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

Organizational Structure

Locations

Job Functions

“contextualization”
SmartOrg at Work - OLF

**Organization**
- CFO
- Exec VP Health
- COO
- Provost
- President

**Location**
- United States
  - Pennsylvania
  - Ambler
  - Philadelphia
  - City Center
  - Main Campus
  - HSC Campus

**Job Function**
- Adjunct
- Student Worker
- Staff
SmartOrg at Work

- **User Groups**
- **Prescreening Questions?**
- **Req, Candidate & Offer Fields**
- **Workflows**
- **Correspondence**
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.
Channels give you quick views and links to perform a wide range of recruiting activities.

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

The Refresh button is used to update the information in Channels.

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

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

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

The Navigation Bar can access the primary areas of the Recruiting Center.
Note that a more simple Center Stage is configured for Hiring Managers.
Lists and Quick Filters

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

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

Advanced Filters option which will allow you to apply additional filtering criteria to your list.
Show information for Filter

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

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

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

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>| | |</p>
<table>
<thead>
<tr>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Back and Forward buttons" /></td>
<td>Don’t use the Back and Forward buttons in your browser</td>
</tr>
<tr>
<td><img src="image" alt="Refresh and Stop buttons" /></td>
<td>Don’t use the browser’s Refresh or Stop buttons</td>
</tr>
<tr>
<td><img src="image" alt="My Setup icon" /></td>
<td>When pointing to most options your selection will be colored or darkened in some way prior to clicking on it.</td>
</tr>
<tr>
<td><img src="image" alt="Tool tip" /></td>
<td>Access tooltips by pointing to a button, icon, tab etc. for more information.</td>
</tr>
<tr>
<td><img src="image" alt="Sign out button" /></td>
<td>Always log out of the system before closing the browser window</td>
</tr>
</tbody>
</table>
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 1st 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

<table>
<thead>
<tr>
<th>Job Requisitions</th>
<th>Draft</th>
<th>Pending</th>
<th>Open</th>
<th>Canceled (Since Nov 1, 2015)</th>
<th>Filled (Since Nov 1, 2015)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>1</td>
<td>0</td>
<td>8</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td></td>
<td>2</td>
<td>1</td>
<td>19</td>
<td>2</td>
<td>14</td>
</tr>
</tbody>
</table>

Candidates

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.

HR/Recruiters

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

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.

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

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.

Required fields are highlighted with a red asterisk.
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
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 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

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 can be identified when you see the Selector Button to the right of the field. You may type 3 or more characters to leverage Taleo’s Suggestive Text features – OR – You may click the Selector Button to use Taleo’s filtering features.
Owners and Collaborators

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

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.

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

Reveals HTML/CSS code. Administrator may make HTML/CSS edits

Add, Modify or Remove Hyperlinks

Click the Enlarged View button for more toolbars and larger text space
Add Evaluations to Requisition

**Vacation Counselor (SAL00001E)**

1. Interviews and Evaluation Requests

4. Resources

Questionnaires Attached to Requisition

- Preview
- Add
- Remove

Nothing found to display.
Add Evaluations to Requisition

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

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

Approval is pre-defined based on your approval matrix.

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

Approval is pre-defined based on your approval matrix.

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.
Recruiters and HR

eShare Approval Response Center

eShare Response Center

- 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

<table>
<thead>
<tr>
<th>Requisition</th>
<th>00000024 — Accountant</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requested by</td>
<td>User Recruiter</td>
</tr>
<tr>
<td>Comments</td>
<td>Please approve the replacement for the accountant in the Oakland office.</td>
</tr>
</tbody>
</table>

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

Respond...
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
Requisition List Formats

Standard Requisition List Format

Click here to customize the list format

Create a Custom List Format ...

… or select a Pre-Defined List Format
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
4. Set Optional 2nd and 3rd Sort Columns
5. Name Your Custom Format

Note: Use this same procedure for custom Candidate Lists
# Requisition Statuses

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

– 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

Users can set Requirements and Assets

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Required/Asset</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Please indicate the highest level of education you have received.

- Global Code: HighestLevelEducation
- Type: Single Answer
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

2. Quick Filters to search questions library

3. Selecting to add questions to the requisition
### Requirements, Assets

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Required/Asset</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Please indicate the highest level of education you have completed.</td>
<td>High School Diploma or GED</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Associate’s or 2 year degree/certificate</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Bachelor’s degree</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Master’s or advanced degree</td>
</tr>
<tr>
<td></td>
<td></td>
<td>PhD / JD</td>
</tr>
<tr>
<td></td>
<td></td>
<td>None of the above</td>
</tr>
<tr>
<td>2</td>
<td>Please indicate if you have an intermediate level of proficiency (requiring minimal supervision) in interpreting the following. Please select all that apply:</td>
<td>Blueprints</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Wiring Diagrams</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Assembly Prints</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Parts Lists</td>
</tr>
<tr>
<td></td>
<td></td>
<td>None of the Above</td>
</tr>
</tbody>
</table>

**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

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

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*

<table>
<thead>
<tr>
<th>Title</th>
<th>ID</th>
<th>Hiring Manager</th>
<th>Recruiter</th>
<th>Status</th>
<th>Status Detail</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>ACCOUNTANT</td>
<td>1203761</td>
<td>HENDRICKS ANTHONY</td>
<td>CHRISMAN KYLE</td>
<td>Open</td>
<td>Approved (Ready)</td>
<td>NORTH AMERICA &gt; UNITED STATES &gt; Colorado &gt; DENVER &gt; US61-US-CO -DENVER 1030</td>
</tr>
<tr>
<td>ACCOUNTANT</td>
<td>1203760</td>
<td>HENDRICKS ANTHONY</td>
<td>CHRISMAN KYLE</td>
<td>Open</td>
<td>Approved (Ready)</td>
<td>NORTH AMERICA &gt; UNITED STATES &gt; Colorado &gt; DENVER &gt; US61-US-CO -DENVER 1030</td>
</tr>
<tr>
<td>ACCOUNTANT</td>
<td>1203749</td>
<td>TELLEZ ALEX</td>
<td>00 Recruiter</td>
<td>Open</td>
<td>Unposted @11/12, 1:00 AM</td>
<td>MIDDLE EAST &gt; UAE &gt; U.A.E. &gt; DUBAI &gt; AE11-AE- YYYY-DUBAI 1030</td>
</tr>
</tbody>
</table>

The graphic above shows requisitions with active ACE alerts
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.

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.
4. 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

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Submission Completed</th>
<th>Selection Status</th>
<th>Requirements</th>
<th>Assets</th>
</tr>
</thead>
<tbody>
<tr>
<td>Simo, Herve (657442)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>4 / 4</td>
</tr>
<tr>
<td>Kasivajula, Sai Sourya (655996)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>4 / 4</td>
</tr>
<tr>
<td>Niggemyer, Cody (659876)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>3 / 4</td>
</tr>
<tr>
<td>Wang, Belinda (657876)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>3 / 4</td>
</tr>
<tr>
<td>Jokodola, Mayowa Ayodeji (655536)</td>
<td></td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>2 / 4</td>
</tr>
<tr>
<td>Garcia, Juan (656167)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>2 / 4</td>
</tr>
<tr>
<td>Loper, William (659639)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>2 / 4</td>
</tr>
<tr>
<td>Hendricks, James E (667535)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>2 / 4</td>
</tr>
<tr>
<td>Lopez, Josue (659756)</td>
<td></td>
<td>Added to Requisition</td>
<td>3 / 3</td>
<td>2 / 4</td>
</tr>
<tr>
<td>Basilio, Gómez (659701)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>2 / 3</td>
<td>4 / 4</td>
</tr>
<tr>
<td>Abdelgadir, Ahmed (659701)</td>
<td>✓</td>
<td>Added to Requisition</td>
<td>2 / 3</td>
<td>4 / 4</td>
</tr>
<tr>
<td>Sahni, Ankush (659701)</td>
<td></td>
<td>Added to Requisition</td>
<td>2 / 3</td>
<td>4 / 4</td>
</tr>
</tbody>
</table>

- **Meets ALL Requirements and have desired Assets to be considered an ACE candidate**: Simo, Herve (657442), Kasivajula, Sai Sourya (655996), Niggemyer, Cody (659876), Wang, Belinda (657876), Jokodola, Mayowa Ayodeji (655536), Garcia, Juan (656167), Loper, William (659639), Hendricks, James E (667535), Lopez, Josue (659756), Basilio, Gómez (659701), Abdelgadir, Ahmed (659701), Sahni, Ankush (659701).

- **Meets ALL Requirements but does not meet Assets threshold to be considered an ACE candidate**: Jokodola, Mayowa Ayodeji (655536).

- **Does NOT meet all requirements. Recruiter may ‘Reject’ candidates.**
  - Future Enhancement – system to auto-reject these candidates: Lopez, Josue (659756), Basilio, Gómez (659701).
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

- Tasks assigned to me
  - Total: 5

- All staffing tasks
  - Total: 5

Requisitions
- Ready for sourcing
  - Total: 2

Self-assigned Tasks
- Open
  - Total: 3
- Overdue
  - Total: 3

Req. List: Status Details column

Req. File: More Actions menu

Req. File: Posting and Sourcing tab
Posting & Sourcing

Click here to Post to Taleo Career Sections
Posting a Requisition to Career Sections

List of Career Sections available

Posting start and end date

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
ONLY FOR HR STAFF: Posting to Broadbean

You may post to 3rd Party Job Board via the Broadbean Job Distribution Service

Click here to post

Complete instructions on the Broadbean page

Click here to return to Taleo

This posting will cost at least $300.00

<table>
<thead>
<tr>
<th>Supplier</th>
<th>Account</th>
</tr>
</thead>
<tbody>
<tr>
<td>Broadbean</td>
<td>Kimberly Woods</td>
</tr>
</tbody>
</table>

Broadbean Test Board
(Free)
Cost per post: $300.00

CareerBuilder (North America Only)

LinkedIn
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

![Taleo Enterprise career section](image-url)
CANDIDATE FILES
Lesson Goals

- Access Candidates
- View Candidate Actions
- Candidates on Multiple Submissions
- Review Indicators
Candidate List via Requisition

Requisition List - Candidate column

Requisition File - Left Pane
Candidate List via Candidate Menu

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

Candidate Lists has it’s own set of Quick Filters.
Candidate File

Job Submission tab works like the Requisition tab

Attachments can be accessed here
View Candidates on Multiple Requisitions

- 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 one 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.
From the Candidate List

From the Candidate Record

You must have a LinkedIn account to use this feature.
### Candidate Indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image1.png" alt="Icon" /></td>
<td>Internal Candidate</td>
</tr>
<tr>
<td><img src="image2.png" alt="Icon" /></td>
<td>Referred candidate</td>
</tr>
<tr>
<td><img src="image3.png" alt="Icon" /></td>
<td>New candidate or candidate has been modified since last viewed</td>
</tr>
<tr>
<td><img src="image4.png" alt="Icon" /></td>
<td>Disqualified Candidate</td>
</tr>
<tr>
<td><img src="image5.png" alt="Icon" /></td>
<td>Disqualification information to be verified</td>
</tr>
</tbody>
</table>
## Candidate Indicators

<table>
<thead>
<tr>
<th>Indicator</th>
<th>Status Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="72x458" alt="Image" /></td>
<td>Candidate in Selection Process on another Requisition</td>
</tr>
<tr>
<td><img src="643x19" alt="Image" /></td>
<td>Most Advanced Progression Status: Contact (not on a req.)</td>
</tr>
<tr>
<td><img src="157x360" alt="Image" /></td>
<td>Most Advanced Progression Status: New</td>
</tr>
<tr>
<td><img src="157x261" alt="Image" /></td>
<td>Most Advanced Progression Status: Reviewed</td>
</tr>
<tr>
<td><img src="157x212" alt="Image" /></td>
<td>Most Advanced Progression Status: Interview (1(^{st}), 2(^{nd}), 3(^{rd}))</td>
</tr>
<tr>
<td><img src="157x153" alt="Image" /></td>
<td>Most Advanced Progression Status: Offer</td>
</tr>
<tr>
<td><img src="157x104" alt="Image" /></td>
<td>Most Advanced Progression Status: Testing</td>
</tr>
<tr>
<td><img src="157x54" alt="Image" /></td>
<td>Most Advanced Progression Status: Hired</td>
</tr>
</tbody>
</table>
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.

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

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

Type or paste text here

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

Users can add fields to the Search Form …

… or remove items from the Search Form

NOTE: Available Search Fields are configured by a system administrator
After Customizing the Search Form, users can Save as Default for future use.
# Advanced Search Keyword Field Tools

<table>
<thead>
<tr>
<th>Keyword Format Tools</th>
<th>Examples</th>
<th>Results in Candidates with keywords in Candidate Files:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Wild card</td>
<td>program*</td>
<td>program; programming; programmer, etc.</td>
</tr>
<tr>
<td><strong>Boolean operators</strong></td>
<td></td>
<td></td>
</tr>
<tr>
<td>AND OR NOT</td>
<td>president OR vice president NOT regional</td>
<td>president OR vice president, but no files with the word &quot;regional&quot;</td>
</tr>
<tr>
<td><strong>Parentheses</strong></td>
<td>(retail or store) accountant</td>
<td>retail and accountant OR store and accountant</td>
</tr>
<tr>
<td><strong>Space between words</strong></td>
<td>Java JavaScript</td>
<td>Java and JavaScript</td>
</tr>
<tr>
<td>= AND</td>
<td>&quot;project manager&quot;</td>
<td>project manager (words must appear in exact order with a literal space)</td>
</tr>
<tr>
<td><strong>Quotes</strong></td>
<td>&quot;project manager&quot;</td>
<td></td>
</tr>
</tbody>
</table>
Taleo automatically creates an HTML version for all attached documents.

Keywords from an Advanced Search are highlighted on the HTML document.
Location Proximity Search

Search by Taleo Place of Residence locations …

… or search by Main Line Health locations

Select a Proximity
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

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

Name your query
Save it to a Query Folder
Create or file to an existing folder
Click ‘Done’ when complete
Search Queries

Click here to find your saved Search Queries

Click here to open and run your saved Search Query

San Diego Construction Engineers
CANDIDATE MANAGEMENT
Take Actions from the Candidate List

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

1. Prescreening

Prescreening Competencies

1. Analyze and interpret data/information

Prescreening Questionnaire

<table>
<thead>
<tr>
<th>Question</th>
<th>Answer</th>
<th>Required/Asset</th>
<th>Result</th>
</tr>
</thead>
<tbody>
<tr>
<td>1 Select all that you have working experience in:</td>
<td>✓ Managing the quality of corporate repository</td>
<td>Met (Asset)</td>
<td>0/0</td>
</tr>
<tr>
<td></td>
<td>✓ Support data quality assurance processes</td>
<td>Met (Asset)</td>
<td>0/0</td>
</tr>
<tr>
<td></td>
<td>✓ Participate in the evaluation of application packages</td>
<td>Met (Asset)</td>
<td>0/0</td>
</tr>
<tr>
<td>2 How many years of working experience do you have with systems development in the information technology field?</td>
<td>✓ More than 7 years</td>
<td>Met (Required)</td>
<td>0/0</td>
</tr>
</tbody>
</table>
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 Job Submission(s)

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

Step
HM Screen
Status
To be Reviewed
Creation Date
May 20, 2014

Personal Information

First Name
Bruce
Last Name
Wayne
Address (line 1)
P.O. Box 3352
City
Summerville
Zip/Postal Code
29484-3352

Multiple records will be condensed into one PDF file
Share Candidate

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Relevance</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stevenson, Ellie (12220)</td>
<td>100</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Chambless, Micah (11233)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Donaldson, Matthew (11232)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Esurone, Esttte (21788)</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Humphrey, Rob (11004)</td>
<td>80</td>
<td>Doctorate Degree (over 19 years)</td>
</tr>
<tr>
<td>Marmot, Mukmuknine (21265)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
</tbody>
</table>
Check the box beside each name you wish to share with,
and type an email address in the Email field.
Share Candidate

Determine sections to include/exclude

Recipients will receive PDF candidate profile and any attachments via email

Multiple records will be condensed into one PDF file
Send Correspondence

1. More Actions > Send Correspondence

2. Select a Message Template

3. Click to continue
Send Correspondence

Preview Message. Click ‘Send’ to deliver
Check for Duplicates

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

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Email Address</th>
<th>Home Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>Smith, Alice (13624)</td>
<td>alicesmith@invalidemail</td>
<td>33333344444</td>
</tr>
<tr>
<td></td>
<td>mail.com</td>
<td></td>
</tr>
<tr>
<td>Smith, Alice (14103)</td>
<td>a2smith@invalidemail</td>
<td>934-345-3344</td>
</tr>
<tr>
<td></td>
<td>ail.com</td>
<td></td>
</tr>
<tr>
<td>Smith, Alice (14108)</td>
<td><a href="mailto:shunt@taleo.com">shunt@taleo.com</a></td>
<td></td>
</tr>
<tr>
<td>Smith, Bill (11063)</td>
<td>billsmith@invalidemail</td>
<td>214 567-7533</td>
</tr>
<tr>
<td></td>
<td>ail.com</td>
<td></td>
</tr>
<tr>
<td>Smith, Brittany (12257)</td>
<td>nmglobal-general@oracleads</td>
<td></td>
</tr>
</tbody>
</table>
Merge Duplicate Records

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.
### Match Candidate

#### Advanced Candidate Search Results

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Relevance</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stevenson, Ellie (12220)</td>
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<td>Bachelor's Degree (±16 years)</td>
</tr>
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<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Donaldson, Matthew (11232)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Esurone, Esttone (21788)</td>
<td>80</td>
<td>View</td>
</tr>
<tr>
<td>Humphrey, Rob (11004)</td>
<td>80</td>
<td>Doctorate Degree (over 19 years)</td>
</tr>
<tr>
<td>Marmot, Mukmuknine (21265)</td>
<td>80</td>
<td>View</td>
</tr>
</tbody>
</table>
Match Candidate

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

Click 'Done'

Select requisition(s)
You may compare up to 4 candidate records at once.
## File Candidates to a Folder

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Relevance</th>
<th>Education Level</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stevenson, Ellie (12220)</td>
<td>100</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Chambless, Micah (11233)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Donaldson, Matthew (11232)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
<tr>
<td>Esurone, Esttone (21788)</td>
<td>80</td>
<td></td>
</tr>
<tr>
<td>Humphrey, Rob (11004)</td>
<td>80</td>
<td>Doctorate Degree (over 19 years)</td>
</tr>
<tr>
<td>Marmot, Mukmuknine (21265)</td>
<td>80</td>
<td>Bachelor's Degree (±16 years)</td>
</tr>
</tbody>
</table>
File Candidates to a Folder

File candidates to an existing folder or Create a new folder in which to file your candidate(s)
Create and Manage Folders

[Image of the interface showing how to create and manage folders]
Create Folder

Select Personal or an existing folder, then click ‘Create’

Name your folder

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

- UTempleeck ‘Users…’ box
- Select Users tab
- Select User(s)
- Click ‘Done’
## Icons for Additional Common Actions

<table>
<thead>
<tr>
<th>![Icon]</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>![Icon]</td>
<td>Add Comments (comments appear in History Tab)</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Add an Attachment to Candidate File(s)</td>
</tr>
<tr>
<td>![Icon]</td>
<td>Find More Candidates Like This One (Conceptual Search)</td>
</tr>
</tbody>
</table>
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

First Step

Step 1

Step 2

Step 3

Step 4

Step 5

Hire
CSW - Change Status

Change Status

New Step

Step 1

Step 2

Step 3

Step 4

Final Step

Step 5

Rejected

Under Consideration

*Meets Qualifications
CSW - Change Step

First Step

Step 2

Step 3

Step 4

Step 5

Final Step

*Eligibility Confirmed
## STAFF Candidate Selection Workflow

### Temple Candidate Selection Workflow - Staff

<table>
<thead>
<tr>
<th>Steps</th>
<th>New</th>
<th>Prescreen</th>
<th>Manager Review</th>
<th>Interviews</th>
<th>Offer</th>
<th>Pre-Employment</th>
<th>Hire</th>
</tr>
</thead>
<tbody>
<tr>
<td>Reference Model</td>
<td>New</td>
<td>Reviewed</td>
<td>Reviewed</td>
<td>1st Interview</td>
<td>Offer</td>
<td>Testing</td>
<td>Hired</td>
</tr>
<tr>
<td>Restricted</td>
<td>Restricted</td>
<td>Not Restricted</td>
<td>Not Restricted</td>
<td>Not Restricted</td>
<td>Not Restricted</td>
<td>Not Restricted</td>
<td>Not Restricted</td>
</tr>
<tr>
<td>Step Requirement</td>
<td>Mandatory</td>
<td>Mandatory</td>
<td>Mandatory</td>
<td>Mandatory</td>
<td>Mandatory</td>
<td>Optional</td>
<td>Mandatory</td>
</tr>
<tr>
<td>Code</td>
<td>NEW 2</td>
<td>HM REVIEW</td>
<td>HM REVIEW</td>
<td>INTERVIEWS</td>
<td>RSOFER</td>
<td>POST OFFER</td>
<td>HIRE 3</td>
</tr>
</tbody>
</table>

### Legend

- **Initial Status**
- **In Progress**
- **Completion Status**
- **Unsuccessful**

### Statuses

- **To be Reviewed**
- **To Be Reviewed**
- **Manager to Review**
- **Interview Scheduled**
- **Offer to be made**
- **Ready for Pre-Employment Screening**
- **Hired**

- **Meets Qualifications**
- **Not Reviewed**
- **Under Consideration**
- **Under Consideration**
- **- Draft**
- **- Canceled**
- **- Approval In Progress**
- **- Approval Rejected**
- **- Approved**
- **- Extended**
- **- Rescinded**
- **- In Negotiation**
- **- Refused**
- **Pre-Employment Screening in Progress**
- **Pre-Employment Screening Successful**

- **Rejected**
- **Under Consideration**
- **Proceed to Interview**
- **Additional Interview(s)**
- **Rejected**
- **- - Draft**
- **- - Canceled**
- **- - Approval In Progress**
- **- - Approval Rejected**
- **- - Approved**
- **- - Extended**
- **- - Rescinded**
- **- - In Negotiation**
- **- - Refused**

- **Applicant Withdraw**
- **Ready for Manager Review**
- **Rejected**
- **- Applicant Withdraw**
- **- Proceed to Offer**
- **- Accepted**
- **- Applicant Withdraw**
Adjunct/Student Candidate Selection Workflow

Temple Candidate Selection Workflow - Adjunct/Student

Steps
- Restricted?
- Step Requirement

Legend
- Initial Status
- In Progress
- Completion Status
- Unsuccessful

Manager Review
- Not Restricted
- Mandatory

Interviews
- Not Restricted
- Mandatory

Offer
- Not Restricted
- Mandatory

Hire
- Not Restricted
- Mandatory

Manager to Review
- Not Reviewed
- Under Consideration
- Proceed to Interview
- Rejected
- Applicant Withdrew

Interview Scheduled
- Under Consideration
- Additional Interview(s)
- Assessment
- Proceed to Offer
- Rejected
- Applicant Withdrew

Offer to be made
- Draft
- Canceled
- Approval In Progress
- Approval Rejected
- Approved
- Extended
- Rescinded
- In Negotiation
- Refused

Accepted

Hired
- Rejected
- Applicant Withdrew

Rejected
- Applicant Withdrew
Workflow Steps on Requisition

Click to filter the candidate list by Step
Change status/step – More Actions

Access Change Step/status window
Change Step/status window

Current Step and Status:
- Pre-Screen
- To Be Evaluated

New Step:
- Pre-Screen

New Status:
- Screening

Completion Buttons:
- Save and Continue
- Save and Close
- Cancel
Change Status/Step with Shortcut Buttons

YES  NO  MAYBE  MOVE

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

- Candidate, Adrienne (11450)
- Candidate, Alex (11448)
- Candidate, Ann (11447)
- Candidate, Bradley (11451)
Reject / Withdraw Candidates

New Step:
- New

New Status:
- Rejected

Send Correspondence:
- From template: Rejection Letter

Additional Information:
- Level of experience does not match role
Revert Candidate

Click Revert to move the candidate backwards in the CSW

- 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

Input required Comments

- Save and Continue
- Save and Close
EVALUATION MANAGEMENT
Lesson Goals

• Understand how to schedule an interview
• Understand how to request an Interview Evaluation
Schedule Interview

1. Interviews and Evaluation Requests

- Create Interview
- Event Date
- Event Type

Select Interview Type

Indicate the number of interviews

Select predefined data, if relevant

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

- One-on-One
- Panel

2

Create
Schedule Interview

1. Interview Properties

Add Interview Participants

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

Select Internal Participants (Taleo Users) ...

Select Participants

First Name: Paul
Last Name: Jones
Email Address: paul.jones@invalidemail.com
Schedule Interview

1. Interview Properties
   - Select Participant(s)
   - Indicate Date, Time, and Time Zone
   - Include Evaluation Questionnaire (optional)

   ![Interview Properties Diagram]

   - Location: Main Conference Room

2. File Sharing
   - Select which files will be sent to participants.
     - Candidate file
     - Requisition file

   ![File Sharing Diagram]

   - Submission-specific Attachments*
     - All
     - Demo_Candidate_Resume.docx
Participant Interview Confirmation

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

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 – 15060
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 participate:

Interview URL

Best regards,
Human Resources Department

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

Candidate File, Req File, & Candidate Attachments available

Participant receives email confirmation. Clicks here to confirm

Participant provides response

Recruiter receive email response
Review Completed Evaluations

2. Completed Interviews and Evaluations

Completed Evaluation Questionnaires

- **Completed Date**: 5/10/13 4:55 PM
  - **Event Type**: Feedback
  - **Questionnaire**: Manager Recommended Questions
  - **Participants**: Peter Campbell
  - **Skill Score**: 0% - 0%

- **Completed Date**: 5/10/13 4:54 PM
  - **Event Type**: Feedback
  - **Questionnaire**: Recommended Questions and Feedback
  - **Participants**: Hannah Skillman
  - **Skill Score**: 70% - 0%

- **Completed Date**: 5/10/13 4:51 PM
  - **Event Type**: Feedback
  - **Questionnaire**: Interview Feedback
  - **Participants**: Sue Peters
  - **Skill Score**: 100% - 0%

Questions

1. What did you feel the candidate’s strengths were?

   Answer: Josh came across as excited about his work. He talked a lot about his peers. He answered questions well about the technologies he’s researching about our company and some of the projects we have gone.

2. What do you consider your strongest assets?

   Answer: Problem Solving, Collaboration, Creativity

3. During my interview the candidate expressed sentiments that support they have skills in the following areas:

   - Teamwork
   - Leadership
   - Problem Solving Skills
   - Communication Skills

4. How would you rate this candidate as a fit for this role?

   Answer: Poor Fit

   Options: Poor Fit, Partial Fit, Good Fit
EMBEDDED REPORTS
Lesson Goals

- Run an Embedded Report
  - FOR HR STAFF ONLY
Access and Run Reports

- Go to Reports List tab
- Select Report to Run
- Name Report
- Select an Output Format
- Select Requisition Number
  - All
  - 15000003
  - 15000009
  - 15000014

- Options:
  - PDF
  - RTF
View Report

Go to My Reports tab

Refresh list until report is Ready

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

These actions can be taken during any Step of the CSW
Capture Offer Expectations

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

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

You may repeat this process to Capture Desires, Will Refuse, and Current Job parameters.
These actions can only be taken on or after the Offer Step
Offer Grid

Input Required and Optional Information in the Offer Grid

View related Requisition Information and Candidate Expectations
Request Offer Approval
## Request Offer Approval

### Offer Approval Matrix Presented

### Request Approval

<table>
<thead>
<tr>
<th>Message Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>From</td>
</tr>
<tr>
<td>For Requisition</td>
</tr>
<tr>
<td>Send me an email with my decision</td>
</tr>
</tbody>
</table>

### After Approval

<table>
<thead>
<tr>
<th>Order</th>
<th>Approver</th>
<th>Decision</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Mike Manager</td>
<td>Pending</td>
</tr>
<tr>
<td>2</td>
<td>Gina Consalvo</td>
<td>Pending</td>
</tr>
</tbody>
</table>

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

### Add Approvers

#### Click here to add approvers

<table>
<thead>
<tr>
<th>Action</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Add Approvers</td>
<td></td>
</tr>
</tbody>
</table>

#### Comments

Needed for upcoming Acme project.
eShare Response Center

- Hiring Managers
- Approvers

Requisition Approval Request

Requisition: 00000024 — Accountant
Requested by: User Recruiter
Comments: Please approve the replacement for the accountant in the Oakland office.

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.

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)

- 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...
eOffer

Extend offer in writing

Select / De-select applicable paragraphs

Ensure to select E-Offer

Select your Offer Letter Template
Candidate’s CSW Status will automatically update to Offer/Accept or Offer/Refused accordingly.
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
Request a Screening Service
Review Screening Results

<table>
<thead>
<tr>
<th>Job Submission</th>
<th>Attachments</th>
<th>Tasks</th>
<th>Offers</th>
<th>Offer Approvals</th>
<th>Referral</th>
<th>History</th>
</tr>
</thead>
</table>

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: Cleared for Hire (Apr 25, 2014)
- Credit Check Result: Cleared for Hire (Apr 29, 2014)
- Federal Drug Test Result: passed (Apr 30, 2014)
- Forensic Drug Test Result: prior failed (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

- Must be in the Candidate File

- Update Start Date...
Update Start Date

- Access Action in Tasks Channel...
- ... or Access from Candidate File
- Remove the Tentative Flag
Automatic Transactions for Filled Requisitions

- Requisition is Marked as "Filled"
- Requisition is Unposted from active Career Sections
- Any candidates not already dispositioned will be disqualified from the requisition
- Hired Candidate may be marked as Withdrawn from all other active submissions
- Hired External Candidate changes to Internal
  (either via integration with HRMS or Taleo Setting)
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)

Pre-Hire Process:
Criminal History Disclosure

New Hire Process as part of the Hire process:
- Onboarding
- Medical Faculty
Access Onboarding (Transitions)
Onboarding (Transitions) Center

### Tasks Assigned to you

<table>
<thead>
<tr>
<th>Name</th>
<th>Due Date</th>
<th>Candidate/Employee</th>
<th>Priority</th>
<th>Status</th>
<th>Assigned to</th>
<th>Owned by</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Confirm Drug Test Initiated</td>
<td>Jun 2, 2014</td>
<td>Ryan, Nolan</td>
<td>Normal</td>
<td>Completed</td>
<td>Recruiter, Rhonda</td>
<td>Recruiter, Rhonda</td>
<td></td>
</tr>
<tr>
<td>Post Offer Invitation to Self Identify PDF</td>
<td>Jun 2, 2014</td>
<td>Ryan, Nolan</td>
<td>Normal</td>
<td>Completed</td>
<td>Recruiter, Rhonda</td>
<td>Recruiter, Rhonda</td>
<td></td>
</tr>
<tr>
<td>Veteran Self Identify PDF</td>
<td>Jun 2, 2014</td>
<td>Ryan, Nolan</td>
<td>Normal</td>
<td>Completed</td>
<td>Recruiter, Rhonda</td>
<td>Recruiter, Rhonda</td>
<td></td>
</tr>
</tbody>
</table>

### Processes to Monitor and Manage

<table>
<thead>
<tr>
<th>Candidate/Employee</th>
<th>Process</th>
<th>Job Title</th>
<th>Start Date</th>
<th>Status</th>
<th>Progress</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Cooper Bradley</td>
<td>New Hire 2014 v03.1 (w/ HMCs)</td>
<td>PROTOTYPING_SOFTWARE ENGINEER 4</td>
<td>—</td>
<td>In progress</td>
<td>88%</td>
<td></td>
</tr>
<tr>
<td>Cowin Elliot</td>
<td>Advanced EOffer 2014 v0.07.0</td>
<td>I-Network Security Spclst 3</td>
<td>Jun 30, 2014</td>
<td>In progress</td>
<td>33%</td>
<td></td>
</tr>
</tbody>
</table>
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

<table>
<thead>
<tr>
<th>Name</th>
<th>Due Date</th>
<th>Candidate/Employee</th>
<th>Priority</th>
<th>Status</th>
<th>Assigned to</th>
<th>Owned by</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>I-9 Manager PDF</td>
<td>Oct 23, 2013</td>
<td>Weber, John William</td>
<td>Normal</td>
<td>In progress</td>
<td>Tellez, Alex</td>
<td>Adams, Carla</td>
<td>Execute</td>
</tr>
<tr>
<td>New Hire Information Form</td>
<td>Feb 24, 2014</td>
<td>Candidate, Calvin</td>
<td>Normal</td>
<td>In progress</td>
<td>Tellez, Alex</td>
<td>Adams, Carla</td>
<td>Execute</td>
</tr>
</tbody>
</table>

**Complete requested information and Submit**
Execute Tasks – Open PDF

Tasks | Create

Refine by

- My Opened Tasks
  - Refresh

<table>
<thead>
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<th>Owned by</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Export Control Compliance Verification Form Boeing eSig</td>
<td>Apr 25, 2014</td>
<td>Cooper, Bradley</td>
<td>Normal</td>
<td>In progress</td>
<td>Tellez, Alex</td>
<td>Recruiter, Prototype</td>
<td>Execute</td>
</tr>
<tr>
<td>Finalize Start Date</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>User, System</td>
<td>Reassign</td>
</tr>
<tr>
<td>Post Offer</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

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.

Voluntary Self-Identification of Disability

Form CC.105
OVI: Control Number 1234-0005
Editor

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. 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 Table

<table>
<thead>
<tr>
<th>Name</th>
<th>Due Date</th>
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<th>Status</th>
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<td>Cooper, Bradley</td>
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<td>In progress</td>
<td>Tellez, Alex</td>
<td>Recruiter, Prototype</td>
<td>Execute, Reassign</td>
</tr>
<tr>
<td>Finalize Start Date</td>
<td>-</td>
<td>-</td>
<td>Normal</td>
<td>In progress</td>
<td>Tellez, Alex</td>
<td>User, System</td>
<td>Reassign</td>
</tr>
<tr>
<td>Post Offer Invitation to Self Identify PDF</td>
<td>Jun 2, 2014</td>
<td>Eller, Carl</td>
<td>Normal</td>
<td>In</td>
<td>Tellez, Tellez,</td>
<td>Tellez, Alex</td>
<td>Execute, Reassign</td>
</tr>
</tbody>
</table>

### Task - Finalize Start Date

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

**Properties**

- **Complete**
- **Cancel**
Candidates/New Hires are directed to the Career Section to complete Tasks.
New Hire Experience – Fill Forms

Request for Information

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

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

- **First Name**: Jered
- **Middle Name**: 
- **Last Name**: Weaver

- **Address (line 1)**: 36 Angels Way
- **City**: Philadelphia
- **State**: Pennsylvania
- **Zip/Postal Code**: 92806

- **Social Security Number**: 550555555
- **Date of Birth**: Mar 8 1987
- **Gender**: Male
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
- Parking Services
- State of Art Tech Center
Review Transitions Process Progress

Review status of tasks in process

Review Progress:
- Green – no tasks are past due
- Red – tasks are past due
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.

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.

Click on the Task Name to drill into the properties

Click to Edit Task properties

Click the calendar to modify the Due Date.
You may Share a process to allow another user access to monitor progress.

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.

Click to drill into a Step that is In progress

Click Send Immediate Reminder link