Taleo - HR Recruiting Security Updates & Changes

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Taleo - HR Recruiting

Taleo Recruiting - Other Features

Taleo Security Updates & Changes

Procedure

As Taleo's successful rollout continues, there are three items to update all users on.

• Selecting Default Users via My Setup - A strongly encouraged reminder to select default users.

• **Department list security access** - With Taleo, even if a user only needs access to one specific department, depending where in the school/ department structure the department falls, the user may find that a large number of departments are displayed. This tutorial reviews an easy Best Practice for users who have access to a large number of departments.

• **Approval process** - This is an actual change that directly affects the workflow of a new requisition. We are moving from "dynamic approval", where the approval path was predetermined, to a process where the individual entering the requisition will decide the approval path. This will give the user more flexibility in determining the approval path for requisitions.

Step	Action
1.	Selecting Default Users via My Setup When creating a new requisition, two required fields include the Recruiter and Hiring Manager fields.
	It is STRONGLY ENCOURAGED to select <i>default users</i> that will automatically populate into these fields. If you have not done this, please review the Selecting Default Users via My Setup tutorial to learn how.
	If you do not select default users and then also don't correctly populate these fields, the workflow for the new requisition will be affected and the new requisition will not advance correctly.

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Step	Action
2.	Department List Security Access
	Again, even if a user only needs access to one specific department, depending where in the school/ department structure the department falls, the user may find that a large number of departments are displayed.
	This is most noticeable when entering a new requisition as the department is a required field.
	Click the Selector button.



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Step	Action
3.	The departments for which you have access to based on your security role will appear. Due to the security set-up in Taleo, if you have access to one department under, in this example, Office of the President, you will see <i>all</i> departments that fall under the Office of the President.
	In this example, there are only 9 departments and all are in view. However, many schools and departments will have a much longer list. As such, a recommended Best Practice is to search by Department Number.
	With many of the search windows in Taleo, the Quick Filters on the left-hand side of the window are available in order to narrow down the data that appears to the right.
	Click the Department Number field.

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Step	Action
4.	Enter "02200000" into the Department Number field.



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Step	Action
5.	Click the Search button.

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Step	Action
6.	To the left of UMB Counsel, click the Select button.



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Step	Action
7.	The selected department now appears in the Department field.
	Anytime the Quick Filter window is in view, it can be utilized to narrow down your options. Again, this feature may be particularly beneficial when searching for a specific department from a large list.



Step	Action
8.	Approval Workflow Changes Previously, the approval path was predetermined by the system. It went to the Hiring Manger > Dean's Office > Compensation > Staffing.
	Due to user feedback, this process has been modified to allow users to select the appropriate approvers and possibly multiple approvers at the department level. This also allows for either <u>sequential approval</u> or <u>parallel approval</u> .
	 Sequential approval is where the approvals are done in a specific order - the 1st approver must approve before the 2nd can approve, and so forth. This is the standard approval method. Parallell approval is where more than one approver can view and approve a requisition at a time. Meaning, two people can both be listed as the 1st approver and do not have to wait on one another. However, both must approve before the requisition can move forward to the next approver.
	Both of these types of approval will be reviewed shortly.
	What does not change is that the Dean's office and Compensation must still be the <i>last two approvers</i> on a requisition with Compensation being last. The staffing specialist should be listed in the After Approval box, which is discussed in the next section.



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Step	Action
9.	Once you've entered a new requisition, you'll come to this screen. Select the Save and Close button to start the approval process.

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Step	Action
10.	First, always review that the person listed in the After Approval field is the HRS staffing specialist assigned to your Department.
	In the user list pictured below, you'll see all Taleo users in your department along with your HR Staffing and Compensation specialists. It is from this list that you'll select those who need to approve the requisition.
	As mentioned, it is possible to do either a sequential approval or a parallel approval. We'll review a parallel approval shortly.



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THE FOUN	Message Details			
A · R	From Melissa Kessler For Requisition Test Position (1600001F)		Select approvers in the list below.	7
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English (Be	Frequent Collaborators	Dean (Test), A	Kamaria.Jackson@umaryland.edu	Select
Requisition	Name	Dickerson, Juliet	Juliet.Dickerson@umaryland.edu	Select
Professiona	Ð	George , Andrew	andrew.george@umaryland.edu	Select
Hired Candi	Email Address	Greenwell, Rebecca	rebecca.greenwell@umaryland.edu	Select
Department	4	Jackson, Kamaria	Kamaria.jackson@umaryland.edu	Select
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Kessler, Me	V		8 users available	
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Step	Action
11.	Selecting A Sequential Approval Path Initially it doesn't matter what order you select the users from the user list. You can do it in order if you wish, but you'll have the option to reorder the approvers. We're going to select 4 approvers. REMEMBER: This must include the Dean's office and Compensation. Click Select to the right of Dean (test), A. This is the Dean. Select
Step	Action
12.	Click Select to the right of George, Andrew . This is the Compensation specialist.
Step	Action
13.	Click Select to the right of Daughton , Joanne , who is in your department and must approve the requisition.
Step	Action
14.	Click Select to the right of Dickerson, Juliet , who is another necessary approver from your department.



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Step	Action
15.	The four approvers are listed. It defaults to a sequential order based on the order you made the selections. So the Dean is first, then Compensation, then the two department approvers.
	REMEMBER: The Dean's office and Compensation need to be the LAST two approvers with Compensation being last.
	As such, you need to reorder the approvers.
Step	Action
16.	Joanne should be the first approver. Click the Drop-down arrow next to Joanne's name.



Message Details					
From	Order	Approver	Decision	Date and Time	Comments
Melissa Kessler	1 -	Dean (Test), A	Pending		
For Requisition	2 🔻	George , Andrew	Pending		
Test Position3 (1600001H)	3 💌	Daughton, Joanne	Pending		
After Approval	1	Dickerson, Juliet	Pending		
Assign the pext task to	2 a	pprovers to the list of collabor	ators defined for this requisition	n	
Greenwell, Rebecca	3 a	pprovers to the list of my frequ	uent collaborators		
					Done
	Name		Fmail Address		Done
Quick Filters	Name		Email Address		Done
Quick Filters	Name Daughton, Jo	sanne	Email Address Joanne Daughton	gumaryland.edu	Done
Quick Filters Suggested Users	A Daughton, Jo Dean (Test),	senne A	Email Address Joanne Daughton Kamaria Jacksong	gumaryland.edu gumaryland.edu	Done C Selec Selec
Quick Filters Suggested Users	A Daughton, Jo Dean (Test), Dickerson, J	zanne A	Email Address Joanne Daughton Kamarla Jackson Juliet Dickerson@	@umaryland.edu @umaryland.edu umaryland.edu	Done C. Selec Selec Selec
Quick Filters Suggested Users	Name Daughton, Jo Dean (Test), Dickerson, J George , And	senne A uliet drew	Email Address Joanne Daughton Kamaria Jacksong Juliet Dickerson@ andrew.george@u	Bumaryland, edu Bumaryland, edu umaryland, edu maryland, edu	Done C Selec Selec Selec
Cuick Fillers Suggested Users Frequent Collaborators Name Email Address	A Daughton, Jo Dean (Test), Dickerson, J George , And Greenwell , F	anne A uliet ferew Rebecca	Email Address Joanne Daughton Kamaria Jacksond Juliet Dickarson@ andrew george@u rebecca greenwel	Gumaryland edu gumaryland edu umaryland edu maryland edu @umaryland.edu	Done C Selec Selec Selec Selec
Autok Filters Suggested Users	Name Daughton, Jc Dean (Test), Dickerson, J George , Anc Greenwell , F Jackson, Ka	zanne A uliet debecca maria	Email Address Joanne Daughton Kamaris Jacktord Juliet Dickersong andrew george (), relecca greenwel Kamaris jacksong	Sumaryland edu Sumaryland edu umaryland edu Sumaryland edu Sumaryland edu	Done C Selec Selec Selec Selec Selec
Aurick Filters Suggested Users	Name Daughton, Jc Dean (Test), Dickerson, J George, And Greenvell, F Jackson, Ka Kessler, Meli	anne A ulet tetwo tebecca maria tosa	Email Address Joanne, Daughton Kamaria, Jackstong Juliet, Dickerson@ andrew george@s rebecca.greenwel Kamaria jackson@ este0005@umaryk	Sumaryland edu Sumaryland edu umaryland edu @umaryland.edu @umaryland.edu umaryland.edu nd.edu	Done C Selec Selec Selec Selec Selec Selec Selec
Culick Filters Suggested Users Prequent Colaborators Name Cmail Address Employee ID Employ	Name Daughton, Jo Dean (Test), Dickerson, J George, And Greenwell, F Jackson, K Kessler, Mell Reynolds, Si	oanne A Uliet Jebecca Besa erra	Email Address Joanne Daughton Kamaria Jackson Juliet Dickensoog andrew george (), relecco, greenwel Kamaria jackson estelölö Guyar Sierra Reynolde ()	Bumaryland edu Bumaryland edu umaryland edu @umaryland edu (umaryland edu umaryland edu umaryland edu	Doro C Selec Selec Selec Selec Selec Selec
Zuick Filters Sogeted Uses Frequet Caborators Itane Data Address Englopee ID Sog Tite	Name Daughton, Jo Dean (Test), Dickerson, J George , Anc Greenwell , F Jackson, Ka Kessler, Meli Reynolde, Sa	senne A Vilot Srew Robecca maria Sisse Erra	Email Address Joanne: Daughton Kamaria Jacksonj utet Dickerson@ andrew pologe@, rebecca greenvel Kamaria jackson@ sstei005@umaryle Sierra Reynolds@	Sumaryland edu Sumaryland edu umaryland edu @umaryland edu @umaryland edu umaryland edu umaryland edu	Done C Selec Selec Selec Selec Selec
Curck Fitters Suggested Users	Name Daughton, Jc Dean (Teat), Dickerson, J George, And Greenwell, F Jackson, Ka Kessler, Mel Reynolds, Si	sanne A Vilet Vetocos Rebeccos erra erra	Email Address Joanne Daughton Kamaria Jackston Juliet Dickerson@ rebecca greenwel Kamaria jackson@ sstel005@umaryle Sierra Reynolds@	gunaryland odu gunaryland odu amaryland odu gynaryland odu gynaryland odu umaryland odu umaryland odu umaryland odu	Done C
Cuick Filters Segreted Users	Name Daughton, Jo Dean (Test), Dickerson, J George , And Greenwell , F Jackson, Ke Kosson, Ke Reymolds, Sk	oanne A Viete tebecca maría tesa tesa terra	Email Address Joanne, Daughton Kamaria Jacistono Juliet Dickerson (j) andrew george (j), rebecca greenwel Kamaria gackson (j) sstel005 (g),umaryts Sierra Reynolds (j)	Qumaryland adu gumaryland adu maryland adu gumaryland adu gumaryland adu umaryland adu umaryland adu	Done C Selec Selec Selec Selec Selec
Cuick Filters Suggested Users	Name Daughtion, Jc Dean (Test), Dickarson, Ji George, And Greenwell, F Jackson, Kai Kessler, Mell Reynolds, Si	sanne A udet Vebecca soa erra	Email Address Joanne Daughton Kamara Jackson Julie Dickenson Index george rebecca greened Kamara jackson Sierra Reynolds Sierra Reynolds	Qumaryland adu Qumaryland adu amaryland adu amaryland adu Qumaryland adu ad adu amaryland adu amaryland adu	Conortic Control Contr

Step	Action
17.	Select the number 1.
18.	Click the Drop-down arrow next to Juliet's name.
19.	Select the number 2.
20.	Click the Drop-down arrow next to the Dean's name.
21.	Select the number 3 as the Dean will be the next to last approver.
22.	Click the Drop-down arrow next to Andrew's name, who is the Compensation representative.
23.	Select the number 4. This will place Compensation as the last approver.
24.	To view the list in the proper order, click the Reorder button.



Request Approval							^
Message Details		Order	Approver	Decision	Date and Time	Comments	1
From Melissa Kessler		1 .	Daughton, Joanne	Pending			<u>^</u>
For Requisition		2 🔻	Dickerson, Juliet	Pending			
Test Position (1600001F)		3 🔻	Dean (Test), A	Pending			Ш 💻
After Approval		4 💌	George , Andrew	Pending			v
* Assign the next task to		Add the a	approvers to the list of collabora	tors defined for this requisition			_
Greenwell, Rebecca	ē	Add the a	approvers to the list of my frequ	ent collaborators			
		Commenta					
							1
							- 8
						0000	Canaal
						Done	Calicei
Quick Filters		Name		Email Address			
Suggested Users	A	Daughton, J	oanne	Joanne.Daughton@	umaryland.edu	Se	lect
Suggested Users Frequent Collaborators		Daughton, J Dean (Test)	oanne , A	Joanne.Daughton@ Kamaria.Jackson@u	umaryland.edu umaryland.edu	Se	lect
Suggested Users Frequent Collaborators Name		Daughton, J Dean (Test) Dickerson,	oanne , A Juliet	Joanne.Daughton@ Kamaria.Jackson@u Juliet.Dickerson@ur	umaryland.edu umaryland.edu naryland.edu	Se Se	lect lect
Suggested Users Frequent Collaborators Name		Daughton, J Dean (Test) Dickerson, C George, An	oanne , A Juliet drew	Joanne. Daughton@ Kamaria. Jackson@u Juliet. Dickerson@ur andrew.george@um	umaryland.edu umaryland.edu naryland.edu aryland.edu	Se Se Se	lect lect lect
Suggested Users Frequent Collaborators Name Email Address		Daughton, J Dean (Test) Dickerson, George , An Greenwell ,	oanne , A Juliet drew Rebecca	Joanne, Daughton@ Kamaria, Jackson@u Juliet, Dickerson@ur andrew.george@um rebecca.greenweli@	umaryland.edu umaryland.edu naryland.edu aryland.edu umaryland.edu	Se Se Se Se	lect lect lect lect
Suggested Users Frequent Collaborators Name Email Address		Daughton, J Dean (Test) Dickerson, C George, An Greenwell, J Jackson, Ka	oanne , A Juliet drew Rebecca amaria	Joanne. Daughton@ Kamaria. Jackson@u Juliet. Dickerson@u andrew.george@um rebecca.greenweli@ Kamaria.jackson@u	umaryland.edu umaryland.edu aryland.edu aryland.edu umaryland.edu maryland.edu	Se Se Se Se Se Se	lect lect lect lect lect
Suggested Users Frequent Collaborators Name Email Address Employee ID		Daughton, J Dean (Test) Dickerson, C George, An Greenwell, I Jackson, Ka Kessler, Mel	oanne , A Juliet drew Rebecca amaria lissa	Joanne Daughton@ Kamaria Jackson@u Juliet Dickerson@u andrew.george@um rebecca.greenweli@ Kamaria jackson@u sstei005@umarylan	umaryland.edu umaryland.edu aryland.edu aryland.edu (umaryland.edu aryland.edu	Se Se Se Se Se Se Se	lect lect lect lect lect lect
Suggested Users Frequent Collaborators Name Email Address Employee ID Ch Title		Daughton, J Dean (Test) Dickerson, k George, An Greenwell, I Jackson, Ka Kessler, Mel Reynolds, S	oanne , A Juliet drew Rebecca amaria Iissa ierra	Joanne. Daughton@ Kamaria. Jackson@u Juliet.Dickerson@u andrew.george@um rebecca.greenweli@ Kamaria.jackson@u sstet005@umaryhan Sierra.Reynolds@um	umaryland.edu umaryland.edu aryland.edu aryland.edu tumaryland.edu maryland.edu d.edu maryland.edu	Se Se Se Se Se Se Se Se Se	lect lect lect lect lect lect lect lect
Suggested Users Frequent Colaborators Name Email Address Email Address Employee ID Job Title		Daughton, J Dean (Test) Dickerson, C George , An Greenwell , I Jackson, Ka Kessler, Mel Reynolds, S	aanne A Juliet drew Rebecca smaria lissa eierra	Joanne. Daughton@ Kamaria Jackson@u Juliel: Dickerson@u andrew.george@um rebecca.greenwei@ Kamaria.jackson@u sste005@umarylan Sierra.Reynolds@ur	umaryland.edu umaryland.edu aryland.edu aryland.edu tumaryland.edu maryland.edu d.edu maryland.edu	Se Se Se Se Se Se Se Se	lect
Suggested Users Frequent Collaborators Name Email Address Employee ID Job Title Department		Daughton, J Dean (Test) Dickerson, K George , An Greenwell , I Jackson, Ka Kessler, Mel Reynolds, S	, A Juliet Meteros Rebecca Issa Issa Issa	Joanne Daughton@ Kamaria Jackson@ Uulet.Dickerson@u andrew.george@um rebecca.greenwek@ Kamaria.jackson@u sete000@umarylan Sierra.Reynolds@ut	umaryland.edu imaryland.edu anyland.edu aryland.edu iumaryland.edu d.edu aryland.edu	Se Se Se Se Se Se	Aect
Suggested Users Frequent Collaborators Name Email Address Employee ID Job Title Department Q		Daughton, J Dean (Test) Dickerson, C George , An Greenwell , Jackson, Ka Kessler, Mel Reynolds, S	, A Juliet Arew Rebecca amaria Issa	Joanne Daughton@ Kamaria Jackson@ Juliet Diekerson@u rebecca greenwelig Kamaria jackson@u satel005@umaryfan Sierra Reynolds@ur	umaryland.edu maryland.edu aryland.edu aryland.edu umanyland.edu aryland.edu d.edu d.edu	Se Se Se Se Se Se	Aect
Suggested Users Frequent Colaborators Name Email Address Employee ID Job Title Oepartment User Group		Daughton, J Dean (Test) Dickerson, « George , An Greenwell , Jackson, Ka Kessler, Mel Reynolds, S	, A Juliet drew Rebecca amaria lisaa ierra	Joanne Daughton@ Kamaria Jackson@, Juliet Dickerson@u andrew george@um rebecca greenweli@ Kamaria jackson@u satel005@umarylan Sierra.Reynolds@ur	umaryland edu manyland edu anyland edu anyland edu anyland edu umaryland edu d edu d edu	Se Se Se Se Se Se Se	lect

Step	Action
25.	The names now appear in order.
	Depending on personal preference and the size of your department, adding these approvers to your frequent collaborators may be beneficial moving forward. We're going to select it for this example and we'll see the benefits in the next example. Click the Add the approvers to the list of my frequent collaborators checkbox.
Step	Action
26.	Enter "Please approve" into the Comments field.
Step	Action
27.	Review the approvers again and make sure everyone is selected, including the Dean's office and Compensation, and that they are in the correct order. Click the Done button.



UNIVERSITY of MARVI AND			Melissa Kessler Home Resource	ces 🔻 🕴 Sigi
THE FOUNDING CAMPUS		ŵ	 Search Candidate 	
Recruiting Tasks	Requisitions Candidates Offers Libraries			
Requisition Test Position 1600001F Status Pending Status Details To Be Approved	Test Position (1600001F) More Actions Requestion Attachments Approvals History Interviews Request Approval Path Amendment Send Reminder Order By Decision	Date and Time	Comments	
Candidates for this 0	2 Juliet Dickerson 3 A Dean (Test) 4 Andrew George			
Activated Languages English (Base) ▼				-
rofessional lired Candidates out of 1				
lepartment JMB Counsel rimary Location University of Maryland, Baltimore				-1
Recruiter Sreenwell, Rebecca				_
firing Manager Kessler, Melissa				

Step	Action
28.	You'll be returned to the Approvals tab and the requisition has been submitted for approval.
	Next we'll review a parallel approval path.
29.	Selecting A Parallel Approval Path Most approval paths are sequential - approver 1 must approve before approver 2, and so forth.
	With a parallell approval path, if there are two or more people who need to approve the requisition but it doesn't matter in what order, using a parallel path may be beneficial.
	This allows two or more individuals to receive the requisition at the same time and review and approve it without having to wait on each other. However, if three people are selected to be "1", all three must approve before the requisition will move on to the next level.
	REMEMBER: The Dean's office and Compensation need to be the LAST two approvers with Compensation being last.



Step	Action
30.	 First, in the previous example, we choose to add the four approvers to our frequent collaborator list. As such, we can now select Frequent Collaborators in the Quick Filter window. Click the Frequent Collaborator checkbox.

thursday								* S	ign Ou
The Foun	Message Details From Melissa Kessler For Requisition Test Position 2 (1600001G) After Approval			Select a	oprovers in the list below.				· · · · ×
Test Posi 1600001G Status Status Deta	* Assign the next task to Greenwel. Rebecca		* Comments						
Candidate requisition	Quick Filters	_	Name		Email Address	Done	Cancel		
Activated La	Suggested Users	•	Daughton, Joanne		Joanne.Daughton@umaryland.edu	Sel	lect		
English (Be	Frequent Collaborators		Dean (Test), A		Kamaria.Jackson@umaryland.edu	Sel	lect		
Requisition	Name		Dickerson, Juliet		Juliet Dickerson@umaryland.edu	Sel	lect		
Professiona	0		George , Andrew		andrew.george@umaryland.edu	Sel	lect		
Hired Cando	Email Address								
0 out of 1	63						_		
UMB Count	Employee ID								
Primary Loc	0							600	
University	Job Title								
Recruiter	Construct								
Greenwell,	Department +3	Ш,							
Hiring Mana	Liser Group								
Kessler, Me		٣			4 users available			-	
				_					

Step	Action
31.	Now we see our list of Frequent Collaborators . Again, depending on how large your department is, this may assist you in selecting the appropriate approvers.
	We are going to select all four people listed. Click the Select button for Joanne.
Step	Action
32.	Click the Select button for A Dean.
Step	Action
33.	Click the Select button for Juliet.



Step	Action
34.	Click the Select button for Andrew.
Step	Action
35.	For this requisition, it doesn't matter if either Juliet or Joanne approve it first. As such, we're going to make both of them the first approver. As Joanne was selected from the user list, she is 1 in the order.
	Click the Drop-down arrow next to Juliet's name.



Step	Action
36.	Click the number 1.



Action
Now both Joanne and Juliet will receive the requisition first.
The Dean's office is already listed as the 2nd approver. Now we need to list Compensation as 3rd.
Click the Drop-down arrow.
•
Action
Click the number 3 .
3
Action
To view the names in order, click the Reorder button.
Action
Enter "Please approve" into the Comments field.
Action
Review the approvers again and make sure everyone is selected, including the Dean's office and Compensation, and that they are in the correct order. Click the Done button.



UNIVERSITY# MARYLAND THE FOUNDING CAMPUS	Search Candidate	Q
Recruiting Tasks Requisitions Candidates Offers Libraries		
Test Quality Test Position 2 (1600001G) Regulation Image: Constraints Test Position 2 Image: Constraints 1 Test Position 2 2 A Den (Test) 3 Andrew George 1 Test Position 2 2 A Den (Test) 3 Andrew George 1 Test Position 2 2 Test Position 2 2 Test Position 2 3 Andrew George 1 Test Position 2 2 Test Position 2 3 Test Position 2 4 Test Position 2 <td>Comments</td> <td></td>	Comments	

Step	Action
42.	You'll be returned to the Approvals tab and the requisition has been submitted for approval.
	Juliet and Joanne are both listed as Approver 1. They do not need to wait on one another to review and approve the requisition. However, they both need to approve the requisition before it will move on to the Dean's office.
43.	This concludes the Taleo Security Updates & Changes tutorial. For further information on Taleo, please continue to review the tutorials.
	For help with any questions or issues, please contact your Staffing Specialist at 6-7171.
	End of Procedure.