Taleo Talent Management System Training

Staff
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Remember – if you have any questions or need assistance, send an e-mail to Taleohelp@temple.edu or call 215-204-4008 (1-4008).
Navigation

Taleo is accessed from the TUPortal. Click on Taleo Talent Management System.

The recruiting Center has a 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 click on 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.
Navigation 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 orgs.

![Quick Filters]

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.
My Set-up

You can use the Resources menu to access the My Setup, or user preferences, area of the system. This allows you to setup 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.

Process Steps

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

2. Once in the Frequent Collaborators tab, click on the 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. Click the Refresh button to populate your results.

4. Once you have found the right User, add them to the list of Selected Collaborators by clicking the 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, click the button.

6. You can repeat these steps for the Frequent Approvers as well.
Quick Filters

Quick filters can help you narrow results for data you are seeking. You can view quick filters when viewing any of the tabs in the core navigation. Quick filters are always found on the left hand side. The quick filters available in the pane will be relevant to the area of the Recruiting Center you have accessed. Below is a screen shot of the Quick Filters in the Requisition tab.

Example: Requisition List Quick Filters

In the Requisition List view of the Recruiting Center you have many options for filtering the list of Requisitions to view a select group of requisitions. Each option can be used independently or in connection with other filters to narrow the list even further.
Option 1: Show requisitions for – This filter allows you to show only requisitions you own, or collaborate on or show all requisitions in your coverage area (see Navigation Tips, page 4).

Option 2: Requisition Status – This filter allows you to filter the list by a specific or multiple requisition Statuses. For example, if you wanted to see only active requisitions in the list you would select Open Status requisitions.

Option 3: SmartOrg (Primary Location, Job Field, Organization, Posting Title) – This filter allows you to condense the list of Requisitions to only requisitions for a certain location or organization.
- Primary location = Country-State-City-Campus-Building
- Job Field = Type of employee (adjunct, grad ass't, post doc, staff, student) and category of job
- Organization = 5 digit home org

Option 4: – The Advanced Filters button will open the Advanced Filter window which will allow you to search by other requisition data points, such as, HR Business Partner/Department Recruiter, Hiring Manager, Requisition number, Job Codes, etc.
Create a Requisition

Both Hiring Managers and Department Recruiters have the ability to create a requisition. To start the Requisition, click on the Create Requisition button in the Requisitions Channel.

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 valid PCN is required before you start the requisition. Please check with your Business Manager or HR Business Partner if you have any questions about the title, e-class, or grade associated with the PCN.

The format of the PCN is:

Full-time Staff position       6 digit all numeric code
Part-time Staff position      “R” followed by the 5 digit org
Temporary Staff              “P” followed by the 5 digit org

Step 1
You can search for PCN’s by using a Quick Filter. For example, if you enter the first few digits of the PCN, then hit the refresh button, a list will appear.

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

TRAINING 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. Ensure you are selecting your PCN from the list provided. If your data is not underlined, then you do not have a valid entry.

Next 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.

Step 2
Next, you will enter the organization. Start to type your **5 digit Home Org** and suggested values will populate. Select the org desired.

**Example:**

![Organization screenshot](image)

The next step is to enter the location. Enter the name or address of the building where the job will be located. You can also choose by campus.

**Example:**

![Location screenshot](image)

**Taleo Tip:** If your Staff is working from home or working remotely, you can select **Location INSIDE of PA** or **Location Outside of PA**. If you are hiring multiple Staff employees to one position, the location must apply to all Staff employees.
The Job Field will populate from your PCN. You can include a category for applicants to search for when applying for positions. Click on the selector icon to open the category selector.

Under the “Quick Filters” section, use the Type field and enter “Staff.” Use the filter button or click “enter” to return the results. Then, click “Select” next to the category appropriate for the position.

Now click Create.
Requisition Structure

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

**TRAINING 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.

Requisition Structure

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

- Posting Title
- Number of Openings
- Banner Home Org
- Department Description for Offer Letter (department name to populate in the offer letter)
- Banner Check Distribution
- Justification for the position
  - New position
  - Replacement
    - If this is a replacement, you will need to free form enter the name of the previous incumbent
- Name and TUid of Supervisor
The Supervisor field is very important as this field will be imported into Banner and feed other systems such as the PDP. 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

Staff requisitions will have three fields for Owners. The Hiring Manager should already be filled in with your own name. This will make you an owner of the requisition.

The Business Partner field will be the **Human Resources representative** you are working with on the requisition. Begin typing the name of your HR Business Partner and click on their name from the dropdown options given. You can also use the selector icon to filter a list of names. You do not need to select a Talent Acquisition Specialist. This field will be completed by the Business Partner.

Adding Collaborators

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 add your own Add Frequent Collaborators if you have set up your personalized list.

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.
**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.

**Important Note: Depending on your access to the system, the “Additional Information” section may be located within the Requisition Structure.**
Job Information

This section contains data such as shift, targeted start date, earnings code (use REG for all) and the Compliance questions.

3. Job Information

- **Schedule**
  - Part-time
  - Full-time

- **Shift**
  - Day Job

- **Target Start Date**

- **Employee Status**
  - Regular
  - Only complete for adjuncts or temporary workers

- **Chemical Right to Know required?**
  - Not Specified
  - Answer yes if the person in this position is required to have Chemical Right to Know training.

- **Working for a JOAHO accredited unit?**
  - Not Specified
  - Answer yes if the person in this position is required to have JOAHO compliant Employee ID Badge.

- **Handle Purchasing Cards, Cash, Checks or Credit Cards?**
  - Not Specified
  - Answer yes if the person in this position will be issued a purchasing card or will handle cash, cash equivalents, checks, or credit cards. A yes answer results in a background check.

- **Unescorted Access to Radioactive Material Required?**
  - Not Specified
  - Answer yes if the person in this position needs access to areas restricted due to the presence of radioactive material. A yes answer results in a background check.

- **Unescorted Access to Radioactive Material Required?**
  - Not Specified
  - Answer yes if the person in this position needs access to areas restricted due to the presence of radioactive material. A yes answer results in a background check.

- **Hepatitis B Vaccination Required?**
  - Not Specified
  - Answer yes if the person in this position has the potential to be exposed to blood borne pathogens.

- **Is this a Campus Safety position?**
  - Not Specified
  - Answer yes if the person in this position will be Campus Police or Campus Security. A yes answer results in a background check.

Compliance Questions - Answers to these questions trigger processes in the background. These are required for all requisitions.

**TRAINING TIP** – If all of the answers are no, you can save time by navigating to the first question and then typing in N tab, N then tab, etc. This can also be done using the Y key for “yes” answers.
The Compensation section displays the basis of pay for the staff employee. All staff requisitions pull in the pay basis from the PCN. This will reflect a pay basis of either **Hourly** or **Monthly** at the requisition level. **DO NOT** make any changes to this section.

Banner Hours per Week and Earn Code can be chosen from drop down lists. For Banner Hours, please choose the correct number of hours this position will be working per week.

In the Anticipated Salary field, enter the salary you are expecting to pay for this position.

**NOTE:** If you see Posting Rate (most Hiring Managers should not), leave this blank for Human Resources to complete.
Job Description

You need to complete the Internal Job Description field. You must copy and paste using the HTML editor (see 1 below). If you selected a Generic Template to create your requisition, you will need to update the job description and Qualifications fields.

4. Job Description

![HTML Editor Image]

Questionnaire

This section displays questions to be answered by students who are applying to requisitions. The Eligibility Questions will be utilized on all requisitions. An applicant’s answers will have a green check mark 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: WorkAuth_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>
Additional questions may also be included. Click **Add** under the Job Related Questions section. Use the Quick Filters on the left to find a question you would to add, then click **Select** to add the question to your list.

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.
At this point, 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.

- **Save**: can be used throughout creating of the requisition to ensure your work is being saved as you complete the fields.
- **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.
- **Cancel**: exits out of the requisition without saving changes.

TRAINING TIP – Before sending your requisition for approval, 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. If the requisition is ready for approval, the Diagnostics Tool will read “File ready for approval.”

TRAINING 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.
TRAINING TIP – As you move through the requisition, the status box on the left will update and display the status of the requisition.

Routing for Approval

For Staff requisitions, the system will default to your Business Partner as the first approver. You can add Requisition Approvers according to your department procedures. Your Business Partner will add the Talent Acquisition Specialist to the approval path and, if applicable, Research Accounting.
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 (required) and click Done. An email will be sent to the Business Partner to approve the requisition, starting the approval chain.
Approving a Requisition

If you are in the approval chain, you will be sent an email to approve the requisition.

Through the Taleo dashboard, locate the “Tasks” channel on the right hand side of the screen and click on “Approve Requisition.” Click on the title to open the requisition. This will allow you to review the requisition if needed.

Click on the More Actions tab at the top. Click on “Decide on Approval” to bring up the approval box.

Choose “Approve” from the drop down menu under, input a comment, and click “Done.” An email will be sent to the next approver, if there is one. The status of the requisition will remain as “Pending: To be Approved” until the last person in the list has given their approval.
If you are the last person in the approval chain, the status of the requisition will update to “Open: Approved” when the approval is given.

**NOTE:** After the requisition is fully approved and open, it will remain in Human Resources to be posted. When applicants begin to submit their job applications, you will not see anyone on the requisition. All applicants will go through a pre-screening process, completed by Human Resources. When your HR Talent Acquisition Specialist determines an applicant meets the criteria you are searching for, they will be moved into the step/status of “Manager Review: Manager to Review.” When an applicant has been moved to this step/status, they will appear on your candidate list and you will be able to move to the steps below to continue the staff hiring process.
Viewing Candidates

After your Human Resources Talent Acquisiton Specialist has moved candidates into the “Manager to Review” status, you will be able to view candidates through your dashboard. If applicants are in any steps before “Manager Review”, you will not see them on the requisition.

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.

   ![Image of Requisitions Table]

   Click on 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.

   ![Image of Candidates Table]
Changing Step/Status of Candidates

1. While in an applicant 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.

2. A pop-up box will appear, giving options of steps to move the applicant through. The applicant will appear to the Hiring Manager as “Manager Review: Manager to Review.” 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.
TRAINING TIP: If you status an applicant by mistake, you are able to move back to a previous 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.

3. Continue moving applicants through the Step/Status box until you arrive at “Manager Review: Proceed to Interview.”
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 Candidate’s list, **check off** the candidate you wish to schedule an interview with.

3. Go to **More Actions** and choose **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. Click **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
NOTE: 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 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 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.

Click Next when all attendees have been added.

6. 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.
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 Interview Evaluation Form for Staff Interviews

1. Go to your candidate’s profile in your requisition by clicking on 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. Click on the **Interviews** tab and scroll down to section **4. Resources** and click **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. Click **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 participant to list.

   Click **Done** when all participants are added to your list.

4. Right above Participants, you will see **Questionnaires Attached to Requisition**. Check the circle next to Interview Evaluation Form and click on **Send Request**.
5. In the new window, click on 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.

Click **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.

---

**EMAIL TO PARTICIPANTS**

Dear Dorothy Ryan,

Please complete the following evaluation:

Evaluation: Interview Evaluation Form  
Requisition: Football Head Coach  
Candidate: Hooter Owl  
Expiration Date: 1/13/17

Click the link below to access and save the evaluation.

[Evaluation URL]

Best regards,  
Human Resources Department

Reply to this message are undeliverable and will not reach the Human Resources Department. Please do not reply.
6. To view completed evaluations, go back to your requisition and click on the candidate’s name to open their profile. Click 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 click **View Results**.

<table>
<thead>
<tr>
<th>Completed Date</th>
<th>Candidate</th>
<th>Event Type</th>
<th>Questionnaire</th>
</tr>
</thead>
<tbody>
<tr>
<td>1/17/17 9:25 AM</td>
<td>Hooter Cowl</td>
<td>Feedback</td>
<td>Interview Evaluation Form</td>
</tr>
</tbody>
</table>