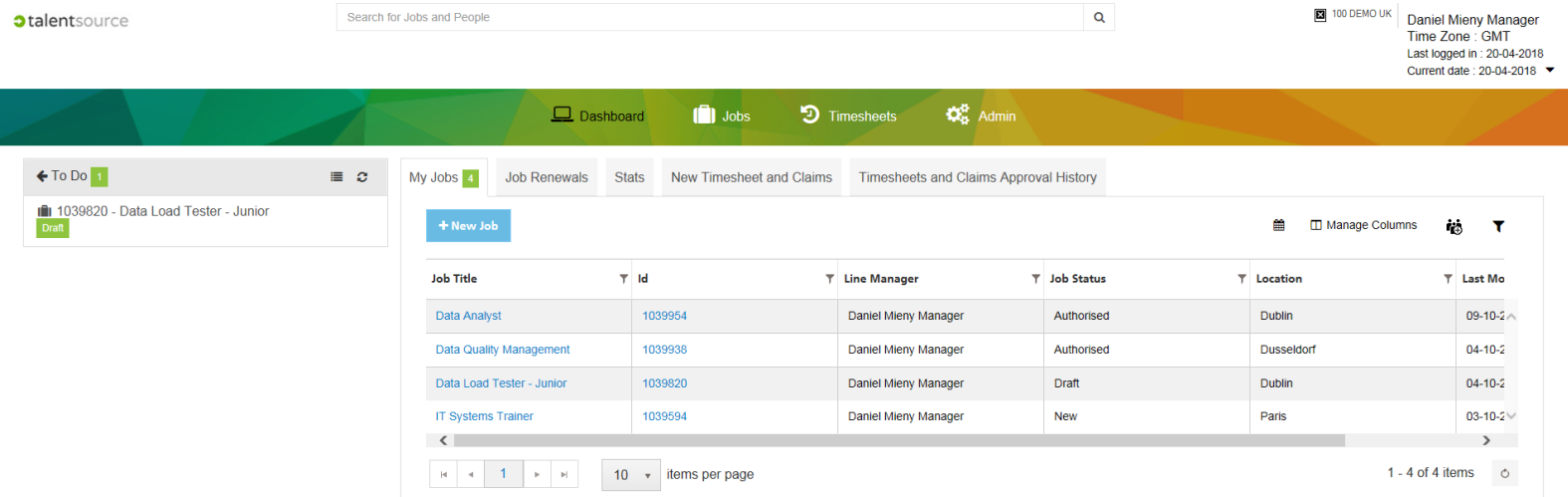


001 Dashboard and console navigation



The screenshot shows the talentsource dashboard interface. At the top, there is a search bar labeled "Search for Jobs and People" and a user profile for "Daniel Miemy Manager" with details like "Time Zone : GMT", "Last logged in : 20-04-2018", and "Current date : 20-04-2018". Below the search bar is a navigation bar with tabs: "Dashboard", "Jobs", "Timesheets", and "Admin". The "Jobs" tab is active, showing a sub-navigation bar with "My Jobs", "Job Renewals", "Stats", "New Timesheet and Claims", and "Timesheets and Claims Approval History". The "My Jobs" sub-tab is selected, displaying a table of jobs. The table has columns for "Job Title", "Id", "Line Manager", "Job Status", "Location", and "Last Mo". The jobs listed are "Data Analyst", "Data Quality Management", "Data Load Tester - Junior", and "IT Systems Trainer". A "To Do" list on the left shows a task "1039820 - Data Load Tester - Junior" with a "Draft" status. At the bottom, there is a pagination bar showing "10 items per page" and "1 - 4 of 4 items".

Job Title	Id	Line Manager	Job Status	Location	Last Mo
Data Analyst	1039954	Daniel Miemy Manager	Authorised	Dublin	09-10-2
Data Quality Management	1039938	Daniel Miemy Manager	Authorised	Dusseldorf	04-10-2
Data Load Tester - Junior	1039820	Daniel Miemy Manager	Draft	Dublin	04-10-2
IT Systems Trainer	1039594	Daniel Miemy Manager	New	Paris	03-10-2

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

The screenshot shows the talentsource dashboard. At the top, there is a search bar labeled 'Search for Jobs and People' and a user profile for Daniel Miemy Manager. The main navigation bar includes links for Dashboard, Jobs, Timesheets, and Admin. On the left, a 'To Do' sidebar lists tasks like '1039820 - Data Load Tester' and 'Draft'. A dropdown menu for 'My Tasks' is open, showing options like 'New Jobs', 'Job Renewals', 'Candidates', 'Timesheets', 'Expense Claims', and 'Pay Per Call'. The main content area displays a table titled 'My Jobs' with columns for Job Title, Id, Line Manager, Job Status, Location, and Last Mo. The table lists four jobs: Data Analyst, Data Quality Management, Data Load Tester - Junior, and IT Systems Trainer. At the bottom, there is a pagination bar showing '10 items per page' and '1 - 4 of 4 items'.

Job Title	Id	Line Manager	Job Status	Location	Last Mo
Data Analyst	1039954	Daniel Miemy Manager	Authorised	Dublin	09-10-2
Data Quality Management	1039938	Daniel Miemy Manager	Authorised	Dusseldorf	04-10-2
Data Load Tester - Junior	1039820	Daniel Miemy Manager	Draft	Dublin	04-10-2
IT Systems Trainer	1039594	Daniel Miemy Manager	New	Paris	03-10-2

Using the To do list

1. **talentsource** 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

The screenshot shows the talentsource dashboard. At the top, there's a search bar and user information: Daniel Mieny Manager, Time Zone: GMT, Last logged in: 20-04-2018, Current date: 20-04-2018. The main navigation bar includes Dashboard, Jobs, Timesheets, and Admin. The 'My Jobs' tab is active, showing a table with columns: Job Title, Id, Line Manager, and Job Status. The table lists four jobs: Data Analyst, Data Quality Management, Data Load Tester - Junior (Draft), and IT Systems Trainer. A 'Manage Columns' sidebar is open on the right, showing options to select or deselect columns. The 'Active' section lists Job Title, Id, Line Manager, Location, Last Modified, and Job Status, all of which are checked.

Job Title	Id	Line Manager	Job Status
Data Analyst	1039954	Daniel Mieny Manager	Authorised
Data Quality Management	1039938	Daniel Mieny Manager	Authorised
Data Load Tester - Junior	1039820	Daniel Mieny Manager	Draft
IT Systems Trainer	1039594	Daniel Mieny Manager	New

1. When you first access **talentsource** 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):

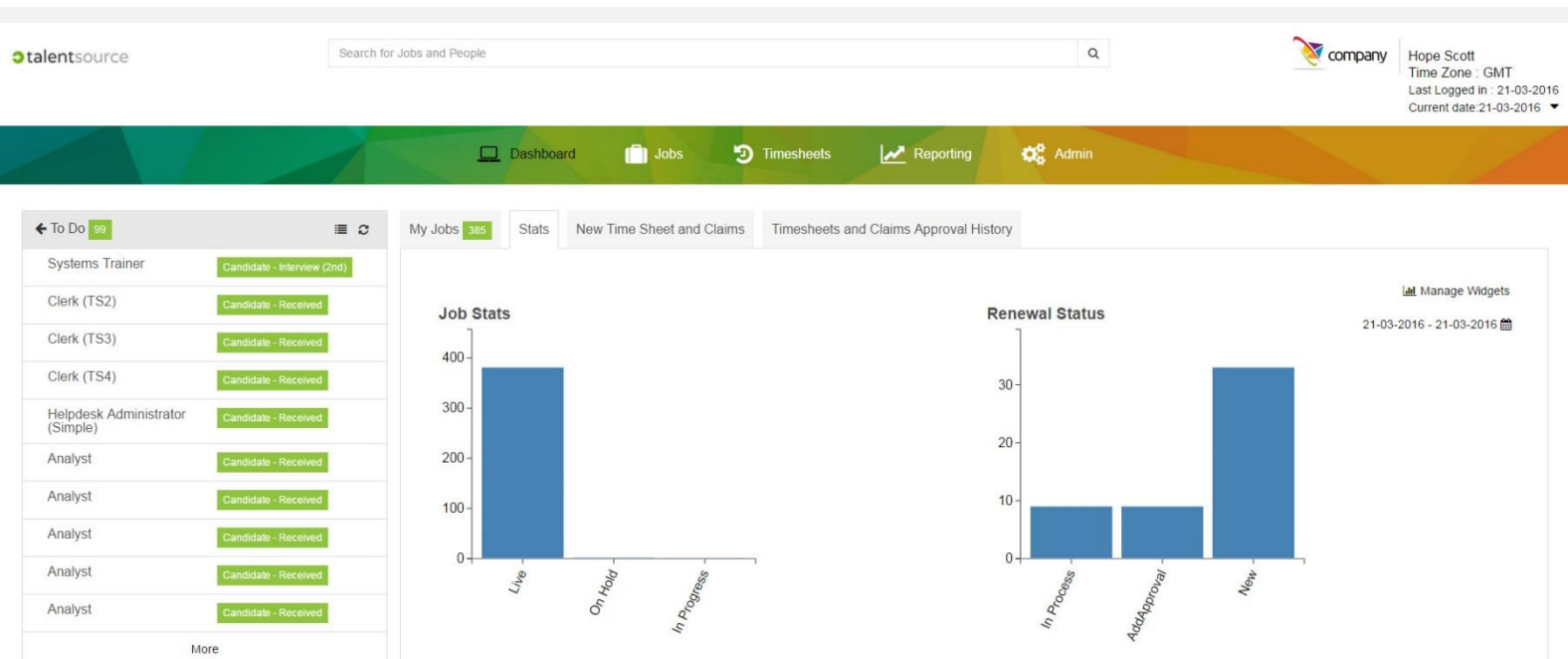
- ▶ Name.*
- ▶ ID.*
- ▶ Location.*
- ▶ Modified Date.*
- ▶ Start Date.
- ▶ End Date.
- ▶ Contract Length (weeks).
- ▶ Pay Code.
- ▶ Minimum Pay.
- ▶ Maximum Pay.
- ▶ Overview.
- ▶ Create Date.
- ▶ Department.
- ▶ Type.
- ▶ Cost Code.
- ▶ Skill Detail.
- ▶ Skill Band.
- ▶ Number of Open Positions.
- ▶ 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.



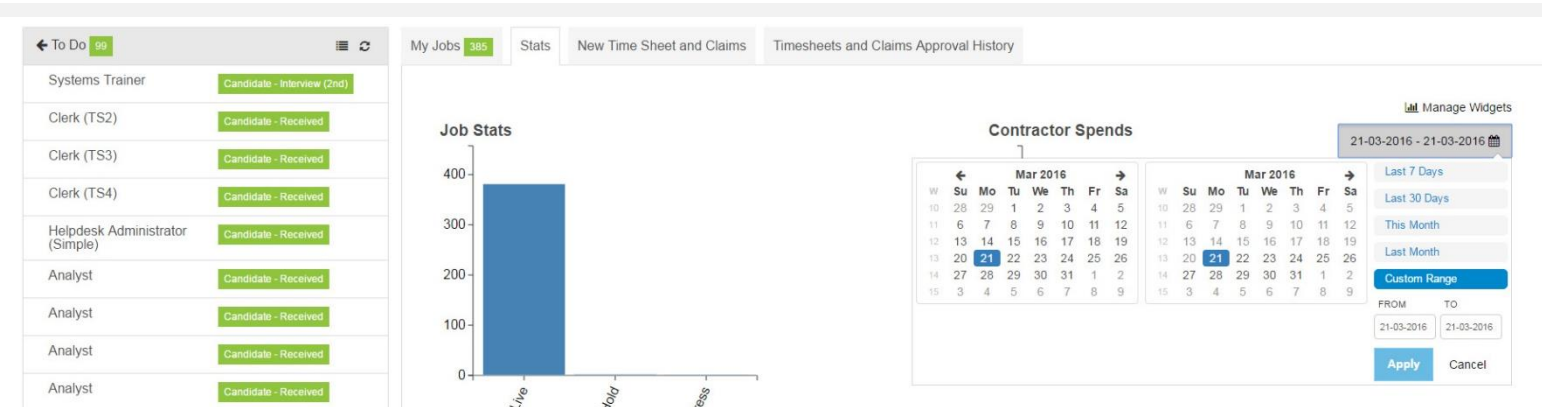
Using Stats

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

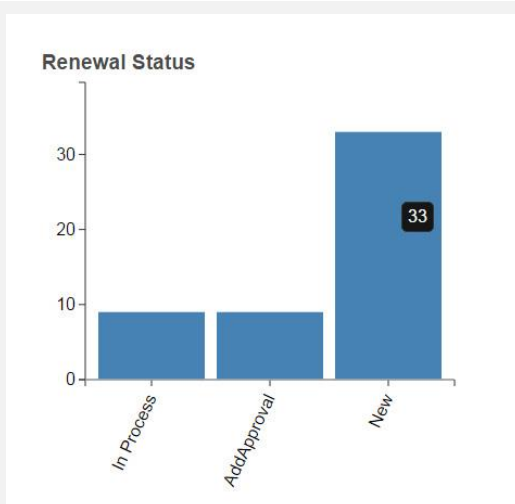
1. Click on the **Manage Widgets** button to turn widgets on or off. Possible widgets include:
 - a) Job Stats.
 - b) Renewal Status.
 - c) Timesheet Approval Count.
 - d) Jobs by Location.
 - e) View Interviews by Date Range.
2. This menu includes a **select all** option and a **search** filter.

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 **talentsource** 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.

Results for Job Renewals in New

Actions	Job ID	Job Name	Renewal Status
View Details	783844	Print Room Operator	New
View Details	661240	Analyst Gdrive	New
View Details	629934	Analyst TEMP	New
View Details	632886	Administration Officer	New
View Details	637438	Risk Management KL	New

1 - 5 of 33 items

Ok

talentsource

← To Do 99

- Systems Trainer
- Clerk (TS2)
- Clerk (TS3)
- Clerk (TS4)
- Helpdesk Administrator (Simple)
- Analyst
- Analyst
- Analyst
- Analyst
- Analyst

Candidate - Received

More

On Hold

In Progress

In Progress

Add Appro

Manage Widgets

Hope Scott
Time Zone : GMT
Last Logged in : 21-03-2016
Current date: 21-03-2016

The Console

Editing Account Settings

talentsource Search for Jobs and People Q

100 DEMO UK Daniel Mieny Manager
Time Zone : GMT
Last logged in : 20-04-2018
Current date : 20-04-2018

Account Settings
Help
Contact
Report Unauthorised Login
Log Out

Dashboard Jobs Timesheets Admin

My Jobs 4 Job Renewals Stats New Timesheet and Claims Timesheets and Claims Approval History

+ New Job Manage Columns

Job Title	Id	Line Manager	Job Status	Location	Last Mo
Data Analyst	1039954	Daniel Mieny Manager	Authorised	Dublin	09-10-2
Data Quality Management	1039938	Daniel Mieny Manager	Authorised	Dusseldorf	04-10-2
Data Load Tester - Junior	1039820	Daniel Mieny Manager	Draft	Dublin	04-10-2
IT Systems Trainer	1039594	Daniel Mieny Manager	New	Paris	03-10-2

10 items per page 1 - 4 of 4 items

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.

talentsource Search for Jobs and People Q

company Hope Scott
Time Zone : GMT
Last Logged in : 22-03-2016
Current date: 22-03-2016

Dashboard Jobs Timesheets Reporting Admin

Account Settings

General Appearance Notifications Activity Log

First Name Hope Change First Name

Middle Name Change Middle Name

Last Name Scott Change Last Name

Username tshire7 Change Username

Password Change Password

Pin Change Pin

Email clint.scott@resourcesolutions.com

Phone Change Phone Number

Photo Change Photo

Email Signature Change Email Signature

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.

The screenshot shows the 'Account Settings' page in the 'talentsource' system. The user is logged in as Sarah Smith, with a time zone of GMT. The page has a navigation bar with links to Dashboard, Jobs, Timesheets, Reporting, and Admin. The 'Account Settings' section is active, and the 'Appearance' tab is selected. The settings are as follows:

- Date Format:** DD-MM-YYYY
- Default Number of Table Rows:** 10
- Landing Page:** Dashboard
- Language:** English
- Text Size:** MEDIUM
- Time Format:** 24 hour
- Time Zone:** GMT

A 'Submit' button is located at the bottom left of the settings form.

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

talentsource

Search for Jobs and People

100 DEMO UK Daniel Miemy Manager
Time Zone : GMT
Last logged in : 20-04-2018
Current date : 20-04-2018

Dashboard Jobs Timesheets Admin

Account Settings

General Appearance **Notifications** Activity Log

Email daniel.miemy@resourcesolutions.com

Phone Change Phone Number

NOTIFICATIONS	EMAIL
Job Sent to Authorising Manager	<input checked="" type="checkbox"/>
Offer Requested	<input checked="" type="checkbox"/>
Offer Requested	<input checked="" type="checkbox"/>
Offer Accepted	<input checked="" type="checkbox"/>
Job Created	<input checked="" type="checkbox"/>
Job Cancelled	<input checked="" type="checkbox"/>
Candidate/Interview Information	<input checked="" type="checkbox"/>
Job Revised	<input checked="" type="checkbox"/>
Job Rejected	<input checked="" type="checkbox"/>
Invoice: Vendor Response	<input checked="" type="checkbox"/>
Direct Applicant Submission	<input checked="" type="checkbox"/>
Job Authorised	<input checked="" type="checkbox"/>

Submit

6. **talentsource** 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)