link, a pop-up box will appear with a list of your requisitions. Click **Select** next to the requisition to which you are matching the candidate. The name of the requisition will appear under **Selected Requisitions**. Select **Done** to match the candidate.

6. After clicking **Done**, a pop-up box will ask if you want to send an email to the candidate. Choose **No**, since the e-mail will invite the candidate to apply for the job and you have already matched them to it.

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

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

From the dashboard, you can navigate to candidates in two ways:

1. **View Requisitions:** Navigate from Center Stage to view a full list of your requisitions. On the left-hand side of the page, the number of candidates is shown under the Candidate Count icon. Select the blue number to bring up the list of candidates for this job. You can click on each candidate’s name to review their profile and job submission.

2. **View Candidates:** Navigate from Center Stage to view lists of candidates on various requisitions. A list of active requisitions will show on the screen. You can toggle the gray triangle on the left-hand side to show a list of candidates for each requisition. To the right-hand side of the list, you are able to view how this person applied (i.e. Online or Matched to Job).
Changing Step/Status of Candidates

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

Moving Candidates in Groups

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

1. Check off all candidates to be moved to the next Step/Status. All candidates chosen will be moved to the same point in the process. Candidates must all start at the same step/status (i.e. all candidates below are shown in Manager Review: Manager to Review).
2. Click on the More Actions tab to bring up a list of options. Choose the Change Step/Status option to bring up a pop-up box. The box will show the current Step/Status at the top and the next move in the process.

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

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

B. **Save and Close:** By choosing this option, you are moving the candidate one Step/Status at a time. It will save your choice and close the window, bringing you back to the candidate list and showing the updated Step/Status.
3. The candidates can be moved along the process as far as you wish to take them at that time. You can continue to update the Step/Status up to the Offer stage. Once a candidate is in the Step/Status of **Offer: Offer to be Made**, you will need to stop to create the offer. The Department Recruiter will receive an email indicating that the candidate is ready to receive an offer. Their updated Step/Status can be viewed in the candidate list.

![Candidates for Adjunct Faculty](image)

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Employee ID</th>
<th>Step/Status</th>
<th>Selection Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Ryan, Dorothy (12824)</td>
<td>015312736</td>
<td>Manager Review</td>
<td>Manager to Review</td>
</tr>
<tr>
<td>Silvestri, Jennifer H. (21082)</td>
<td>005930100</td>
<td>Manager Review</td>
<td>Manager to Review</td>
</tr>
<tr>
<td>Bernardi, Laurie Acct for SSO (678)</td>
<td></td>
<td>Offer</td>
<td>Offer to be Made</td>
</tr>
<tr>
<td>Ricorden, Michael F (12000)</td>
<td>9045305861</td>
<td>Offer</td>
<td>Offer to be Made</td>
</tr>
</tbody>
</table>
# Moving Candidates One at a Time

1. Navigate to the candidate profile either from the requisition or the **View Candidates** tab on your dashboard.

2. While in a candidate profile, locate the **More Actions** tab at the top of the page. Click on the arrow in the tab for a drop-down list. Choose the **Change Step/Status** option.

<table>
<thead>
<tr>
<th>More Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Job Submission</td>
</tr>
<tr>
<td>Check for Duplicates...</td>
</tr>
<tr>
<td>Create Self-assigned Task...</td>
</tr>
<tr>
<td>Send Correspondence...</td>
</tr>
<tr>
<td>1. Personal Information</td>
</tr>
<tr>
<td>Candidate Personal Information</td>
</tr>
<tr>
<td>First Name</td>
</tr>
<tr>
<td>Last Name</td>
</tr>
<tr>
<td>Address (line 1)</td>
</tr>
<tr>
<td>Change Step/Status...</td>
</tr>
<tr>
<td>Create Offer...</td>
</tr>
<tr>
<td>Capture Expectations...</td>
</tr>
<tr>
<td>Capture Competito...</td>
</tr>
<tr>
<td>Bypass...</td>
</tr>
<tr>
<td>Revert...</td>
</tr>
</tbody>
</table>
3. A pop-up box will appear, giving options of steps to move the candidate through. The initial Step/Status will show the top of the box. The next Step/Status to move to will show below. You can review each applicant and change the status accordingly.
   a. If you wish to interview a candidate, you will need to stop changing the step/status of the candidate at “Manager Review: Proceed to Interview” by choosing Save and Close.

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

**Taleo Tip:** If you status an applicant by mistake, you are able to move back a step. From the More Actions tab, choose Revert from the drop-down menu. A pop-up box will appear to move the candidate back a step. Comments are required to be included when the Revert option is chosen.
Creating an Interview

1. Ensure all candidates you wish to bring in for an interview have the Step/Status of **Interviews: Interview Scheduled**.

2. From the candidate list within the requisition, **check off** the candidate you wish to schedule an interview with.

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

4. Fill in appropriate fields in the new window. Most of these will be auto-populated with information. You can make edits to any field. **Select Next** when done.
   a. **Subject**
   b. **Organizer** (this should be left as your own name)
   c. **Location**
   d. **Start and End date and times**
   e. **Default Time Zone** (do not change, should reflect Eastern Time)
   f. **Reminder**
**Taleo Tip:** Check off the box for sending an invite to the candidate if you want them to receive an email with this information as well. Uncheck the box if you do not want candidate to receive an email from Taleo.

5. Next, choose the **Interview Attendees** to send an invitation to. The **Quick Filters** on the left-hand side of the window will allow you to jump directly to the name or email address of the person you are searching for. Click **Select** on the right-hand side of the window to add attendees to your list.

6. Click **Next** when all attendees have been added.

7. In the next window, the **Message Template** field will indicate the **Interview Notification** template as chosen. This can be left as is. You may also include an additional message in the invitation email, to appear at the bottom of the email. Otherwise, the email will contain only the information given for the **Interview Properties** window.
8. You are also able to send a link to the candidate file or the requisition file to attendees, excluding the candidate. Click **Done** to send the interview invitation.
Sending Out and Reviewing an Interview Evaluation

1. Go to your candidate’s profile in your requisition by selecting their name from the candidate list. You will want to see the name of your requisition, with your candidate’s name over the top.

2. Select the Interviews tab and scroll down to section 4. Resources. Select Add, under the Participants section.
3. Participants to receive an Interview Evaluation form can be added from this window. The upper section can be used to add people who are not users of Taleo. The lower section can be used to add participants who have access to Taleo.
   a. For the upper section, manually type in first and last name and the email address of your participant. Select Add when names are entered.
   b. For the lower section, use the Quick Filters to jump to the name or email address of your participant. Click Select to add a participant to the list.

Select Done when all participants are added to your list.

4. Right above Participants, you will see Questionnaires Attached to Requisition. Select the radio button next to Interview Evaluation Form and select on Send Request.
5. In the new window, select the dropdown for Select User to choose participants to send the evaluation to. You may also check off Candidate file and Requisition file below if you wish to share these files with the participants.

Select Send when done. An email will be sent to all participants with a link to the interview URL. All participants can complete the evaluation and submit it to Taleo.
6. To view completed evaluations, go back to your requisition and select on the candidate’s name to open their profile. Select on the Interviews tab and scroll to 2. Completed Interviews and Evaluations. You will see a list of all completed evaluations. Check off the evaluation you wish to review and select View Results.
Creating and Extending an Offer – Non-Credit Instructor

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

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

**Top Section**

1. Enter the following information which will appear on the E-offer appointment letter
   a. **Pay Start Date**: the date of the non-credit instructor’s first day of work
   b. **Pay End Date**: can be left blank as the individuals will be on the Kronos system
   c. **Teaching Begin Date**: The first day of the class
   d. **Teaching End Date**: The last day of the class
   e. **Offer Expiration Date**: Date by which you want them to respond to the offer

**Taleo Tip**: you may enter a date or click on the calendar function for all date fields

**Taleo Tip**: By default, the box labeled Tentative is checked. This means that the job start date is tentative. For Non-Credit Instructors, **uncheck this box** since the start date is not tentative as it might be for staff positions.
General Terms

1. The next section relates to pay and title.

```
General Terms

<table>
<thead>
<tr>
<th>General Terms</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Salary (Pay Basis)</td>
<td></td>
</tr>
<tr>
<td>Currency</td>
<td>US Dollar (USD)</td>
</tr>
<tr>
<td>Pay Basis</td>
<td>Not Specified</td>
</tr>
</tbody>
</table>
```

2. Enter the rate of pay and pay basis. Always choose Hourly for non-credit instructors.

<table>
<thead>
<tr>
<th>Type of Candidate</th>
<th>Pay Rate Field</th>
<th>Pay Basis Field</th>
<th>E-Class</th>
</tr>
</thead>
<tbody>
<tr>
<td>Non-Credit/CE Instructor</td>
<td>Hourly Rate</td>
<td>Hourly</td>
<td>56</td>
</tr>
<tr>
<td>Artist in Residence</td>
<td>Hourly Rate</td>
<td>Hourly</td>
<td>57</td>
</tr>
<tr>
<td>ESL Instructor</td>
<td>Hourly Rate</td>
<td>Hourly</td>
<td>54</td>
</tr>
</tbody>
</table>

3. Below that field, there is a Credit Hours field. For non-credit instructors, this field can be left to read 0.
4. Next, click on the selector icon to select the correct title. Scroll down to find the appropriate title.

![Selector Icon]

5. The **Hours Per Week** field can be left blank for non-credit instructors.

**Details**

1. Lastly, complete the **Details** grid with the semester contract total amount and the number of pays. The number of pays can be entered as **26**.

2. If needed, the FOP index is available. This is to be used if you do not want the default FOP from Banner Position Control to default into the job.

![Details Grid]

**Taleo Tip:** If you need to lookup an INDEX, please sign in to TU Portal and go to Banner Tab, Finance Channel.

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

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

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

1. Go to More Actions and click on Request Approval.

2. To add approvers, click on Add Approvers on the bottom left. You are able to search for approvers in the new window to add to your list.

3. When you are ready to request approval, add a comment in the comment box and click Done. An email will be sent to the Approver alerting them that action is needed.
Extend the Offer

1. Click on the candidate’s name in your requisition to open their profile.

2. Go to More Actions and select Extend Offer.

3. Recruiters will see the following pop-up warning box. If you have the proper authority, you may click Yes to self-approve the offer. Otherwise you must route for approval.

4. An Extend Offer dialogue box will appear. Select Extend in Writing and click Done.
5. Select E-offer in the Send Offer Letter dialogue box.

6. To select the correct appointment letter, click on the drop-down menu to select your school or college.

7. Navigate to your school/college and click Select. The choice of Internal or External templates will display based on the candidate’s status.
   a. **Non-credit/CE Instructors** will have templates titled Non-Credit/CE Instructor followed by the campus
   b. **ESL instructors** will each have a template named for the employee type
   c. **Artist in Residence** letters will begin with the college name, **Boyer** or **Tyler**.
8. Click **Select** to choose the template you wish to use. Then click **Next**.

9. Letter Prompt for Non-Credit/CE Instructors and ESL Instructors - input a Prefix and the name of the course. Then click **Next**.

10. Letter Prompt for Artist in Residence – input a Prefix and the number of students to teach.
11. Your appointment letter has been created.

12. To view the E-offer Appointment letter, click on the recipient link. You may make edits or corrections directly in the body of the letter.

13. When you are finished reviewing the offer letter, click **Send**. The instructor will receive an email with a link to Taleo to accept the offer.

14. The instructor’s step/status will update to **Offer: Extended**.

**Taleo Tip:** If the offer letter is sent to an internal candidate, their TUID will appear on the E-offer appointment letter instead of their home address.

15. To access a copy of the instructor’s offer letter, click on the **History** tab in the candidate’s profile.

16. You will see the title of the letter in the **History** tab highlighted in blue. You can click on the title of the letter to view a copy of the offer.
<table>
<thead>
<tr>
<th>Date</th>
<th>Events</th>
<th>Language</th>
<th>Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep 23, 2016</td>
<td>Offer 1 – Send an E-Offer on College of Liberal Arts - External - Temple University Appointment Letter</td>
<td></td>
<td></td>
</tr>
<tr>
<td>11:00 AM</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
Hiring – Non-Credit Instructor

Hire/Hired Change

1. When the candidate responds to the offer, the Recruiter will receive a notification e-mail.

2. If the offer is accepted, then the Recruiter needs to log into Taleo to hire the candidate.

3. Open the requisition and navigate to the Candidate’s record to Change Step/Status. Click on More Actions and choose Change Step/Status.

4. The update of status to Hired will update Banner.
   a. If you are not receiving the option of Change Step/Status, you may still have the Tentative box from the Offer grid marked. To change this, go to Update Start Date. Uncheck Tentative in the pop-up box and click Done.
5. Click **Save and Close** at the bottom of the box.

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

   ![Warning Message]

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

If you have extended an offer to an incorrect or invalid email or must make changes to the offer itself, the offer must be rescinded and revised before being resent. Otherwise, the original offer will continue to be sent.

1. Navigate into your requisition’s list of candidates and choose the candidate you are revising the offer for. Click on their name to open their profile.

2. Go to More Actions and choose Rescind Offer.

3. Input a comment in the pop-up window and click Done.
4. After the screen updates, go to More Actions and choose Create Offer. This will open the offer grid with new fields to fill in for the updated offer.

5. If any offer details will remain the same, the previous offer can be copied over. Hover under the paperclip symbol shown with the previous offer and click on the two arrows that appear there. All fields can also be re-entered manually.
6. After offer details are copied, **make changes** to fields that need to be changed.

7. **Click** Save and Close when finished creating the offer.

8. **Go to** More Actions and choose Extend Offer or Request Approval. Follow the same steps you had completed previously for extending an offer.