

## Taleo - Quick Reference Guide

**Document Purpose:** The purpose of this document is to serve as a quick reference for New Jersey City University's team members who will be using Taleo. This document covers basic interaction with Taleo. Additional training will be provided on the use of the tool.

### TALEO LOGIN

- You will receive or should have access to the Taleo login url <https://chi.tbe.taleo.net/dispatcher/login.jsp> Save to Favorites and enter your User Name, Password, along with the Customer Code. (NJCU)
- For new Users, you will receive a "Welcome to Taleo" email with this information.

### Secure Customer Login

Please enter your User Name, Password and Company Code below to access your secure account.

User name:

Password:

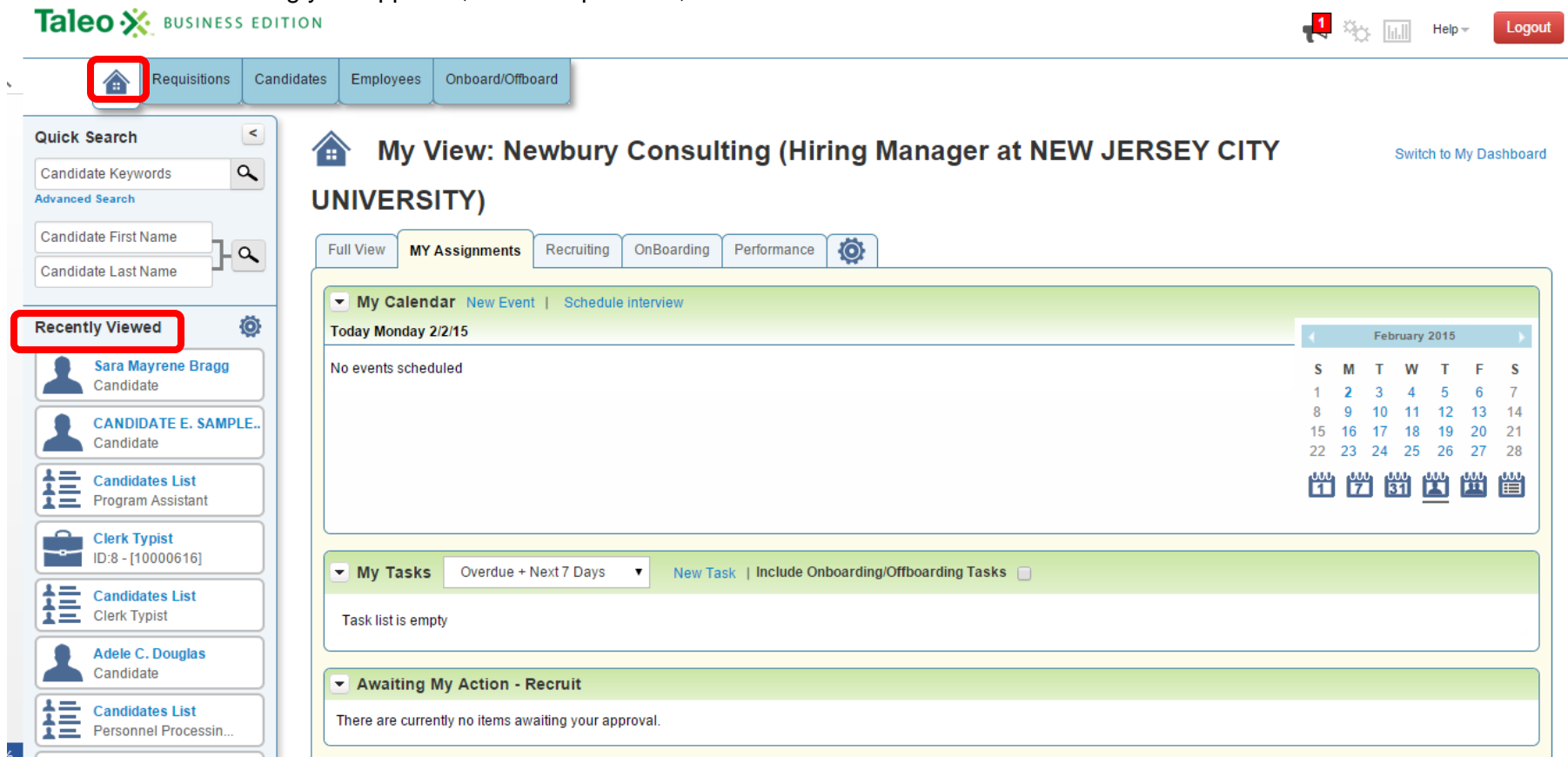
Company code:

[Forgot your password?](#)

If you should ever forget your password, click on the "Forgot Your Password?" link and follow the instructions to reset your password.

### BASIC NAVIGATION

- TBE is a tab-driven system with a series of main tabs, with associated sub tabs
- Once you log in, you are driven to the My View page – your dashboard of information
- View items waiting your approval, active requisitions, and active candidates



**Taleo** BUSINESS EDITION

1 [Settings] [Help] Logout

Requisitions Candidates Employees Onboard/Offboard

**Quick Search**

Candidate Keywords [Search]

Advanced Search

Candidate First Name [Search]

Candidate Last Name [Search]

**Recently Viewed**

- Sara Mayrene Bragg Candidate
- CANDIDATE E. SAMPLE.. Candidate
- Candidates List Program Assistant
- Clerk Typist ID:8 - [10000616]
- Candidates List Clerk Typist
- Adele C. Douglas Candidate
- Candidates List Personnel Processin...

**My View: Newbury Consulting (Hiring Manager at NEW JERSEY CITY UNIVERSITY)** [Switch to My Dashboard](#)

Full View **MY Assignments** Recruiting OnBoarding Performance [Settings]

**My Calendar** [New Event](#) | [Schedule interview](#)

Today Monday 2/2/15

No events scheduled

February 2015						
S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

**My Tasks** Overdue + Next 7 Days [New Task](#) | Include Onboarding/Offboarding Tasks

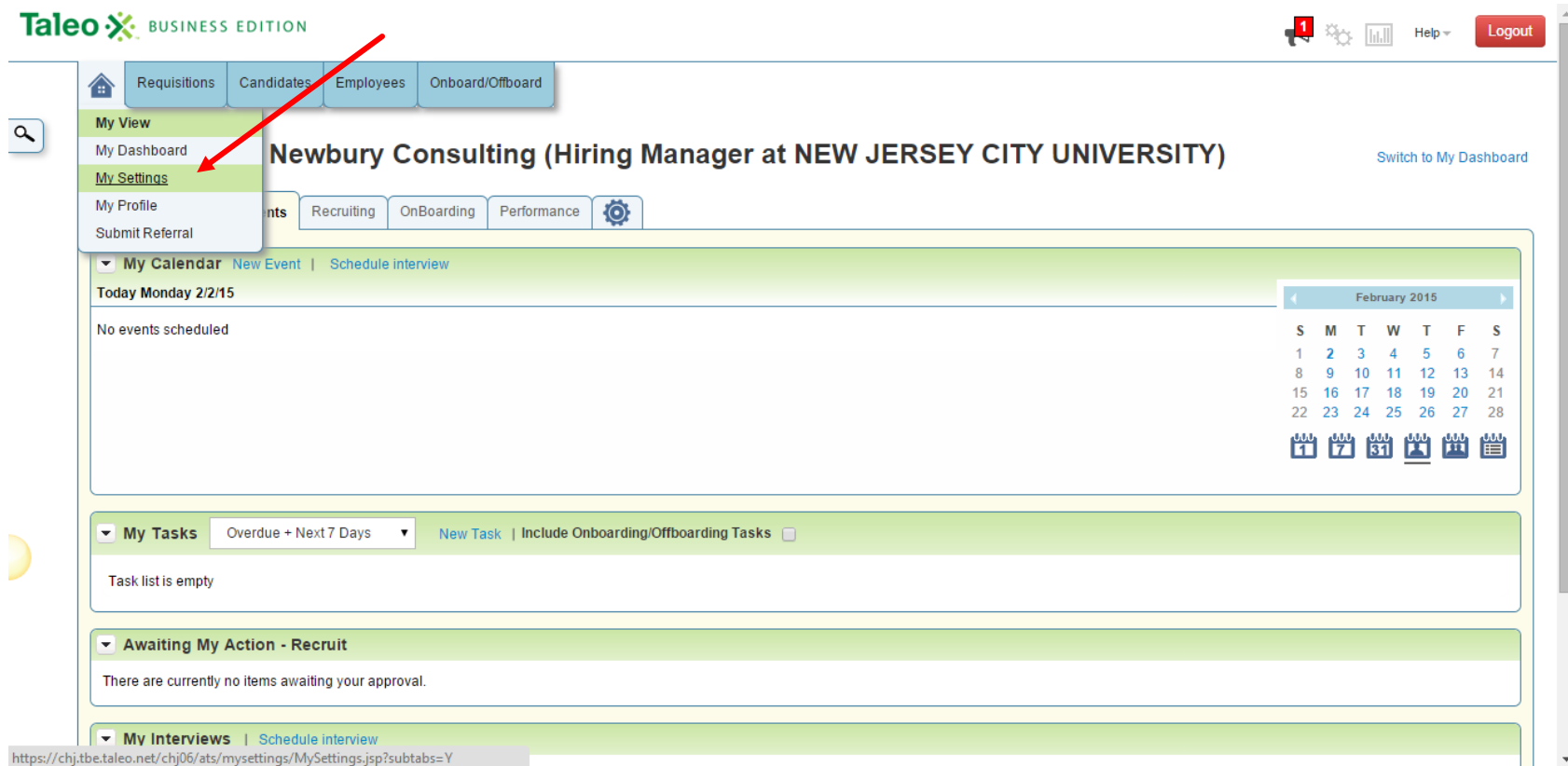
Task list is empty

**Awaiting My Action - Recruit**

There are currently no items awaiting your approval.

## My View > My Settings

- Review the defaults and potentially change
- Allows you to change the number of rows per page, color scheme, default approvers, and communications
- This is where you can also change your password



Taleo BUSINESS EDITION

1 [Settings] [Help] Logout

Requisitions Candidates Employees Onboard/Offboard

My View  
My Dashboard  
**My Settings**  
My Profile  
Submit Referral

Newbury Consulting (Hiring Manager at NEW JERSEY CITY UNIVERSITY) [Switch to My Dashboard](#)

Jobs Recruiting OnBoarding Performance [Settings]

My Calendar [New Event](#) | [Schedule interview](#)

Today Monday 2/2/15

No events scheduled

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28

My Tasks Overdue + Next 7 Days [New Task](#) |  Include Onboarding/Offboarding Tasks

Task list is empty

Awaiting My Action - Recruit

There are currently no items awaiting your approval.

My Interviews | [Schedule interview](#)

<https://chj.tbe.taleo.net/chj06/ats/mysettings/MySettings.jsp?subtabs=Y>

- Requisitions
- Candidates
- Accounts
- Contacts
- Employees
- Onboard/Offboard
- Users
- Reports
- Documents Library



### My Settings

The My Settings page allows you to customize your email settings, change your password, modify time zone/locale settings, and edit your personal display preferences.

Save
Cancel
Reset

**Display Preferences:** Red = Required Information

Number of rows per page:  (100 maximum)

TBE style:

Referred By is presented with Candidate Name in List Views.

Quick Views or Talent cards appear when hovering on TBE links

Allow bubble notifications for background events and save reminders.

**Proxy Approvers:**

Assign proxy approvers to approve on your behalf.

Requisition Proxy Approver: [\[ Select User \]](#) Offer Proxy Approver: [\[ Select User \]](#)

Continue to receive approval request email notifications where a proxy approver has been assigned.

Receive email notifications when your proxy approver has approved or rejected on your behalf.

**System Settings:**

Automatically add me as an **Owner** to any New Requisition or New Requisition Template that I create.

Identify relevant countries when doing a Zip Distance search for Candidates and Employees

**Email Settings:**  
 Check this box if you would like to receive an email whenever a candidate applies to one of your requisitions.  
 Check this box if you would like to receive an email whenever a candidate updates submitted information to one of your requisitions.  
 Check this box if you would like to receive General Email Announcements from Taleo.  
 Check this box if you would like to receive an email when employee updates their information on the EWS  
  
What email address would you like to use as your return address?  
**Email address:**   
  
This signature will be added to your outgoing emails (512 characters max):  
Email Signature:

**Global Settings:**  
Time zone:   
Locale:

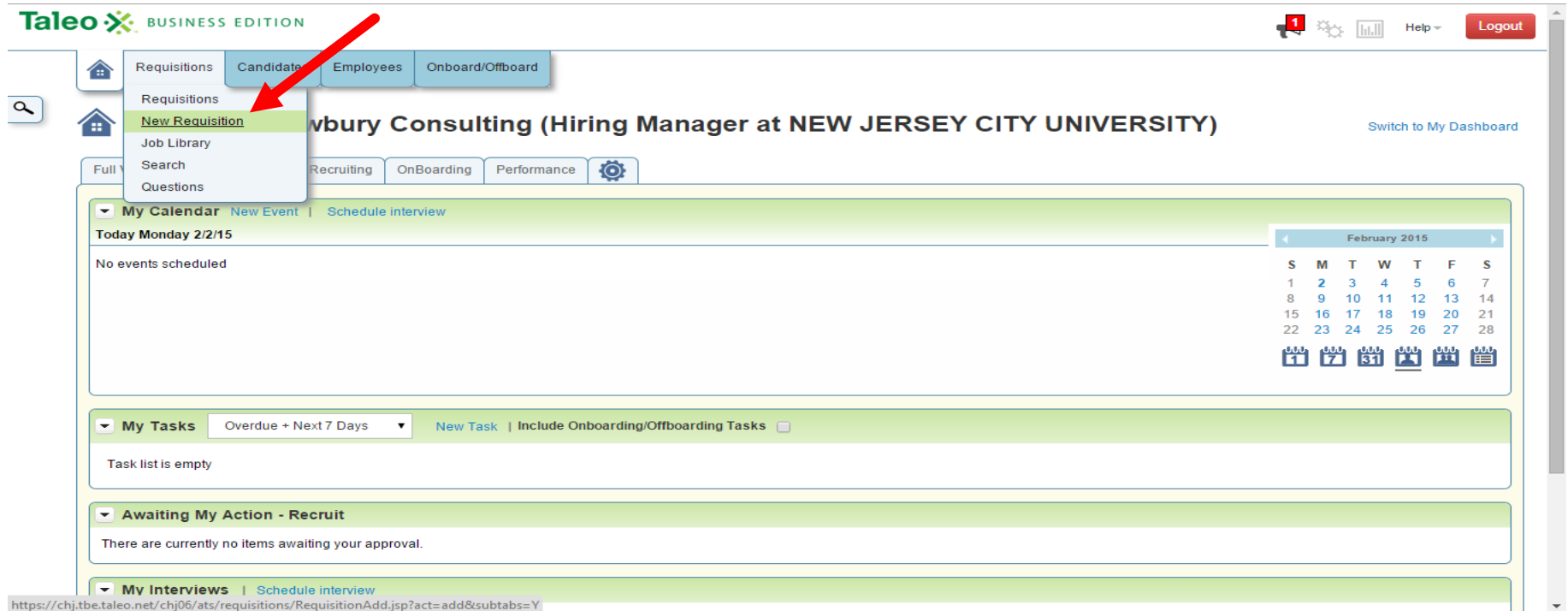
**Resume Parsing Settings**  
When importing candidates or adding new candidates through the Outlook Plug-in or the API, resumes shall be parsed as follows:  
 Parse contact information only  
 Attempt to extract and parse work history and other information

**Change Password:**  
Old password:   
New password:   
Re-type new password:   
User password must be at least 8 characters long.  
User password must include non-alphabetical characters.  
You cannot reuse your last 3 password(s).

**REQUISITION PROCESS – HIRING MANAGER**


- The Hiring Manager will start the Requisition Process by going to the “Requisition Tab” and then clicking on “New Requisition”.

- A new blank requisition form will open (please note every category that is required will have red)



The screenshot shows the Taleo Business Edition interface. The top navigation bar includes 'Requisitions', 'Candidate', 'Employees', and 'Onboard/Offboard'. The 'Candidate' menu is open, and 'New Requisition' is highlighted with a red arrow. Below the navigation, the page title is 'Newbury Consulting (Hiring Manager at NEW JERSEY CITY UNIVERSITY)'. The main content area is divided into sections: 'My Calendar' (Today Monday 2/2/15, No events scheduled), 'My Tasks' (Overdue + Next 7 Days, Task list is empty), 'Awaiting My Action - Recruit' (There are currently no items awaiting your approval), and 'My Interviews' (Schedule interview). A calendar for February 2015 is visible on the right side of the 'My Calendar' section.

- Requisition Owner Section
  - **Click Add/remove (required)** - Assign owner from available list – choose yourself and you may also choose multiple owners - Move to assigned list by clicking the right arrow in the middle
  - Search committee (optional)
    - Add names of members of your search committee

 Requisitions: New Requisition

Language ▼

Save Cancel Reset

Requisition Owner(s) Red = Required Information

\* Requisition Owners: [ Add/Remove ]

Bragg, Sa

Search Committee:



Check Spelling



- Position Information Section
  - a. Current/former employee – type in the name of person being replaced (if new position leave blank)
  - b. Status – defaults to waiting for approval
  - c. Reason for opening – choose from categories in drop down list
  - d. Opened date – date request starts
  - e. Payroll title – type in payroll title of position
  - f. Location – defaults to main
  - g. Department – choose from drop down list

- h. Type of hire – select unclassified or classified
- i. Number of openings
- j. Filled date – effective date of hire

**Position Information**

Current/Former Employee:	<input type="text"/>	* Location:	Main <input type="text"/>
* Status:	Waiting For Approval <input type="text"/>	Department:	Please select <input type="text"/>
Reason for Opening:	--Please select-- <input type="text"/>	Employee Type:	--Please select-- <input type="text"/>
* Opened Date:	<input type="text"/> 	# of openings:	<input type="text"/>
* Payroll Title:	<input type="text"/>	Effective Date Of Hire:	<input type="text"/> 

- Compensation/payroll information Section
  - a. Employee category – select if Full-time/Part-time and Temporary/Permanent - hold control button to make 2 selections
  - b. Employee classifications – choose from drop down list
  - c. Desired salary – write minimum to maximum desired salary
  - d. Range – write position range



**Compensation/Payroll Information**

EEO job category:

*To make more than one selection hold the "Ctrl" key and make selections with your mouse.*Employee Category:   
  
  
Employee Classification: Desired Min to Max Range: Range: 

- Budget Details Section
  - a. Position Number – type in 8 digit position number assigned to this position
  - b. FTE – Full time equivalency - not to exceed 1.0
  - c. Budgeted – choose from drop down
  - d. Funding source – choose from drop down
  - e. Business justification – why is this action needed: ex due to retirement

**Budget Details**

Position Number:

FTE:

Budgeted:

Funding Source:

Grant Name:

Grant #:

Please use the space below to explain and justify the business need for this position.

Business Justification:

[Check Spelling](#)

- Approvals Section
  - a. This is already set-up with the correct approvals, no action required on your part

**Approvals: This is already set-up with the correct approvals, no action required on your part**

\* Requisition Approvers: [\[ Add/Remove \]](#)

[Carroll, Darnell](#)

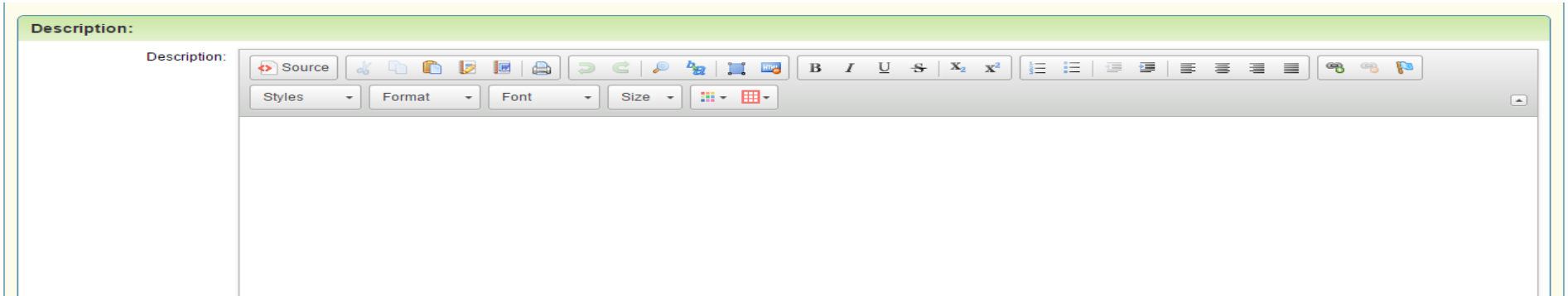
[Scott-Crook, Michelle](#)

Offer Approvers: [Scott-Crook, Michelle](#)

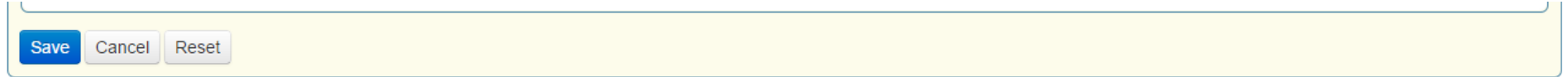
[Piaskowsky, Robert](#)

- Description Section
  - a. Type in desired job description

- b. Description can also be copied and pasted from another source
- c. Please also add any job specific questions that you would like to ask the candidates as they are completing the application form



**Save – press save**



### REQUISITION PROCESS – HR

- Once the HR receives the Requisition Approval email they will log into Taleo and under the “My View” screen to locate the requisition. They will need to edit the requisition and complete the sections required that weren’t completed by the Hiring Manager and click “Save”. All fields in **RED** are required.
- **\*\*\*Please also remember to check all the information on the requisition and change if required.**
- If you see any job specific questions in the description section on the req. please delete these off the description area and create these questions under the Questions link when you hover on the requisitions tab. **Please remember to make the questions required when creating them.**
- If you are adding pre-screening questions you will need to be In View mode scroll down to the Questions & Ranking section and attach questions. Once the questions have been attached click on the “Edit Ranking Template Link” and complete what you want to occur for this job. **This needs to be completed before the requisition is posted**

## CANDIDATE PROCESS – HR

- Click on the “Requisition Tab” and locate your requisition from the list of jobs that appear. You will notice a “Candidates” field in the List View” these numbers indicate All of the Candidates that have applied as well as any New Candidates that have applied to your requisition you are recruiting for.
- HR will set-up a Task in the Req. for their hiring manager to log-in and review the candidates that have applied and send an email or phone HR and indicate who they wish to move forward with.
- Click on “NEW TASK” and complete the form presented, click “SAVE”

▼ **Tasks** [New Task](#)

No Tasks available

Save Cancel Reset

**Task Details:** Red = Required Information


Assigned To: [ Add User ]  
Bragg, Sara [Remove](#)

Related to: Requisition [ Select ]  
Programmer/Analyst - [10000946] [Remove](#)

\* Subject:

\* Status: Not Started [ v ]

\* Priority: --Please select-- [ v ]

\* Due Date:  

**Description Information:**

Description:

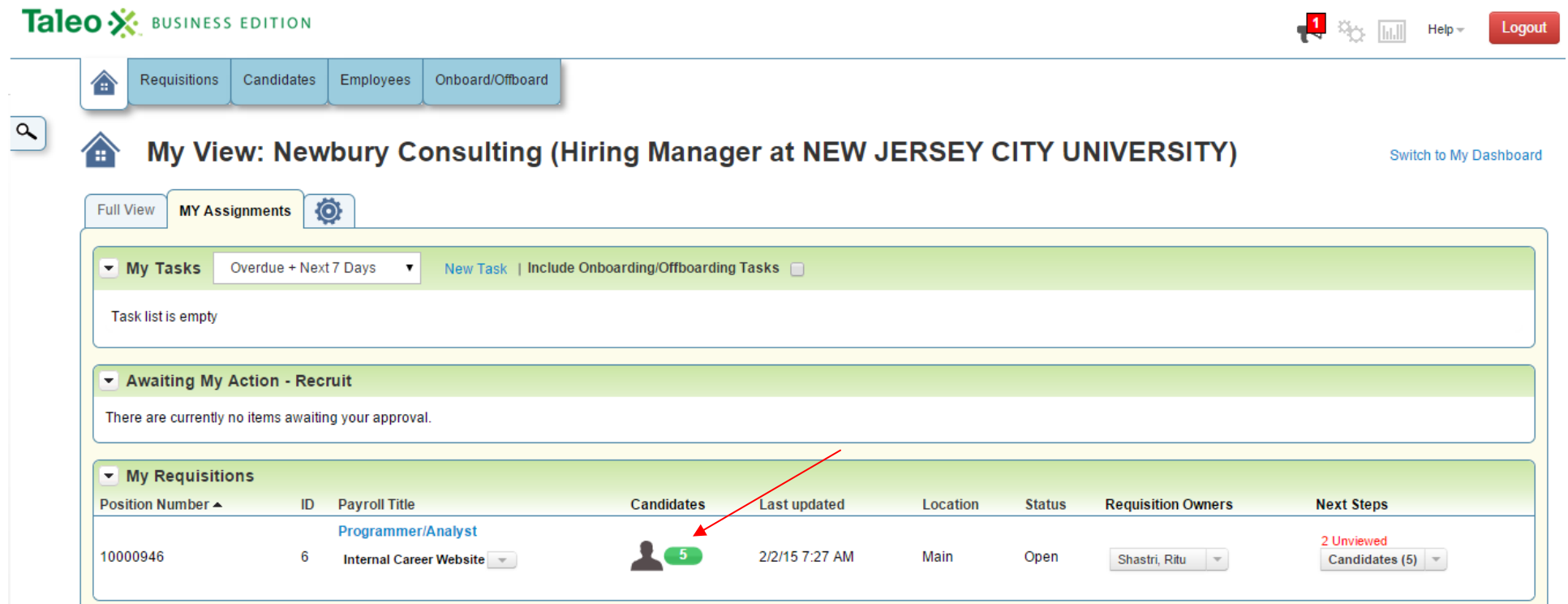
[Check Spelling](#)

Remember to add USER which is the hiring manager assigned to this task under the Assigned To field. Remove your name.


Save Cancel Reset

### CANDIDATE PROCESS – HIRING MANAGER


- The Hiring Manager will log-in to Taleo once they have received a Task notification from Taleo or email from Outlook informing them to review the candidates that have applied to their requisition.
- When the hiring Manager logs in they are shown the My View DashBoard where they will scroll down to My Requisitions and click on the candidates icon beside the title of the requisition they are recruiting for. This will display a list of candidates for them to review.



The screenshot shows the Taleo Business Edition interface. At the top, there is a navigation bar with 'Requisitions', 'Candidates', 'Employees', and 'Onboard/Offboard' tabs. Below this is a search bar and a title 'My View: Newbury Consulting (Hiring Manager at NEW JERSEY CITY UNIVERSITY)'. The main content area is divided into sections: 'My Tasks' (empty), 'Awaiting My Action - Recruit' (empty), and 'My Requisitions'. The 'My Requisitions' section contains a table with the following data:

Position Number	ID	Payroll Title	Candidates	Last updated	Location	Status	Requisition Owners	Next Steps
10000946	6	Programmer/Analyst Internal Career Website		2/2/15 7:27 AM	Main	Open	Shastri, Ritu	2 Unviewed Candidates (5)





- Click on the candidates name and there you will see the candidates resume and application form for your requisition. Or you can click on the Application and Resume icon to view these as well.

**Taleo BUSINESS EDITION** Help 

Requisitions Candidates Employees Onboard/Offboard

**Candidates: Programmer/Analyst**

This list shows all the candidates that have applied or have been submitted for requisition 10000946: [Programmer/Analyst - \[10000946\]](#)  
[Search these Candidates](#)

Internal Candidate	Name	Last updated	Application	Resume	Main status	Req. Based Status	Requisitions	Req Rank	ACE
<input type="checkbox"/>	<a href="#">N, Vidy</a>	11/17/14 12:09 PM			In Process	Phone Screen	Programmer/Analyst - [100...		
<input type="checkbox"/>	<a href="#">Douglas, Adele</a>	12/3/14 3:55 PM			In Process	Phone Screen	Personnel Processing Manager - ...		

- The HR will be responsible for the candidate workflow until the candidate is hired. You will be able to see the candidate’s progress through the workflow.
- After you have reviewed the candidates send an email to HR with the list of the candidates you want to move forward with.

## CANDIDATE PROCESS – HR

## Taleo - Quick Reference Guide

- Once the HR Business Partner receives the email or phone call from the hiring manager on who they want to move forward with they will then schedule the interviews through the Interviewer Scheduler within Taleo by clicking on “Schedule Interview” in the Interview Section. A form will pop up when you click on “Schedule Interview”, complete the form and click “Save”. If you have included the Hiring Manager they will receive an email invite to the interviews if applicable. The Hiring Manager will need to send you feedback once the interview has been completed and you will then complete the Feedback form within the candidate record.

Interviews <a href="#">Schedule interview</a>							
Type	Date/Time	Status	Scheduler	Requisition	Interviewers		Action
Phone Screen	1/30/15 8:00 AM	Feedback Pending	Bragg, Sara	Professional Services Specialist IV - [12]	8:00 AM - 8:00 AM	Scott-Crook, Michelle	Acceptance Pending <a href="#">View</a>

### Candidate: Adele C. Douglas

[Save](#)
[Cancel](#)
[Reset](#)

**Interview Information** Red = Required Information

\* **Requisition:** --None-- [View](#)

\* **Type:** --Please select--

\* **Date:**  

\* **Start Time:** 8:00 AM (EST) Eastern Standard Time (GMT-05:00) America/New\_York

Interview Room: --Please select--

\* **Status:** Scheduled

Feedback template: Feedback

**Interviewers** [Add Interviewer](#)

Name	Start Time	End Time	Action
All interviewer times shown in (EST) Eastern Standard Time (GMT-05:00) America/New_York			



**Attachments for Interviewers**

You can select attachments to send to the interviewers. Attachments may be pulled from the Candidate record or may be uploaded as additional attachments.

**Candidate Provided Attachments**

Adele C. Douglas\_Resume.doc (24 KB)

**User Provided Attachments**

No attachments available.

Compress (as a ZIP file) all attachments in each email.

---

**Comments from Interview Scheduler**

Comments:



[Check Spelling](#)

Send interview schedule email to interviewers.  CC myself.

Send interview schedule email to candidate. ([View Email Template](#))

[Save](#) [Cancel](#) [Reset](#)

- Once all the interviews are completed you will start to workflow the candidates through the next steps in the workflow.
- HR will “Make Offer” through Taleo.
- The candidate can sign or decline the offer, both option you will receive an email back and the status of the offer letter will change to Declined or Accepted.

Offer Letters <a href="#">New Offer</a>		Last Updated ▲	Creator	Requisition	Status	Approval	Offer Letter	Accepted Off
1/20/15 7:09 PM	<a href="#">Bragg, Sara</a>	<a href="#">Sample Job - [7]</a>	Accepted	<a href="#">Bragg, Sara</a> - Approved				



**HR WILL MANAGE THIS**

- Once the offer accepted email is received the candidate will be into the “PRE-EMPLOYMENT status to complete the pre-employment activities (background check.)

 **Candidate: CANDIDATE E. SAMPLE 1** [Flag](#) [Back To List](#) | [Next](#)

Edit Send To Forms Printable View More ⚙️

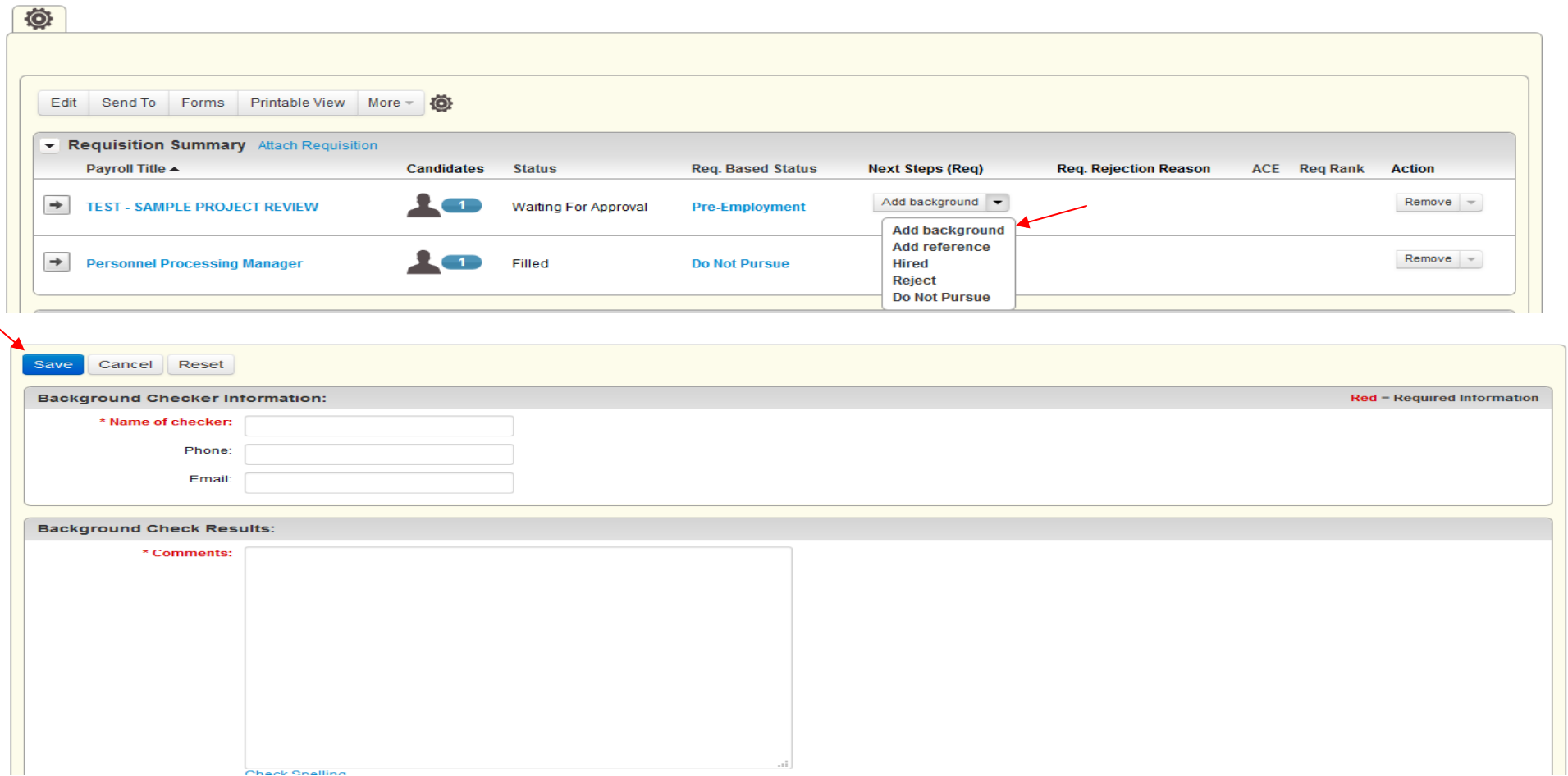
⌵ **Requisition Summary** [Attach Requisition](#)

Payroll Title	Candidates	Status	Req. Based Status	Next Steps (Req)	Req. Rejection Reason	ACE	Req Rank	Action
<a href="#">TEST - SAMPLE PROJECT REVIEW</a>	 1	Waiting For Approval	Pre-Employment	Add background				<span>Remove</span>
<a href="#">Personnel Processing Manager</a>	 1	Filled	Do Not Pursue	Add background Add reference Hired Reject Do Not Pursue				<span>Remove</span>

### Background Checks ( This is for informational purposes only )

- Click on “Add background”. The background form window opens and you can type in the notes about your background check.

Click "Save" once you have completed the fields in the form.



The screenshot shows the Taleo interface. At the top, there is a navigation bar with buttons for 'Edit', 'Send To', 'Forms', 'Printable View', and 'More'. Below this is a 'Requisition Summary' table with columns for 'Payroll Title', 'Candidates', 'Status', 'Req. Based Status', 'Next Steps (Req)', 'Req. Rejection Reason', 'ACE', 'Req Rank', and 'Action'. Two rows are visible: 'TEST - SAMPLE PROJECT REVIEW' (Status: Waiting For Approval, Req. Based Status: Pre-Employment) and 'Personnel Processing Manager' (Status: Filled, Req. Based Status: Do Not Pursue). A dropdown menu is open for the 'Next Steps (Req)' column of the first row, showing options: 'Add background', 'Add reference', 'Hired', 'Reject', and 'Do Not Pursue'. A red arrow points to the 'Add background' option. Below the table is a form with a 'Save' button (highlighted in blue) and 'Cancel' and 'Reset' buttons. The form has two sections: 'Background Checker Information' with fields for 'Name of checker', 'Phone', and 'Email', and 'Background Check Results' with a large text area for 'Comments'. A legend indicates 'Red = Required Information'.

Payroll Title	Candidates	Status	Req. Based Status	Next Steps (Req)	Req. Rejection Reason	ACE	Req Rank	Action
TEST - SAMPLE PROJECT REVIEW	1	Waiting For Approval	Pre-Employment	Add background				Remove
Personnel Processing Manager	1	Filled	Do Not Pursue	Add background Add reference Hired Reject Do Not Pursue				Remove

**Background Checker Information:**

\* Name of checker:

Phone:

Email:

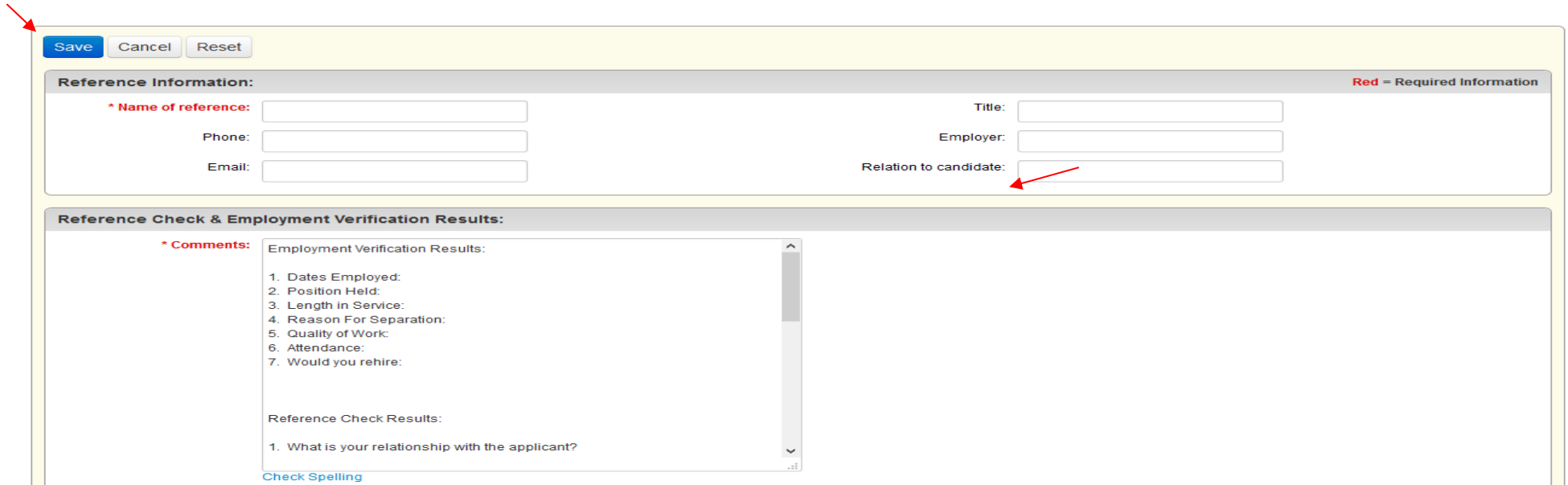
**Background Check Results:**

\* Comments:

Red = Required Information

### Reference Checks

This is managed by the search committee. There is a section in taleo to which it can be stored.



**Save** **Cancel** **Reset**

**Reference Information:** Red = Required Information

\* **Name of reference:**  **Title:**

**Phone:**  **Employer:**

**Email:**  **Relation to candidate:**

**Reference Check & Employment Verification Results:**

\* **Comments:**

Employment Verification Results:

1. Dates Employed:
2. Position Held:
3. Length in Service:
4. Reason For Separation:
5. Quality of Work:
6. Attendance:
7. Would you rehire:

Reference Check Results:

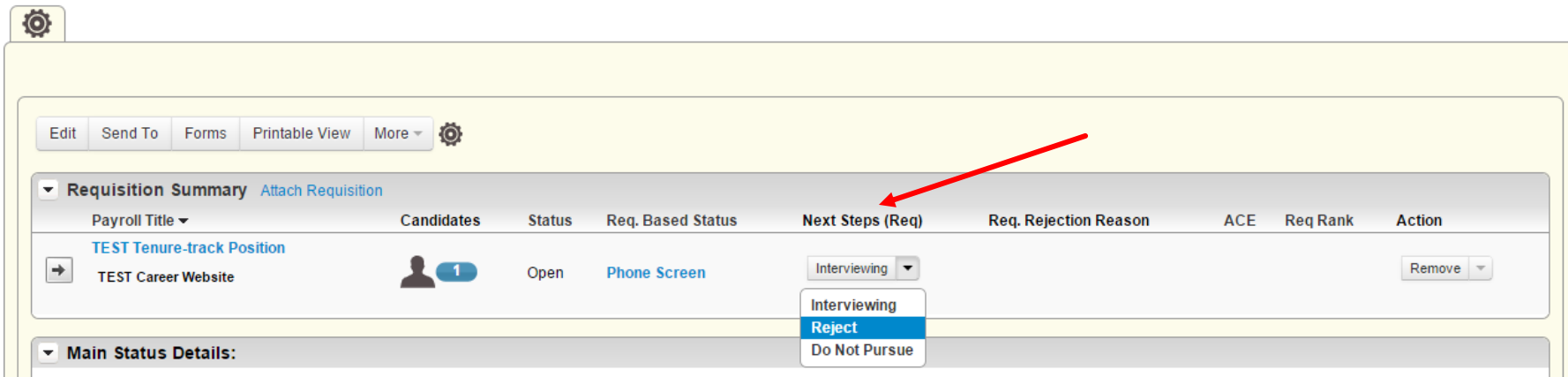
1. What is your relationship with the applicant?

[Check Spelling](#)

Congratulations! You have finalizing the recruitment process

**Rejecting a Candidate (This is managed by Human Resources). This is for informational purposes only.**


- Rejection emails are sent once the selected candidate has accepted and passed the background check.





The screenshot displays the Taleo Requisition Summary interface. At the top, there are navigation buttons: Edit, Send To, Forms, Printable View, and More. Below this is a table with the following columns: Payroll Title, Candidates, Status, Req. Based Status, Next Steps (Req), Req. Rejection Reason, ACE, Req Rank, and Action. A red arrow points to the 'Next Steps (Req)' dropdown menu for the first row, which is currently set to 'Interviewing'. The dropdown menu is open, showing three options: 'Interviewing', 'Reject', and 'Do Not Pursue'. The 'Reject' option is highlighted in blue. Below the table, there is a section for 'Main Status Details'.

Payroll Title	Candidates	Status	Req. Based Status	Next Steps (Req)	Req. Rejection Reason	ACE	Req Rank	Action
TEST Tenure-track Position TEST Career Website	1	Open	Phone Screen	Interviewing Reject Do Not Pursue				Remove


- Now you will see that the candidate's status has changed to rejected and the reason for rejection is capture.

 **Candidate: AWESOME CANDIDATE** [Flag](#) [Back To List](#)



[Edit](#) [Send To](#) [Forms](#) [Printable View](#) [More](#) 

**Requisition Summary** [Attach Requisition](#)

Payroll Title	Candidates	Status	Req. Based Status	Next Steps (Req)	Req. Rejection Reason
<a href="#">TEST Tenure-track Position</a>	 0	Open	Rejected		Does not meet the required criteria for the role

## ONGOING RESOURCES

### Help Tools (upper right corner)

- Help Manuals
- Recourse Center

Taleo  BUSINESS EDITION



### Process Guide

Located on Intranet (provide URL)

### Internal Resource

- Michelle Scott-Cook at Ext. 2335
- Darnell Carroll at Ext. 2335

### Ongoing Enhancements/Changes

Keep in mind Taleo is an online tool that is enhanced and changes frequently. We have the ability to introduce new functionality and make additional changes. Reach out to HR regarding ongoing requests. Below, an example of possible enhancements:

- Changes to the Req Profile (additional fields/data)
- Changes to candidate record (additional fields/data)
- Search capabilities
- Workflow changes (adding or eliminating steps in the process)
- Automated tools
- Reports