

Taleo - HR Recruiting

Security Updates & Changes

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Taleo - HR Recruiting

Taleo Recruiting - Other Features

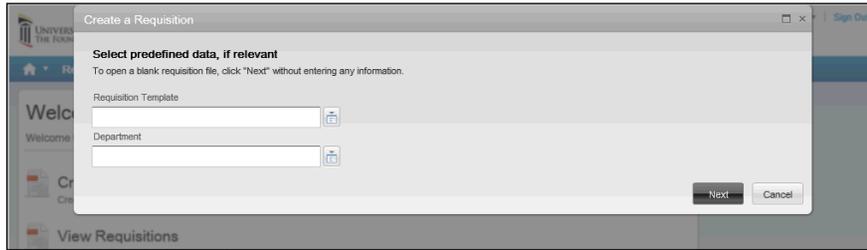
Taleo Security Updates & Changes

Procedure

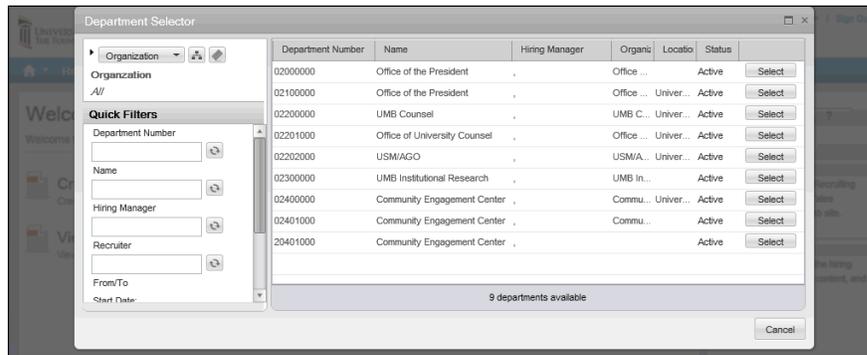
As Taleo's successful rollout continues, there are three items to update all users on.

- **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.

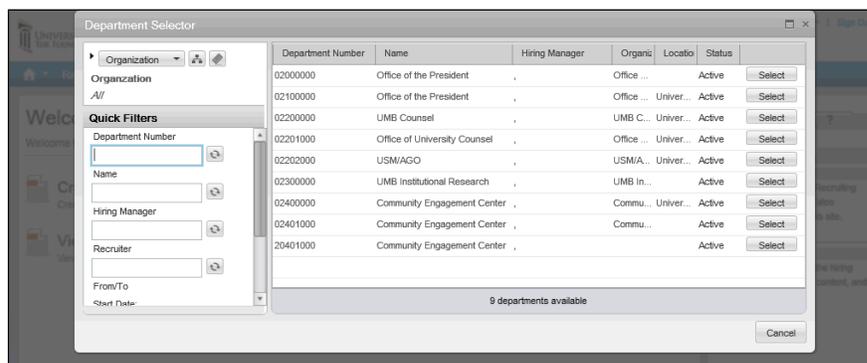
Step	Action
1.	<p>Selecting Default Users via My Setup When creating a new requisition, two required fields include the Recruiter and Hiring Manager fields.</p> <p>It is STRONGLY ENCOURAGED to select <i>default users</i> that will automatically populate into these fields. If you have not done this, please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



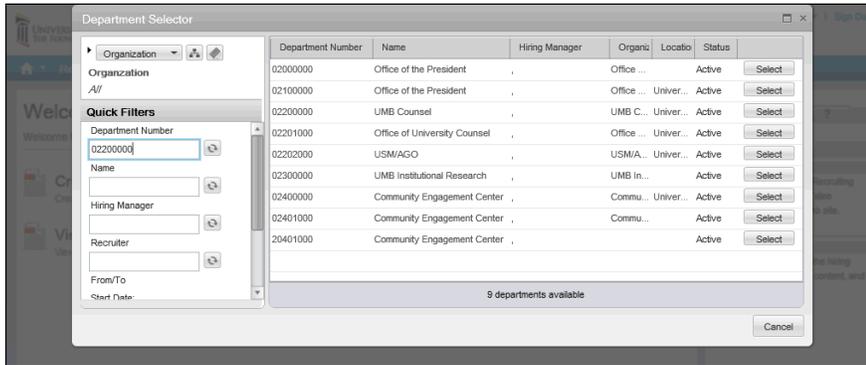
Step	Action
2.	<p>Department List Security Access</p> <p>Again, even if a user only needs access to one specific department, depending where in the school/ department structure the department falls, the user may find that a large number of departments are displayed.</p> <p>This is most noticeable when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



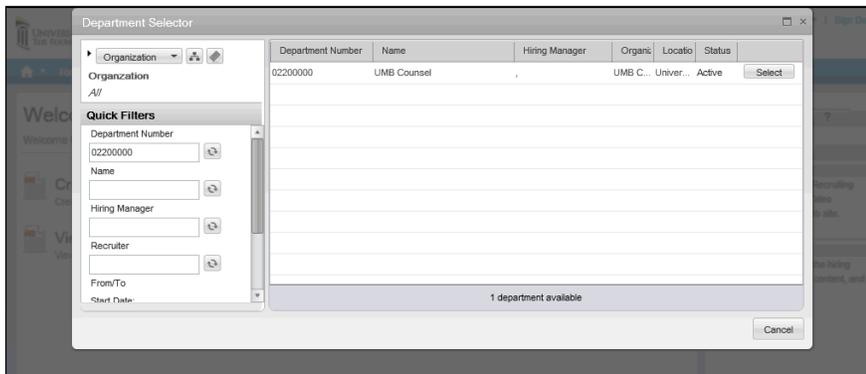
Step	Action
3.	<p>The departments for which you have access to based on your security role will appear. Due to the security set-up in Taleo, if you have access to one department under, in this example, Office of the President, you will see <i>all</i> departments that fall under the Office of the President.</p> <p>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.</p> <p>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.</p> <p>Click the Department Number field.</p> <div style="border: 1px solid black; width: 150px; height: 20px; margin-left: 20px;"></div>



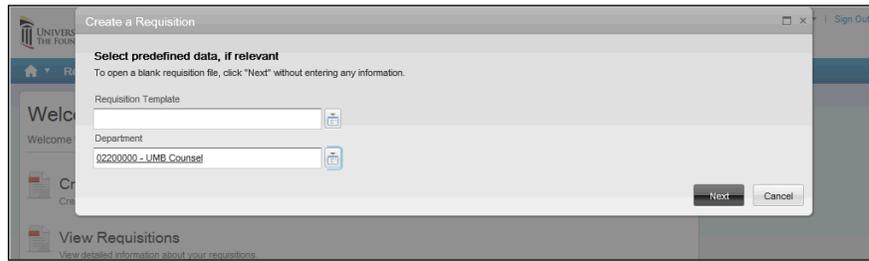
Step	Action
4.	Enter " 02200000 " into the Department Number field.



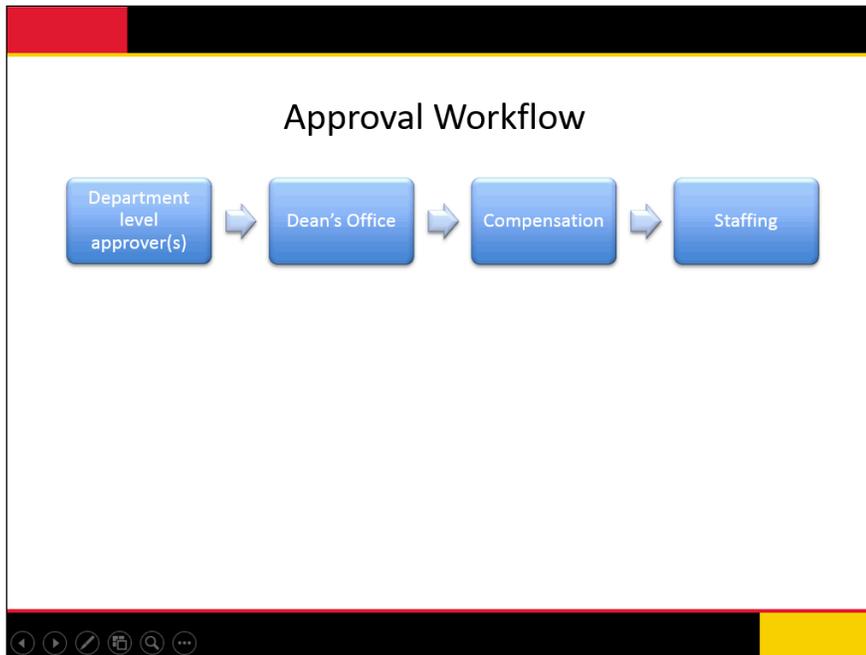
Step	Action
5.	Click the Search button. 



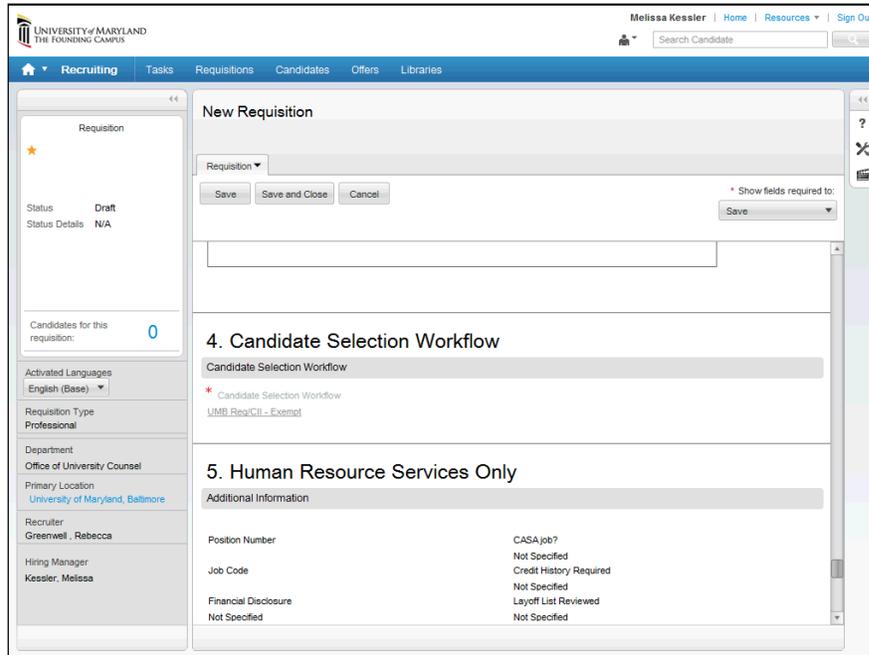
Step	Action
6.	To the left of UMB Counsel, click the Select button. 



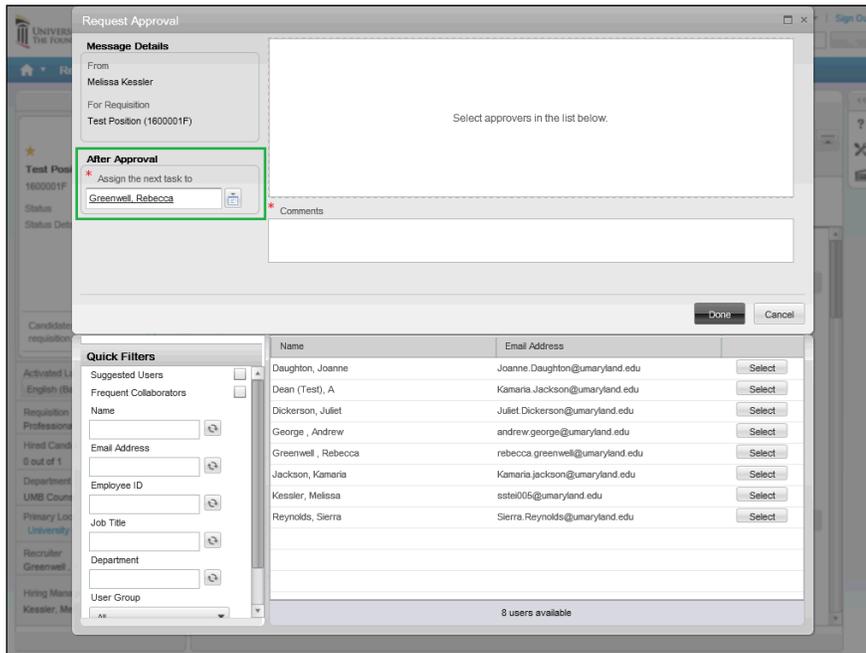
Step	Action
7.	<p>The selected department now appears in the Department field.</p> <p>Anytime the Quick Filter window is in view, it can be utilized to narrow down your options. Again, this feature may be particularly beneficial when searching for a specific department from a large list.</p>



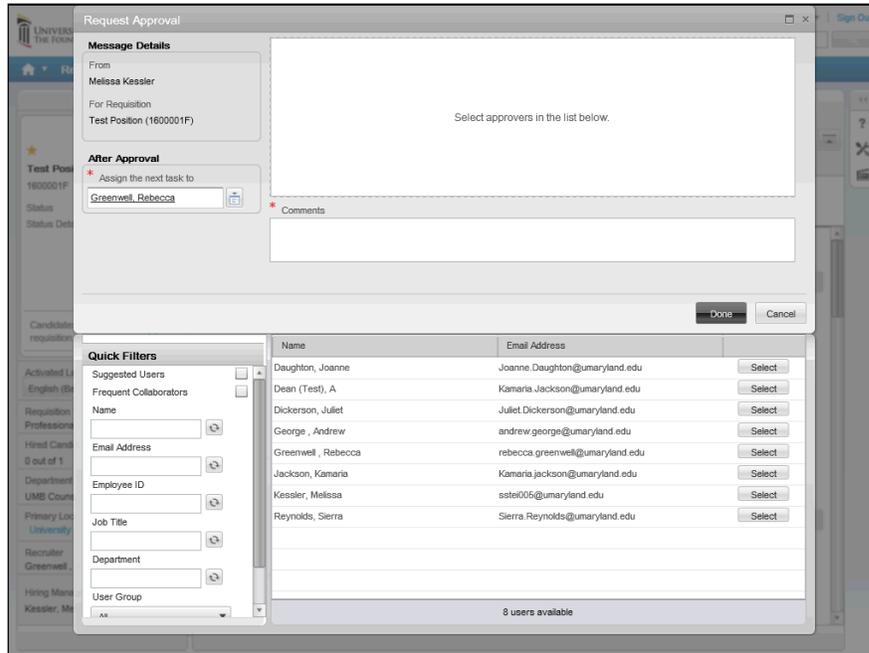
Step	Action
8.	<p>Approval Workflow Changes Previously, the approval path was predetermined by the system. It went to the Hiring Manger > Dean's Office > Compensation > Staffing.</p> <p>Due to user feedback, this process has been modified to allow users to select the appropriate approvers and possibly multiple approvers at the department level. This also allows for either <u>sequential approval</u> or <u>parallel approval</u>.</p> <ul style="list-style-type: none"> • <i>Sequential approval</i> 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. • <i>Parallell approval</i> 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. <p>Both of these types of approval will be reviewed shortly.</p> <p>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.</p>



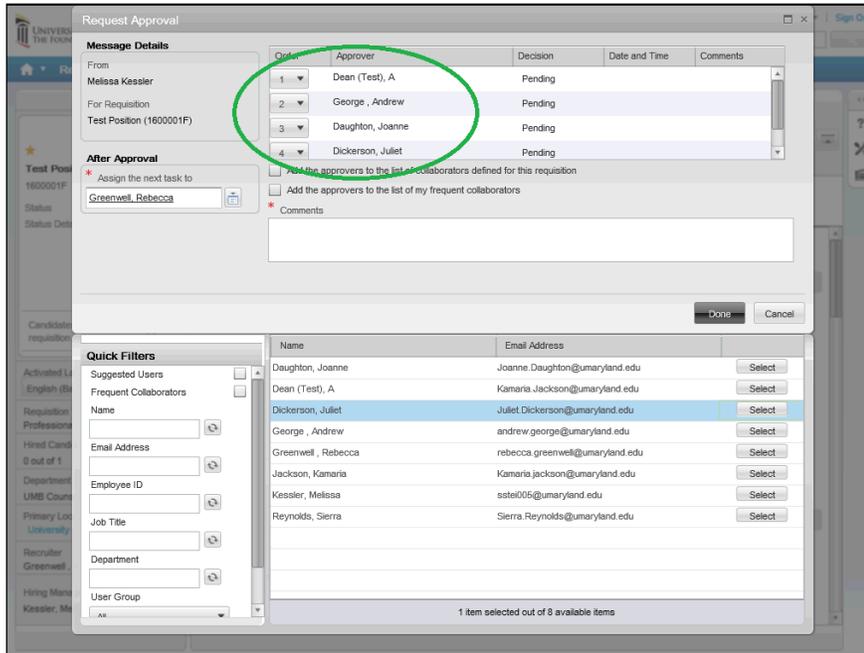
Step	Action
9.	<p>Once you've entered a new requisition, you'll come to this screen. Select the Save and Close button to start the approval process.</p> <div data-bbox="441 1037 636 1100" style="border: 1px solid black; padding: 5px; display: inline-block;"> <p>Save and Close</p> </div>



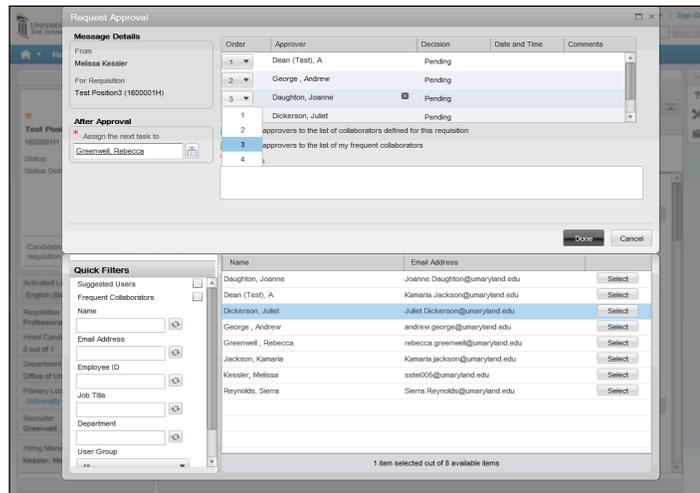
Step	Action
10.	<p>First, always review that the person listed in the After Approval field is the HRS staffing specialist assigned to your Department.</p> <p>In the user list pictured below, you'll see all Taleo users in your department along with your HR Staffing and Compensation specialists. It is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



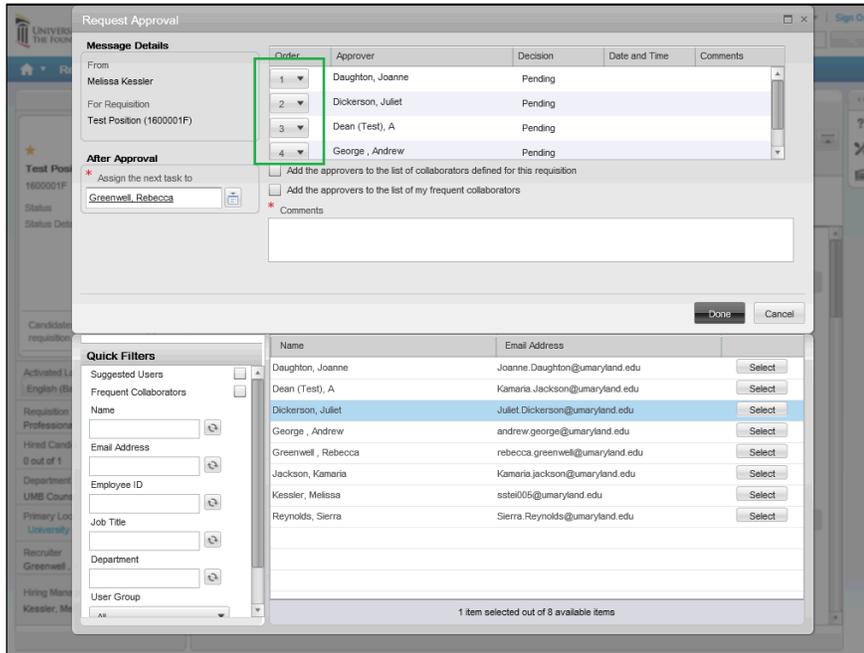
Step	Action
11.	<p>Selecting A Sequential Approval Path</p> <p>Initially it doesn't matter what order you select the users from the user list. You can do it in order if you wish, but you'll have the option to reorder the approvers.</p> <p>We're going to select 4 approvers. REMEMBER: This must include the Dean's office and Compensation.</p> <p>Click Select to the right of Dean (test), A. This is the Dean.</p> <p><input type="button" value="Select"/></p>
12.	<p>Click Select to the right of George, Andrew. This is the Compensation specialist.</p> <p><input type="button" value="Select"/></p>
13.	<p>Click Select to the right of Daughton, Joanne, who is in your department and must approve the requisition.</p> <p><input type="button" value="Select"/></p>
14.	<p>Click Select to the right of Dickerson, Juliet, who is another necessary approver from your department.</p> <p><input type="button" value="Select"/></p>

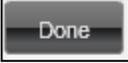


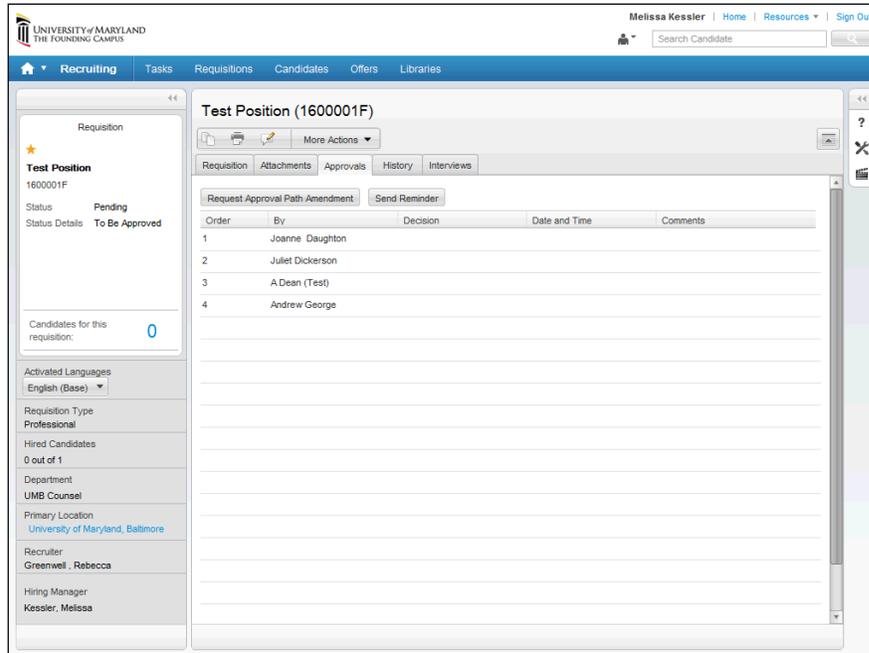
Step	Action
15.	<p>The four approvers are listed. It defaults to a sequential order based on the order you made the selections. So the Dean is first, then Compensation, then the two department approvers.</p> <p>REMEMBER: The Dean's office and Compensation need to be the LAST two approvers with Compensation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



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. 

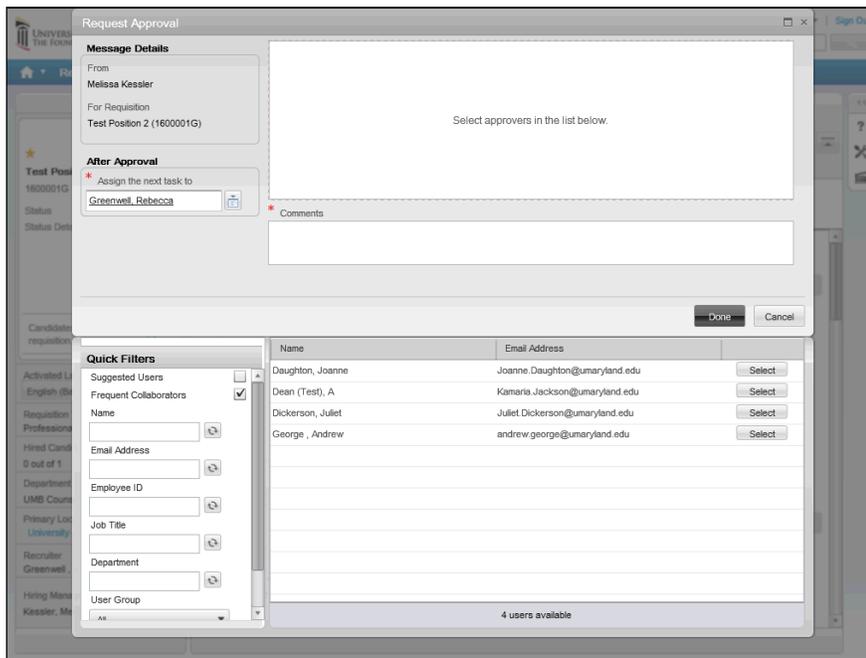


Step	Action
25.	<p>The names now appear in order.</p> <p>Depending on personal preference and the size of your department, adding these approvers to your frequent collaborators may be beneficial moving forward. We're going to select it for this example and we'll see the benefits in the next example.</p> <p>Click the Add the approvers to the list of my frequent collaborators checkbox.</p> 
Step	Action
26.	Enter " Please approve " into the Comments field.
Step	Action
27.	<p>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.</p> <p>Click the Done button.</p> 



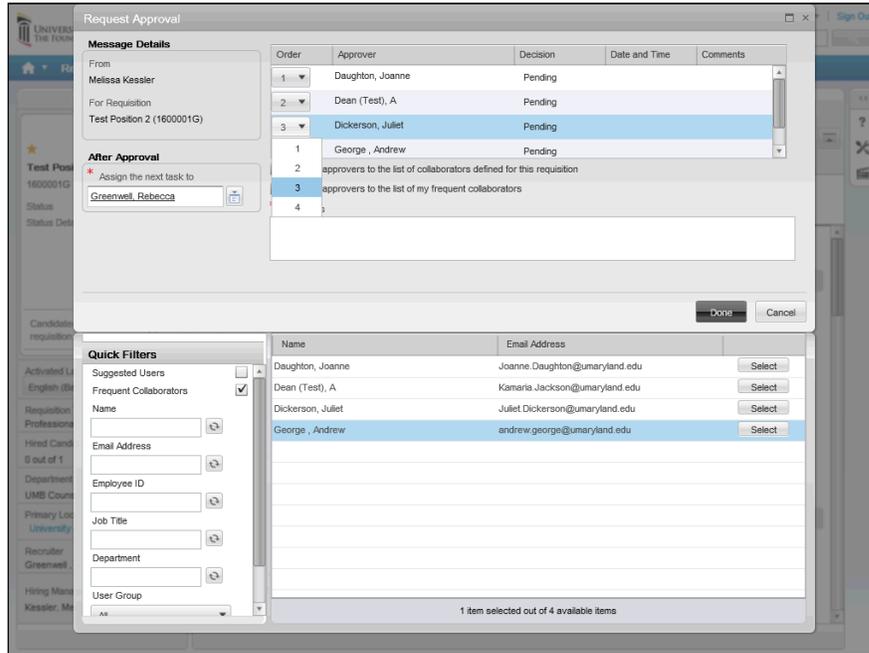
Step	Action
28.	<p>You'll be returned to the Approvals tab and the requisition has been submitted for approval.</p> <p>Next we'll review a parallel approval path.</p>
29.	<p>Selecting A Parallel Approval Path</p> <p>Most approval paths are sequential - approver 1 must approve before approver 2, and so forth.</p> <p>With a parallel 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.</p> <p>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.</p> <p>REMEMBER: The Dean's office and Compensation need to be the LAST two approvers with Compensation being last.</p>

Step	Action
30.	<p>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.</p> <p>Click the Frequent Collaborator checkbox.</p> 

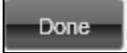


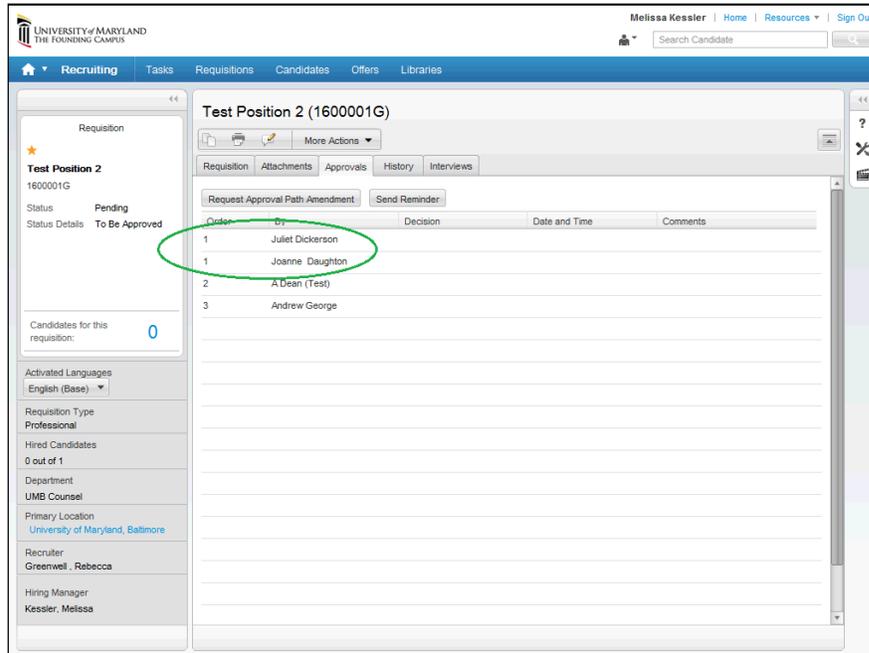
Step	Action
31.	<p>Now we see our list of Frequent Collaborators. Again, depending on how large your department is, this may assist you in selecting the appropriate approvers.</p> <p>We are going to select all four people listed. Click the Select button for Joanne.</p> 
Step	Action
32.	<p>Click the Select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

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 . 

Step	Action
37.	<p>Now both Joanne and Juliet will receive the requisition first.</p> <p>The Dean's office is already listed as the 2nd approver. Now we need to list Compensation as 3rd.</p> <p>Click the Drop-down arrow.</p> 
Step	Action
38.	<p>Click the number 3.</p> 
Step	Action
39.	<p>To view the names in order, click the Reorder button.</p> 
Step	Action
40.	<p>Enter "Please approve" into the Comments field.</p>
Step	Action
41.	<p>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.</p> <p>Click the Done button.</p> 



Step	Action
42.	<p>You'll be returned to the Approvals tab and the requisition has been submitted for approval.</p> <p>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.</p>
43.	<p>This concludes the Taleo Security Updates & Changes tutorial. For further information on Taleo, please continue to review the tutorials.</p> <p>For help with any questions or issues, please contact your Staffing Specialist at 6-7171.</p> <p>End of Procedure.</p>