Creating a Requisition

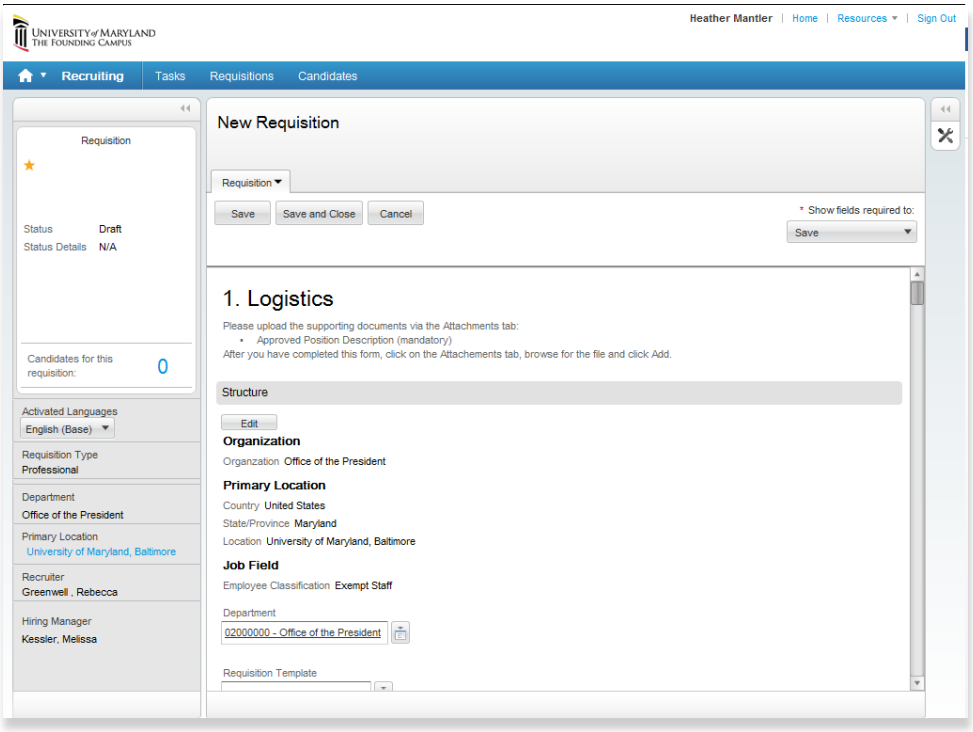
Creating a Requisition Overview

This section is going to provide an overview of how to create a requisition. Most of the process is self-explanatory but a few items will be highlighted.

From the Recruiting Center homepage, select the **Create a Requisition** option. The process starts with a few pop-up windows which allow the user to select:

- The type of position (Exempt/ Non-Exempt or Contingent II, or Contingent I)
- Department
    - In the same pop-up window is Requisition Template. This field is not presently used.
- Primary Location & Job Field

Once these items are selected, click **Create**. The new requisition will appear:

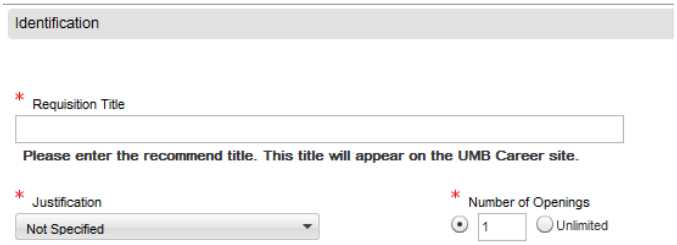


<u>Section 1 – Logistics</u>

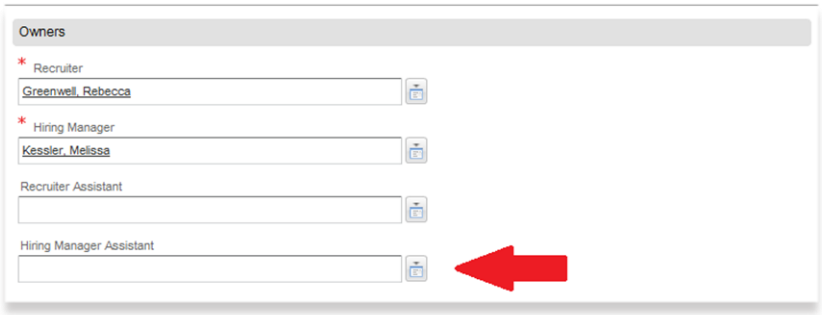
This *Structure* portion of Section 1 will be populated with the data selected in the previous steps.

As the user begins to scroll through the requisition, any field with a red asterisk (*) is a required field. However, even if a field isn't required by Taleo, in order for the requisition to successfully advance through the workflow and approval process, other fields will need to be populated appropriately.

In the *Identification* portion, the **Number of Openings** field will allow the user to note if the requisition is for more than one job opening. The default is for 1. If more than one person is expected to be hired in this role, the number needs to be reflected in this field. The number of offers that can be made is directly tied to the **Number of Openings**.



IMPORTANT – Owners



In the *Owners* section, if a default Recruiter and Hiring Manager were selected under My Setup, they will automatically populate. Either of these fields can be changed if necessary.

If the user entering the requisition is an Initiator and not the Hiring Manager, it is **required** that they enter his/her name into the **Hiring Manager Assistant** field. If he/she does not do this, the requisition will not enter the approval workflow.

Section 2 – Additional Questions for Position Description

This section is required by the **Compensation** department. From a system perspective, most of the fields are not required. However, if the information isn't provided to **Compensation**, the requisition *will be returned*.

Section 3 – Job Advertisement

This section is broken into 4 areas. An Internal Description, Internal Qualifications, External Description, and External Qualifications. All 4 sections must be completed. Each section looks the same - it's a free-form field where the information can be edited in a similar fashion to Microsoft Word.

If copying text from Microsoft Word, make sure the text is “clean”. Formatted text in Word may have background coding that, if not removed, may affect how the job description appears on-line. There are 3 paste options:

- **Paste** (left icon) - If selected, a prompt will appear asking if the text should be before posting.
- **Paste as plain text** (middle icon) - This will remove all formatting entirely and paste the data as unformatted text.
- **Paste from Word** (right icon) - This is the option that will clean the formatted text while keeping the formatting (unlike the "Paste as plain text" icon). This is the preferred option if pasting text from another Word document.

Once either the 2 internal fields or the 2 external fields are populated, the **Copy From** button will allow the internal fields to be copied to the external and vice-versa.

Once the first 3 sections are completed, Sections 4 & 5 will be in view. **Section 4 (Candidate Selection Workflow)** is the workflow that the requisition will follow. This is automatic and can't be changed by the initiator or hiring manager. **Section 5 Human Resource Services Only**, as stated, is for HR Services only.

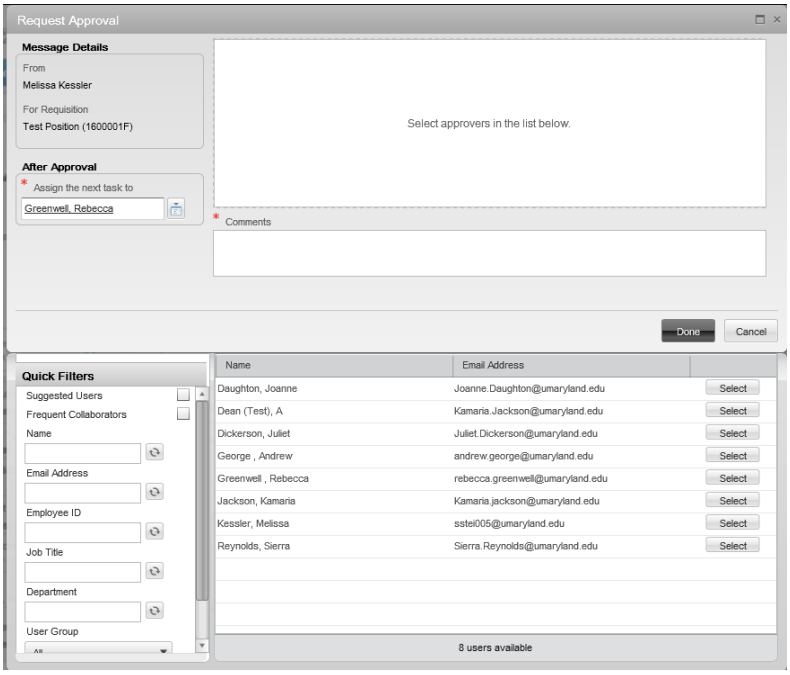
At this point the user can:

- **Save** - Save as a draft.
- **Save and Close** - This will automatically send the requisition through the pre-determined workflow.
- **Cancel** - Cancels the requisition.

If there are any problems or missing fields, once **Save** or **Save and Close** is selected, a notification will appear detailing the missing items that must be corrected.

Request Approval

Once **Save and Close** is selected, the **Request Approval** pop-up window will appear as seen below:

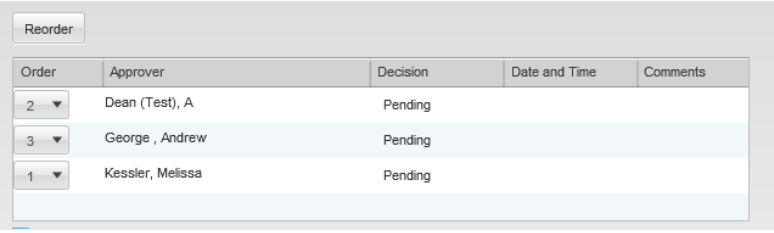


The approval path must be selected. From the user list, the appropriate departmental approvers along with the Dean's office and Compensation must be selected. The order will always be:

Departmental approver(s) > Dean's office > Compensation

Selection and Order

To select users, click **Select** to the right of each approver. Their names will appear in the upper portion of the window.



Initially it doesn't matter what order they are selected but once in the upper section, they must be placed into the correct order using the numbered drop down arrows. **IMPORTANT:** The Dean's office and Compensation ***must*** always be the last two approvers with Compensation being last.

The **Reorder** button will place the approvers in the 1-2-3 order after changes have been made. This may make it easier to review to ensure that the approvers are in the correct order.

Once it's approved at all levels, it will go to the Staffing Specialist.

A comment is required. Remember that all comments entered into Taleo cannot be deleted and are discoverable. Always exercise caution when entering comments.

After entering a comment, click **Done** to send the requisition through the approval workflow.

<u>Required Documentation</u>

Once the requisition is finished, it will be necessary to attach any required documentation. This is done on the **Attachments** tab. The **Browse** button will allow the user to access his/her PC and attach the necessary files.