FACULTY HIRING
TALEO
USER GUIDE FOR
INTERVIEW POOL
REVIEW/APPROVAL

Table of Contents

1 Introduction

Included in these materials are step by step instructions for the Department Chair, Dean, Vice Provost and OIIE to review and approve an interview pool

1.1 Course Goals

This guide includes instruction for the following:

- Taking actions on candidates to approve/decline for interview pool
- Understanding the candidate selection workflow structure and moving candidates through the workflow

2 Interview Pool Management

2.1 JOB AID: Pre-Interview Approval for Department Chairs, Deans, Vice Provost and OIIE

This job aid provides step-by-step instructions for two different ways Department Chair, Dean, Vice Provost and OIIE to be able to see applied candidates and approve/pass candidates for on campus interviews.

User can go to the Faculty document storage in ImageNow to review uploaded application files. Applicants can be found in ImageNow using the requisition id, TU search number, name or candidate identifier. See Section 3.1 for information on using ImageNow and section 3.2 for viewing files in Taleo.

2.1.1 Option 1 to View and Approve Interview Candidates (This is the quickest)

1) Navigate to Taleo environment using link -> https://towson.taleo.net/

> **Towson University Authenticated Login**
>
> Use your Towson University NetID to log into
>
> **An External Service Provider**
> *(http://stgtowson.taleo.net/smartorg)*
>
> **Username**
>
> **Password**
>
> Login
>
> Forgot Password   Manage My NetID
>
> **Terms and Conditions**
> **Questions and/or Comments?**

      i.

2) Once logged into Taleo, either the Welcome screen or Dashboard will display (this is dependent on the user. From the Welcome screen, select 'Submissions' from the left menu OR from the Dashboard select 'Submissions' from the top menu

a. Welcome Screen:
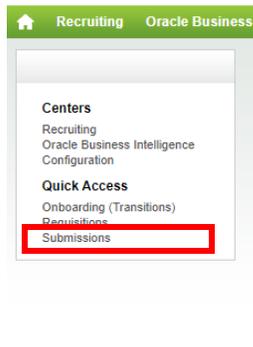
b. Dashboard:
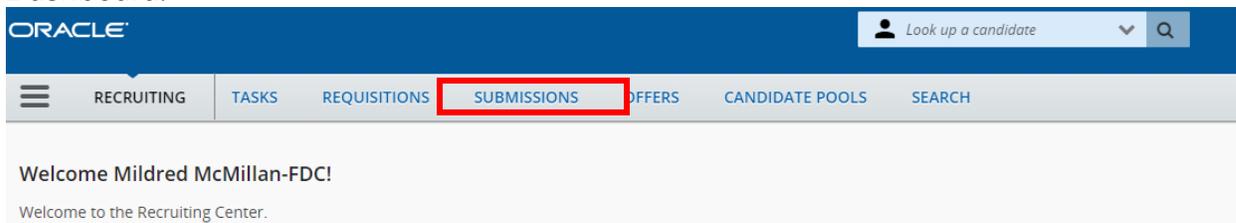
3) Expand Submissions under the Filters on the left.
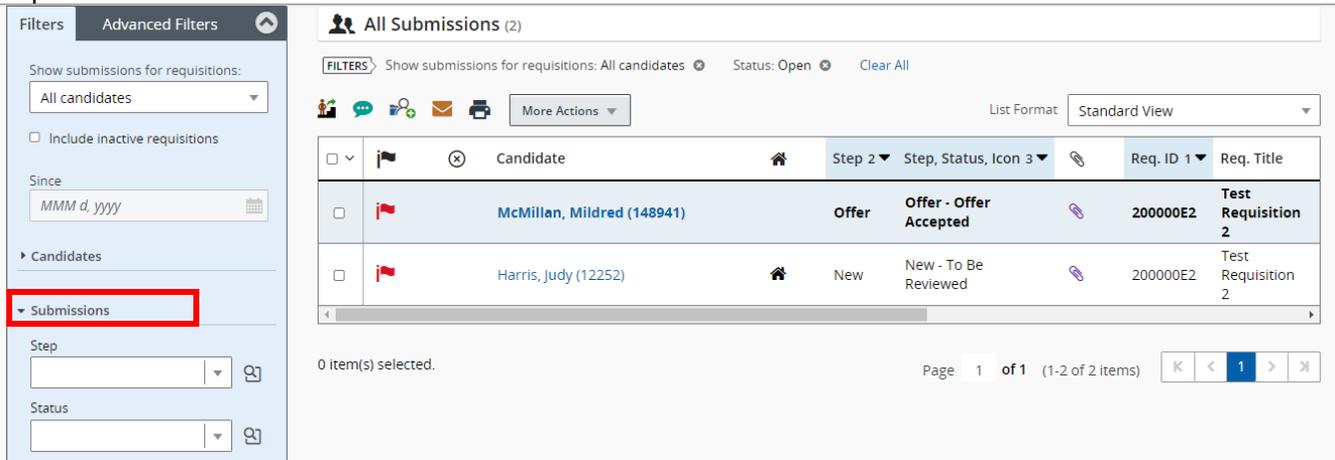
4) To filter for the candidates awaiting approval, enter 'Pre' in the step field and then select the down arrow. This narrows down the options to select the below step.
   a. Department Chair – Select 'Pre-Interview Screen – Dept Chair
   b. Dean – Select 'Pre-Interview Screen – Dean'
   c. Vice Provost – Select 'Pre-Interview Screen – Vice Provost'
   d. OIIE – Select 'Pre-Interview Screen – OIIE'
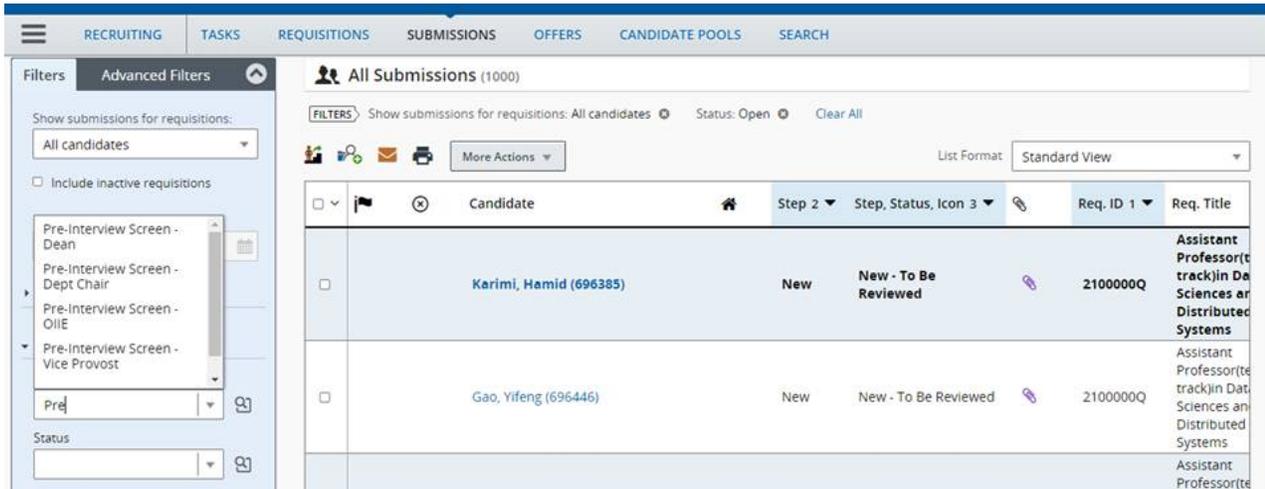
5) Then select to 'Apply Filters'. This will then show any candidates on any requisitions waiting approval
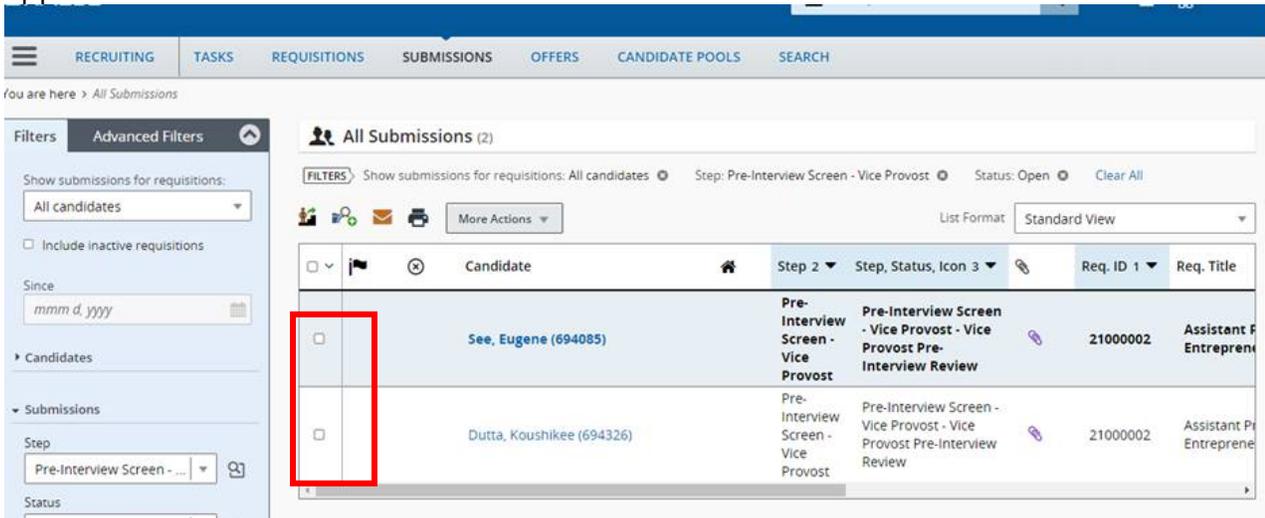
6) To change the step and status of a candidate and approve or decline for the interview pool, select one or more candidates using the checkboxes to the left of the candidate name as shown above. (NOTE: You may also click on the candidate name to open that specific candidate.)

7) Then click the **Change Step/Status** shortcut button at the top of candidate listings and the top of a candidate's file

> **- OR -**

From the **More Actions** drop-down list, select the **Change Step/Status** option.
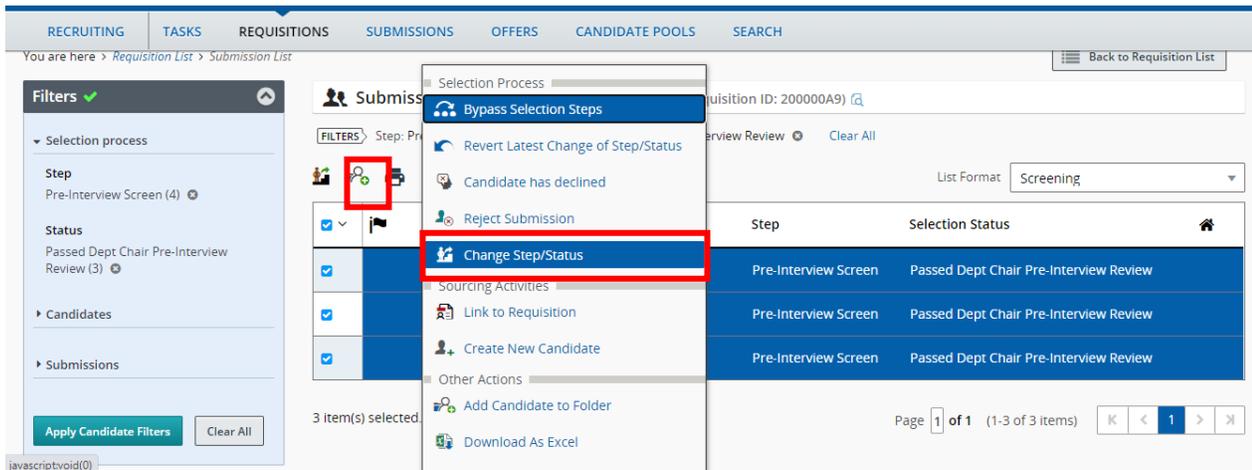
8) From the **Status** drop-down list, select the following based on your approval role:
    a. Department Chair
        i. If approving for interview pool, select a status of 'Passed Dept Chair Pre-Interview Review'
        ii. If declining for interview pool, select a status of 'Did Not Pass Dept Chair Pre-Interview Review'
    b. Dean
        i. If approving for interview pool, select a status of 'Passed Dean Pre-Interview Review'
        ii. If declining for interview pool, select a status of 'Did Not Pass Dean Pre-Interview Review'
    c. Vice Provost
        i. If approving for interview pool, select a status of 'Passed Vice Provost Pre-Interview Review'
        ii. If declining for interview pool, select a status of 'Did Not Pass Vice Provost Pre-Interview Review'
    d. OIIE
        i. If approving for interview pool, select a status of 'Passed Dept Chair Pre-Interview Review'
        ii. If declining for interview pool, select a status of 'Did Not Pass Dept Chair Pre-Interview Review'
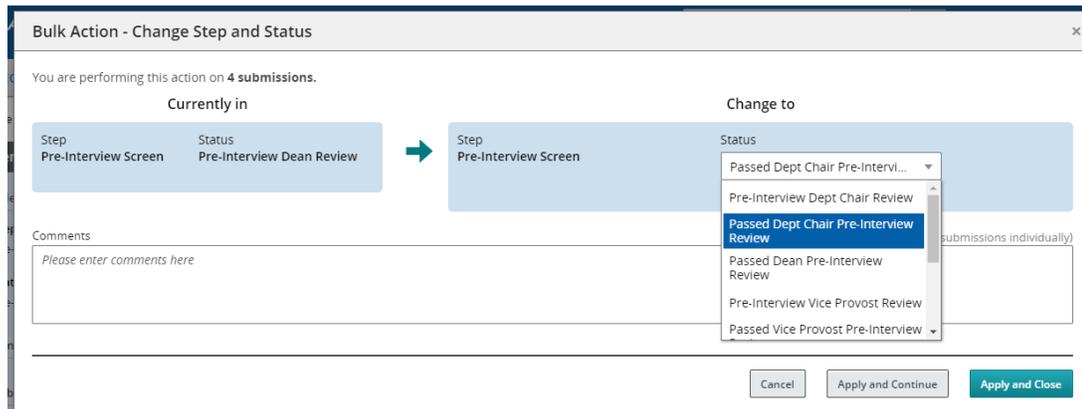
9) **IMPORTANT FOR ALL USERS:**
   a. If approving or passing candidate(s) for interview pool, after selecting the status for pass from the previous step first select the 'Apply and Continue' button to record the status. Then select 'Apply and Close' to move to the next approver's queue. This two-click process is required to move to the next approvers queue (for OIIE move to ready to be interviewed) and make it easier for each approver to identify candidates waiting on their approval or let the search committee know that the candidate is fully approved.
   b. If declining the candidate for the interview pool, after selecting the status of did not pass from the previous step, select 'Apply and Close'. Someone from the search committee will then move the applicant to a status of 'Reject' if needed.

The details of all steps and statuses with the order are below in 'Faculty Candidate Selection Workflow' (see Section 3.6).

2.1.2 Option 2 to View and Approve Interview Candidates

1) Navigate to Taleo environment using link -> https://towson.taleo.net/

   i.
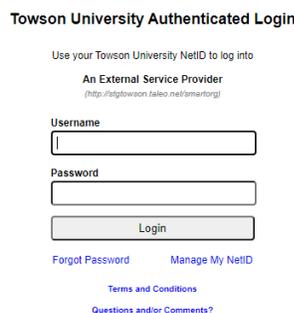
2) Once logged into Taleo, from the Welcome screen, select 'Requisitions' from the left menu and the requisition list will display

3) Locate the applicable requisition by using the filters or scrolling

4) In the **Active Candidate Count** column, click the hyperlink displaying the number of candidates. **TIP: 'Filters' on the left hand side can be used to find requisition. Enter search data and then select 'Apply Filters' at bottom of section. The 'Filters' tab can also be collapsed to see more data elements on the screen.**

5) The candidate submissions for the selected requisition displays. To display only candidates currently in the Pre-Interview step and waiting approval, use the 'Filters' tab on the left. Under Step under filters, click on Pre-Interview Screen.

6) All of the statuses in this step will display with the number of candidates in the step. Click on the appropriate status.
   a. Department Chair – Select 'Pre-Interview Screen – Dept Chair
   b. Dean – Select 'Pre-Interview Screen – Dean'
   c. Vice Provost – Select 'Pre-Interview Screen – Vice Provost'
   d. OIIE – Select 'Pre-Interview Screen – OIIE'

7) The applicants in the status waiting to be approved/moved to next step display

8) Follow steps 6 through 9 in option 1 above.

3 Appendix

3.1 View Candidate Files in ImageNow

Search committee members will view applicant materials using a web based application that will work with any modern browser on any platform without the need to install the Perceptive Content/ ImageNow client.

To log into Perceptive Content Experience navigate to https://webnow.towson.edu/experience/#login

Login screen:
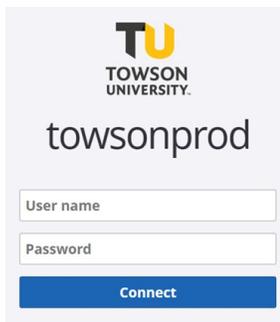
Use your Towson University NetID account for Perceptive Content. Log-in with your standard network credentials. Once logged in, click on the 'Workflow'
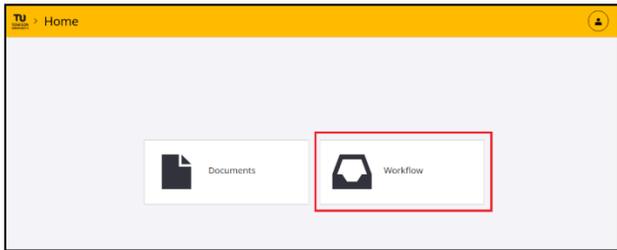
button.

You will be taken to a Workflow space and all Searches where you participate in will be listed on the left. Navigate to the appropriate queue.
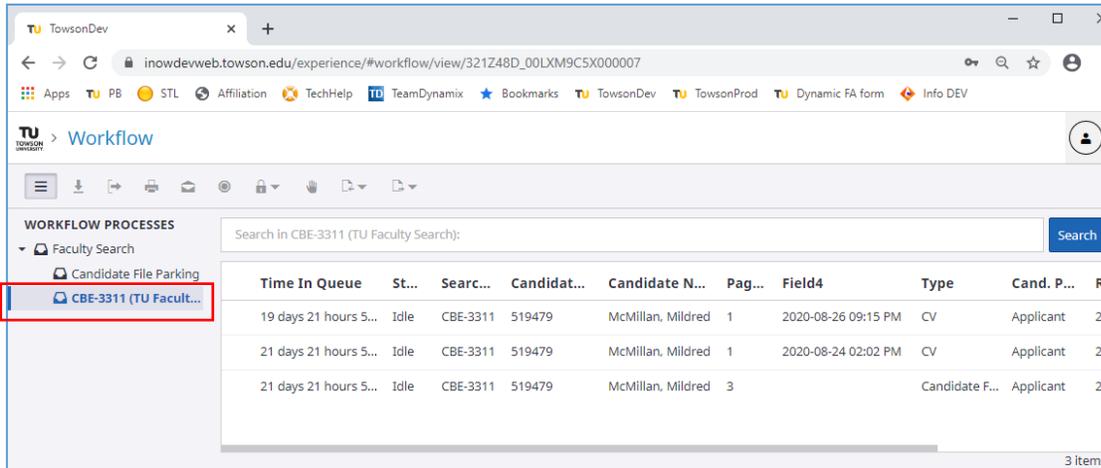
Click on the document to open it. The pages of the document are shown with thumbnail images on the left. Clicking on one of these will open that page. Note: Each 'page' is a separate file submitted by the applicant in their native, original format. For example, a multi-page PDF file will open the PDF file within the view screen with the PDF controls available to navigate through the PDF pages. The properties of the document are on a panel to the right. The Properties will list the Index values and other meta-data of the document. The page View / Zoom controls are on the bottom. To turn off the Properties box, click the 'Show or Hide Properties' button on the far-right hand side.
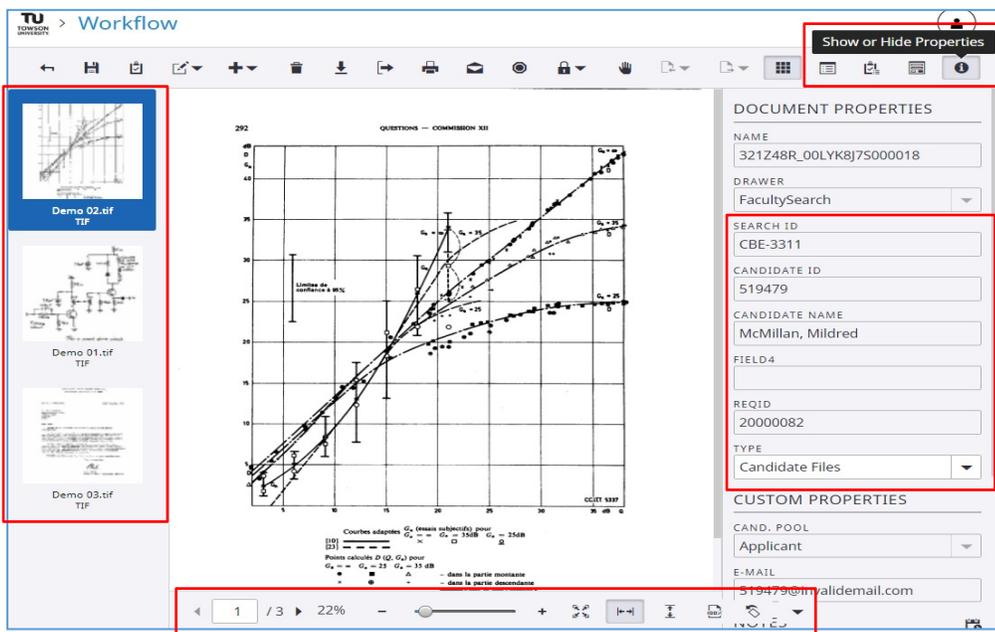
Viewing Video Files

While most candidate files can be viewed within the Experience app, video files, AVI, MOV, MP4, etc., will need to be exported to your local machine. When you click on a page that is a video file, a short description of the file will display.
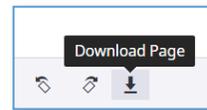
Along the bottom of the viewing panel, is the Download Page button:

There is a similar button on the top toolbar, this is to download the entire document. Use the Download Page button to just export the video file.

The file will be saved in your default Downloads folder, where you can open it using your computer's video software. Unfortunately, the file will be named with Perceptive Content's database identifier that is not very useful. You might want to rename the file to reference the candidate, but this is not necessary since the original file remains in the Content file store.
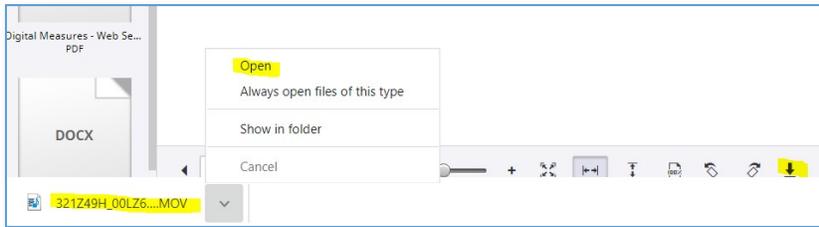
While still in the document view, clicking the back arrow in the upper left corner will close the document and take you back to the queue.

Clicking on the TU at the top left corner at any point will take you back to the initial 'Home' landing page.

The top right "profile" button is how you Disconnect. Click on the [button] to Disconnect / Logoff.

Profile

Office of the Provost
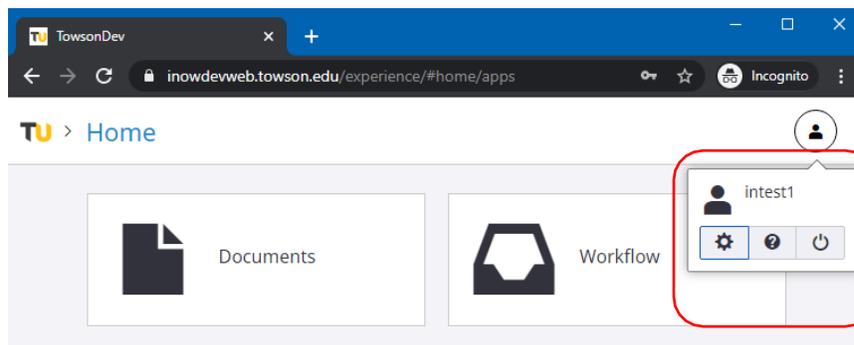
3.2 View Candidate Files and Attachments in Taleo

This job aid provides step-by-step instructions on how to view a candidate's file in Taleo. A candidate file contains candidate information such as personal information which includes address, email and phone number(s) from the Job Submission and the General Profile. To access the candidate file, click a candidate name in the list. Other tabs allow for viewing attachments and history of actions taken on or by the candidate. This topic covers the navigation of the sections and tabs within a candidate file.

Attachments (cv's, etc) may be uploaded into Taleo and can be viewed from the Attachments tab. However all attachments uploaded will be copied to ImageNow for review. All hire documents for candidates should be reviewed via ImageNow (see Section 3.7).

1) From the list of submitted candidates (accessed by clicking on the number in requisition list), click on candidate's name to view their file.

2) The candidate's file displays in view mode with the Job Submission tab selected and the Personal Information section expanded. In View mode, only fields that contain data display.

3) The candidate file is organized into two panes. The left pane 'Summary' contains the candidate card and supporting information. The candidate card can be flipped to display a quick view of either Submission details or General Profile details. The pane can also be expanded or collapsed/hidden.

4) The right pane contains the main content of the file as well as an action bar allowing users to perform actions on the candidate. Tabs provide complete information about the candidate. Depending on the candidate card side being viewed, the information displayed on the tabs will vary.

5) You can collapse Personal Information to see all sections. You can also expand each section within the Job Submission tab to review the candidate's information.
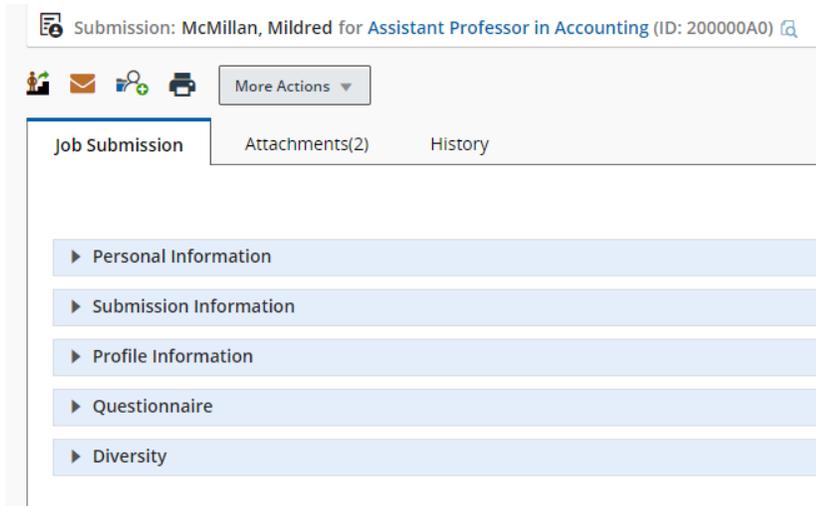
6) On the Job Submission form, navigate to the Questionnaire section.

▶ Personal Information

▶ Submission Information

▶ Profile Information

◢ Questionnaire

Prescreening Questionnaire

	Question	Answer	Required/Asset
1	Do you have a Master's degree?	→ Yes	-
		No	-
2	Are you proficient with various computer software packages, such as Microsoft Word, Excel, PowerPoint, and Outlook?	→ Yes	-
		No	-
			Required 0/0 Assets 0/0

7) If prescreening questions were added to the requisition, In the Prescreening Questionnaire block, you will see the candidate's answers to the questions. The green checkmark indicates the candidate's answer.

8) On the Job Submission tab, in the Personal Information block, the candidate's Email Address is noted.

9) Hover over each button on the Action bar and read the tooltip that explains them. Review the actions listed within the More Actions drop-down list. See section form 'Moving Candidates Through Hire Process' and 'Faculty Candidate Selection Workflow' for more information on how to move candidates and details on the steps and statuses.

More Actions ▼

■ Selection Process ■
🔁 Change Step/Status
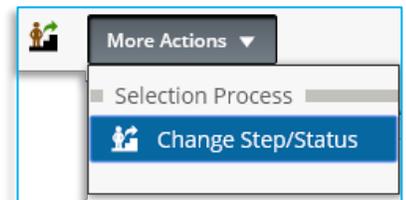
10) Click the Attachments tab. There may not be attachments. All attachments will be copied to ImageNow for review.

11) Switch the Summary details that display on the left pane by using the slider to view either the

TOWSON UNIVERSITY.
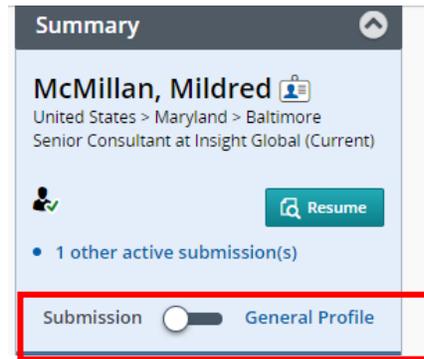
12) Submission details or the General Profile details.

13) Click the History tab. If applicable, modify the history of events to show additional events. Note that you can view the history for different job submissions from this tab.

14) On the left pane, in the Other Submissions section, click the Back to Submission List button to return to the list of candidates.
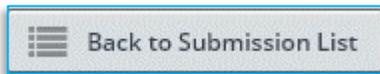
15) You have viewed a candidate's file.

10) Hiding rejected candidates from list of candidates to make review cleaner and easier. From a listing of candidates, use the Filters panel to hide rejected candidates.
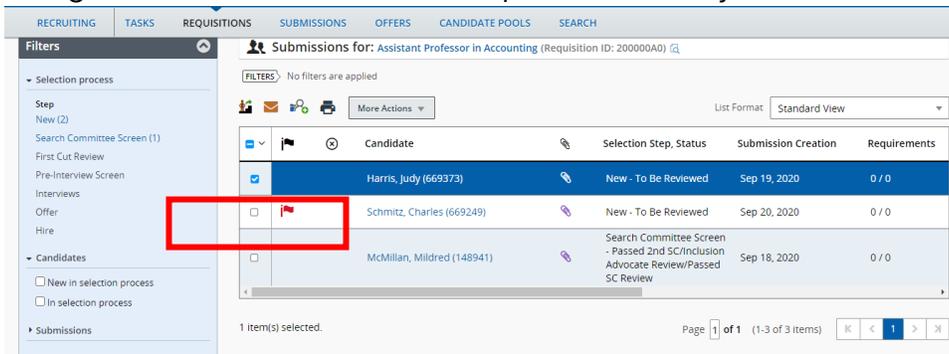
11) In the Quick Filters section, expand the Candidates option.

12) Select the In selection process option.

13) At the bottom of the Filters panel, click the Apply Candidate Filters button.

14) Result: The rejected candidate is removed from the list.

3.3 Faculty Hiring Process Steps and Statuses (Candidate Selection Workflow)

9) The following table details the steps in the process to move applicants from pre-interview status to approval for on-campus interviews.

Office of the Provost

Candidate Step	Candidate Step Configuration	Candidate Status	Notes/Details of Candidate Status	Who Clicks	Comments Optional or Required?	Status in ImageNow
New	• Mandatory	To Be Review	Newly applied candidates - All candidates with completed applications	SYSTEM	Optional	New
		Declined	Candidate withdraws before Search Committee review		Optional	Rejected/Declined
Search Committee Screen	• Mandatory	Passed 1st SC Review	Passed review by 1st SC member meeting	Search Committee	Optional	Applicant Pool
		Passed 2nd SC/Inclusion Advocate Review	Passed review by 2nd SC member, inclusion advocate or by outside meeting/conversation of Search Committee (NOTE: The Search Committee will also have the option to only select this status and enter in the comments that it was done by	Search Committee	REQUIRED	Applicant Pool
		Rejected	Candidate does not pass SC review (NOTE: Candidate should only be rejected after agreement by Search Committee)		Optional	Rejected/Declined
		Declined	Candidate withdraws during SC Review		Optional	Rejected/Declined
First Cut Review (Optional steps and statuses to use when doing a first cut.	• Optional	First Cut Review	Candidates identified for first cut (intial online/phone interview). This is the narrowing down of pool before sending for Dept Chair, Dean, Vice Provost and OIIE review.	Search Committee	Optional	First Cut
		Rejected	Candidate does not pass First Cut Review		Optional	Rejected/Declined
		Declined	Candidate withdraws during First Cut Review		Optional	Rejected/Declined

Pre-Interview Screen (Screen of candidates identified for interview by Chair, Dean, VP, OIIE)	• Mandatory	Pre-Interview Review by Dept Chair	Candidate SC wants to be considered for Interview This is the smaller list narrowed down from the first cut review (Candidates who are identified as alternate for interview will be identified with a comment)	Search Committee	Optional (NOTE: Comments are optional byt a not if candidate is being identified as an alternate to be reviewed should be included.)	Pre-Interview
		Passed Pre-Interview Review by Dept Chair	Department Chair's approval to interview candidate	Department Chair	Optional	Pre-Interview
		Pre-Interview Review by Dean	Candidate waiting to be reviewed by Dean	Department Chair	Optional	Pre-Interview
		Passed Pre-Interview Review by Dean	Dean's Approval to interview candidate	Dean	Optional	Pre-Interview
		Pre-Interview Review by Vice Provost	Candidate waiting to be reviewed by Vice Provost	Dean	Optional	Pre-Interview
		Passed Pre-Interview by Vice Provost	Vice Provost's Approval to interview candidate	Vice Provost		Pre-Interview
		Pre-Interview Review by OIIE	Candidate waiting to be reviewed by OIIE	Vice Provost	Optional	Pre-Interview
		Passed Pre-Interview by OIIE	OIIE's Approval to interview candidate	OIIE		Pre-Interview
		Rejected	Candidate rejected		Optional	Rejected/Declined
		Declined	Candidate declines		Optional	Rejected/Declined

Interview	• Mandatory	To be Interviewed	Passed Pre-Interview Screen by Chair, Dean, VP and OIIE and can move forward with interview	OIIE or Search Committee		Interview Pool

		Interviewe Successfully Completed	Selected candidate	Search Committee	Optional	Interview Pool
		Interviewe Not Completed	For alternate candidates or others nontinterviewed	Search Committee	Optional	Interview Pool
		Rejected	Candidate rejected after any interview		Optional	Rejected/Declined
		Declined	Candidate declines after any interview		Optional	Rejected/Declined
Offer	• Mandatory	Offer Extended	Indetify Candidate who offer was extended verbally and/or in writing	Search Committee	Optional	Offer Pool
		Offer Accepted	Offer accepted by candidate	Search Committee	Optional	Offer Pool
		Declined	Offer declined by candidate		Optional	Rejected/Declined
		Rejected	Offer rejected because req cancelled		Optional	Rejected/Declined
		Hired External	Candidate Hired NOTE: Moving a candidate to this step will allow the requisition status to be automatically or manually moved to Filled.	Search Committee	Optional	Hired Pool
		Rejected	Candidate rejected before in PeopleSoft		Optional	Rejected/Declined
		Declined	Candidate declined before in People Soft		Optional	Rejected/Declined