



# Training Handouts

Updated: March 2016  
For further assistance please contact  
your Recruitment Team

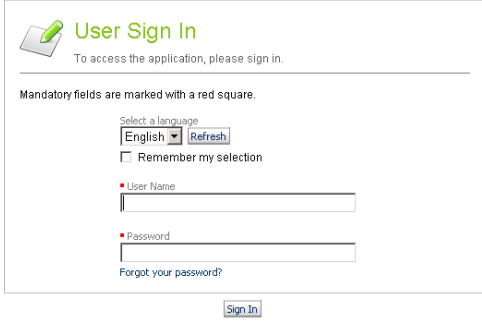
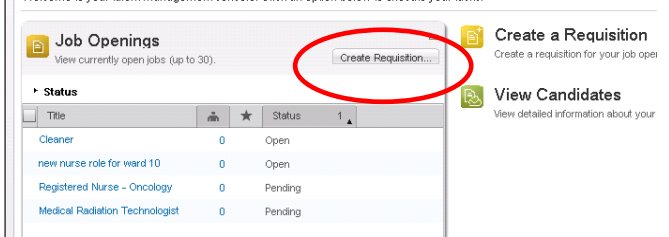
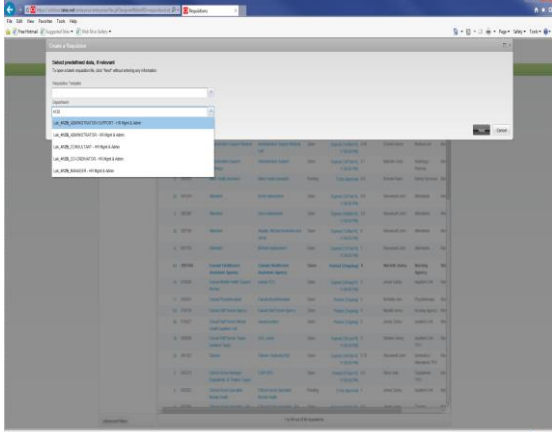
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Midland Candidate Selection Workflow (CSW)

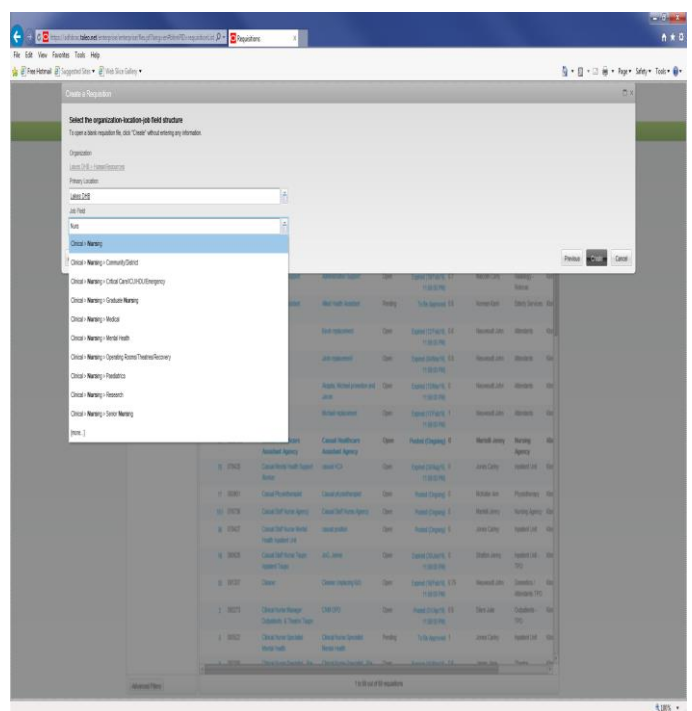


## Logging in and Creating a Requisition

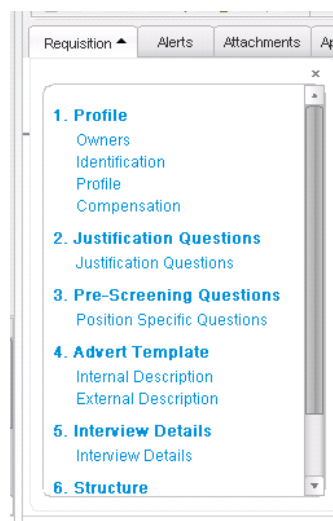
<ul style="list-style-type: none"> <li>Go to the Intranet and click on the link to access Taleo</li> </ul>	
<ul style="list-style-type: none"> <li>Login with your user name and password</li> </ul> <p>(First time users – you should have been notified of your user name and password during training, otherwise contact the recruitment team)</p> <ul style="list-style-type: none"> <li>Please contact the Recruitment Team if you have forgotten your login and password, as it will need to be reset.</li> </ul>	 <p>The screenshot shows the 'User Sign In' page. It includes a language selector set to 'English', a 'Remember my selection' checkbox, and input fields for 'User Name' and 'Password'. A 'Forgot your password?' link and a 'Sign In' button are also visible.</p>
<ul style="list-style-type: none"> <li>Click on Create Requisition</li> </ul>	 <p>The screenshot shows the 'Job Openings' dashboard. A red circle highlights the 'Create Requisition...' button. Other options include 'View currently open jobs (up to 30)', 'Create a Requisition', and 'View Candidates'.</p>
<ul style="list-style-type: none"> <li>Leave Requisition Template empty (unless you have selected a template to use)</li> <li>In Department, start typing either your cost centre. <u>Wait for a few seconds</u>. Then select the correct position.</li> <li>Click on <u>Next</u></li> </ul>	 <p>The screenshot shows the 'Create Requisition' form. A dropdown menu is open for the 'Department' field, showing a list of departments. The 'Next' button is visible at the bottom right of the form.</p>

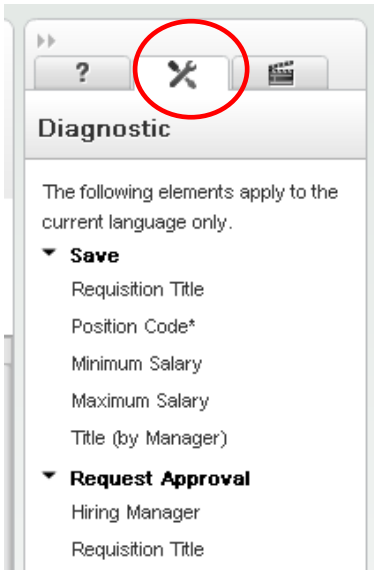
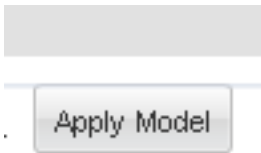

- Type in Job Field, this is the closest occupation group relating to the requisition you are creating. Eg: Social Worker,
- Select the Job Field
- Click on Create

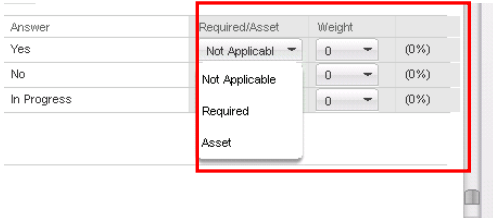
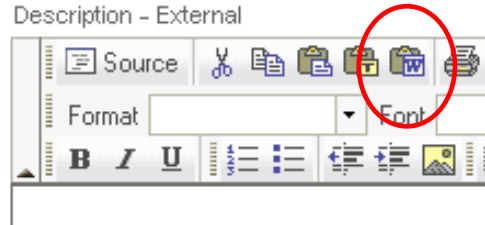
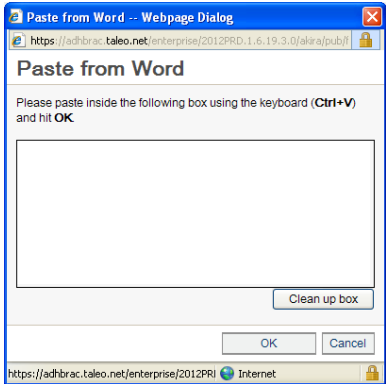


*Eg. For Nursing roles, type nurs and then see the options.*



- Work your way through the form.
- **Owners** – who owns the requisition  
Hiring Manager = yourself  
Hiring Mgr Assistant = if you have an administrator or PA who may need access to the requisition to assist you during the process.
- **Identification & Profile** – this is the detail of the vacancy – at a minimum fill in the mandatory fields with the \*
- **Compensation** – the salary details for the vacancy




<ul style="list-style-type: none"> <li>Use the <u>Diagnostic tool</u> on the right to check that all the essential fields are completed.</li> </ul>	
<ul style="list-style-type: none"> <li><b>Justification questions</b> – either answer the questions or attach documents to support the approval of this requisition.</li> </ul>	<p>The Attachments tab will appear after you <u>Save &amp; Close</u> the requisition form</p>
<ul style="list-style-type: none"> <li><b>Pre-Screening Questions</b> – these assist with shortlisting your candidates.</li> </ul> <p><b>Note:</b> there must be at least one pre-screening question added to the requisition.</p> <ul style="list-style-type: none"> <li>Click the <u>Apply Model</u> icon. This will update the requisition with pre-defined questions for that job field.</li> </ul>	
<ul style="list-style-type: none"> <li>Review the questions. If you do not want the questions shown, tick the box next to the question and then click on <u>Remove</u></li> <li>More questions can be added from the library by clicking <u>Add</u></li> <li>If you would like different/more questions, please discuss with your recruiter.</li> </ul>	

<ul style="list-style-type: none"> <li>Questions can also be assigned criteria of either being <u>Required</u> or an <u>Asset</u>. Weightings can also be applied in relation to the importance of the question.</li> </ul>	
<ul style="list-style-type: none"> <li><b>Advert Template</b> – Put advert in the <u>Internal Description box</u>, and the <u>External Description box</u>, if required.</li> </ul> <p>You can copy and paste in an advert from Word, or type directly into the box.</p> <ul style="list-style-type: none"> <li>To paste from Word, use the <u>paste icon</u>.</li> </ul>	
<ul style="list-style-type: none"> <li>Paste text into post and click <u>OK</u></li> <li>Edit further if necessary.</li> </ul>	
<ul style="list-style-type: none"> <li>To copy/paste from one advert box to the other, use the <u>Copy From</u> button above the box you will be pasting into</li> </ul>	
<ul style="list-style-type: none"> <li><b>Interview Details</b> – if you already have the interviews planned, please note these down in this section</li> </ul>	
<ul style="list-style-type: none"> <li><b>Structure</b> – do not need to change.</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Save and Close</u></li> </ul>	

## Organisation Wide Pre-Screening Questions

These questions automatically appear for every applicant, and do not need to be selected by the Hiring Manager in the requisition form.

Depending on how a candidate answers the question, their file may be 'flagged,' with this icon: . This is simply to draw attention to that particular answer, and flagged candidates can still progress through the selection process like normal.

1. Are you currently employed, or have you previously been employed, by the District Health Board or its previous entities?
2. Do you have the legal right to work in New Zealand, either as a New Zealand citizen or permanent resident, or as a holder of an Australian passport or a valid work visa/permit? (Evidence will be required if you are interviewed for the position.)
3. Do you smoke?
4. Have you been subject to professional or other disciplinary inquiry or have knowledge of an event that might give rise to disciplinary inquiry?
5. Have you ever been convicted for, are currently being charged with, under investigation, or awaiting to appear in court for a criminal offence?
6. NOTE: You are not required to disclose any convictions that you are eligible to conceal under the provisions of the Criminal Records (Clean Slate) Act 2004. It is your responsibility to determine if you are eligible to conceal any conviction. To find if you may be eligible visit: <http://www.justice.govt.nz/services/criminal-records/criminal-records-clean-slate-act-2004>.  
All prospective workers whose position may involve contact with children must be Safety Checked prior to commencing employment and to be periodically checked thereafter. If you have been convicted of a specified offence as detailed in Schedule 2 of the Vulnerable Children's Act 2014 (VCA), these convictions will be disclosed. To find out more on the VCA visit:  
<http://www.legislation.govt.nz/act/public/2014/0040/latest/DLM5501618.html>
7. It is our policy that Police Vetting (NZ Police Vetting Service) or Criminal History Convictions (Ministry of Justice) checks will be completed for all preferred candidates as a pre condition of employment. Will you consent to the District Health Board (DHB) undertaking a check and by continuing with your application and submitting it to the DHB, you hereby give your consent. (Failure to provide consent to the DHB will prevent your application from progressing further.)"
8. The District Health Board is a smoke free workplace. We expect staff to be smoke free during work hours and to support the smoke free campus philosophy. Does this present a challenge for you?
9. "I agree that the outcome of the Police vet and safety checks of me carried out for the purposes of this application in accordance with the Vulnerable Children Act 2014 and subsequent Regulations 2015 may be shared by the DHB to which this

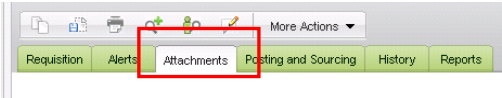




application relates with any DHB(s) at which I subsequently apply to work ("the subsequent DHB(s)") within 3 years from the date of the receipt of the result of the vet and safety check for the role as a core or non-core children's worker.

The purpose of sharing the outcome of the Police vet and safety check in this way is to allow the subsequent DHB(s) to ensure that I have been Police vetted and safety checked within the 3 year period prior to applying to work at that/those subsequent DHB(s) and is in accordance with an agreement that has been reached between the 20 DHBs. This will ensure I can transfer between employing DHBs in a timely manner and reduces the strain on DHB and Police resources from having to reprocess employees within a short timeframe.

The outcome of the Police vet and safety check will not otherwise be shared with any person or organisation except as permitted by law and will be dealt with in accordance with the Privacy Act 1993."

## Attaching Files


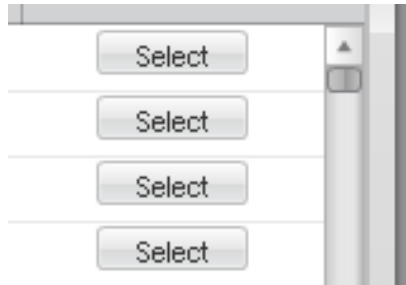
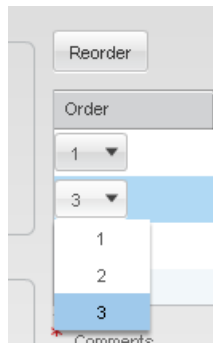
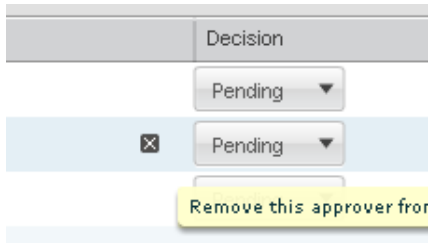
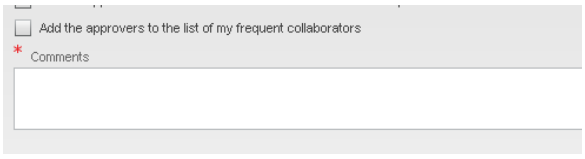
<ul style="list-style-type: none"> <li>Click on the <u>Attachments</u> Tab</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Browse</u></li> <li>Find file and select</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Add</u></li> </ul> <p>File will appear in the list below</p>	
<ul style="list-style-type: none"> <li>Repeat as necessary</li> </ul>	

### Note:

Files to attach may include (but not limited to):

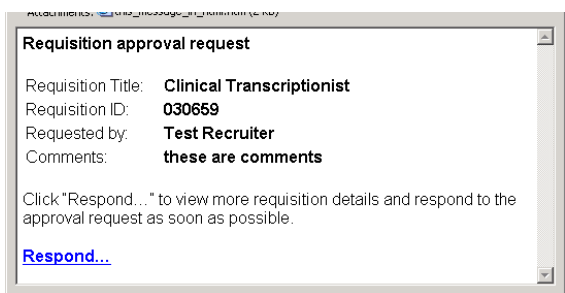

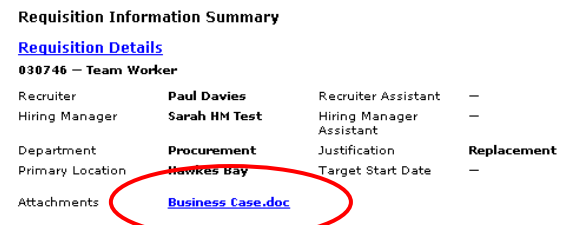
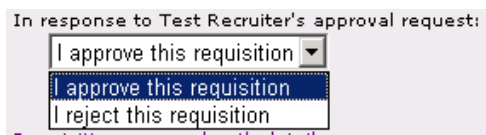
- Financial statements
- Business Case
- Supporting memo's.

## Seeking Approval

<ul style="list-style-type: none"> <li>Check that the requisition is complete and you have attached relevant documents</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>More Actions</u></li> <li>Select <u>Request Approval</u></li> <li><i>If <u>Request Approval</u> doesn't appear, please click on the <u>Diagnostic Tool</u> for assistance</i></li> </ul>	
<ul style="list-style-type: none"> <li>The default approvers for your department should appear in the list, in the correct order. If the approvers are incorrect, please see below.</li> <li>To add approvers, click on Add Approvers in the bottom left corner</li> <li>Search for and select the name of the approver you want</li> </ul>	
<ul style="list-style-type: none"> <li>If required, Reorder the approvers so that they are in the correct order.</li> <li>Click on the number next to the name and select the correct number</li> <li>Click on <u>Reorder</u> at the top</li> </ul>	
<ul style="list-style-type: none"> <li>To remove an approver (if you selected the wrong person, hover over their name and you will see a X appear.</li> <li>Click on this.</li> </ul>	
<ul style="list-style-type: none"> <li>Once your approver list is correct, put in some comments (mandatory)</li> <li>Click <u>Done</u>.</li> </ul>	
<ul style="list-style-type: none"> <li>The first person in the list has now received an email requesting approval.</li> <li>The Hiring Manager and Recruiter</li> </ul>	

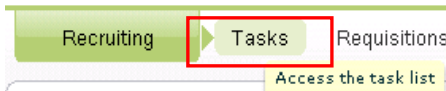
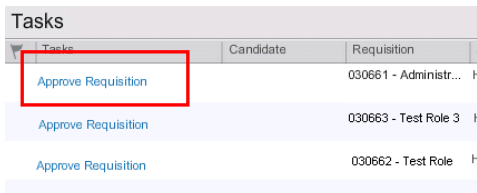
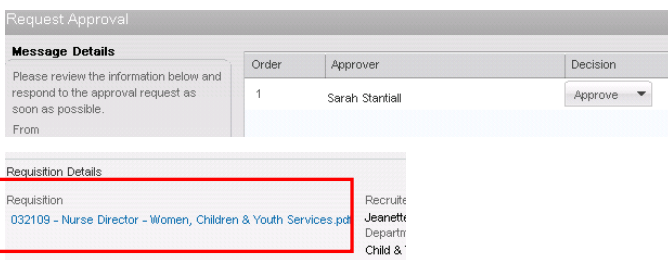
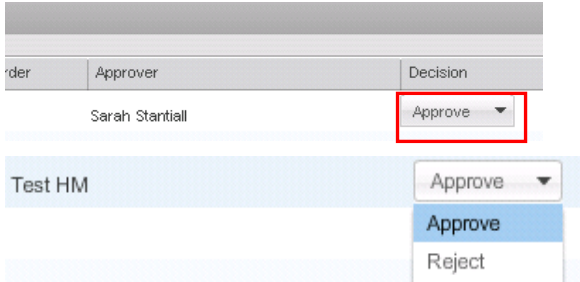
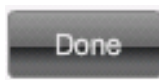
will receive an email once all approvers have approved the requisition	
<p><b>If Approval Rejected</b></p> <ul style="list-style-type: none"> <li>• If one of the approvers rejects the approval, then the Hiring Manager and the Recruiter will receive an email notification.</li> <li>• It is mandatory for the approver to add comments explaining why they have rejected the requisition.</li> </ul>	<p>The Hiring Manager can then have a conversation with the manager(s), update the requisition and then resubmit for approval.</p>

## Approving Requisitions from email

<ul style="list-style-type: none"> <li>Manager will receive an email</li> <li>Click on <u>Respond</u></li> </ul>	
<ul style="list-style-type: none"> <li>A window will open in Internet Explorer.</li> <li>Click on <u>Requisition Details</u>. This should open a new tab in the window. Click on this to view the full requisition</li> </ul>	
<ul style="list-style-type: none"> <li>Review the Requisition.</li> <li>Close down this tab (if it has opened in a new tab)</li> </ul>	
<ul style="list-style-type: none"> <li>To view attachments, click on the hyperlinks at the bottom of the email body</li> </ul>	
<ul style="list-style-type: none"> <li>These should open in a new tab. Review and then close.</li> </ul>	
<ul style="list-style-type: none"> <li>Back at the first screen, make your decision</li> <li>Drop down and select the decision option</li> </ul>	
<ul style="list-style-type: none"> <li>Add any comments ((this is compulsory if a requisition is rejected))</li> </ul>	
<ul style="list-style-type: none"> <li>Click <u>Done</u></li> </ul>	
<ul style="list-style-type: none"> <li>Close Email</li> </ul>	

## Approving requisitions from within Taleo


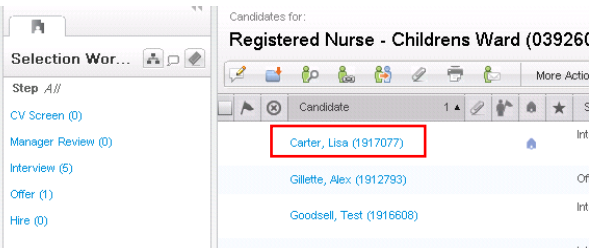
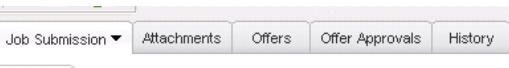
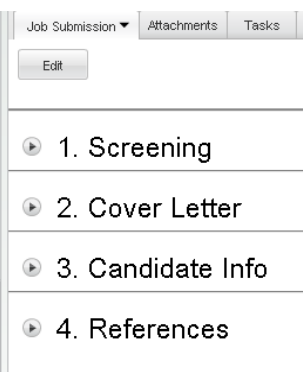
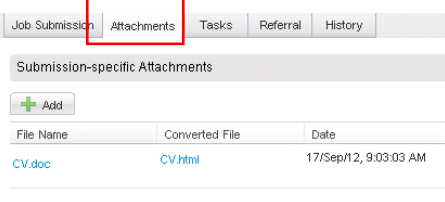
Rather than looking at each email received and then responding individually, we are able to view all roles that require approval by using Taleo's "Tasks" function.


<ul style="list-style-type: none"> <li>Go to the Intranet</li> <li>Login to Taleo</li> <li>Click on <u>Recruiting</u></li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Tasks</u></li> </ul>	
<ul style="list-style-type: none"> <li>You will be taken to a list of all roles in your name requiring attention.</li> </ul>	
<ul style="list-style-type: none"> <li>Click <u>Approve Requisition</u></li> <li>To view Requisition Details, click on hyperlink</li> </ul>	
<ul style="list-style-type: none"> <li>To Approve, click on <u>Decision</u></li> <li>Select either <u>Approve</u> or <u>Reject</u></li> </ul>	
<ul style="list-style-type: none"> <li>Add Comments in the <u>comments</u> field</li> </ul>	
<ul style="list-style-type: none"> <li>Click <u>Done</u> (bottom right)</li> </ul>	
<p>Your part in the approval process has now been completed. Repeat from step 3 for any other outstanding roles.</p>	

## Working with Candidates

- Candidates will apply online
- The recruiter will review to ensure they meet the minimum requirements
- The recruiter will either (based on discussions with the manager):
  - Make the candidates available to you as they come in
  - Make the candidates available to you once the closing date has been reached
- The recruiter will email you confirming candidates are available to view after the closing date has been reached. The email will include the shortlisting form required to be completed.


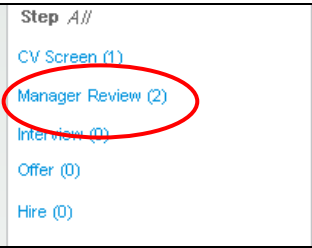
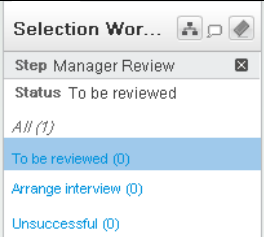
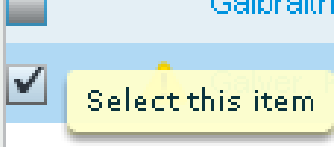

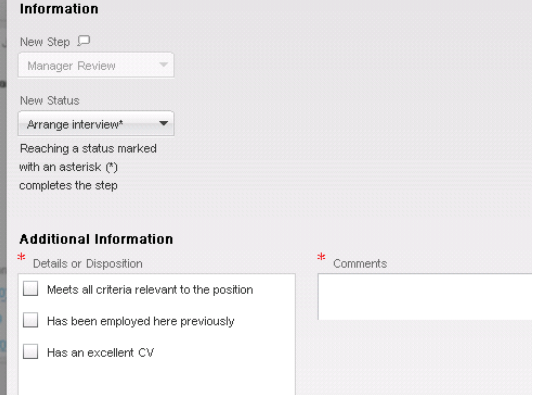
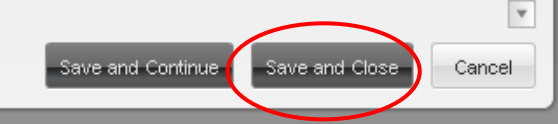
## To View the Candidate Application and CV


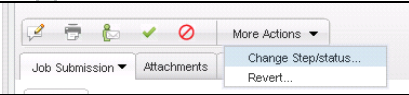
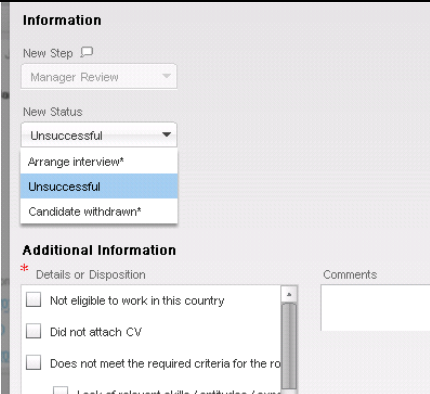
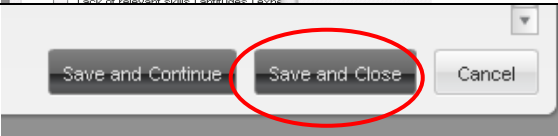
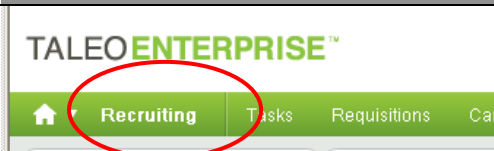
<ul style="list-style-type: none"> <li>• Log into Taleo from the intranet</li> </ul>	
<ul style="list-style-type: none"> <li>• From your homepage, identify the requisition</li> <li>• Click on the number next to the requisition. This is the number of candidates who have applied</li> </ul>	
<ul style="list-style-type: none"> <li>• Click on the name of the first candidate</li> </ul>	
<ul style="list-style-type: none"> <li>• This should open the candidate's <u>Job Submission</u> tab</li> </ul>	
<ul style="list-style-type: none"> <li>• Under <u>Screening</u> are the answers to all the pre-screening questions. Review these answers</li> <li>• If the candidate has copied their cover letter into their application, this will be under <u>Cover Letter</u> (note: they could have also attached it.).</li> </ul>	
<ul style="list-style-type: none"> <li>• Click on the <u>Attachments</u> tab</li> <li>• Select the file link to view the CV or cover letter.</li> <li>• Note: the <u>converted file</u> will open quicker but will not be well formatted.</li> </ul>	

<ul style="list-style-type: none"> <li>Review the document and then close</li> </ul>	
<ul style="list-style-type: none"> <li>Complete the paper based shortlisting form for the candidate</li> </ul>	
<ul style="list-style-type: none"> <li>To go to the next candidate, click on the arrows (top, right)</li> </ul>	



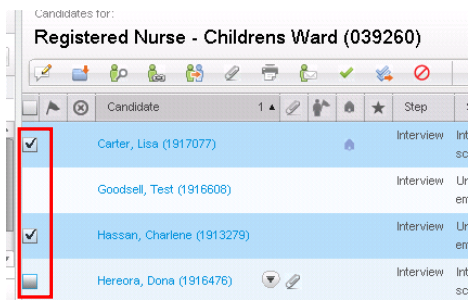
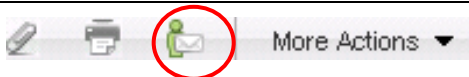
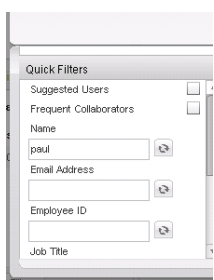
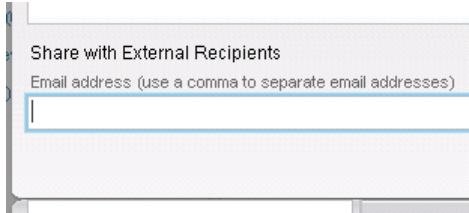
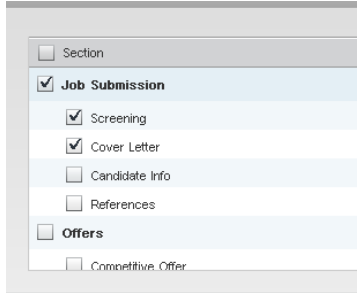

## Shortlisting: To identify which candidates to interview & which are unsuccessful

<ul style="list-style-type: none"> <li>Once you have completed shortlisting, go back to your candidate list</li> </ul> <p><i>The <u>up</u> arrow will take you back to your full list of candidates, if you are in an individual candidate file</i></p>	
<ul style="list-style-type: none"> <li>Click on <u>Manager Review</u> on the left hand side</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>To be reviewed</u></li> </ul>	
For the Candidates to Interview	
<ul style="list-style-type: none"> <li>Select the candidates by hovering over their name and then ticking the box to the left their name</li> </ul>	
<ul style="list-style-type: none"> <li>Select <u>More actions</u> &gt; <u>Change step/status</u></li> </ul>	
<ul style="list-style-type: none"> <li>A pop-up box will appear. The New Status field should automatically show <b>Arrange interview</b></li> <li>Identify under <u>Additional Information</u> why this candidate(s) should be interviewed (tick one or more boxes)</li> <li>Type the interview details in the <u>Comments</u> box – eg. date, time, venue</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Save and Close</u> (bottom right)</li> </ul>	
For the Unsuccessful Candidates	

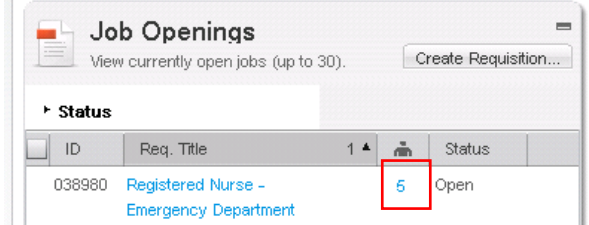
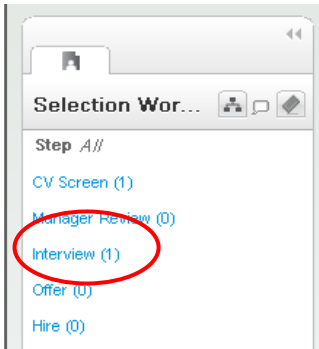


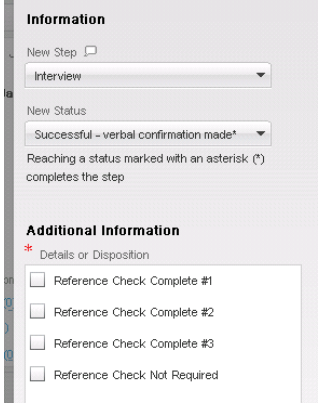
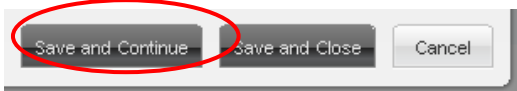

<ul style="list-style-type: none"> <li>Select the candidates by hovering over their name and then ticking the box to the left of their name</li> </ul>	
<ul style="list-style-type: none"> <li>Select <u>More actions</u> &gt; <u>Change step/status</u></li> </ul>	
<ul style="list-style-type: none"> <li>A pop-up box will appear. Change the New Status to <b>Unsuccessful</b></li> <li>Identify under <u>Additional Information</u> why these candidates are not progressing (tick one or more boxes)</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Save and Close</u> (bottom right)</li> </ul>	
<ul style="list-style-type: none"> <li>If all your shortlisting is completed, click on <u>Recruiting</u> to go back to the homepage</li> </ul>	

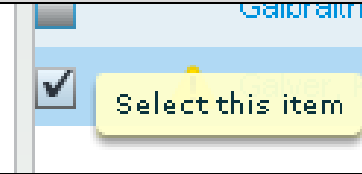

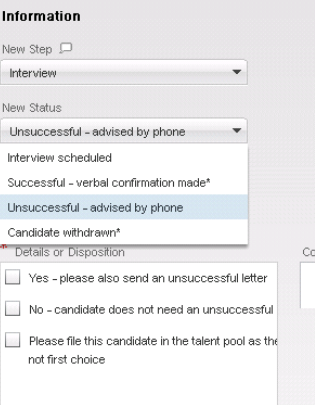

## To Share candidate applications with other people

There may be times when you want to send a copy of the candidate application and CV to other staff members – eg: those who will be on the interview panel. Note – if you select multiple candidates, the system will send one email per candidate to the user(s) selected.

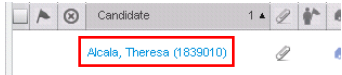
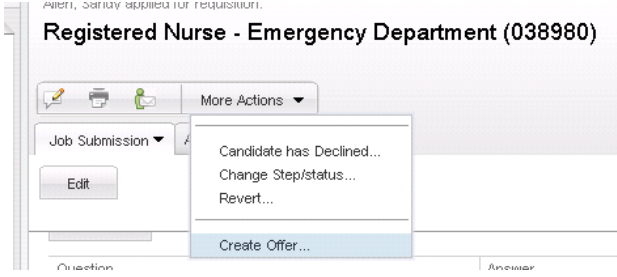
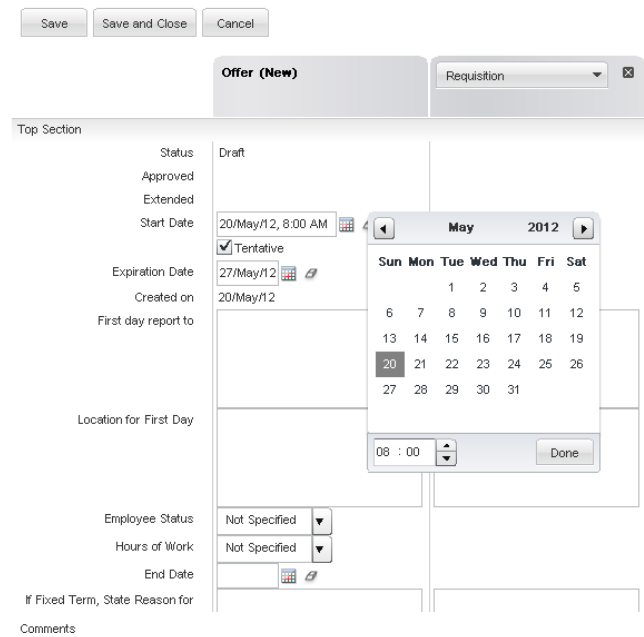
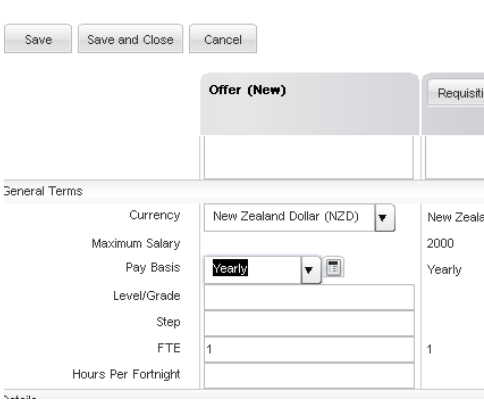
<p>From the candidate list page,</p> <ul style="list-style-type: none"> <li>• hover over the candidate</li> <li>• Tick the box next to their name(s)</li> </ul>	
<ul style="list-style-type: none"> <li>• Click on the shortcut icon to share information</li> </ul>	
<ul style="list-style-type: none"> <li>• If the person is a hiring manager at the DHB, search for their name using the <u>Quick Finder</u></li> <li>• Click on <u>Select</u> next to their name</li> </ul>	
<ul style="list-style-type: none"> <li>• Otherwise, type in their email address. If more than 1 address, use a <u>comma</u> to separate the addresses.</li> </ul>	
<ul style="list-style-type: none"> <li>• Click on <u>Next</u></li> </ul>	
<ul style="list-style-type: none"> <li>• Untick <u>Candidate Info</u> and <u>References</u></li> <li>• Scroll down and check that <u>Offers</u> is unticked.</li> <li>• Scroll down and untick <u>History</u></li> </ul>	
<ul style="list-style-type: none"> <li>• In the <u>comments</u> box, type in a message that will appear in the body of the email</li> </ul>	
<ul style="list-style-type: none"> <li>• Click on <u>Share</u>.</li> <li>• The person will now receive a email per candidate with their details.</li> </ul>	

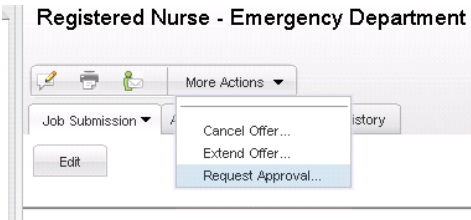
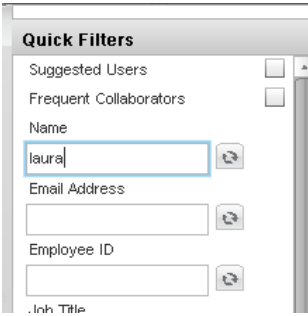
## After interviews: To identify successful candidate for Offer & unsuccessful candidates

<ul style="list-style-type: none"> <li>Log into Taleo from the intranet</li> </ul>	
<ul style="list-style-type: none"> <li>From your homepage, identify the requisition</li> <li>Click on the number next to the requisition.</li> </ul>	
<ul style="list-style-type: none"> <li>In the <u>Selection Workflow</u>,</li> <li>Click on <u>Interview</u></li> </ul>	
<ul style="list-style-type: none"> <li>Select the successful candidate(s) by hovering over their name and then ticking the box to the left of their name</li> </ul>	
<ul style="list-style-type: none"> <li>Select <u>More actions</u> &gt; <u>Change step/status</u></li> </ul>	
<ul style="list-style-type: none"> <li>A pop-up box will appear. The New Status field should automatically show <b>Successful – verbal confirmation made</b></li> <li>Under <u>Additional Information</u> confirm how many reference checks have been completed by ticking the relevant box(es).</li> <li>Write comments if necessary</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Save and Continue</u></li> </ul>	
<ul style="list-style-type: none"> <li>This automatically brings the candidates onto the next step: <b>Offer to be made.</b></li> <li>Click on <u>Save and Close</u></li> </ul>	

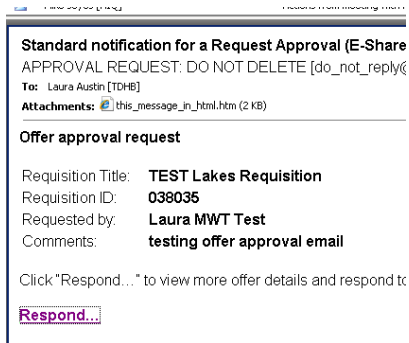
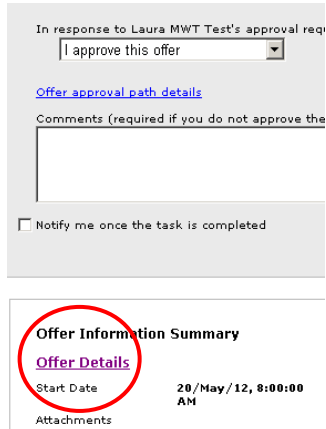
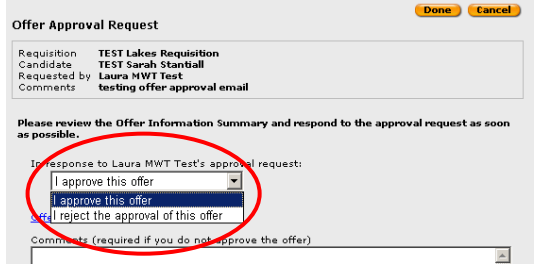
For the Unsuccessful Candidates	
<ul style="list-style-type: none"> <li>Select the successful candidate(s) by hovering over their name and then ticking the box to the left of their name</li> </ul>	
<ul style="list-style-type: none"> <li>Select <u>More actions</u> &gt; <u>Change step/status</u></li> </ul>	
<ul style="list-style-type: none"> <li>A pop-up box will appear. Change the New Status to <b>Unsuccessful – advised by phone</b></li> <li>Identify under <u>Additional Information</u> whether you would like a confirmation email to be sent to the candidate</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Save and Close</u> (bottom right)</li> </ul>	

## To Provide the Offer details

<p>Click on the name of the successful candidate to go into their file</p>	
<ul style="list-style-type: none"> <li>Click on <u>More Actions</u></li> <li>Select <u>Create Offer</u>. This will bring you to the offer grid</li> <li><i>If the <u>Create Offer</u> option does not appear, please check that the candidate is on the <b>Offer to be made</b> status, and that you are in their candidate file</i></li> </ul>	
<p>Click on <b>F11</b> on your keyboard. <i>This will make the grid larger and easier to use</i></p>	
<ul style="list-style-type: none"> <li>Click on <u>Start Date</u>. A calendar will appear. Select the correct start date.</li> <li>If Start Date is not yet confirmed, leave the <u>tentative</u> box ticked.</li> <li>If Start Date is confirmed, then untick the <u>tentative</u> box.</li> </ul>	
<ul style="list-style-type: none"> <li>Work your way down the grid by using the scroll on the right hand side.</li> <li>Complete the fields that are relevant. If they are not relevant, leave them blank.</li> <li>Note: Currency = New Zealand Dollars. Pay Basis = Yearly.</li> <li>Once complete, click on <u>Save and Close</u>.</li> </ul>	

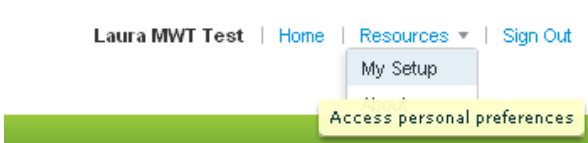
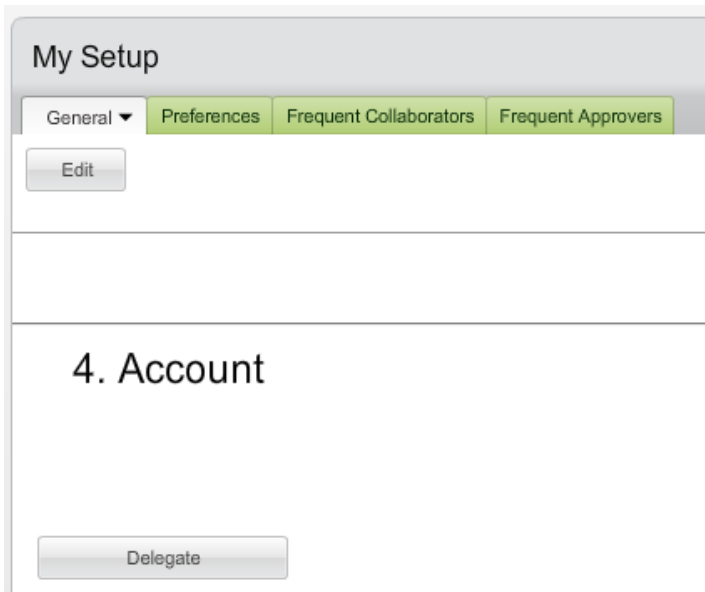
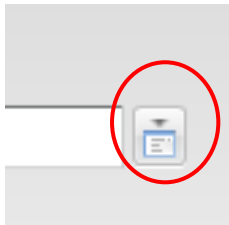
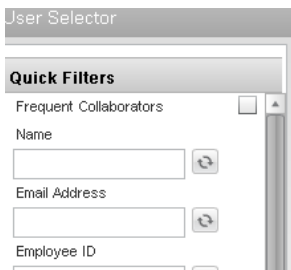
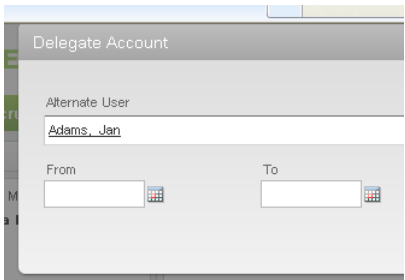
<ul style="list-style-type: none"> <li>Click on <b>F11</b> on keyboard to get the screen back to normal</li> </ul>	
<ul style="list-style-type: none"> <li><b>If Approval is required:</b> <ul style="list-style-type: none"> <li>Click on <u>More Actions</u></li> <li>Click on <u>Request Approval</u></li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>Use <u>Quick Filters</u> to find your approver</li> <li>Click on <u>Select</u> next to their name</li> </ul>	
<ul style="list-style-type: none"> <li>Type in some <u>Comments</u>. (mandatory)</li> <li>Click on <u>Done</u></li> </ul>	
<ul style="list-style-type: none"> <li>Once approved, you will be notified by email.</li> <li>The recruiter will then prepare the offer letter.</li> </ul>	
<ul style="list-style-type: none"> <li><b>If Approval is not required:</b></li> </ul>	Email the recruiter to notify them that the offer grid is completed and ready for an offer letter.



## Approving Offers

<ul style="list-style-type: none"> <li>• Manager will receive an email</li> <li>• Click on <u>Respond</u></li> </ul>													
<ul style="list-style-type: none"> <li>• A window will open in Internet Explorer.</li> <li>• Top Section – your decision</li> <li>• Bottom Section – links to the following: <ul style="list-style-type: none"> <li>○ Offer details</li> <li>○ Requisition details</li> <li>○ Successful Candidate details</li> </ul> </li> </ul>													
<ul style="list-style-type: none"> <li>• Click on <u>Offer details</u></li> </ul>													
<p>(depending on your version of Internet Explorer)</p> <ul style="list-style-type: none"> <li>• Click on the new tab</li> <li>• Review offer details</li> <li>• Close tab</li> </ul>	<h3>Offers</h3> <table border="1"> <thead> <tr> <th colspan="2">Offer 1 (Current)</th> </tr> </thead> <tbody> <tr> <td>Top Section</td> <td></td> </tr> <tr> <td>Status</td> <td>Approval in Progress</td> </tr> <tr> <td>Start Date</td> <td>20/May/12, 8:00 AM</td> </tr> <tr> <td>Tentative</td> <td>true</td> </tr> <tr> <td>Expiration Date</td> <td>27/May/12</td> </tr> </tbody> </table>	Offer 1 (Current)		Top Section		Status	Approval in Progress	Start Date	20/May/12, 8:00 AM	Tentative	true	Expiration Date	27/May/12
Offer 1 (Current)													
Top Section													
Status	Approval in Progress												
Start Date	20/May/12, 8:00 AM												
Tentative	true												
Expiration Date	27/May/12												
<ul style="list-style-type: none"> <li>• Back in the first screen, make decision</li> <li>• Click on drop down and select</li> <li>• Add <u>Comments</u> if necessary</li> <li>• Click on <u>Done</u></li> </ul>													
<ul style="list-style-type: none"> <li>• The recruiter and hiring manager will then receive an email with your decision.</li> </ul>													



## For a user to setup their own delegation to another user in Taleo.

<ul style="list-style-type: none"> <li>Log into Taleo</li> </ul>	
<ul style="list-style-type: none"> <li>Click on <u>Resources</u> (at the very top right hand corner)</li> <li>Select <u>My Setup</u></li> </ul>	
<ul style="list-style-type: none"> <li>Scroll down the bottom of the <u>General</u> tab and you should see <b>Account</b></li> <li>Click on <u>Delegate</u></li> </ul>	
<ul style="list-style-type: none"> <li>Type in part of the name of the user you want to delegate to. Select their name if it appears.</li> <li>If it does not appear click on the drop down icon on the right</li> </ul>	
<ul style="list-style-type: none"> <li>User the <u>quick filter</u> to search for the user</li> <li>Click on select next to their name</li> </ul>	
<ul style="list-style-type: none"> <li>Enter in the <u>From</u> and <u>To</u> dates for the delegation to be effective from</li> </ul>	


<ul style="list-style-type: none"> <li>Click on <u>Done</u></li> </ul>	
<ul style="list-style-type: none"> <li>A pop up will ask you to confirm that this is correct.</li> <li>Click on Yes</li> </ul>	<p>Delegation is now setup and will be effective from the dates specified</p>
<ul style="list-style-type: none"> <li>Click on <u>Recruiting</u></li> </ul>	
<p>From the effective dates, the delegated person will receive any approval emails that may be sent to you</p>	


## Duplicating Requisitions

- Open the requisition you want to duplicate

Show information for  
I own

Status

ID	Req. Title	Status
032501	Cleaner 	0 Draft
032540	Waikato DHB staff member	0 Open
032541	Waikato DHB Registered Nurse	4 Open
032546	Midwife - PT .5	0 Open
032547	Tairāwhiti DHB Registered Nurse	4 Open
032548	Bay of Plenty DHB Registered Nurse	4 Open
032549	Lakes DHB Registered Nurse	4 Open
032550	Midwife - .5 FTE	0 Open

- Click on the Duplicate icon  below the requisition title
- This creates a copy of the original requisition

Waikato DHB Registered Nurse (032541)

8 out of 20 requisitions

 More Actions

Requisition Attachments History Reports

1. Profile

Owners

Recruiter Hiring Manager

- Update the new requisition by making changes where required
- 'Save and close' the requisition


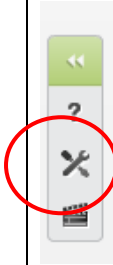
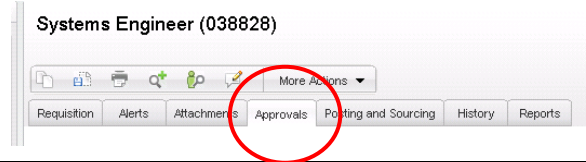
Requisition

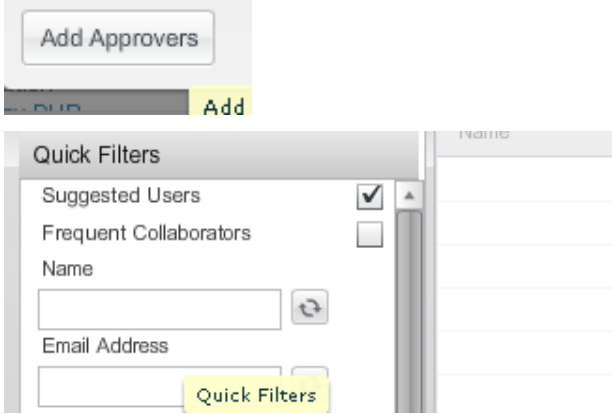
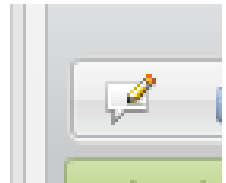
Save Save and Close Cancel

1. Profile

Owners

## Recruitment / Taleo Frequently Asked Questions (FAQ)

Ref	Question	Answer	Screenshot
1	I've done my requisition but when I go 'More Actions' I cannot see the option to 'Request Approval'	Click on <u>Edit</u> to go back into your requisition. Click on the <u>diagnostic tool</u> icon on the right hand side, and this will tell you which fields still need to be updated/populated for the requisition to proceed to the next stage.	
2	I've done my requisition but when I go to 'Save and Close' it comes up with an error message.'	The error message will tell you which fields still need to be populated before the requisition can be saved. Also use the diagnostic tool on the right hand side to see which fields need updating before the requisition can be saved.	
3	How can I see where the requisition is in the approval path?	<ul style="list-style-type: none"> <li>Go to the requisition</li> <li>Click on the <u>Approvals Tab</u></li> <li>This will show you where it is at.</li> </ul>	
4	I received a email to say my requisition has been rejected by one of the approving managers. What do I do?	<ol style="list-style-type: none"> <li>Have a conversation with the manager as to why they rejected the requisition.</li> <li>If agreed, go back into Taleo and edit the requisition with new information.</li> <li>Resubmit the requisition for approval</li> </ol>	

Ref	Question	Answer	Screenshot
5	An approving manager is/has gone on holiday – how do we get it approved?	<ul style="list-style-type: none"> <li>The approving manager can setup in Taleo a <a href="#">delegation</a> to another user who would then receive the approving requests via email and would be able to approve on the managers behalf.</li> <li>If this wasn't setup before the manager went on holiday, contact the recruiter and they can set it up.</li> <li>The Hiring Manager can also go back into their requisition and <a href="#">Amend the Approval path</a>, unless the pending requisition is sitting with the manager they want to amend. In this case, contact the recruitment team.</li> </ul>	
6	I'm trying to select approvers for the requisition (or Offer approval) and I do not have any names appearing in the list	<ol style="list-style-type: none"> <li>After you have gone 'More Actions &gt; Request Approval', at the bottom of the screen there will be a button called <a href="#">Add Approvers</a>. Click on this</li> <li>This will bring up a section at the bottom. Untick the <a href="#">Suggested Users</a> box on the left hand side. All the users should then pop up on the right hand side.</li> <li>Find your approvers and click on select by their name. They will then appear in the top section</li> <li>Complete approval process by adding comments and then click on Done.</li> </ol>	
7	How can I add comments to the candidate file?	<ul style="list-style-type: none"> <li>Click into the candidate file, and go to the History Tab.</li> <li>In here there should be a toolbar, and the first icon is a speech bubble with a pencil. Click on this.</li> <li>Type in your comment and click on Done</li> </ul>	

## Quick Reference Sheet

### General Definitions

Requisition Form:	The online form that provides details and justification for the vacancy. The Requisition replaces the hard copy form which may have been known as a 'Request to Recruit' or 'Justification to Recruit'
Career Section:	The section on your DHB's website or intranet which displays current vacancies
Dashboard:	The home screen in Taleo. Access the Dashboard by clicking on 'Recruiting' in the top-left corner

### Definitions for Requisition

Job Field:	The occupation group the vacancy belongs to. Candidates will use this to filter for vacancies in the career section. Choose the closest match
Hiring Manager:	Manager responsible for the recruitment process
Hiring Manager Assistant:	Administrator, PA or second person who may assist you during the process
Recruiter:	Recruiter based in HR that looks after recruitment for your service and will support you through the recruitment process
Requisition Title:	The approved title that matches the position description to be used in advertising
Title (by Manager):	A title that is recognisable for the hiring manager, may include who the position is replacing, total FTE, fixed term, casual etc
Position Code:	Position Number for the position you are recruiter to. This can be accessed from your budget s/sheet eg: nurses 2210, admin 2825. If unsure, or a new position, <b>please contact recruitment.</b>