



Taleo Performance – Quick Start Guide

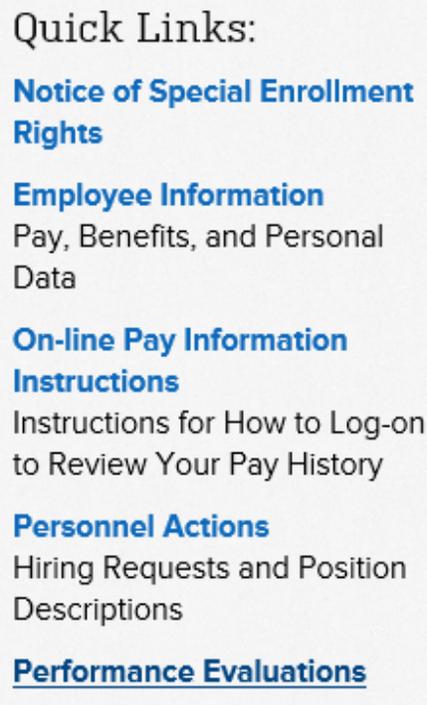
MANAGER GUIDE

GETTING STARTED

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The system can be accessed the following ways:

- By clicking on the following link (or typing it directly into the address block of your browser:
<https://federation.monmouth.edu/adfs/ls/idpinitiatedsignon.aspx?logintoRP=http://www.oracle.com/tbe/sp> OR
- From the **University web site**, under **Resources For...**, choose **Faculty & Staff, Human Resources Homepage, Quick Links – Performance Evaluations**



Quick Links:

- [Notice of Special Enrollment Rights](#)
- [Employee Information](#)
Pay, Benefits, and Personal Data
- [On-line Pay Information Instructions](#)
Instructions for How to Log-on to Review Your Pay History
- [Personnel Actions](#)
Hiring Requests and Position Descriptions
- [Performance Evaluations](#)

You can also create a shortcut for your desktop if you so desire.

Log in using your network user name and password.

If you have difficulty with this step, you may call HR at extension 3470 or the Help Desk at extension 4357.

Since this system is web-based, you can also access it from any off-campus location.

Employee Homepage

Upon logging in you will be directed to the employee webpage where your screen will look like this:

MONMOUTH UNIVERSITY

Switch to Manager View | Logout

Performance Settings

Employee Information [Edit](#)

Employee Code: 000006387
Name: Robyn L. Salvo
Email: rsalvo@monmouth.edu

Position Information

On the top right hand corner of the page, click on 'Switch to Manager View'. This will take you to the Manager site. The first time you come to the site you will land on the Home Page in Dashboard view which will look similar to this:

Taleo BUSINESS EDITION

Web Support Administration Help Logout

Employees Reviews Users Reports

My View
My Dashboard
My Settings
My Profile

Charts

Employees by Location (Total: 11)

Switch to My View

April 3rd 2015, 10:34:08 am

Favorite Reports

Mark Reports as Favorite to display here

Change to 'My View' by either clicking on 'Switch to My View' on the top right side of the screen, or on the 'Home' tab, click on 'My View'.

NOTE: My Dashboard requires a browser which is HTML 5-enabled. Supported browsers are current versions of Firefox, Chrome and Safari, as well as Internet Explorer 9 and above. Users running IE 8 will not be able to click the My Dashboard link despite any settings by the Administrator.

You can click the Switch to My View link in the upper right hand corner of My Dashboard, and this setting will remain in place until you click the Switch to My Dashboard link. You can also choose either My View or My Dashboard from the Home icon.

Manager Homepage – My View

Your 'My View' page should appear and will look similar to this:

Full View Performance

My View: Robyn L. Salvo (Hiring Manager at Monmouth University) [Switch to My Dashboard](#)

Performance Reviews - All -

Action	Employee Name	Status	Due Date	Review Manager	Title	Performance Review Approvers	Current Approver	Employee eSignature Date	Manager eSignature Date
eSign	Steinke, Jennifer	eSignature Pending	4/1/15	Salvo, Robyn	Probationary Performance Review	[1] Swannack, Patricia		4/3/15	
View	Stein, Kathleen	In Progress	4/30/15	Salvo, Robyn	Administrative Performance Appraisal	[1] Coffey, Maureen			
View	Parks, Aimee	In Progress	4/30/15	Salvo, Robyn	Staff Performance Appraisal	[1] Coffey, Maureen			
View	Parks, Aimee	Pending Approval	4/30/15	Salvo, Robyn	Administrative Performance Appraisal	[1] Coffey, Maureen	Coffey, Maureen		
View	McQueen, Maryann	Manager Meeting With Employee	4/30/15	Salvo, Robyn	Staff Performance Appraisal	[1] Coffey, Maureen			
View	Coffey, Maureen	eSignature Pending	4/30/15	Salvo, Robyn	Staff Performance Appraisal	[1] Salvo, Robyn			

You may always switch back to the 'My Dashboard' view from the Home tab or on the top right side of the screen.

On the 'My View' page you will see a 'Performance Review' Section at the top of the page containing three tabs:

- **Reviews** – These are all performance appraisals currently assigned to you that remain outstanding. You will see the performance appraisals for your direct reports on this page until they have been approved and electronically signed by the employee and the review manager. The statuses are as follows:
 - **In Progress** – reviews assigned to you that are pending your completion. Under 'Action' click the drop down box and choose 'Edit' to complete the review. To submit to the next level reviewer, click 'Complete'.
 - **Pending Approval** – reviews that you have completed and are now waiting for all approvals.
 - **Manager Meeting with Employee** – reviews assigned to you that have been approved and may now be reviewed with your employee. Under 'Action' click the drop down box and choose 'View' to review or access a printable view; choose 'Submit for eSignature' to send to your employee for their signature and comments.
 - **eSignature Pending** – reviews assigned to you that you have submitted to your employee for eSignature. If a date appears under the column 'Employee eSignature Date', then they have signed the review and you now need to eSign the review. Under 'Action' choose 'eSign' and click 'eSign Review'. If your employee submitted any comments it will appear on your acknowledgement form screen. Provide any final comments, enter your name and today's date and click on 'eSign'.

Manager Homepage – My View

- **Reviews pending my approval** – These are performance appraisals that have been sent to you as an Evaluation Reviewer that are awaiting your review.

The screenshot shows the 'My View' dashboard for Robyn L. Salvo. The 'Performance' tab is active, and the 'Reviews pending my approval' sub-tab is selected. A table lists two pending performance reviews:

Action	Employee Name	Status	Due Date	Title	Review Manager	Performance Review Approvers	Current Approver
View	Steinke, Jennifer	Pending Approval	4/29/15	Administrative Performance Appraisal	Stein, Kathleen	[1] Salvo, Robyn	Salvo, Robyn 1
View	Mcqueen, Maryann	Pending Approval	4/30/15	Staff Performance Appraisal	Stein, Kathleen	[1] Salvo, Robyn	Salvo, Robyn 1

- **All Completed Reviews** – These are performance appraisals for your direct reports that have been reviewed with the employee, signed and completed to the employee's file. You may review these appraisals by clicking on 'View' under 'Action', or by clicking on the pdf found to the right.

The screenshot shows the 'My View' dashboard for Robyn L. Salvo. The 'Performance' tab is active, and the 'All Completed Reviews' sub-tab is selected. A table lists two completed performance reviews:

Action	Employee Name	Due Date	Title	Review Type	Status	Performance Review Approvers	PDF
View	Stein, Kathleen	4/1/15	Probationary Performance Review	Probationary	Final	[1] Swannack, Patricia	
View	Stein, Kathleen	4/30/15	Staff Performance Appraisal	Annual	Final	[1] Salvo, Robyn	

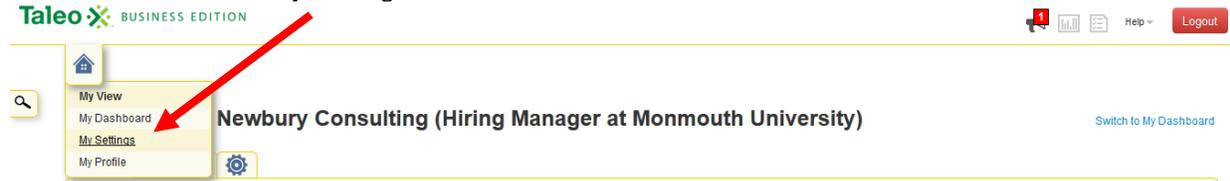
After all approvals have been completed and the performance review has been electronically signed by the employee and the manager, the **PDF column** in the Performance Reviews table will display a PDF version of the final performance review, essentially locking the performance review so that no further edits can be made. The final PDF version will also be displayed for the employee on the Employee Web Site.

NOTE: My Dashboard View requires a browser which is HTML 5-enabled. Supported browsers are current versions of Firefox, Chrome and Safari, as well as Internet Explorer 9 and above. Users running IE 8 will not be able to click the My Dashboard link despite any settings by the Administrator.

My Settings

While many system settings have already been optimized for you, there are several areas throughout the system that you can further customize based on your preferences.

You should adjust your personal settings before getting started with the TBE system. Hover over the Home Tab and select My Settings.



My Settings

The My Settings page allows you to customize your email settings, change your password, modify time zone/locale settings, and edit your personal display preferences.

Save Cancel Reset

Display Preferences: Red = Required Information

Number of rows per page: (100 maximum)

TBE style:

Referred By is presented with Candidate Name in List Views.

Quick views or tooltip cards appear when hovering on TBE links

Allow bubble notifications for background events and save reminders.

Proxy Approvers:

Assign proxy approvers to approve on your behalf.

Review Proxy Approver: [\[Select User \]](#) Goal Proxy Approver: [\[Select User \]](#)

Continue to receive approval request email notifications where a proxy approver has been assigned.

Receive email notifications when your proxy approver has approved or rejected on your behalf.

Please do not uncheck this box! If you do not receive save reminders, you may lose all of your work if you walk away and get logged out of the performance system.

Also, do not change your password in this system. We have set this system up to automatically sync with your Monmouth0/Hawkdom2 credentials. If you attempt to do so you will likely get an error message. Password changes should be managed through the MU network. Contact the Helpdesk at x4357 if you require assistance.