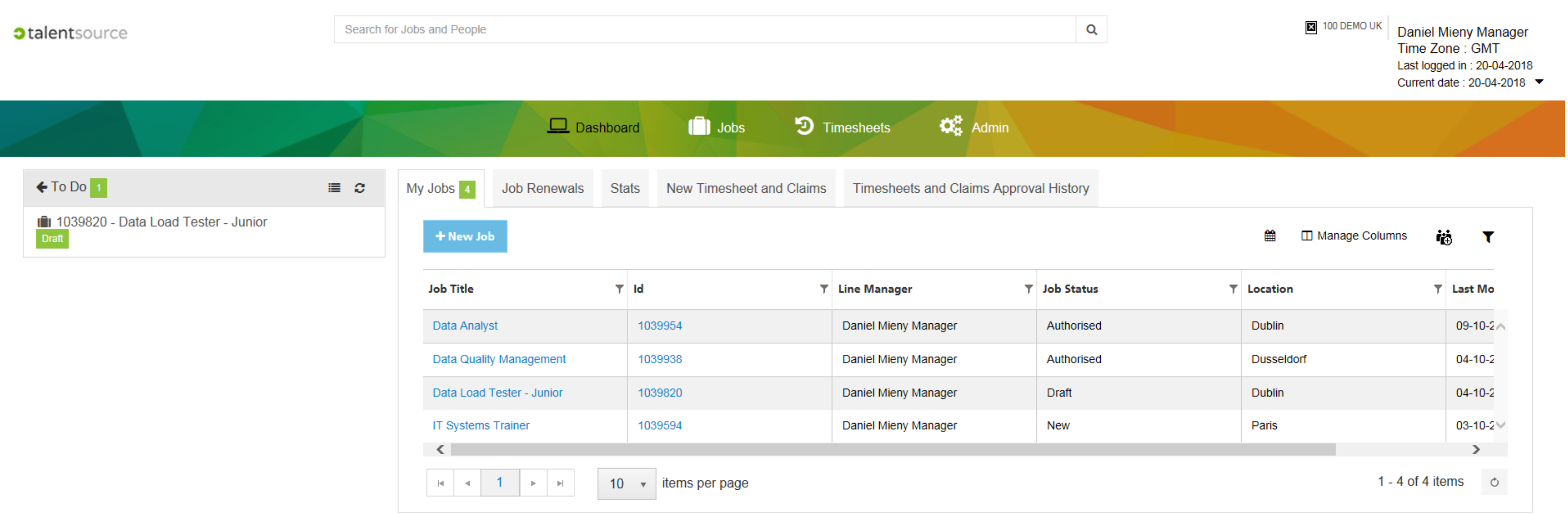
talentsource

RESOURCESOLUTIONS

001 Dashboard and console navigation



Context

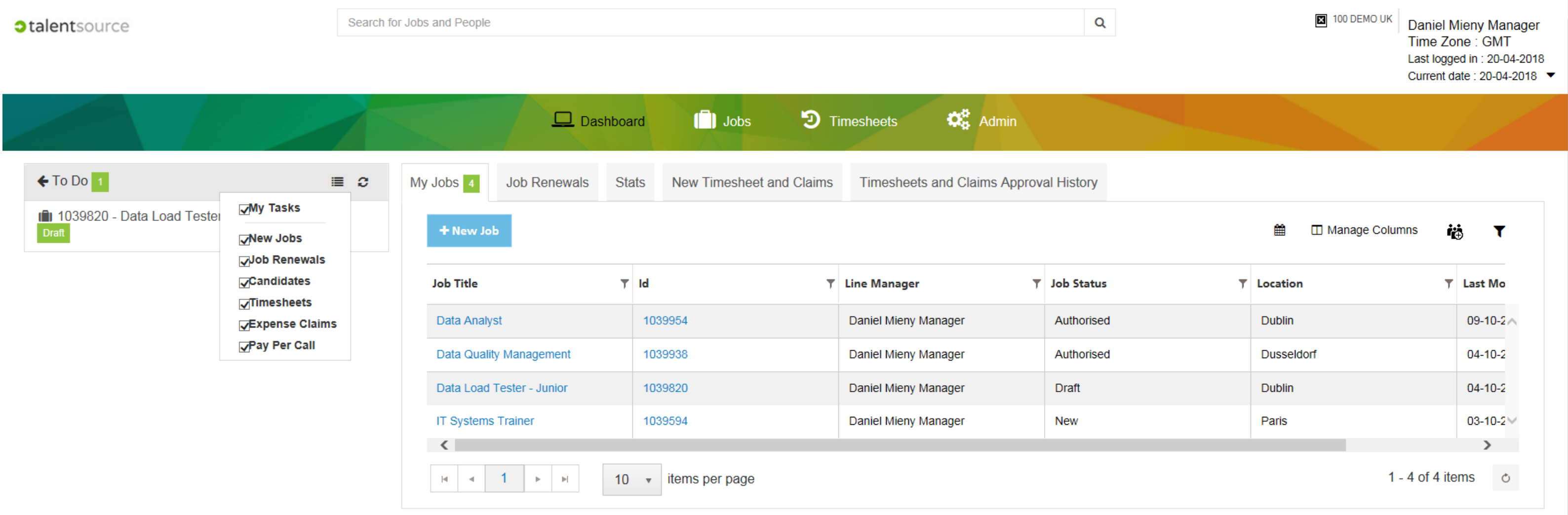
talentsource has been designed with our users in mind. We want you to be able to access all the information you need to accomplish your recruitment goals, in the most efficient and user friendly way, while maintaining high security and a modern user interface.

There are features in the application like the dashboard, console and search that have been created to help you achieve this. These include:

1. **Dashboard**: refers to the main screen you will see when you sign in to the application.
2. **Console:** is the area containing your information and account settings.
3. **Navigation bar:** The strip at the top of the application with links to the main areas.
4. **Search:** the single search for the entire application, search by job name, id or candidate.

This guide has been created to introduce you to the features available on your dashboard as a user and the preferences you can adjust in your console.*Only use dashboard items applicable for you.*

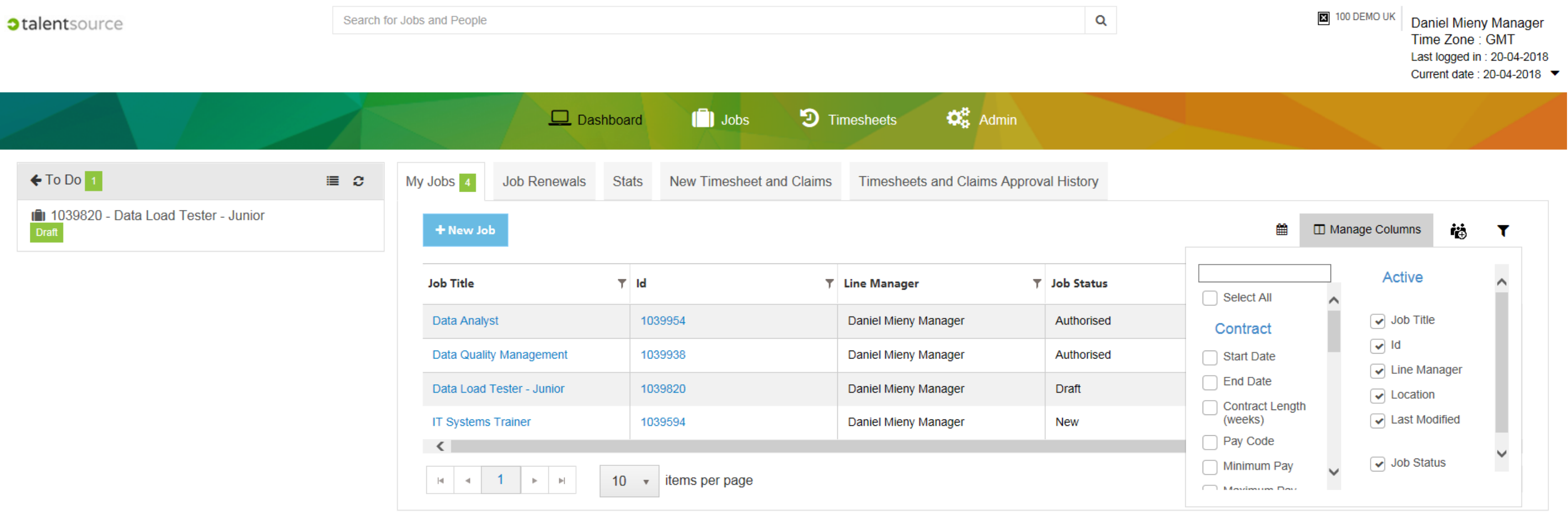
The Dashboard



Using the To do list

1. **talent**source includes a sidebar. This is your **To Do** list.
2. There are a number of tasks you will be able to access from the **To Do** list by clicking on the item, these include:
   a) Authorising timesheets.
   b) Amending a job request.
   c) Authorising a new role.
   d) Reviewing a candidate.
   e) Feeding back on an interview.
   f) Processing a renewal.
3. If you click on the **list** button on the To Do list it will display the task groups, these are:
   a) New Jobs (any task related to a new **job request**).
   b) Job Renewals (any task related to a **renewal**).
   c) Candidates (this includes **CV's** and interview records).
   d) Timesheets (this includes **Timesheets, Expenses** and **Pay Per Calls**).
4. You can choose to turn these **on** and **off**.
5. Clicking **More** will display additional tasks.
6. You can minimise the **To Do** list by clicking the **left arrow** in the application.
7. The **refresh** button will update your **To Do** list in real time.

Managing your My Jobs columns



1. When you first access **talent**source the **My Jobs / Job Renewals** tab will be displayed with the default column options (you can change this to display **Stats** in your preferences [see page 7], in this case click on the My Jobs / Job Renewals tab).
2. You can **change the columns displayed** by clicking on **Manage Columns.**
3. **Select** the columns you want to make active or inactive.
4. Column options for **My Jobs** include (*the first 4 are active by default):

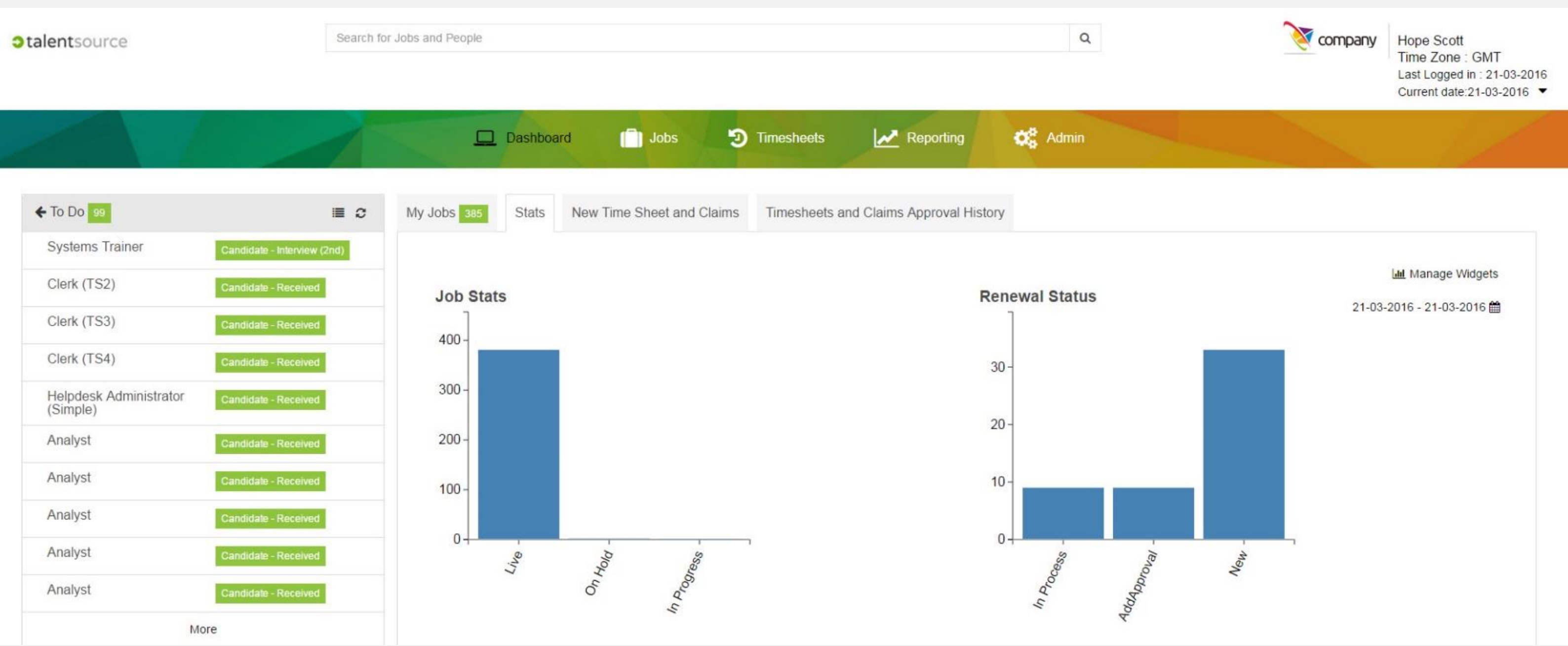
- Name.*
- ID.*
- Location.*
- Modified Date.*
- Start Date.
- End Date.
- Contract Length (weeks).
- Pay Code.
- Minimum Pay.
- Maximum Pay.
- Overview.
- Create Date.
- Department.
- Type.
- Cost Code.
- Skill Detail.
- Skill Band.
- Number of Open Positions.
- Currency.
- Line Manager.
- Number of Candidates.
- New Applicants.
- Interviews Arranged.
- Rejected CVs.
- Current Approver.
- Authorizing Manager.
- Job Status.
- Status Date.

5. Column options for **Job Renewals** include (all columns are active by default):

- Contractor Name.*
- Name.*
- Job ID.*
- Renewal Status.*
- End Date. *

- Recruiter. *
- Current Approver. *
- Line Manager. *

6. Do not be overwhelmed by the amount of options, the manage columns menu includes a **search filter** to find a specific column to be made active.
7. The updates are applied **immediately**.
8. Please note you may have to **scroll from left to right** if you select more than 5 columns.



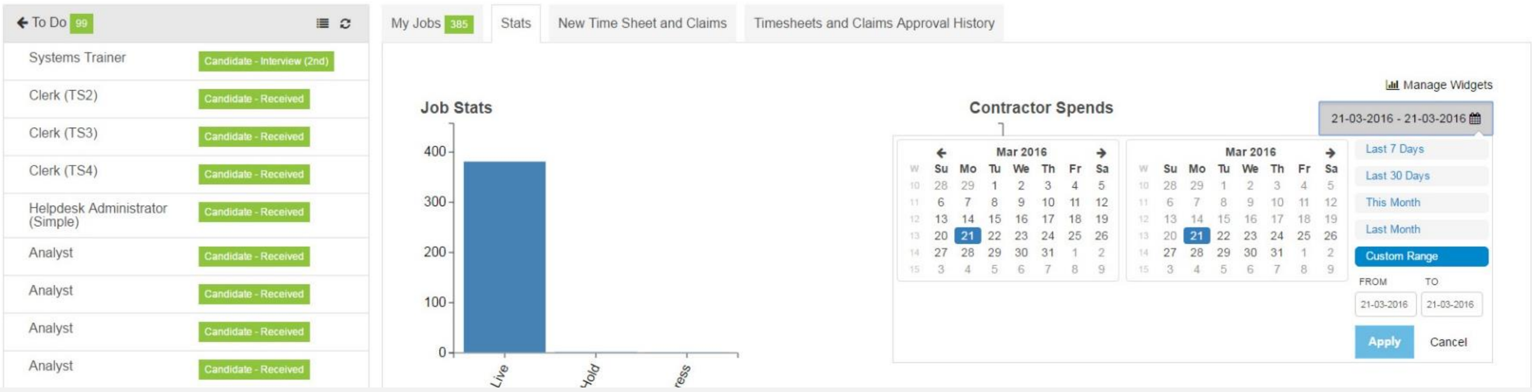
Using Stats

The **Stats** tab provides you with live data using interactive widgets to display everything from Job statuses to contractor spend. It can be accessed by clicking on **Stats** from the Dashboard.

Manage Widgets

1. Click on the **Manage Widgets** button to turn widgets on or off. Possible widgets include:
   a) Job Stats.
   b) Renewal Status.
   c) Timesheet Approval Count.
   d) Jobs by Location.
   e) View Interviews by Date Range.
2. This menu includes a **select all** option and a **search** filter.

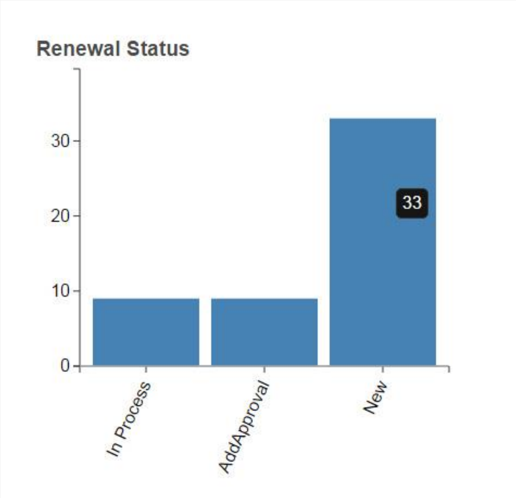
3. Clicking on the **calendar** button will allow you to change the **date range** for the data displayed in that widget.



Using the data

4. These stats are not just good looking visual displays, they are **active widgets** drilling down to real reports which link to your actual tasks and items in the application.

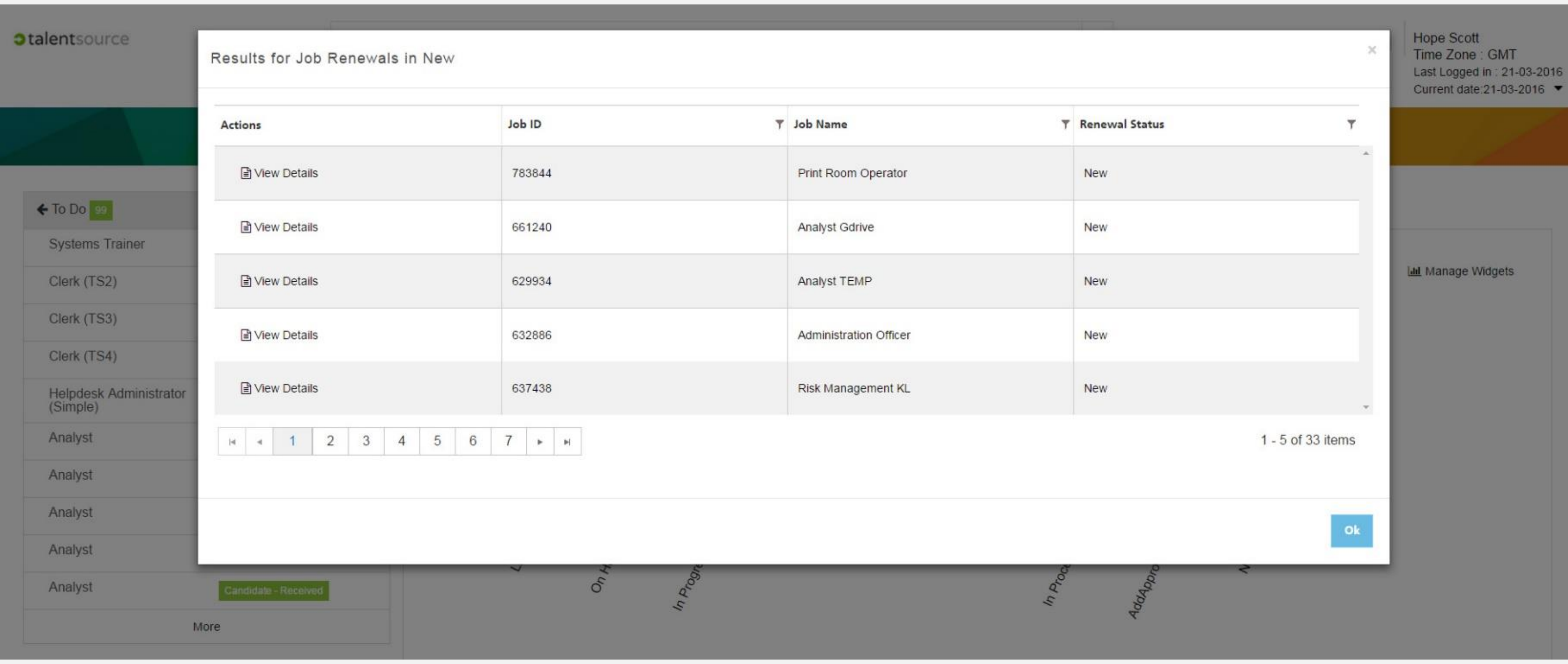
5. When you roll over a **series** of data from the chart a **number value** will be displayed to indicate the amount of



underling records the data is referring to (in this example 33 records will be displayed).

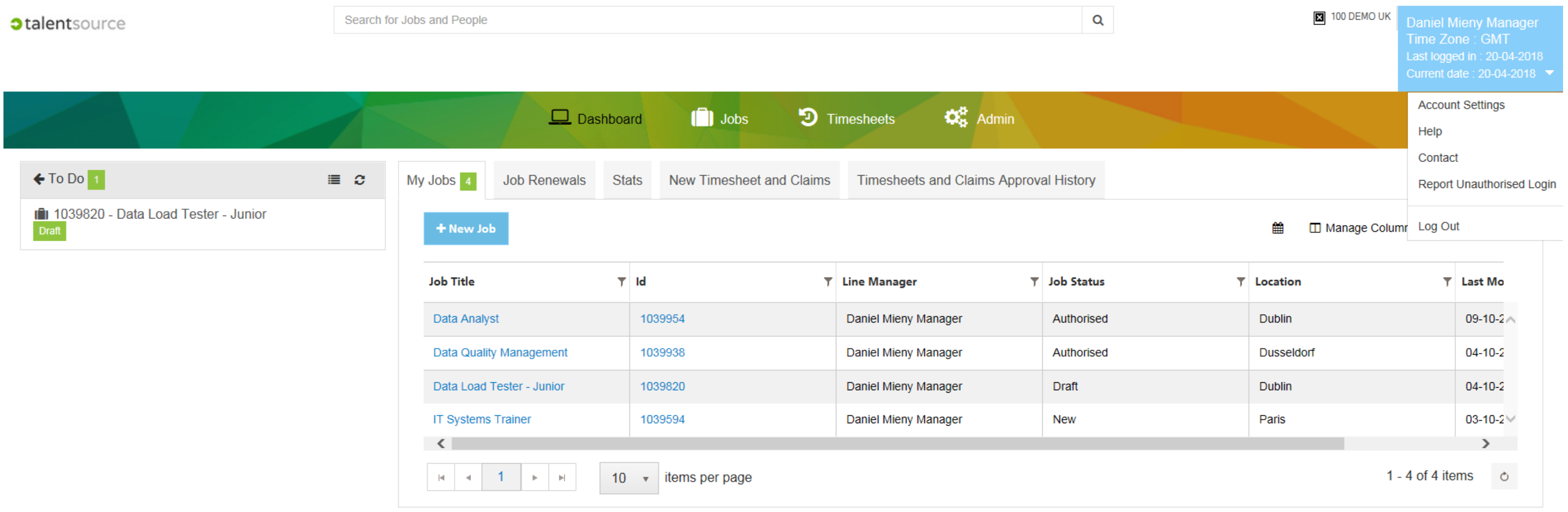
6. Clicking on this will display the actual records in **talent**source and will give you the option to click on **view details** to load an actual task or record.

7. If you do not want to see any of the details you can just click on **OK** to clear the pop up window.

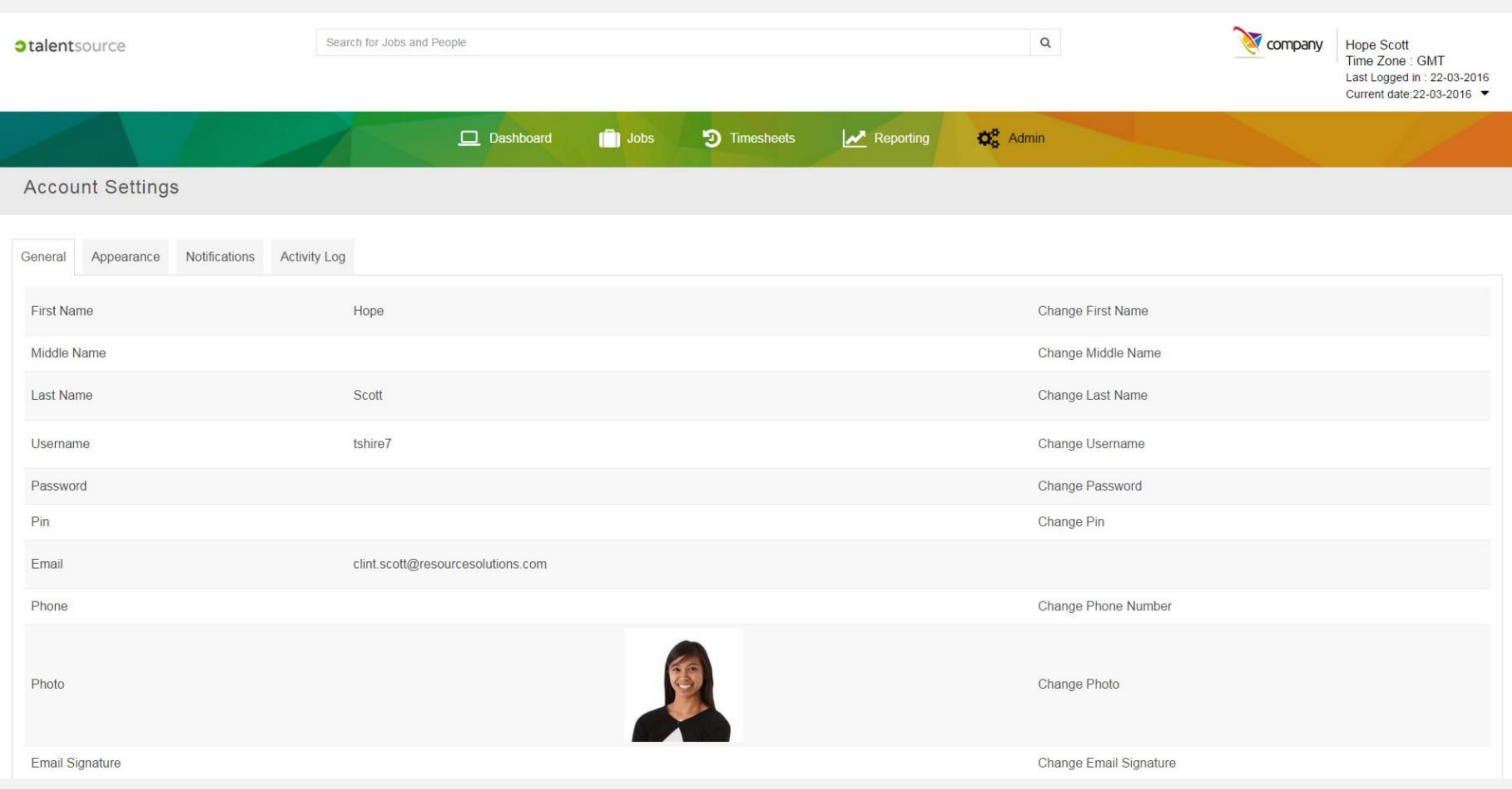


The Console

Editing Account Settings



1. The console will allow you to **edit** your own personal details and preferences.
2. Click on your name in the top right hand of the screen then select **Account Settings** from the dropdown menu.



3. From this **General** tab you will be able to **change** details including the following:

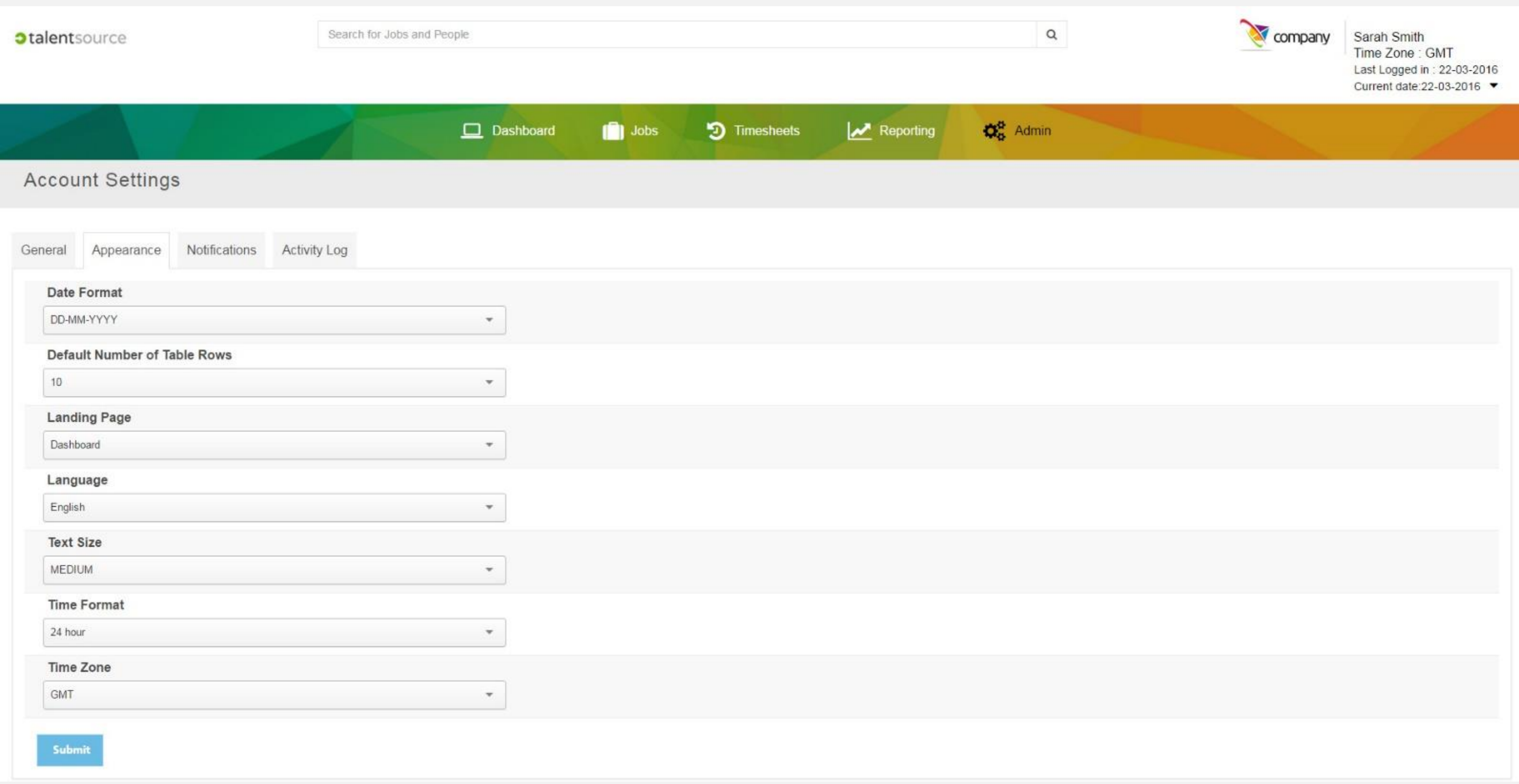
   a) First, Middle and Last Names.

   b) Username, Password and Pin.

   c) Phone Number.

d) Photo.

e) Email Signature.



Changing the Appearance

4. On the **Appearance** tab you can **change** the following **visual** options:

    a) Date Format (DD-MM-YYYY or MM-DD-YYYY).

    b) Default Number of Table Rows (The default is 10).

    c) Landing Page (Dashboard or Stats).

    d) Language (English, Mandarin, Bahasa, Japanese and Korean).

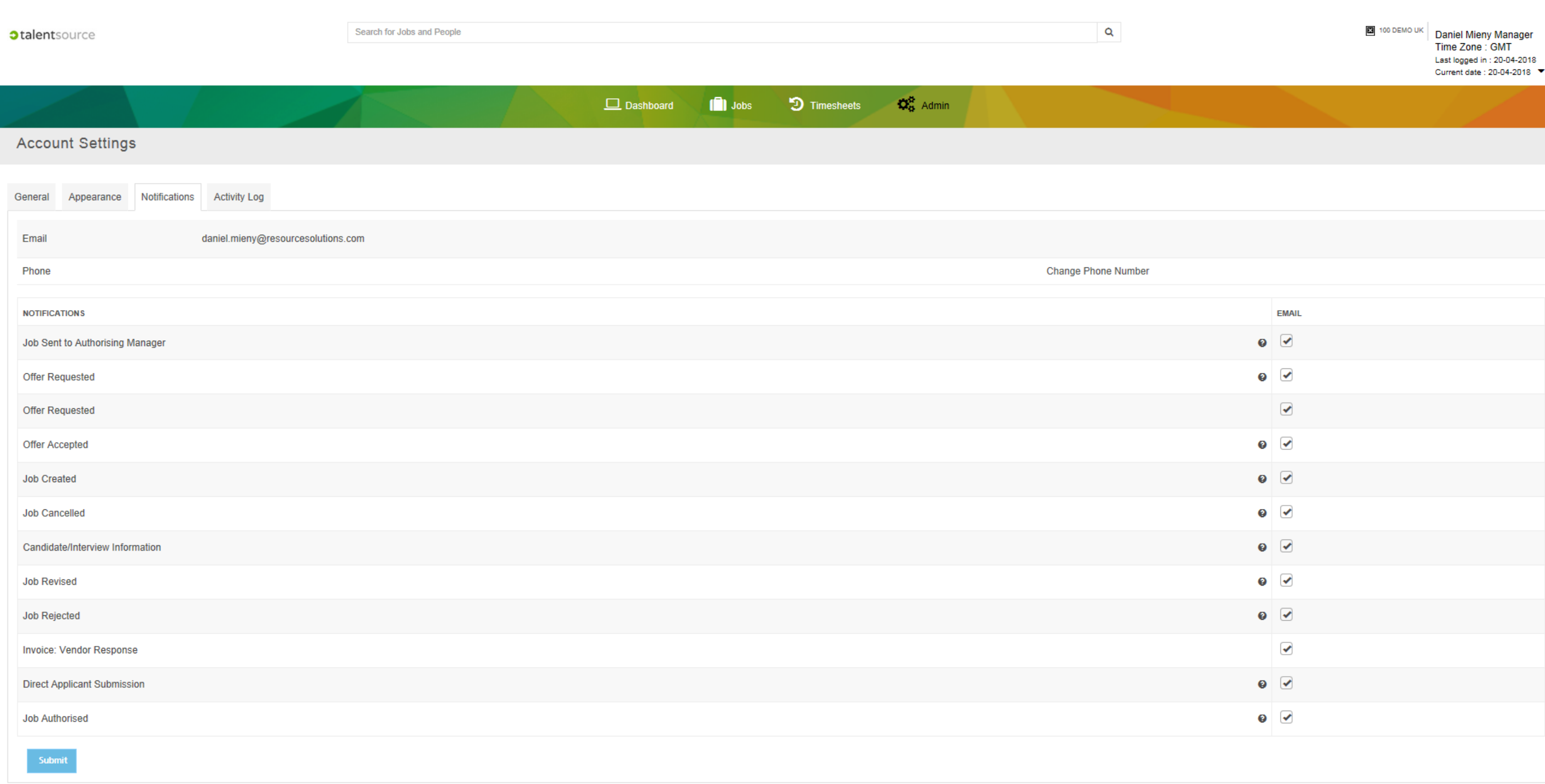
    e) Text Size (Small, Medium or Large).

    f) Time Format (24 hour or 12 hour).

    g) Time Zone (GMT etc.).

5. Click **Submit** to confirm all your changes.

Setting Notifications



6. **talent**source has been set up to notify you by **email** at key points in the recruitment life cycle. You have the ability to decide which, if any, of these notifications you want to receive using the **Notification** tab.

7. Options include:

   a) Offer Requested. (A candidate has been made an offer)

   b) Job Revised. (A job request you raised has been revised by the recruitment team)

   c) Job Cancelled. (A job request you raised has been cancelled by the recruitment team or authorisers)

   d) Job Authorised. (A job request you raised has been authorised by all authorisers)

   e) Job Sent to Authorising Manager. (A job request you raised has been sent to an authoriser)

   f) Job Rejected. (A job request you raised has been rejected by an authoriser)

   g) Job Created. (A job has been created for you by the recruitment team)

   h) Candidate/Interview Information. (Details from an interview set up for you by the recruitment team)

   i) Direct Applicant Submission. (A directly sourced candidate has applied for the role)

   j) Invoice: Vendor Response. (The vendor’s response to an invoice)

   k) Offer Accepted. (The candidate has accepted the extended offer)