TOWSON UNIVERSITY

Office of
Human Resources

Taleo

Entering a Regular Requisition (Posted Position)

Reference Guide

Table of Contents

Introduction

Taleo is the system used by Towson University to enter requisitions. You must attend a training before you can enter a requisition in Taleo. This self-help document will show you how to enter a requisition that will be posted (advertised).

Before beginning to enter the requisition, please keep the following in mind:

1. You are required to have a search committee consisting of at least 3 people. The search committee should be reflective of TU staff, students, faculty, and the surrounding community.
2. If entering a Regular position, make sure you have a State Authorized Position (SAP).
3. It is helpful to have the Position Description readily available.

Entering a Requisition for Posting

1. Type **Towson.taleo.net** in the address bar.
2. Log in with NetID and Password. You will enter the **Welcome** page.
3. Click **Requisitions** on the left navigation.
4. Click the **Create Requisition** in the upper right.

Figure 1

5. Click **Start from the beginning** and click **Next**

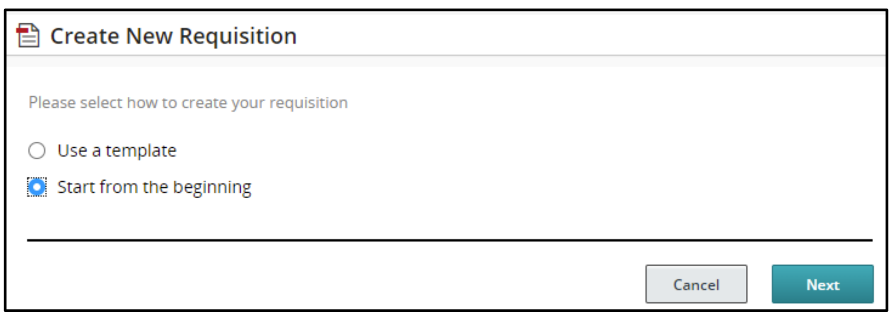


Figure 2

6. Select the **Hire Type**. Choose **Staff**.

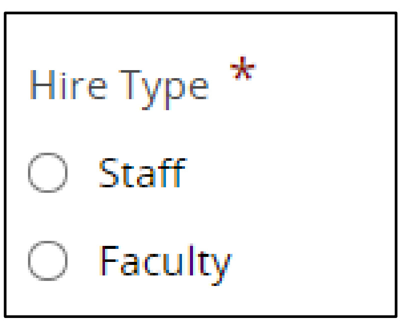


Figure 3

7. After choosing the hire type, **Select the style for the requisition type**. If you are unsure, contact your HR Partner, Talent Acquisition Specialist (TAS) or Divisional Budget Officer. Click **Next**.

   Note: In this example we will be selecting **Regular**.

   - **Regular** – Has a SAP assigned.
   - **Contingent Category I** – An employee who is either appointed to a position for six (6) months or less, the position is intermittent or seasonal in nature, or has a written agreement as a flat-rate Exempt employee. Not eligible for University benefits, service and/or salary credit.
   - **Category II Employee** – Any Contingent Status Employee whose written employment agreement is for more than six (6) months, but no more than twelve (12) consecutive months; is on a full-time basis or on a part-time basis of 50% or more of full-time employment and is hired through competitive recruitment and selection. Eligible for University benefits as defined in USM VII-1.40 Policy on Contingent Status Employment for Nonexempt and Exempt Staff Employees.

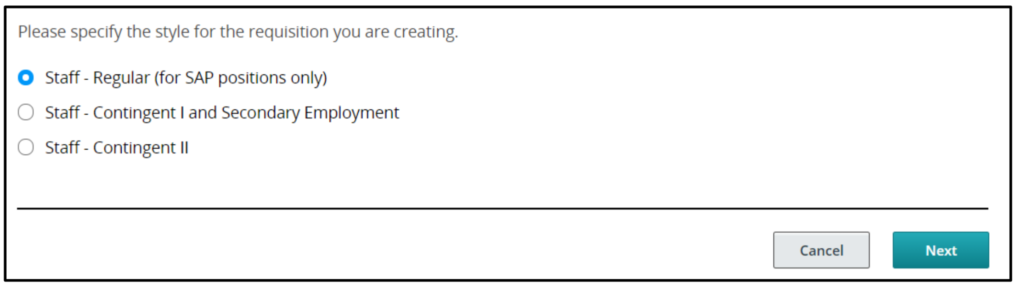


Figure 4

8. You will enter the **Requisition Structure** screen.

   a. **User Group** – Will prefill

   b. **Job Field** - Click the selector and select **Staff** (you must click on the word **Select**).

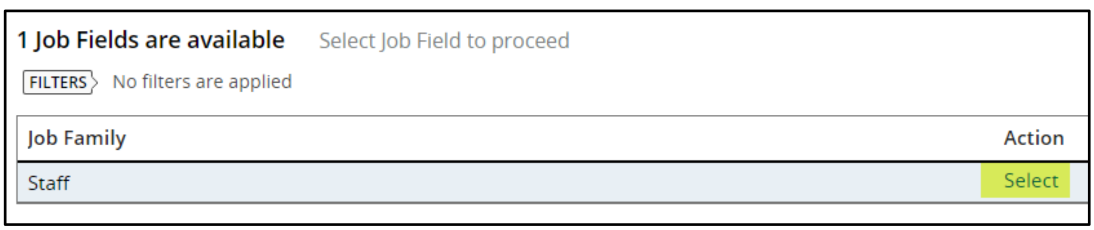


Figure 5

   c. **Department** – Enter the **5-digit Department number**. If you do not know it, you can use the filter button to the right of the field to search by Department name or contact your HR Partner or Talent Acquisition Specialist. Your **Organization** and **Location** will automatically populate based on the Department code. Note that this is the hiring department. The funding department may be different.

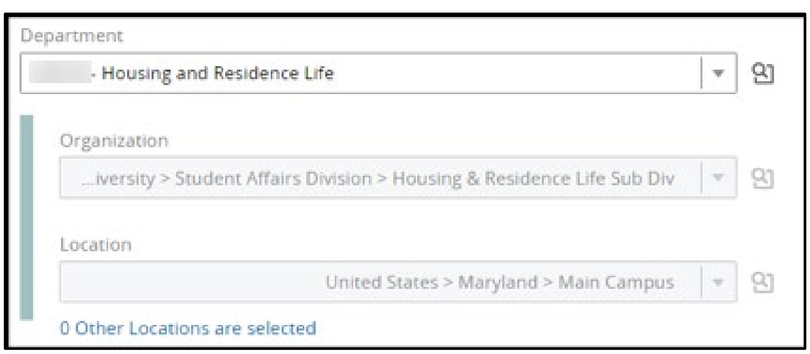


Figure 6

   d. **Organization** and **Location** will prefill.

9. Click **Next** in the bottom right-hand corner.

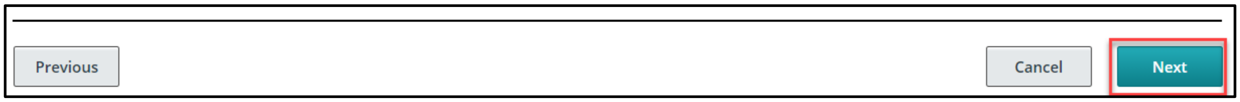


Figure 7

Note: **Basic Structure information** is in the system based on the Department code. If any of this is incorrect, contact Natasha Zhalkovsky.

10. **Inspect Tab** - Select the green **Inspect** tab on the right side of the screen. This will open a listing of all the fields that you'll need to complete before you can Save or Submit for Approval. As you complete the fields, they will disappear from the list. As a Hiring Manager, you only need to complete the fields under **Saving** and **Approval**. HR will complete the fields to Post. You must complete everything under Saving and Approval.

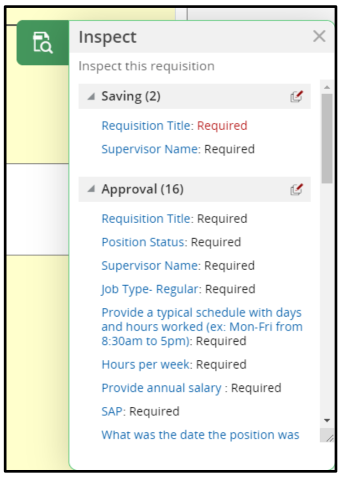


Figure 8

a. Move down to the **Requisition Owners** section. You may give others access to the recruitment in this section. Only those that have been through the Taleo training can be added. Everyone will have the same access.

b. **Recruiter** – The Recruiter will default to the Talent Acquisition Specialist for your division. *Don't change this.*

c. **Hiring Manager** - Your name will default to the Hiring Manager. You can change the Hiring Manager to another person through the selector. However, this is generally the person who enters the requisition and is running the search. They must have gone through Taleo training.

d. **Hiring Manager Assistant** – The Hiring Manager Assistant assists as needed with the search. May check the approval process for example. They must have gone through Taleo training. *Not required. Almost like a backup for the Hiring Manager.

e. **Add Collaborators** – Collaborators have full access to the requisition but may or may not be involved in the process. Usually they just look at resumes, etc. The first time you add a Collaborator, you will need to use the **Add Collaborators** button. These are usually not people on the search committee.

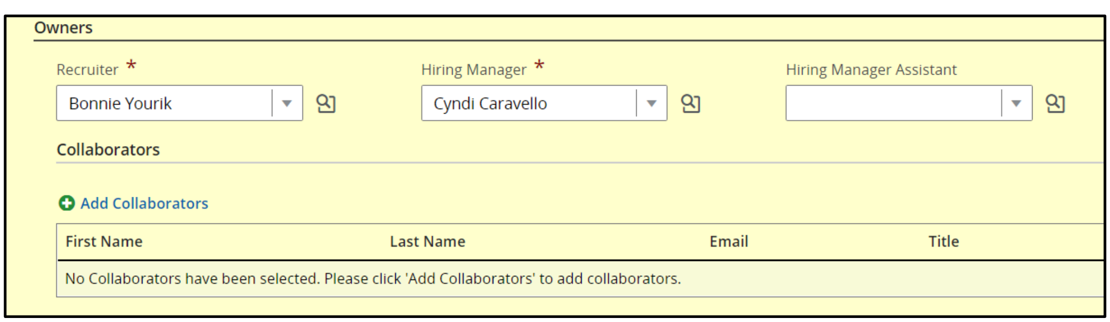


Figure 9

11. Scroll down to the **Job Search Information** section. Enter the following information:

   a. **Requisition Title** – This is the Internal Title. This will be the title posted on our website.

   b. **Number of Openings** – Usually 1. If you are hiring multiple people to do the same job, you could hire all in one requisition. Everything would have to be the same – including salary. You would have to have a SAP for each position you are hiring for.

   c. **Position Status** - Select an option of **New**, **Replacement (no changes to position)**, **Replacement (changes to position)**, or ***Replacement (no changes)*** would be typical for renewals.

   d. **Name and Employee ID of last person in role (if applicable)**. If you do not know the employee ID, contact the Talent Acquisition Specialist.

   e. **Supervisor Name -** Enter Supervisor Name, even if it's the same as Hiring Manager.

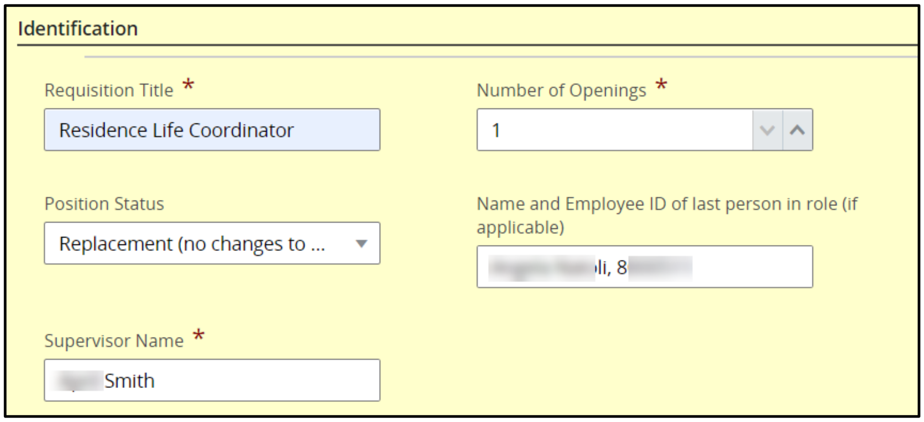


Figure 10

12. Scroll down to the **Profile** section.

   a. **Job Type** – Select the job type - based on the requisition type selected at the beginning of the process.

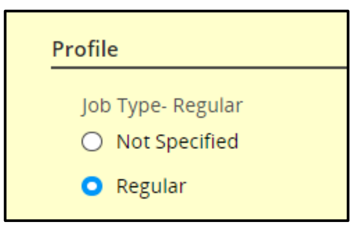


Figure 11

   b. **Provide a typical schedule with days and hours worked.** For example, Monday – Friday, 8:00 am to 4:30 pm. This will be included in job posting.

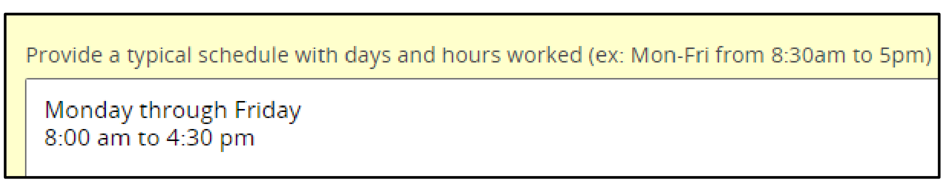


Figure 12

   c. **Hours per week** - Typically 40 (this is the maximum number).

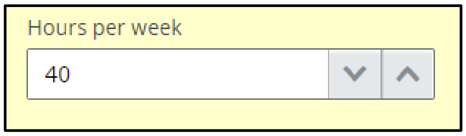


Figure 13

d. **Target Start Date** – Beneficial to make this the Wednesday at the beginning of a payroll period. This is not required but it is helpful for the recruiter. The job must be posted for at least 14 days so make it after that.

e. **Travel** – Click the drop-down arrow and select whether travel is required and if Yes, the % of time.

f. **Will this position work with minors? –** Required for background checks.

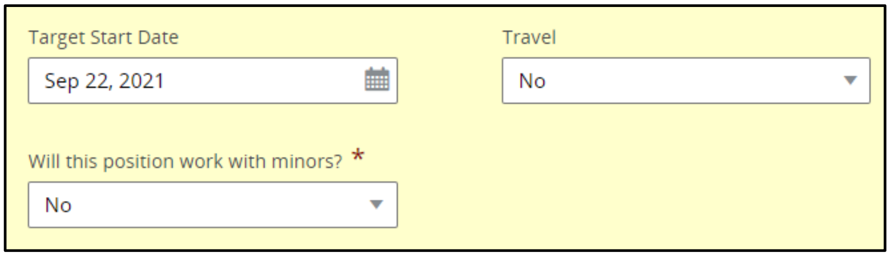


Figure 14

g. **Is this position eligible for telework?** - Click the drop-down arrow and select whether the position is eligible for telework or not (part-time employment is not eligible).

13. Scroll down to the **Compensation** section. The section is for internal use only. Enter the following:

a. **Provide annual salary** – This is an open text field, so numbers, ranges or "TBD" may be entered.

b. **SAP** – Only required for regular positions. Contingent II requisitions will not have this field. If you are unsure, contact your Talent Acquisition Specialist, HR Partner or Divisional Budget Officer.

c. **Post Salary** – Click the down arrow and make your choice. Please note the following:

- **Yes, please post exact salary (as listed)** – Choose this for non-exempt. This would not change unless the applicant has TU or USM experience. If requesting to post for exempt positions, you will have to offer what you posted – no room for negotiation.

- **Yes, please post targeted hiring range (salary min and max)** – Choose this for exempt.

Figure 15

d. **What was the date the position was vacated?** If unsure, contact your Talen Acquisition Specialist or HR Partner.

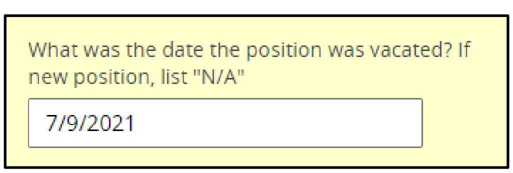


Figure 16

e. **Is this position funded by a grant?** If this position is grant funded, select Yes so the correct approval process is followed.

f. **Funding Dept/Grand Num** – This is a **required** field even if the hiring department is the same as the funding department.

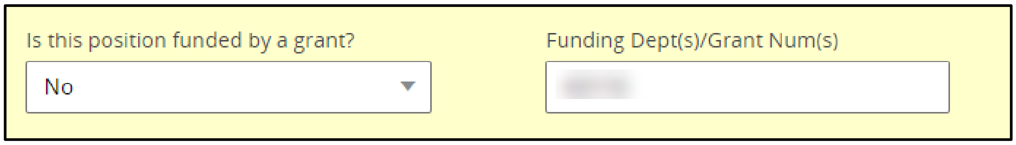


Figure 17

g. **Is the department requesting pre-approval to pay moving expenses?** The default is No. If unsure, contact your Talent Acquisition Specialist or HR Partner.

h. **Does the position provide a car allowance?** The default is No. If unsure, contact your Talen Acquisition Specialist or HR Partner.

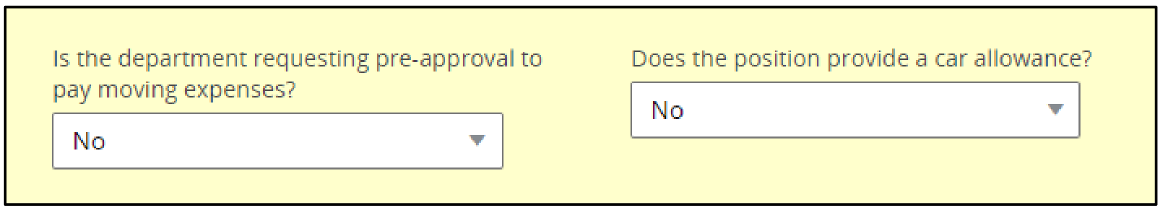


Figure 18

i. **Additional Comments** – This is a place to capture additional information not already captured in the requisition. Examples include multiple SAPs, comments about funding or if the position has been identified as emergency essential personnel.

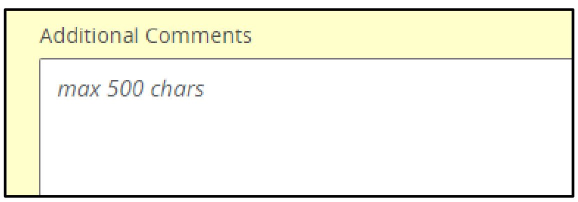


Figure 19

14. Scroll down to the **Outreach Plan** section. Outreach is a critical component of any recruitment. OHR automatically posts to the Higher Education Recruitment Consortium (HERC), LinkedIn, and Indeed and may recommend additional sites to generate a qualified applicant pool. As a Hiring Manger, you may take this opportunity to request additional sourcing sites or indicate site that the department will post to directly.

    a. **Please list all requested source locations** - Please list all requested sourcing locations. There is a charge for additional sourcing locations. Examples include HigherEdJobs, CareerBuilder, NCAA, etc. If you do request an additional sourcing site that has a fee, you must complete the Advertising Budget Code.

    b. **List additional sites the department will post to** – List any site you will post to directly. Examples are organizations you are a member of.

    c. **Advertising Budget Code** – If you have requested additional sourcing locations, you must provide a budget code.

Figure 20

15. Scroll down to **Posting Information**. Posting Information allows the department to enter an internal job posting for current employees and an external job posting for new candidates. **Both sections must be completed**. Both posting sections ask for the same information. The Hiring Manager has several options to input a posting:

    - Develop a unique posting by typing the information directly into the three sections.
    - Copy and paste from a Word document announcement. If doing so, make sure to paste using the plan text icon.
    - Copy and paste verbiage from a Word/PDF document.
    - Enter "See position description" in each field. The Talent Acquisition Specialist will create the announcement (must attach position description).

16. Enter the following information.

    a. **Copy From** – Allows you to copy **Description** and **Qualifications** from internal section to external and vice versa.

    b. **Job Summary** – This is a summary statement which provides a synopsis of the major purpose of the position and its role in the department. It provides a high-level overview of the role, level, and scope of responsibility. It consists of three or four sentences and provides a basic understanding of the role.

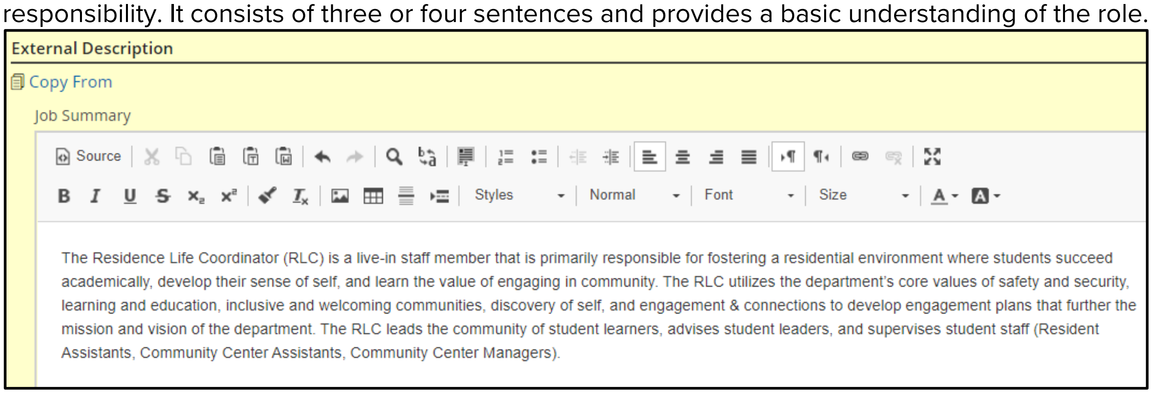


Figure 21

    c. **Description – External** –This section contains a description of the duties and responsibilities assigned to the job; also referred to as the essential functions. They describe the fundamental nature of the job which occupies a large proportion of the employee's time. Some items to consider:

    - Include explanatory phrases which tell why, how, where, or how often the tasks and duties are performed.

- Focus on the outcome of tasks.
- Reference areas of decision-making, where one will influence or impact.
- Identify areas of direct or indirect accountabilities.
- List job duties that reflect the position requirements and ensure they are not based upon the capabilities of any one individual.

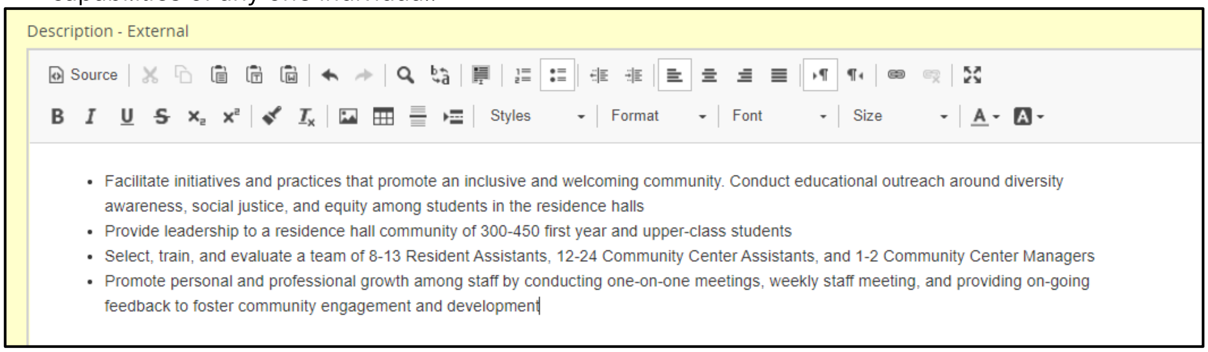


Figure 22

d. **Qualifications** –It is nice to divide this into required and preferred qualifications. Required is the required level of job knowledge (such as education, experience, knowledge, skills, and abilities) to perform the job. Preferred - are “nice to haves” but are not essential to carrying out the day-to-day functions of the job. If included, the Preferred Qualifications can focus on any or all of the following: education, experience, knowledge, skills, and abilities. This will turn into yes or no screening questions.

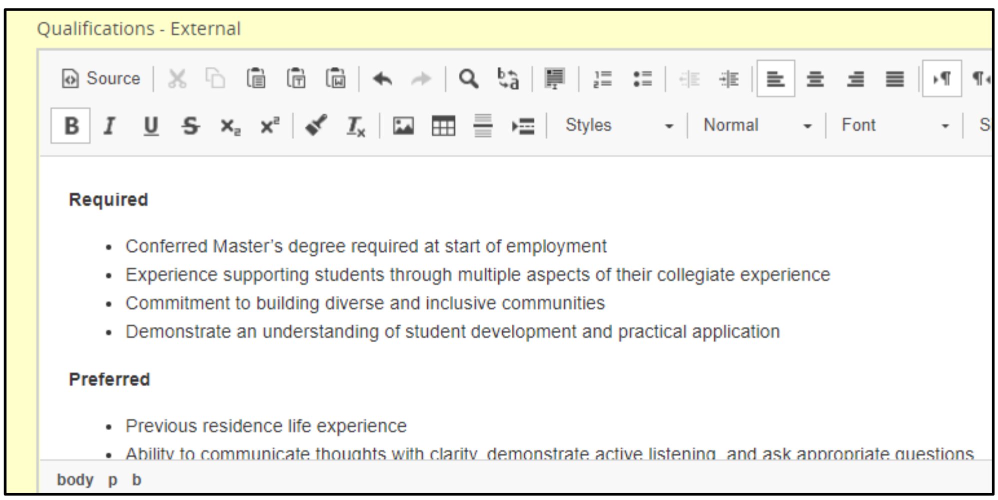


Figure 23

17. Scroll down to **Internal Description**.

a. **Copy From** – Allows you to copy **Description** and **Qualifications** from external section to internal section and vice versa. It won’t copy the Job Summary information to Job Purpose because information about TU needs to be added. This can be added by the Talent Acquisition Specialist, and you can simply retype the summary information from External.

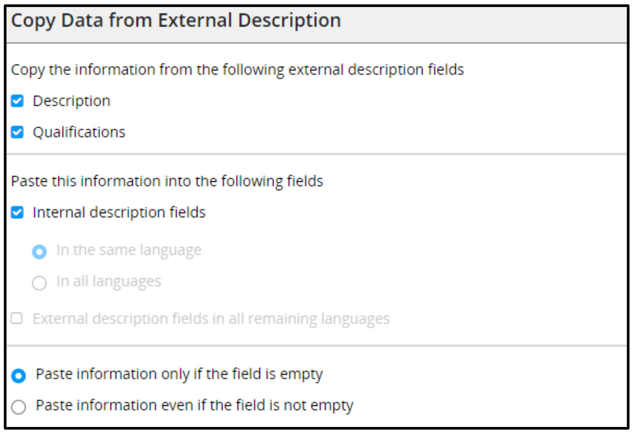


Figure 24

b. **Salary and Benefits** – Not mandatory to fill in, but you can if you wish. OHR will fill this in adding standard benefits.

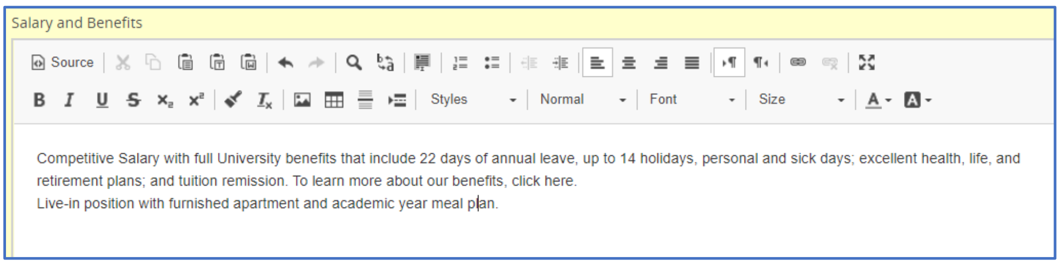


Figure 25

18. Click **Inspect** and make sure you have completed all required fields. When the inspect tool indicates the requisition is **Ready for Approval**, click **Done** at the top of the page.

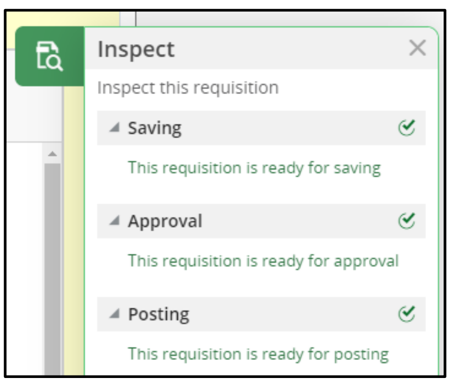


Figure 26

19. You will see additional tabs.

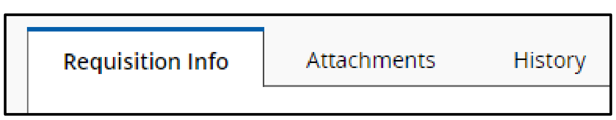


Figure 27

20. Click the **Attachments** tab and then click **Upload Attachments**. You will need to upload the position description. This form is located in the Forms Repository in the Human Resources Forms section.

21. In the **Upload Attachment** dialog box, click **Browse**. Select your file and click on **Open**.

Note: A Word document or PDF is preferred. The file will appear under **File Name**. Click **Upload**.

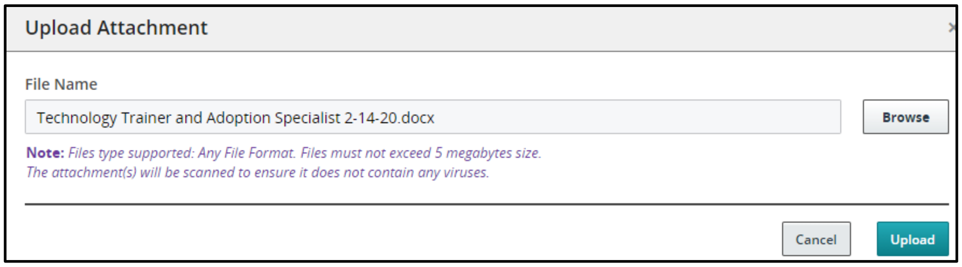


Figure 28

22. You will see the file under the **Attachments** tab.

Figure 29

23. Once the requisition is complete, click on **More Actions**, and then click **Submit for Approval**.

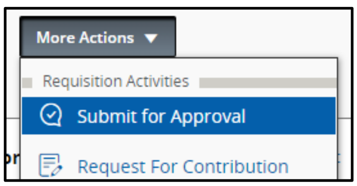


Figure 30

24. The **Approvals** page will automatically load. You will see the list of approvers for your area. The workflow is as follows:
    a. Compensation/Classification
    b. Associate VP
    c. Division Budget Officer
    d. University Budget
    e. Vice President

Note: Additional approvers have been added to the workflow with the hiring pause in effect.

25. You are required to enter **Comments to Approvers**. Add a short statement describing why you need the position. These comments will be included in the email to the approvers. Click the **Submit for Approval** button. The Approval process begins.

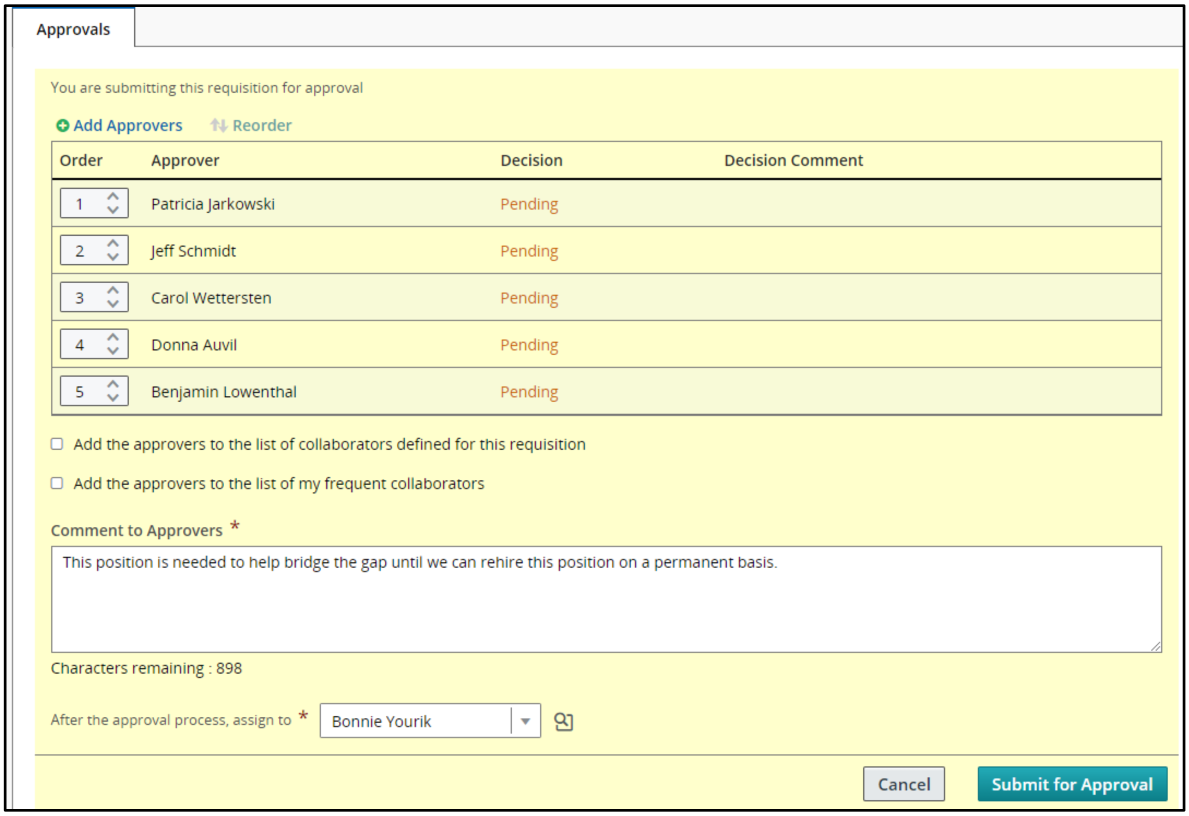


Figure 31

26. Go to **Summary** on left – it should say **Pending – To Be Approved**. Make sure this has happened or it will not go forward to approvals. If it sits with someone for more than 5 days – they get an email reminder.

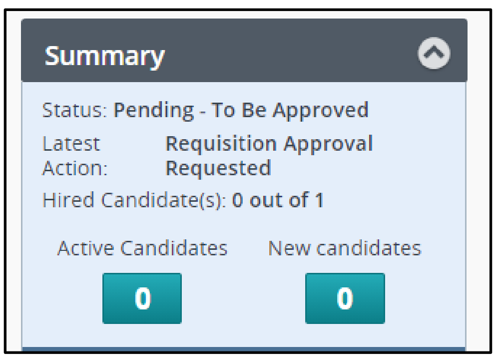
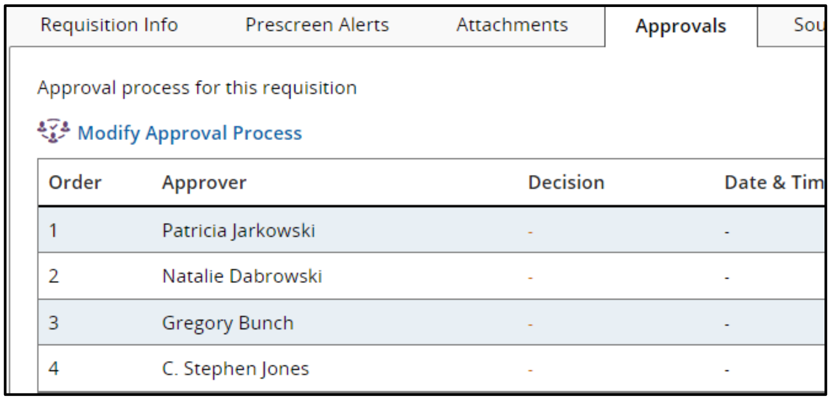


Figure 32

27. Notice the **Approvals** tab will appear. You can always come back to this tab to see the status of the approval process.



Order	Approver	Decision	Date & Tim
1	Patricia Jarkowski	-	-
2	Natalie Dabrowski	-	-
3	Gregory Bunch	-	-
4	C. Stephen Jones	-	-

Figure 33

28. When approved – HR will get the ad ready for posting. You will get an email when it is ready for posting and you will need to approve it. HR will create it based on the information you provided. HR will try to get it ready within 2 days of approval.

Note: The job must be posted for a minimum of 14 days. HR will ask you how long you would like to post the job.

29. Make sure to send the Search Committee members to the Talent Acquisition Specialist (just the names) so that they can be added to the **Interviews** tab. Remember that the Serach Committee must be comprised of at least 3 people.

30. When candidates apply, they will be screened by HR for requirements. The TAS will verify education, work experience, (verify what they can). HR can verify if they have MS Word experience, for example, but not how proficient they are. They will forward the candidates meeting the required qualifications and then you can view them.

Reviewing Applicants

Screening Applicants

1. Candidates will be screened for requirements before being sent on to the Hiring Manager. The Talent Acquisition Specialist will verify education and work experience as best as they can.
2. Type **Towson.taleo.net** in the address bar.
3. Log in with NetID and Password. You will enter the **Welcome** page.
4. Click **Requisitions** (best if you have more than 1 requisition to review) or **Submissions** (best if you only have one requisition) on the left navigation.
5. If you click on **Submissions**, you will see which candidates have passed the screening process in a list. The requisition title is listed in a column.

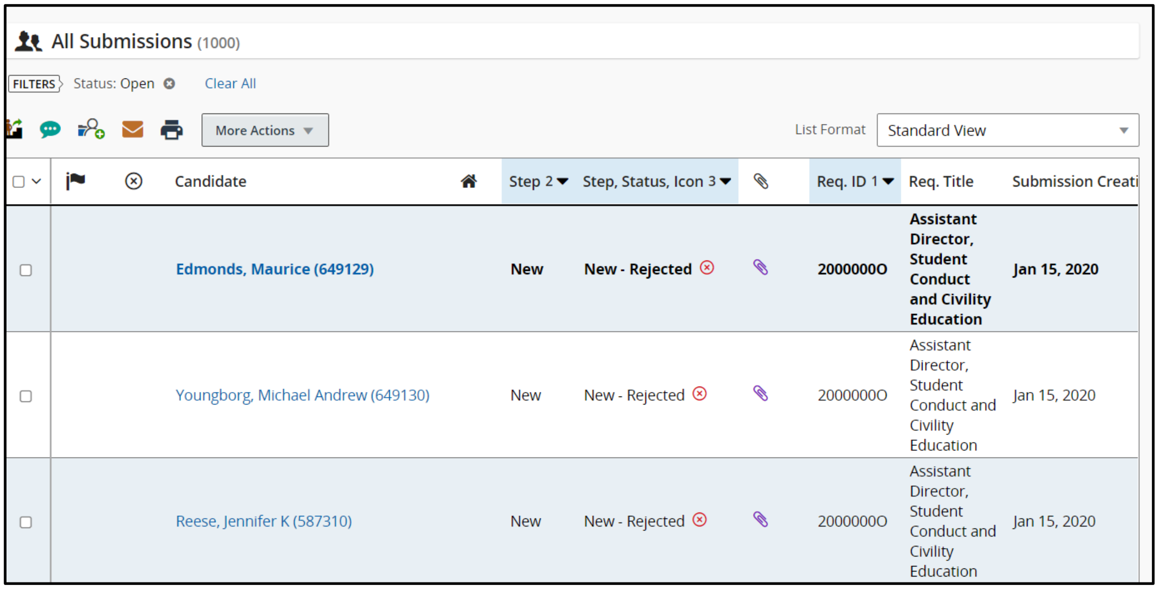


Figure 34

6. If you click on the **REQUISITIONS** tab, and then click the candidate count beside the position you will see a list of the candidates beside the title and the list of candidates will appear on the screen.

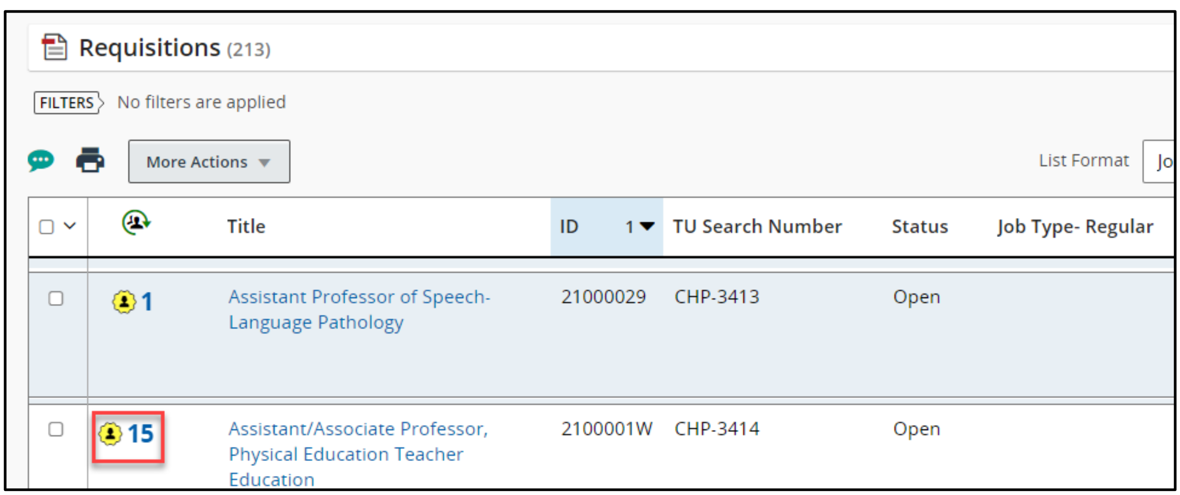


Figure 35

7. The **Selection Status** will begin with **To Be Reviewed**. You can use the column icons to quickly determine if they have any attachments (paper clip), their step/status, and if they meet the job requirements and assets. Click on the candidate's name to see their full information.

8. Click on a candidate's name.

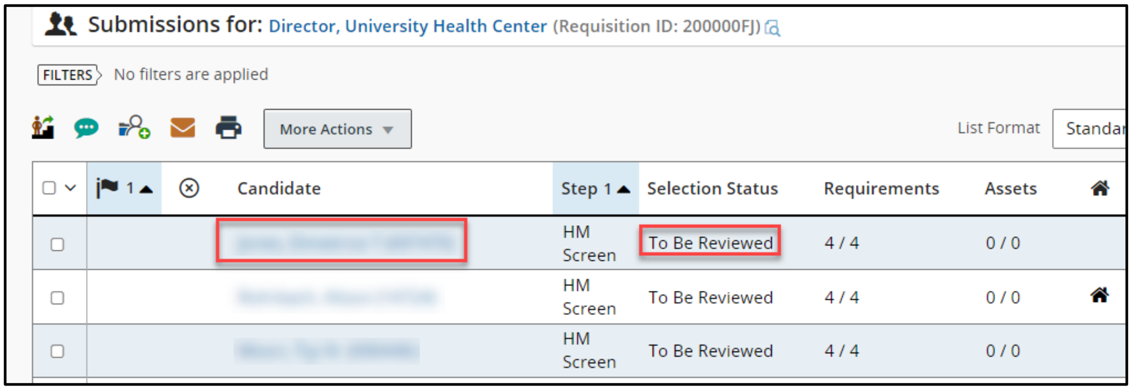


Figure 36

9. You will land on the **Job Submission** tab. There are a multitude of sections as described below.

- **Personal Information**: Includes candidate address, phone number, and email address
- **Experience and Credentials**: The education, work experience details
- **References**: Names, relationship, and contact information for references
- **Submission Information**: Account information and source tracking (how did the candidate hear about the job)
- **Questionnaire**: How the candidate answered the screening questions
- **Diversity**: This is hidden for confidentiality reasons

10. Click on **Attachments** to see the resume, cover letter, etc.

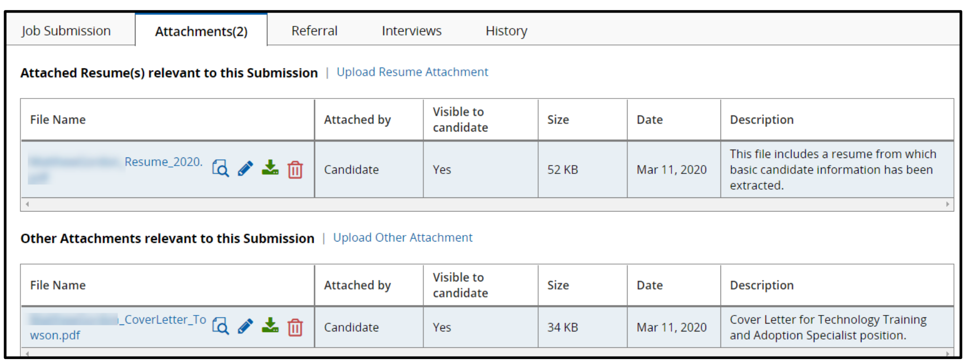


Figure 37

11. Click on the attachment to open it.

12. After reviewing the application, decide what you want to do with the candidate. Click the **Change Step/Status** icon.

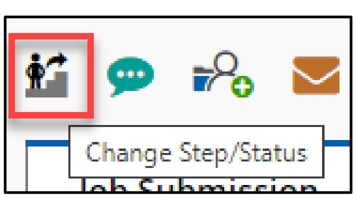


Figure 38

13. From the **Change Step and Status** dialog box, click the down arrow under **Status** and make your selection. You can move the candidate to **Under Consideration** if you need to review again. If they pass your screening, you can select **Passed HM Screen**.

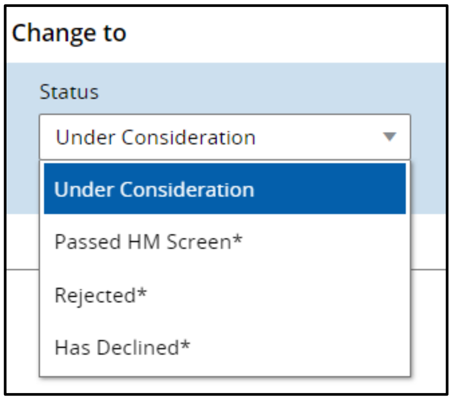


Figure 39

14. Any status with a * beside it you must enter more detailed information. For example, if you choose **Rejected**, a list of reasons will appear. You must select a reason. Make sure the reason is strictly job related. If someone declines for salary, make sure you put that in the comments.

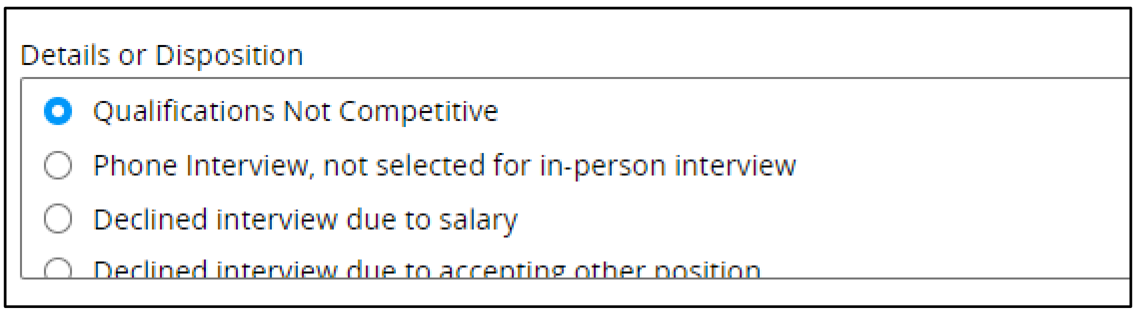


Figure 40

15. After making your selection, click **Apply and Close**.

Figure 41

Note: Alternatively, you can click on **More Actions** and choose a reason from the menu.

16. You must do this for every candidate. At the end, all candidates must be rejected except for the selected candidate.

Sharing Candidate Information with Your Search Committee

You may share information pertaining to an applicant with your search committee even if they do not have access to Taleo. This includes the resume, cover letter, and sections of the Taleo requisition.

1. Click on the candidate.
2. Click the **More Actions** button and choose **Share Candidate**.

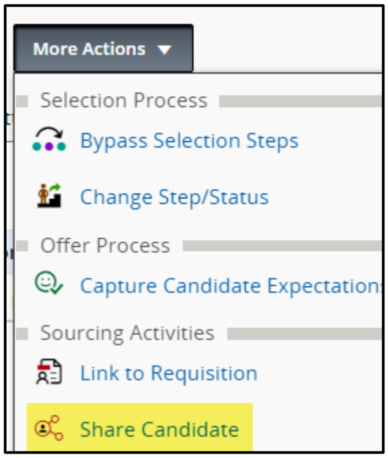


Figure 42

3. The **Share Candidate – Find Recipients** dialog box will appear. You may select both internal and external recipients.
   a. **Internal** - On left hand side of the box, you may filter for a member using one of the available fields and then click on **Apply Filters**. When the recipient appears, select the recipient by clicking on the selection box beside their name (a check will appear).

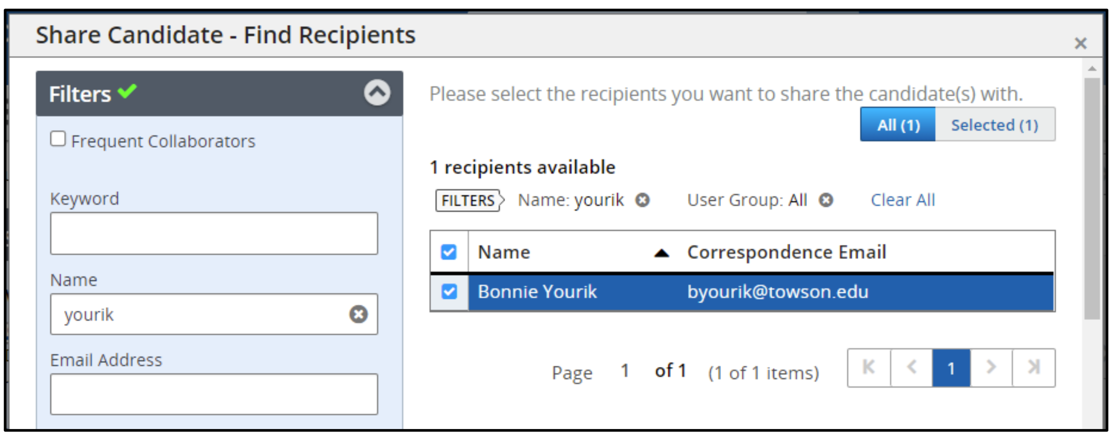


Figure 43

   b. **External Recipients** – Click the expand arrow to the left of External Recipients at the bottom of the dialog box. An **Email Addresses** box will appear. Type the email address of the external recipient separated by a comma if there are multiple recipients.

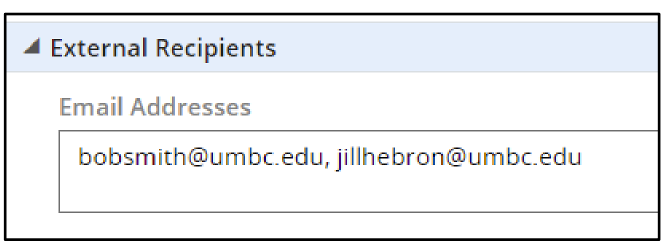


Figure 44

4. Click **Next** at the bottom right corner.
5. The **Share Candidate – Sharing Options** dialog box will appear. You may choose attachments such as a resume or cover letter under the **Attachments** section. Scroll down to the **Job Submission** section to share pieces of the Taleo requisition such as **Personal Information**, the **Questionnaire**, etc.

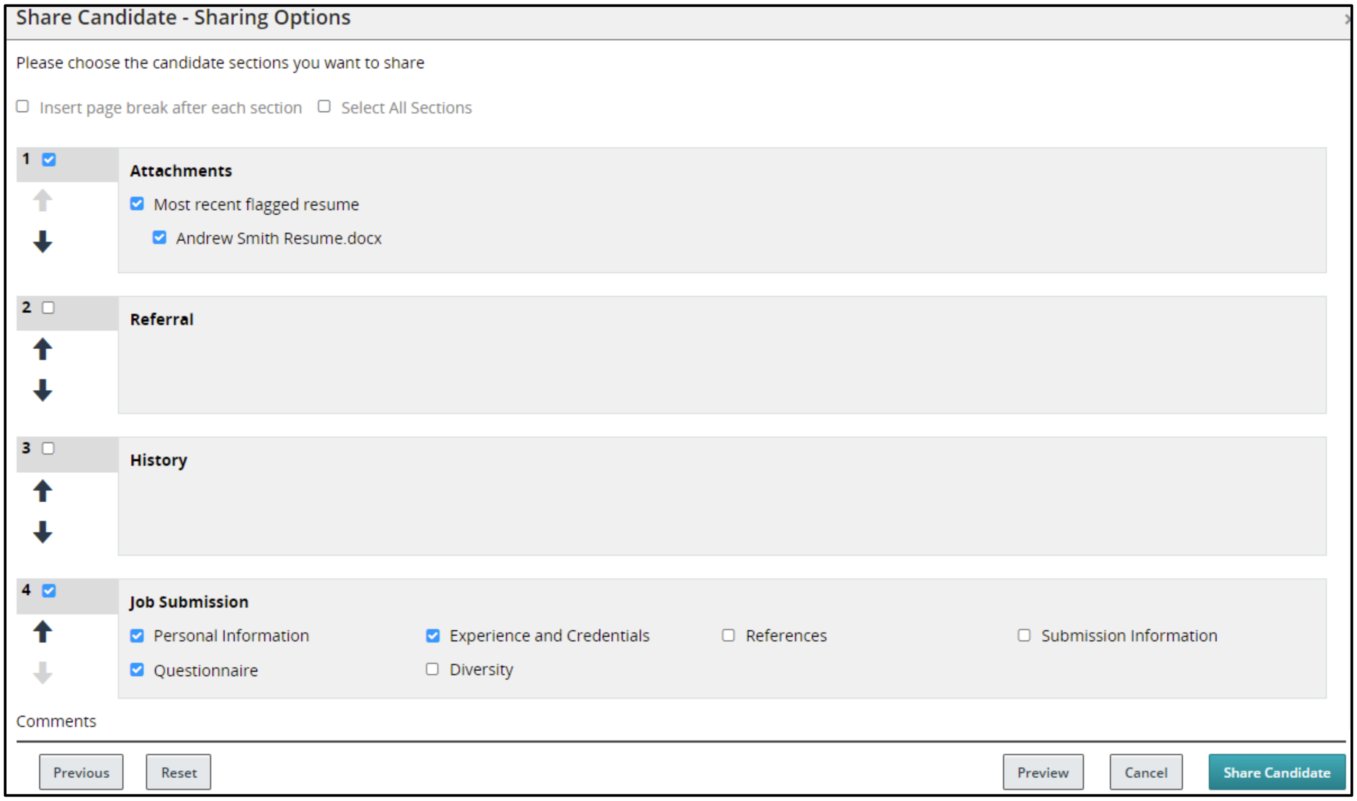


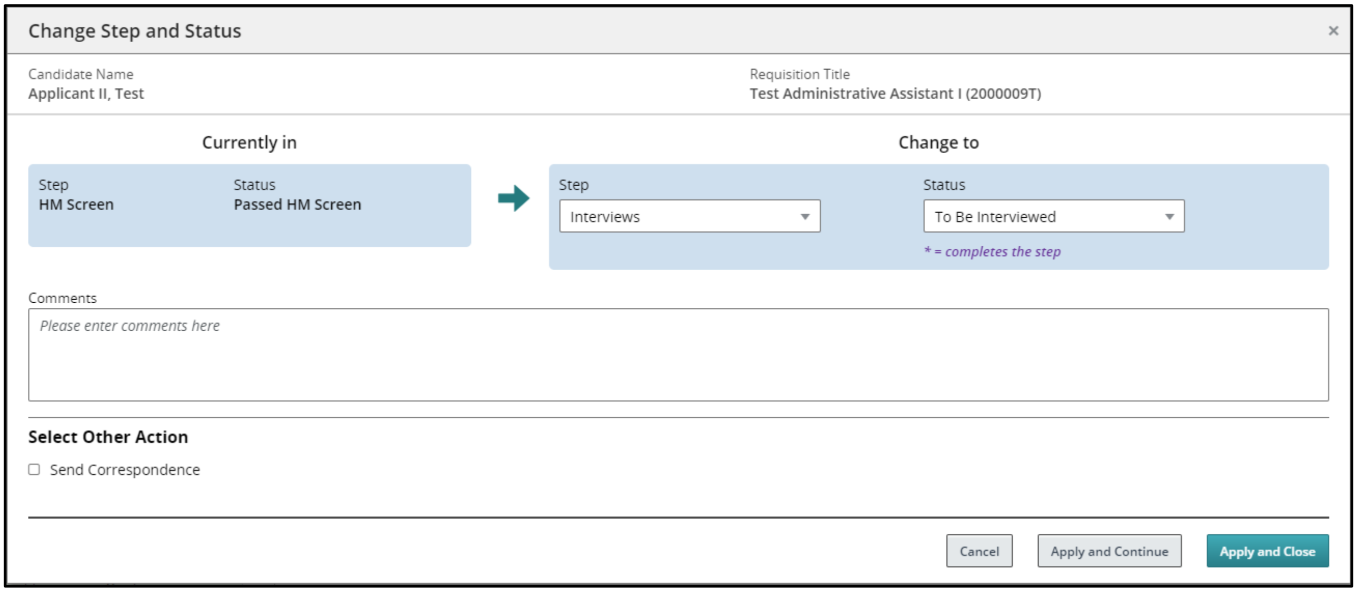
Figure 45

6. After making all selections, click **Share Candidate**.

Interview Process

1. After choosing which candidate(s) to interview, move the candidates you wish to interview to the Interview step. Under Status, you may choose from one of the many interview statuses: **To Be Interviewed, Phone Interview, 1st in Person Interview**, etc. Do this by selecting the **Change Step/Status** icon (person climbing stairs) or by selecting the **More Actions** button and then click **Apply and Close** located in the bottom right corner of your screen.

Note: The **Interview** status step change comes after the status is changed to **Passed HM Screen** status.



4. **Prior** to scheduling interviews, email your search committee panel list to your Talent Acquisition Specialist. They will enter the panel into Taleo.

5. Work with your search committee to interview the candidates. Keep the following in mind:

   a. It is best to schedule interviews directly through Outlook.

   b. Create a list of interview questions and send to the interview committee before the interview. ***You will gather these interview questions and upload them to the system so please make sure the committee members take good notes***.

6. Refer to the Recruitment Guide which provides rules for interview questions, etc.

2. After the candidates have been interviewed, send out a request for each search committee member to do a post evaluation.

Sending out Post Evaluation Requests

After candidates have been interviewed, you must have each committee member fill out a post evaluation. They must also submit their interview notes to be uploaded to Taleo.

1. Click on the candidate and then click on the **Interviews** tab.
2. Go to step **4. Resources** and click on the **radio button** beside **TU Interview Evaluation Questionnaire**.
3. Click **Send Request.**

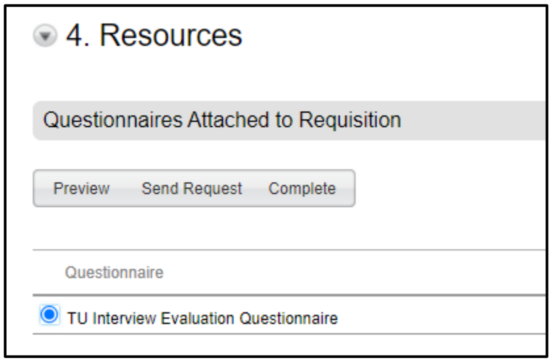


Figure 46

Note: Please do not use any of the other options under the **Interviews** tab. If so – the search committee will get an email inviting them to the interview and then they will have to accept, and it will automatically send the questionnaire. This may cause problems – especially if someone on the committee does not reply to the email.

4. Under **Evaluators**, select the committee members and decide what files you wish to share by selecting them in the dialog box.

Note: You can only send to 3 evaluators (committee members) at a time. So, you may have to send out in 2 or more batches.

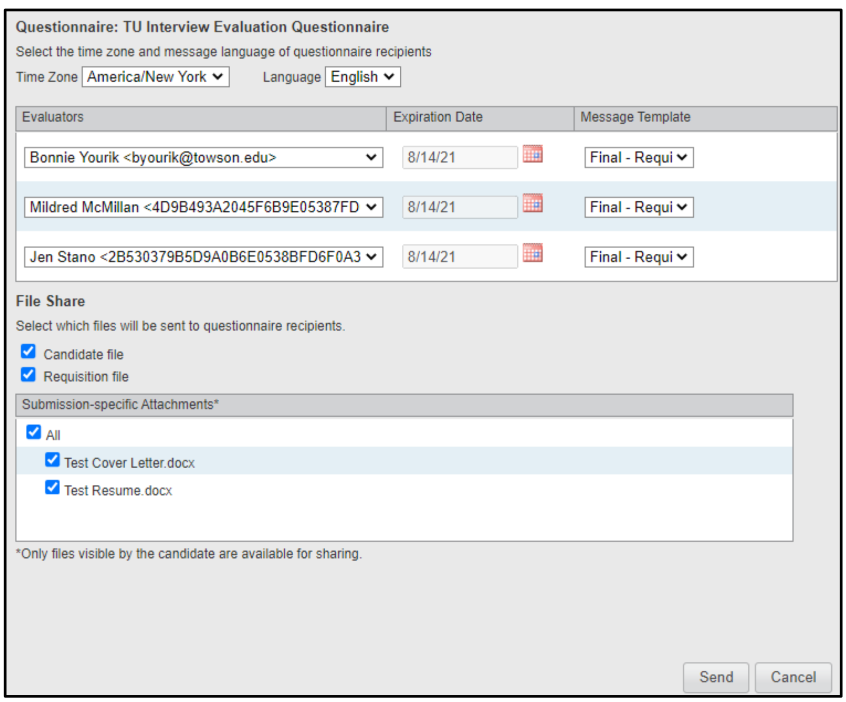


Figure 47

5. Each evaluator will receive an email and will have a limited time to fill out the questionnaire. They will rate the candidate and can recommend multiple candidates.

6. To see completed evaluations, go to the **Interviews** tab and scroll to **2. Completed Interviews and Evaluations**. Select an evaluation and then click **View Results**.

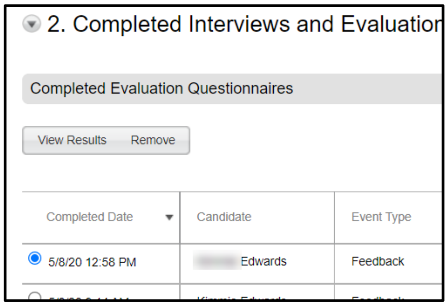


Figure 48

7. Please note that post-interview evaluation request expires if it is not filled out within 5 days. To resend an expired evaluation do the following:
    a. Click on the **Interviews** tab.
    b. Select the expired request under section **3. Expired Evaluation Requests**.
    c. Select **Renew Request**.

Figure 49

Note: You don't have to hire the person with the highest score. You can hire based on the interview. However, your Talent Acquisition Specialist may ask for justification if the candidate with the highest score is not the selected candidate.

8. Make sure to get the interview notes, reference checks, etc. back from the committee and attach them to the requisition. If you have trouble attaching the interview notes, contact HR. To attach these notes:
    a. Click the **Attachments** tab.
    b. Click **Upload Other Attachment**.

Figure 50

    c. Click **Browse** and then select the file. **Make sure you do not select Visible to Candidate**.
    d. Click **Upload**.

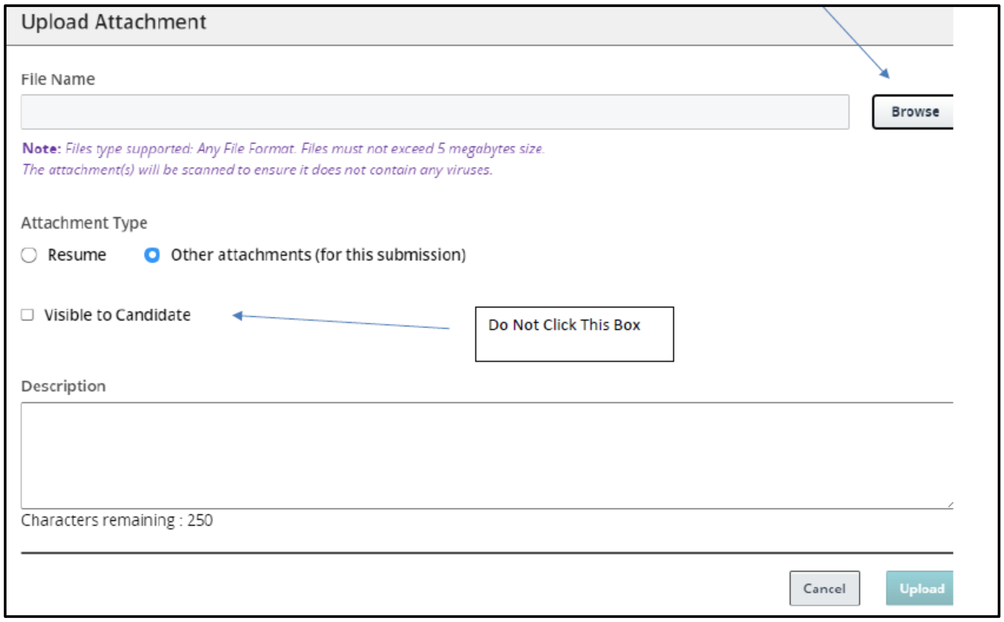


Figure 51

9. Once all evaluations, notes and reference checks are received and uploaded to attachments, and all disposition codes are complete, please email your Talent Acquisition Specialist with the request for offer. Your email should include:

- Candidate to receive offer
- Requested salary or hourly rate
- Requested start date