MISSION: POSSIBLE

TALEO

February 2017
In this module, our objective is to familiarize you with your next mission. We will discuss the benefits and new process of Taleo, walk through the workflow and approval process, review how to create a posting and how to source applicants; and review how to create and offer. Finally, we will walk through the new onboarding module.
First, I want to lay out a brief overview of Taleo. The folder and journal will describe your mission details. Select each of them to learn more about Taleo.

The folder will contain changes and updates.

The journal will provide a detailed view of the workflow process.
The new system will provide a more streamlined process to hiring. The following processes will be changed:

- Taleo will integrate directly with PeopleSoft
- Updated templates pulling straight from PeopleSoft
- No more POIs
- No more ePARs
- Onboarding module that will include automated process for:
  - Offer letter
  - Personal Data Sheet
  - Role based trainings
  - I-9 and Direct Deposit
  - UHS Policies
  - Foreign National Tax Packet

Integrating directly with People Soft, means more accurate data with a more efficient process. The updated templates will be pulling straight from People Soft. Due to this integration, there will no longer be the need for POIs, or ePARs. Taleo also offers and onboarding module. This modules will include automated processes for:

- Offer letters;
- Personal Data Sheet;
- Role based trainings;
- I-9, and Direct Deposit;
- UHS Policies;
- and Foreign National Tax Packet, if applicable.
Let's walk through the workflow in Taleo.

For posting a position, the workflow is as follows.

The department creates the posting. After completing, the department initiates the posting approval. Where the posting is sent to the college to review and approve; and then to the Executive level to review and approve. Finally, it is sent to HR to review and post.

The workflow for approving an Offer begins with the department completing the offer grid. Once the grid is complete, the department send the offer request for approval. The approval is sent to the college to review, then to the executive. The executive level sends it to HR. We will review the onboarding process later in greater detail.
So, what does this new system look like? In this next section, we will walk through the system and review how to create a posting, and how to source applicants. And then, we will look at the new, onboarding module.

Let's first review, how to create a posting.
First, log into Taleo with your user name and password. If you forgot your password, click on the link to generate a new password.
User Sign In

To access the application, please sign in. Mandatory fields are marked with a red indicator.

Select a language

- English

- Remember my selection

**User Name**

- 00861401

- 0086140

Forgot your password?

Sign In
Slide notes

Click: sign in.
Slide notes
This will bring you to the home page. To access your dashboard, click on Recruiting.
This dashboard will allow you to manage your postings. You have 4 different sections: Candidate, Requisitions, Offers and Tasks. In this piece, we will review requisitions. Click: Create Requisition.
Taleo pulls straight from People Soft. Please note, if a position is not correct, you must update accordingly via ePRF to first update the posting in People Soft. We will begin to create a posting by entering the position number. If you do not know the position number, you can click on the chevron to open up the menu of options.
Slide notes

You can search for the position number, or, use the menu on the left to enter the information. In this case, we will enter a position number.
Slide notes
Select the position to post.
Enter the department contact for this posting.
You can start by typing in a name.
Slide notes
Select the name of the department contact.
Slide notes
Click: next.
Slide notes

The organization, location, and job field will automatically populate based off of the position information.
Create a Requisition

Select the organization-location-job field structure
To open a blank requisition file, click "Create" without entering any information

Organization

Primary Location
- United States > Texas

Job Field
- Staff

Add Locations

Previous Create Cancel

Tasks
- Recruiting
- Tasks assigned to me
- All starting tasks
- Reopen
- To be completed
- Extend Posting?
- Instructions

There is no data to display.

Tasks
- Draft
- Open

Total
- 3
- 3
- 2
- 2

- 0
- 2
- 3
- 4

Slide notes
Slide notes

Click: Create.
This will bring you to the posting. Let's review completing the posting.
You will notice, many of the fields pre populate with the information from the position data. All blank fields can be edited and those with a red asterisks are required.
Slide notes

For justification, select if the position is a new or replacement position. If it is a replacement, enter the previous incumbent name.
Slide notes
Slide notes
New Requisition

- Position Title:
- Position Number:
- Justification:
- Department:
- College:
- Internal Notes:

* Show fields required for:

Save
Save and Close
Cancel
Slide notes
Slide notes

You can type in internal notes for HR or the department to see.
Slide notes

In this case, let's indicate that the posting will be for internal applicants only.
Enter the hiring manager.
Slide notes
And hiring manager email.
New Requisition

Hiring Manager: Ashley Wauponer
Hiring Manager Email: awauponer@sun.edu

Internal Notes:

- Internal only

Status: Draft
Status Details: N/A
Select your Employment Rep.
Slide 40 - Slide 40

Slide notes
Slide notes
Slide 42 - Slide notes
Slide 43 - Slide 43

Slide notes
Slide 44 - Slide 44

Slide notes
Slide notes
2. Administration
New Requisition

Requisition:

Status:
- Draft
- N/A

Candidates for this requisition:

Activated Languages:
- English (Bilingual)

Requisition Type:
- Professional

Primary Location:
- Texas

There is no data to display.

2. Administration

Candidate Selection Workflow
Slide 51 - Slide 51

Slide notes
2. Administration

Candidate Selection Workflow

- Candidate Selection Workflow
  - UN CENTRAL STAFF ONLY
  - Automatically reject all submissions when the requisition is filled
  - Automatically reject all submissions when the requisition is canceled
2. Administration

Candidate Selection Workflow

- Candidate Selection Workflow
- UH CENTRAL STAFF ONLY
- Automatically reject all submissions when the requisition is filled
- Automatically reject all submissions when the requisition is canceled
- When a candidate is hired for the requisition, automatically change status to declined for all other requisitions.
Slide 54 - Slide 54

Slide notes
Slide 56 - Slide 56

Slide notes
**Slide notes**
Enter the hiring cost center, or look up the number.
Slide 59

Slide notes
Slide notes
New Requisition

Requisition

Save  Save and Close  Cancel

> Automatically reject all submissions when the requisition is canceled
When a candidate is hired for this requisition, automatically change background status to declined for all other requisitions

Cost Centers

Hiring Cost Center

Search Committee Members

Slide notes
Slide notes
Slide notes
Slide notes
Slide notes
Select the opening date.
And closing date.
Slide 72 - Slide 72

Slide notes
Slide notes
Slide notes
Slide notes
New Requisition

**Opening Date**
Oct 31, 2016

**Closing Date**
Nov 14, 2016

**Minimum Posting Date**

**Description:**
Coordinates Human Resources training administration for mandatory training, role-specific training and elective training. Responsible for the training calendar, web site coordination, training reports, and basic technology support.

- Coordinates the development, production, delivery and tracking of annual UH System online mandatory and role-specific training.
- Develops and designs online training courses, training materials and other training related aids as assigned.
- Responsible for ensuring that all UH System new hires are enrolled in...
Slide notes
New Requisition

* Description:
Coordinates Human Resources training administration for mandatory training, role-specific training and elective training. Responsible for the training calendar, web site coordination, training reports, and basic technology support.
- Coordinates the development, production, delivery and tracking of annual UH System online mandatory and role-specific training.
- Develops and designs online training courses, training materials and other training related aids as assigned.
- Responsible for ensuring that all UH System new hires are enrolled in mandatory new hire training.
- Handles training class administration, including, but not limited to, maintaining sessions in PeopleSoft, coordinating class enrollment, and providing attendee
New Requisition

Description:
Coordinates Human Resources training administration for mandatory training, role-specific training and elective training. Responsible for the training calendar, website coordination, training reports, and basic technology support.
- Coordinates the development, production, delivery and tracking of annual UH System online mandatory and role-specific training.
- Develops and designs online training courses, training materials and other training related aids as assigned.
- Responsible for ensuring that all UH System new hires are enrolled in mandatory new hire training.
- Handles training class administration, including, but not limited to, maintaining sessions in PeopleSoft, coordinating class enrollment, and providing attendee lists and reports to trainers.
- Audits and maintains records regarding course attendance and related.

Candidates for this requisition: 0

Activated Languages
- English (Bilingual)

Requisition Type
- Professional

Primary Location
- Texas

Status
- Draft
- N/A

Slides notes
New Requisition

- Coordinates Human Resources Training Administration for mandatory training, role-specific training and elective training. Responsible for the training calendar, web site coordination, training reports, and basic technology support.
- Coordinates the development, production, delivery and tracking of annual UH System online mandatory and role-specific training.
- Develops and designs online training courses, training materials and other training related aids as assigned.
- Responsible for ensuring that all UH System new hires are enrolled in mandatory new hire training.
- Handles training class administration, including, but not limited to, maintaining sessions in PeopleSoft, coordinating class enrollment, and providing attendee lists and reports to trainers.
- Audits and maintains records regarding course attendance and related training information.
- Develops and distributes statistical reports and public queries for choosing.
Slide notes
New Requisition

- Responsible for ensuring that all UH System new hires are enrolled in mandatory new hire training.
- Handles training class administration, including, but not limited to, maintaining sessions in PeopleSoft, coordinating class enrollment, and providing attendance lists and reports to trainers.
- Audits and maintains records regarding course attendance and related training information.
- Develops and distributes statistical reports and public queries for recurring training information requests.
- Manages the HR Training calendar and coordinates other campus training activities.

Qualifications

Bachelors and 1 year experience

Requires a thorough understanding of both theoretical and practical aspects of an...
New Requisition

- Responsible for ensuring that all UH System new hires are enrolled in mandatory new hire training.
- Handles training class administration, including, but not limited to, maintaining sessions in PeopleSoft, coordinating class enrollment, and providing attendee lists and reports to trainers.
- Audits and maintains records regarding course attendance and related training information.
- Develops and distributes statistical reports and public queries for recurring training information requests.
- Manages the HR Training calendar and coordinates other campus training.

* Qualifications

Bachelor's and 1 year experience
Requires a thorough understanding of both theoretical and practical aspects of an...
forms and graphics.

- Supports other HR processes and projects as needed, including the Staff Tuition Scholarship.
- Provides basic technology support to department personnel as needed or directed.
- Performs other job-related duties as assigned

EEO/AA

Qualifications

Bachelor's and 1 year experience

Requires a thorough understanding of both theoretical and practical aspects of an analytical, technical or professional discipline, or the basic knowledge of more than one professional discipline. Knowledge of the discipline is normally obtained through a formal, directly job-related 4 year degree from a college or university or
New Requisition

* Provides basic technology support to department personnel as needed or directed.
* Performs other job-related duties as assigned

EEO/AA

* Qualifications

Bachelors and 1 year experience
Requires a thorough understanding of both theoretical and practical aspects of an analytical, technical or professional discipline, or the basic knowledge of more than one professional discipline. Knowledge of the discipline is normally obtained through a formal, directly job-related 4 year degree from a college or university or an equivalent in-depth specialized training program that is directly related to the type of work being performed. Requires a minimum of one (1) year of directly job-related experience.
New Requisition

- Performs other job-related duties as assigned
- EEO/AA

* Qualifications

Bachelors and 1 year experience
Requires a thorough understanding of both theoretical and practical aspects of an analytical, technical or professional discipline, or the basic knowledge of more than one professional discipline. Knowledge of the discipline is normally obtained through a formal, directly job-related 4 year degree from a college or university or an equivalent in-depth specialized training program that is directly related to the type of work being performed. Requires a minimum of one (1) year of directly job-related experience.

Activated Languages
- English (Bilingual)

Requisition Type
- Professional

Primary Location
- Texas

Slide notes
New Requisition

Bachelors and 1 year experience
Requires a thorough understanding of both theoretical and practical aspects of an analytical, technical or professional discipline; or the basic knowledge of more than one professional discipline. Knowledge of the discipline is normally obtained through a formal, directly job-related 4 year degree from a college or university or an equivalent in-depth specialized training program that is directly related to the type of work being performed. Requires a minimum of one (1) year of directly job-related experience.
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New Requisition

- Knowledge of the discipline is normally obtained through a formal, directly job-related 4 year degree from a college or university or an equivalent in-depth specialized training program that is directly related to the type of work being performed. Requires a minimum of one (1) year of directly job-related experience.
an equivalent in-depth specialized training program that is directly related to the type of work being performed. Requires a minimum of one (1) year of directly job-related experience.
New Requisition

Job-related experience.

Required Attachments by Candidate

- Resume
- Curriculum Vitae
- Cover Letter/Letter of Application

Status: Draft
Status Details: N/A
Slide 94 - Slide 94

Slide notes
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Slide notes
Slide notes
Select the attachments you wish the candidates to add.
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New Requisition

- Required Attachments by Candidate
  - Resumé
  - Cover Letter/Letter of Application
  - Letters of Recommendation
  - Unofficial Transcripts
  - DD 214
  - Writing Samples
  - Teaching Philosophy or Statement
  - Research Statement
  - Publications

Slide notes
Slide notes
Slide notes
Slide notes

Type in any notes for the applicant to see. Such as clarifying the job description or adding preferred software or knowledge.
Slide 102 - Slide 102

Slide notes
Slide 104

TALEO ENTERPRISE

New Requisition

Status
Draft

Candidates for this requisition
0

Compensation

Grade
UHE-107
Pay Basis
Monthly
Minimum Salary
2,803.00
Midpoint Salary
3,519.00

Salary
2,803.00 - 3,519.00

4. Job Information

Slide notes
Slide 105 - Slide 105

Slide notes
New Requisition

Minimum Salary: 2,803.00
Midpoint Salary: 3,319.00

Employee Status: 1 - FTE

Schedule: Full-time

EEO Job Category:

Profile:

Candidates for this requisition:

0

Slide notes
You can adjust the employee status and schedule for part time or temporary positions.
Two disqualifying questions will automatically be added to each posting.
New Requisition

Questions
1. If hired, are you legally authorized to work in the US?
   • Global
   • Coder: UHE_11
   • Type: Single Answer
   • Visible to: All Candidates
   - Yes
   - No

Answer
The Candidate Passes
The Candidate is Disqualified

Result

2. Per UHS Board of Regents policy, Section 57.07: "Relatives of members of the Board shall not be employed by the System unless the employment took place at least one year prior to the appointment of the Board member."

Do you have any family members (by blood or marriage) serving on the Board of Regents of the University of Houston System?

- Yes
- No

Result
To Be Verified

Candidates for this requisition
0

Activated Languages
- English (US)

Requisition Type
Professional

Primary Location
Texas

Slide notes
Slide 113 - Slide 113

New Requisition

Requisition

Save  Save and Close  Cancel

• Global  • Code: UH5_11
• Type: Single Answer
• Visible by: All Candidates

2. Per UH System Policy, Section 57.07 "Relatives of members of the Board shall not be employed by the System unless the employment took place at least one year prior to the appointment of the Board member."

Do you have any family members (by blood or marriage) serving on the Board of Regents of the University of Houston System?

• Global
• Code: UH5OQ20
• Type: Single Answer

The Candidate is Unqualified

The Candidate Passes

To Be Verified

Slide notes
New Requisition

2. Per UTHC Board of Regents policy, Section 57.07 “Relatives of members of the Board shall not be employed by the System unless the employment took place at least one year prior to the appointment of the Board member.”

Do you have any family members (by blood or marriage) serving on the Board of Regents of the University of Houston System?

- Global
- Code: UNSD002
- Type: Simple Answer
- Visible by: All Candidates

The Candidate Passes
To Be Verified
Slide notes
Do you have any family members (by blood or marriage) serving on the Board of Regents of the University of Houston System?

- Global
- Code: UHED222
- Type: Single Answer
- Visible by: All Candidates

| Candidates for this requisition | 0 |

Activated Languages
- English (Default) *Title*
- Requisition Type
- Professional

Primary Location
- Texas
You can add specific job related questions to each posting. This will help identify top candidates.
Slide notes

To add a question from the library, Click: Add.
This will bring up a list of pre-defined questions.
Slide 124 - Slide 124

Slide notes

[Image of a user interface with a question selector tool]

Available Questions

<table>
<thead>
<tr>
<th>Code</th>
<th>Question</th>
<th>Visible by</th>
<th>Select</th>
</tr>
</thead>
<tbody>
<tr>
<td>UH506</td>
<td>Are you able to work a maximum of 23 hours per week?</td>
<td>All Candidates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Type: Single-Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UH506</td>
<td>Are you able to work evenings and weekends as needed?</td>
<td>All Candidates</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Type: Single-Answer</td>
<td></td>
<td></td>
</tr>
<tr>
<td>UH506</td>
<td>Are you currently an employee of the University of Houston System?</td>
<td>All Candidates</td>
<td></td>
</tr>
</tbody>
</table>

11 questions available
Select the question you wish to add.
Slide 126

Slide notes
Click: Done.
You can select answers as required or an asset. In this case, we will require an employee to be internal. This option will not automatically disqualify the candidate, but it will flag them. We will look at how this translates to the applicant view, when we discuss sourcing candidates.
Slide notes
You also have the ability to create your own questions. Click the icon to create a question.
Slide notes

Select an answer type.
In this example, we will select single answer.
Type in your question.
1. Question Properties

Question

Save and Close  Cancel

Answer Type
Single Answer

Possible Answers:
Answer 1
Answer 2
Answer 3

Question
How would you rate your experience with Adobe Captivate?
1. Question Properties

Answer Type: Single Answer

Answer Display:
- Radio buttons
- Pop-up list

Question:
How would you rate your experience with Adobe Captivate?
Slide notes
Type in your possible answers.
Slide notes
How would you rate your experience with Adobe Captivate?

Question

1. No experience
2. Moderate experience
3. Excellent experience

Possible Answers

— Question

Answer 1

Answer 2
Slide 139 - Slide 139

Slide notes
Slide notes
How would you rate your experience with Adobe Captivate?

1. No experience
2. Basic
3. Intermediate

Slide notes
Slide 144 - Slide 144

Slide notes
How would you rate your experience with Adobe Captivate?

Possible Answers:
- No experience
- Basic
- Intermediate
How would you rate your experience with Adobe Captivate?

Possible Answers:
- No experience
- Basic
- Intermediate
- Advanced
Click: Save and Close.
Let's create another question.
Slide notes
This time, we will select text answer.
Slide notes

Type your question.
Slide notes
Describe your HR Experience.

1. Question Properties

- Answer Type: Text Answer
- Answer Display: In

*Question
Describe your HR Experience.

Created By: Sylvester, Diana
Creation Date: October 27, 2016

Slide notes
Slide notes
Type in the number of lines for the candidate.
Slide notes

Click: Save and close.
Slide notes
Slide notes
Slide notes
Slide notes

If you decide to remove a question, select the question.
And click: remove.
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Slide notes
Slide notes
Click the diagnostic tool to make sure everything is complete.
Slide 169 - Slide 169

Slide notes
This will display anything missing to save, approve or post the position. Once the posting is complete, click: Save and close.
Slide notes
You have the option to edit, or make any changes before sending it through the approval process.
Slide notes
To start the approval process to post, click: More Actions.
Select: Request Approval.
This will display the approval path. You can add approvers if needed. A comment is required.
### Request Approval

**Message Details**

- From: Diane Sylvester
- For: Requisition Coord, HR Training (STA000441)

#### After Approval

- Assign the next task to: Duncan, Nikki

<table>
<thead>
<tr>
<th>Order</th>
<th>Approver</th>
<th>Decision</th>
<th>Date and Time</th>
<th>Comments</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Victor Kalon</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>2</td>
<td>Devi Bala</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
<tr>
<td>3</td>
<td>Niki Duncan</td>
<td>Pending</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- Add the approvers to the list of collaborators defined for this requisition
- Add the approvers to the list of my frequent collaborators

**Comments**

Please approve.
Slide notes
Select: Done.
You have now created a posting. Each approver will receive a notice via email, to approve the posting. Once the posting goes through the approvals, HR will be the final approval. HR will post the position.
Now that we have walked through how to create a posting, let's review how to review candidates in this system.
The candidate workflow is as follows.

Once a candidate applies, they are in the applicant pool.

H. R. conducts the first screen. The candidate can change to the status of: Pass; Reject; Applicant Withdraw.

The next step is the Hiring Manager screen with the same statuses.

The interview step has the statuses of interview pending, phone screen, interview, pass interview, reject, and applicant withdrew. This is followed by the offer step. If they reach the offer step, the status will change to offer to be made.

We will walk through the offer stage after the next section.
Let's begin to discuss how to source applicants. From your dashboard, there are a couple of different ways to view candidates. The first is under the candidates tab.
Slide notes
This option allows you to view all of the postings you own, with the candidates who applied under the posting title.
Slide notes
Slide notes

Let's click on recruiting to return to our dashboard.
Welcome Ashley Waggoner
Welcome to the Recruiting Center:

Show information for requisitions:
- own

Candidates
- Create Candidate

Extended (Since Sep 1, 2018)
- 1

Offers
- Total

Tasks assigned to me
- 0

Requisitions
- Create Requisition

Onboarding (Transitions)
- Total

Recruiting
- Due Today

Manually Matched
- 1
You can also view applicants to a specific posting by going through the requisitions. Click on open to view your open postings.
Slide notes
This will bring up a listing of all the postings you own.
Slide notes

Click on the posting in which you would like to view the candidates.
Click on the number of candidates for the posting.
This will bring up the list of all of the candidates who applied to this posting.
Slide 191 - Slide 191

Slide notes
Slide 192 - Slide 192

Slide notes
Slide notes

Let's review this menu.
Slide notes
Slide notes
The icons on the top can help navigate and change your view. To change the columns on the top, select the menu icon.
The menu default to the standard view. You can select the detail view, or create your own. To create your own view, click on the pencil icon.
Slide notes

This will display a menu of options that you can select for your columns. You can also reorder the columns.
Slide notes
Slide notes
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Slide notes
Slide notes
You can save your selection, or cancel to return to the menu.
You can apply your changes or cancel to return to the applicants.
Let's review the applicant menu and some of the icons.
Slide notes

The paper clip signifies that there are attachments.
Slide notes

The flag signifies that this applicant has not yet been viewed. The flag will disappear once the candidate’s application is viewed. The icon highlighted indicates they have applied for other positions. The star displays for the ace candidates. The home icon indicates that the applicant is internal.
As stated before, the columns can be customized. We are currently viewing the applicants in standard view.
Slide notes
You can quickly identify the name of the candidate, attachments, were they are in the process, if they meet the requirements or assets.
And their contact information.
Slide notes
Slide 216 - Slide 216

Slide notes
Slide 217 - Slide 217

### Digital Fundraising Specialist (STA00006L)

<table>
<thead>
<tr>
<th>Candidate</th>
<th>Status Name, Icon</th>
<th>Requirements</th>
<th>Assists</th>
<th>Cellular Num.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mouse, Mickey</td>
<td>HR SCREEN To BeReviewed</td>
<td>1/1</td>
<td>2/2</td>
<td>222-111-0000</td>
</tr>
<tr>
<td>Duck, Donald</td>
<td>HR SCREEN Reviewed</td>
<td>0/1</td>
<td>1/2</td>
<td></td>
</tr>
<tr>
<td>Grady, Christina</td>
<td>HR SCREEN Reviewed</td>
<td>1/1</td>
<td>2/2</td>
<td></td>
</tr>
<tr>
<td>Abercrombie, Hector (33970)</td>
<td>HR SCREEN Reviewed</td>
<td>1/1</td>
<td>2/2</td>
<td>832.382.7409</td>
</tr>
<tr>
<td>Guapo, Hombre</td>
<td>HR SCREEN Reviewed</td>
<td>1/1</td>
<td>2/2</td>
<td>7137435877</td>
</tr>
<tr>
<td>Simpson, Marge</td>
<td>HR SCREEN Reviewed</td>
<td>1/1</td>
<td>1/2</td>
<td>2013848670</td>
</tr>
</tbody>
</table>

1 to 8 out of 8 candidates

Slide notes
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Slide notes
Slide notes
To view an applicant, click on the name.
This will bring up the candidate's application. You can scroll through to view all of their information, answers and qualifications.
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Slide notes
Slide 222 - Slide 222

Slide notes
Mouse, Mickey applied for requisition:
Digital Fundraising Specialist (STA00006L)

3 out of 8 candidates

3. Submission Information
Account Information

Account Status
Not Looked
User Name
MickeyM

Generate New Password
Slide notes
Mouse, Mickey applied for requisition:

**Digital Fundraising Specialist (STA00006L)**

3 out of 8 candidates

- **Job Submission**
- **Attachments**
- **Tasks**
- **Referral**
- **History**

**eSignature**

The candidate electronically signed this job submission.

IP address of computer used to sign: 129.74.108.46

eSignature data and time: Nov 1, 2016 12:39:49 PM

Document name: ESIGNATURE EXT - eSignature - External

**Source Tracking**

General

---

**Slide notes**

---
Slide notes
Mouse, Mickey

Result: 99%
ID: 49512
Required: 1/1
Assets: 2/2
Step: HR SCREEN
Status: To Be Reviewed

Other Submissions:
- Active (0)
- Inactive (0)

Language: English
Creation Date: Nov 1, 2016

Digital Fundraising Specialist (STA00006L)

5. Questionnaire
6. Profile Information
7. References

Select
Slide notes
Slide notes
6. Profile Information

There is no data to display.

7. References

Select...
Slide notes
Mouse, Mickey applied for requisition:

Digital Fundraising Specialist (STA00006L)

8. Diversity
Slide 240 - Slide 240

Slide notes
Slide notes
To view the documents they attached, click on attachments.
Slide notes

This will display any documents they attached. Select job submission to return to the application.
Once you have reviewed the application, you can move the candidate through the appropriate workflow. Click on: more actions.
Click on change step status.
Each step has multiple status is.
As discussed earlier, for H. R. Screen, the status is passed screening, rejected, or applicant withdrew.
The asterisks symbolize a final step—reject or pass. If the status does not have an asterisk, then the status is a holding place.
Slide notes
Once you update the status, you can save and close, or continue if you would like to continue to move the applicant.
Slide notes
You can also use the icons to move the applicant to different steps and status is. The red circle with a line through it will send the applicant to the rejection status.
The check mark will send the applicant to the passed status.
Slide 252 - Slide 252

8. Diversity

Diversity

The information already provided has been hidden for confidentiality reasons.

The information provided by recruiters appears as "Not Specified" for confidentiality reasons but can be modified if necessary.

The information provided by the candidate cannot be modified by recruiters.

Location

United States

Description

SEO

Slide notes
You can always manually change the steps by going back to more actions.
Click on change step status.
Slide notes

The menu will default to the next step and status.
Select
Slide notes

You can change the status if needed.
And then save.
Slide notes

Let's quickly review the steps and status is one more time. There are four steps: H. R. Screen, hiring manager screen, interviews and offer. Each step has different statuses- they include a pass, reject, withdraw and holding status.
Slide notes

Continue to move the applicant through the workflow.
Slide notes

The next step is interviews.
Select Pending interview

Creating a self-assigned task

Share candidate

Send correspondence

Start Process

Comments:

https://tsguht.taleo.net/enterprise/enterprise/flex.jsf?lang=en&bhm=DID=1066520.bhm&PID=candidateFile&entityKey=110800.entityMetaclas
Slide notes
Slide notes
Slide notes
Slide notes
We will pass this applicant through as the selected applicant. And choose passed interview.
Slide notes
Slide notes

Save and close to return to the applicant screen.
The next steps will be for the offer. We will discuss this process in the next section.
Slide notes

Our next task is to review the offer process.

First, the department moves the applicant to offer status. At the step, the pre-hire process is initiated. The department creates the offer grid, selects the offer letter and sends the offer through the approval process. The approval may be routed to immigration or compensation if needed. Once HR receives the offer request, the background is initiated.

Once the background is cleared, HR will approve and the offer letter can be sent out electronically.

Candidates will complete the first part of onboarding; and departments complete the second part. We will discuss onboarding in the next section.
To start the offer process, the department will need to change the application status. Click on more actions.
Select change step status.
Slide notes

It will automatically be at offer to be made.
Click on Start process.
Slide notes

Click UH pre hire. This will send the candidate information to complete.
Slide notes

Click save and close.
The next step is for the department to complete the offer grid. Once again, click on more actions.
Click: create offer.
I'm going to minimize the side menu to increase the size of the main screen.
Mouse, Mickey applied for position:
Digital Fundraising Specialist (STA00006L)

2 out of 8 candidates

Top Section:
- Status

Comments

Offer (New)

Requisition

Save
Save and Close
Cancel
Slide notes

Scroll down to complete the fields in the offer grid.
Slide notes

Enter the target start date.
Mouse, Mickey applied for resolution:

Digital Fundraising Specialist (STA00005L)

1 out of 8 candidates

Select
Mouse, Mickey applied for the role of Digital Fundraising Specialist (STA00006L).

Offer (New) section:
- Requisition dropdown
- Extended option
- Target Start Date: Nov 14, 2016
- Comments field

Select button highlighted.
Enter the start date. (The same date as the prior entry).
Mouse applied for role:

**Digital Fundraising Specialist (STA00006L)**

- **Offer (New)**
  - **Start Date**: Nov 1, 2016, 5:00 AM
  - **Comments**: [Text field]

Selected date: Nov 16, 2016

2 out of 8 candidates
Mouse, Mickey applied for the position of:
Digital Fundraising Specialist (STA00006L)

Offer (New)

- Start Date: Nov 14, 2016, 8:00 AM
- Comments: [Text]

Select
Mouse, Mickey applied for role as:
Digital Fundraising Specialist (STA00006L)

2 out of 8 candidates

Save | Save and Close | Cancel

Offer (New) | Requisition |
Tentative

Comments
Mouse, Mickey applied for position:
Digital Fundraising Specialist (STA00006L)

Offer (New)
Expiration Date: Nov 4, 2016, 3:15 PM
Comments:

Slide notes
Mouse, Mickey applied for position:
Digital Fundraising Specialist (STA00006L)

Offer (New)
- Created on: 03/27/2016
- Position: Digital Fundraising Specialist

2 out of 8 candidates
Mouse, Mickey applied for position:

Digital Fundraising Specialist (STA00006L)

2 out of 8 candidates

- Saved
- Save and Close
- Cancel

- Offer (New)
  - Created on: Sep 27, 2016
  - Position Number: 00014938, 00014938 - Spec, Digital

Comments
The requisition column brings in fields from the posting. Hover over the item and click on the arrows to populate in the offer grid.
Mouse, Mickey applied for role.

Digital Fundraising Specialist (STA00006L)

[Image of job application form]

2 out of 8 candidates

Job Submission | Attachments | Offers | Referral | History

Offer (New) | Requisition

Position Type: Not Specified

Comments
Slide notes

Select if the position is full time or part time.
Enter, or bring over the department.
Enter the hiring manager.
And the hiring manager e-mail.
Select the answer for: Does debt exist?
Slide notes
Select the citizenship status.
Select the visa type if applicable.
Slide notes
Enter the salary information.
Digital Fundraising Specialist (STA00006L)

Offer (Now)

- Offer:
- Reception

**Personal Information**

- Hiring Manager:
- Ashley Waggner
- Ashley Waggner@nih.edu

- Does Email Exist?
  - Yes

- Citizenship Status:
  - U.S. Citizen

- Visa Type:
  - Not Specified

**General Terms**

- Annualized Salary:
  - $62,666.00 (medium)
- Currency:
  - US Dollar (USD)
- Salary (Pay Basis):
  - $52,666.00
- Pay Basis:
  - Not Specified

**Slide notes**
Slide notes
Moose, Mickey applied for requisition:

Digital Fundraising Specialist (STA00006L)

- Offer (Now): Requisition

**General Terms**

- Annualized Salary: 52,656.00 (median)
- Currency: US Dollar (USD)
- Salary (Pay Basis): 41,304.00
- PayExtras: Not Specified
- Exemption Status: Not Exempted

Slide notes
Slide 316 - Slide 316

Slide notes
Slide notes
Select the pay basis.
Select the exemption status.
Slide notes
Slide notes
Enter the F. T. E.
## Slide notes

### Digital Fundraising Specialist (STA00006L)

- **Annualized Salary**: $41,594.00
- **Currency**: US Dollar (USD)
- **Salary (Pay Basis)**: $41,304.00
- **Pay Basis**: Yearly
- **Exemption Status**: Nonexempt
- **FTE**: 1.0
- **Salary Exception**: Not Specified

---

3 out of 8 candidates
Slide notes

Enter if this will be a salary exception or not.
Slide 326 - Slide 326

Slide notes
Slide notes
Slide notes

If it is a salary exception, enter the justification.
Enter the grade.
Slide notes
Indicate if the selected applicant is internal or a re-hire.
Slide notes
Slide notes

If the candidate is an internal employee or a rehire, complete the requested information. If not, skip to the probationary period.
Slide notes
Enter the building and room number in which the employee will be residing.
Enter your requested, orientation date. This date does not confirm that the new employee will be registered on this date. The department contact and employee will receive confirmation once the date is confirmed.
Slide notes
Enter any notes.
Select the offer letter you wish to use. The offer will not be sent out until the offer approval process is complete.
Open up the template options.
Select the offer letter template you would like to use.
Slide 346 - Slide 346

Slide notes
Slide notes
Click: next.
This will generate the offer letter. You can view the letter. However, the letter will not be sent out to the candidate until the offer is approved.
We hope that you will choose to join us and we look forward to working with you. Please indicate your acceptance of the Digital Fundraising Specialist position by signing this letter below and returning it no later than five working days from the time of receipt. This employment relationship with the University of Houston is at-will, which means that either you or the University may end the employment relationship at any time with or without cause.

Please complete and return the enclosed Personal Data Sheet (3 pages total) with this letter. Failure to complete and return the enclosed PDS at least five days prior to your start date will delay access to many campus services, including parking.

Sincerely,

Ashley Waggoner
Slide notes

Click Finish to continue.
Once the offer grid is complete, click save and close.
To start the approval process, click: more actions.
Select: Request Approval.
This will bring up the approval workflow. You can add approvers if needed. Enter in comments.
Slide notes
Slide notes
Click: Done.
Slide notes

This will bring you back to the candidate screen.
Our final task is to review the onboarding module. We will walk through extending the offer, initiating onboarding, completing tasks and review the status of candidates.
Once the offer has been approved. It is not time to extend the offer and start the onboarding process. Click on more actions.
Slide notes

Select: Extend offer.
Slide notes
Select the option: Extend in writing.
Slide notes

Click: Done.
Slide notes

Select: Send message by.
Select: E-Offer. This is the option that will initiate the on boarding.
Slide notes

Click: Next.
Select: Send.
The offer has now been generated. We will now return to our dashboard.
This will generate an email to the applicant. They will now need to go into their profile on the job site and complete their onboarding tasks. Let's review how to view the candidate's onboarding completion status. And view how to complete the manager tasks.
Select the home icon.
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.

Slide notes

Click on: On boarding.
This will bring you to the onboarding dashboard.
Slide notes

The first part are tasks for managers to complete.
### Processes

![My Opened Tasks](https://stguhs.taleo.net/transition/transition/transitionView.jsf?section=ob_webtop)

<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>Computer/Phone Setup</td>
<td>Oct 13, 2016</td>
<td>Waggoner, Ashley</td>
<td>Normal</td>
<td>In progress</td>
<td>Waggoner, Ashley</td>
<td>Waggoner, Ashley</td>
<td>Execute/Reassign</td>
</tr>
<tr>
<td>Keys</td>
<td>Oct 12, 2016</td>
<td>Waggoner, Ashley</td>
<td>Normal</td>
<td>In progress</td>
<td>Waggoner, Ashley</td>
<td>Waggoner, Ashley</td>
<td>Execute/Reassign</td>
</tr>
<tr>
<td>Orientation Date</td>
<td>Oct 13, 2016</td>
<td>Waggoner, Ashley</td>
<td>Normal</td>
<td>In progress</td>
<td>Waggoner, Ashley</td>
<td>Waggoner, Ashley</td>
<td>Execute/Reassign</td>
</tr>
<tr>
<td>Orientation Date</td>
<td>Oct 15, 2016</td>
<td>Waggoner, Ashley</td>
<td>Normal</td>
<td>In progress</td>
<td>Waggoner, Ashley</td>
<td>Waggoner, Ashley</td>
<td>Execute/Reassign</td>
</tr>
<tr>
<td>UHM Training</td>
<td>Nov 3, 2016</td>
<td>Macco, Mickey</td>
<td>Normal</td>
<td>In progress</td>
<td>Bala, Devi</td>
<td>Waggoner, Ashley</td>
<td>Execute/Reassign</td>
</tr>
</tbody>
</table>

### Processes

![My Opened Tasks](https://stguhs.taleo.net/transition/transition/transitionView.jsf?section=ob_webtop)

<table>
<thead>
<tr>
<th>Candidate/Employee</th>
<th>Process</th>
<th>Job Title</th>
<th>Start Date</th>
<th>Status</th>
<th>Progression</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acercombe Hector</td>
<td>Hire Right #1</td>
<td>Program Coordinator 2</td>
<td>—</td>
<td>In progress</td>
<td>[ ] [ ] [ ] [ ] [ ] [ ] [ ]</td>
</tr>
<tr>
<td>Adams Mary Jane</td>
<td>UH Pre-Hire</td>
<td>ELI Instructor Coordinator</td>
<td>Oct 24, 2016</td>
<td>In progress</td>
<td>[ ] [ ] [ ] [ ] [ ]</td>
</tr>
</tbody>
</table>
### Slide notes

The second shows the onboarding status of the applicants.
### Slide notes

To complete a task, click: Execute.
This will bring you to the task that requires your attention. In this case, it is selecting training for the new hire.
Select the role-based training for your new employee. For more information regarding online courses or access, please visit the Learning & Talent Development website.

**Full Name**
Mickey Mouse

**Requisition Title**
Digital Fundraising Specialist

**Role Based Mandatory Training**
Select the appropriate training for the new employee. If the employee will be working with any campus program with minors, or any employee in Athletics, Student Affairs, and the Charter School should select the Child Protective Training. Employees with access to medical records must take the Medical Privacy Act and HIPAA training.

- #08 - Child Protection Training
- Select Texas Medical Privacy Act
- HIPAA
- HO01 - MySafe Campus
- SS01 - Campus Security Authorities (CSA)

**Finance Mandatory Role Based Trainings**
- SF01 - Petty Cash and Change Fund
- SF02 - Procurement Card Creditor
- SF03 - Procurement Card Business Office

**Slide notes**
Click on the trainings that this role will require.
Select the role-based training for your new employee. For more information regarding online courses or access, please visit the Learning & Talent Development website.

Full Name
Mickey Mouse

Requisition Title
Digital Fundraising Specialist

Role Based Mandatory Training
Select the appropriate training for the new employee. If the employee will be working with any campus program with minors, or any employee in Athletics, Student Affairs, and the Charter School should select the Child Protective Training. Employees with access to medical records must take the Medical Privacy Act and HIPAA training.

- H406 - Child Protection Training
- SH01 - Texas Medical Privacy Act
- SH08 - HIPAA
- AS01 - MySafe Campus
- SS01 - Campus Security Authorities (CSA)

Finance Mandatory Role Based Trainings
- SF01 - Petty Cash and Change Fund
- SF02 - Procurement Card Cartholder
- SF03 - Procurement Cord Business Office
Slide 380 - Slide 380

Slide notes
Training Selection Trainer

- HF01 - Voucher Creation
- HF02 - Service Center Payment
- HF03 - Purchase Req Training
- HF05 - Budget Entry Creation
- HF06 - Budget Development Module

Human Resources Required Trainings for System Access

- HH01 - HR View
- HH02 - HR Query Viewer
- HH03 - HR Query Manager
- SH02 - TRAM Training

Other Training

- HF04 - Moving Expense Reimbursement
- HR01 - SRIL Autoclave Procedures
- HR02 - Ionized Hydrogen Peroxide
- HR03 - Animal Transport Training
- HR04 - IHP Validation Lab Procedure
- HR05 - F650 Operational Training
- HO02 - Building Control System

Slide notes
Select submit. The selected trainings will be in the new employee's training portal (tap), once they are hired.
### Onboarding (Transitions) Center

The Onboarding (Transitions) page displays all the Onboarding (Transitions) tasks and processes that you can access. More info

#### Tasks

<table>
<thead>
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<td>Waggoner, Ashley</td>
<td>Execute, Reassign</td>
</tr>
</tbody>
</table>

---

**Slide notes**
Manager Onboarding Tasks

Training
Keys
Computer/Phone Access
Orientation Enrollment

Slide notes
Manager's tasks for on boarding include setting up training; order keys; setting up computer and phone access; and enrolling in orientation.
Slide 389 - Conclusion

You're done!

Benefits
Workflow
Creating a Posting
Sourcing Applicants
Creating and Extending the Offer
Onboarding

Slide notes