Taleo · X ™
Talent Drives Performance

Taleo Enterprise Edition

Taleo Onboarding Administration Manual

Version 7.5 - Service Pack 9

May 2009

Confidential Information

It shall be agreed by the recipient of the document (hereafter referred to as "the other party") that confidential information disclosed by Taleo through its documents shall be retained in confidence by the other party, and its respective employees, affiliates and/or subsidiaries, pursuant to the following terms and conditions:

For the purpose herein, the term "Confidential Information" shall mean the following:

i. Any information, know-how, data, process, technique, design, drawing, program, formula or test data, work in process, business plan, sales, suppliers, customer, employee, investor or business information contained in a document, whether in written, graphic, or electronic form; or

ii. Any document, diagram, or drawing which is either conspicuously marked as "Confidential", known or reasonably known by the other party to be confidential, or is of a proprietary nature, and is learned or disclosed in the course of discussions, demonstrations, or other collaboration undertaken between the parties.

Table of Contents

Introduction

Getting Started

User-Defined Fields and Selections

User-Defined Forms

Documents

Correspondence

Tasks and Processes

New Hire Portal

Introduction 1

About the Onboarding Administration Manual

The Onboarding Administration section is the main point of entry from which the administrator can access, manage and configure Onboarding components.

This manual provides extensive information about the Onboarding Administration section, information that helps users benefit fully from the software's many features and functions.

Symbols Used in the Manual

Information that merits particular attention.

A useful tip when performing a particular operation.

A best practice to adopt.

Pop-Up Blockers

Taleo advises not to use pop-up blockers as they might interfere with the system.

Navigating from the Staffing WebTop/Manager WebTop to Onboarding

Please note that as soon as you access the Onboarding from the Staffing WebTop or the Manager WebTop, the session in the Staffing WebTop or the Manager WebTop is terminated.

Information Transfer Between Enterprise Edition and Onboarding

Specific candidate information is sent to Onboarding about each New Hire, the first time an Onboarding process is started for each person. The values, if any, within these areas are transferred or copied directly into new fields that are controlled and accessible within Onboarding.

If, afterwards, candidate information is modified, or the same process is canceled and restarted, or another process is launched, the New Hire information will not be affected except for some specific data. The Start Date is the only data that updates immediately without restarting a process. See .

Synchronization of Users and OLF

The Onboarding database is synchronized with SmartOrg users and Organizations, Locations, and Fields every 24 hours, during the night. This means that modifications made for a user will take up to 24 hours before showing up in the Onboarding database. However the New Hires are transferred immediately, with their same password.

Creation of New Hires through Capture Candidate

Users applying to a requisition by themselves will already know their user name and password. But when a New Hire is created in the Staffing WebTop through the capture candidate functionality, a system-generated user name is assigned to the New Hire. This user name may be added in the first correspondence sent.

PDF Creation

Please note that a version of Adobe Publisher 7 or higher is required to create forms. An older version will not allow you to create tokens, display values in PDFs and successfully use the Open PDF task, etc.

Navigating through the Administration Section

Navigation Bar

The navigation bar contains links to various pages that are available no matter what your permissions are.

| Help | Web Support | About | Sign out |

Help	Access to the online help.
Web Support	Access to online technical support.
About	Information about the version.
Sign out	Link to exit the application.

Quick Access

The **Quick Access** pane contains direct links to pages that are relevant to where you are currently located in the application and the options offered to you from this point. The links offered in that pane vary according to your permissions and the context.

Quick Access
Administration

Recently Viewed Items

The **Recently Viewed Items** pane contains direct links to the last ten pages you most recently accessed (according to your permissions) during the current session or previous ones. They can be pages where you made modifications or simply pages that you accessed without making modifications. To access a recently viewed item, simply click the item.

Below is a description of the icons that can be displayed in the **Recently Viewed Items** pane according to your permissions:

Administration portal	Login	History
Wizard	Selector window	User information
Password policies	Company settings	Security permissions
Product settings	Roles and permissions	Document

	HTML document		PDF document		Message
	Message template		Correspondence		Paragraph
	Custom selection		Form		Guide
	New hire configuration		New hire Portal		New resource
	Resource administration		Response center		User-defined field
	User-defined form		Task		Task step
	Task definition		Task reminder		Transition
	Routing step		Subprocess step		Process
	Step		Condition		

Breadcrumb Trail

The breadcrumb trail located at the top of each page allows you to see where you are located within the Onboarding and to jump to previously viewed pages.

Onboarding WebTop > Super Annette Candidate > **Task - Starting Process Notification**

The breadcrumb trail is only available in navigation mode; it disappears when you are in editing mode.

Navigation Icons

When information is spread across multiple pages, the following navigation icons are displayed:

Icon	Definition
<<	Goes to the previous 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 21-30.
≤	Displays the previous page.
≥	Displays the next page.
>>	Goes to the next 10 pages. For example, if you see 31-40 out of 72, clicking this icon will bring you to pages 41-50.

Links and Buttons

Some often-used links and buttons are described in the following table:

Button	Definition
Refresh	Updates the information on the current page.
Delete	Deletes specific elements.
Activate	Activates a specific element. When an element is activated, it is available to be used. The status is Active. See "Status" on page 1-10.
Deactivate	Deactivates a specific element. When an element is deactivated, it can no longer be used. The status is Inactive. See "Status" on page 1-10.
Save	In most cases, applies the changes or selections you made and closes the displayed window.
Cancel	Cancels the changes and closes the window.
Remove	Removes a specific element.

Links	Definition
Create	Opens a creation page.
Configure	Opens the language configuration page.
Edit	Opens a page for editing.
Preview	Opens a preview page.
More	Displays more items from a list.
Add	Adds an element to a list.
Reorder	Reorders elements in a list.

Selector Windows

Selector windows are used throughout Onboarding. They allow you to select various elements according to where you are in the application. The type of selector window (single or multiple) varies according to the selection type. Selector windows contain filters allowing you to quickly find items in a list.

More info

Whenever a description is available below a page title, the **More info** link is displayed. This link gives you access to contextual online help.

History

The **History** section is used throughout Onboarding. It is used to present useful tracking details on an element. The **History** section contains the following information.

Date and Time	Date and time when an event occurred.
Event	The event or action performed on an element.
Details	Information regarding the event.
By	The "actor" (person or system) who performed the event. To obtain basic information about the "actor", click the actor's name.

The three most recent events are displayed in the **History** section. To view a more complete listing of events, click **More**.

List Sorting Method

List sorting are managed by Oracle. The following sorting methods are used:

- Binary sort
- Multilingual sort

Binary sorts (i.e., ordering character strings based on their binary coded values) are based on the numeric values of the characters defined by the character encoding scheme. Binary sorts are the

fastest type of sort and they produce good results for the English alphabet. Accented characters and punctuation are not considered.

Ascending Sort	blank space - (dash) -b a b c null
Descending Sort	null c b c -b - (dash) blank space

Multilingual sort is used when data is available in more than one language and when data is available in a single language other than English. Oracle evaluates multilingual sorts at different levels of precision. On the first level sort, accented characters and punctuation are ignored. Accented characters and punctuation are considered on the second level sort (for example, the words "multilingual" and "multi-lingual" are considered identical during the first level sort).

Ascending Sort	blank space - (dash) a b -b c null
Descending Sort	null c -b b a - (dash) blank space

Status

Elements can have one of the following statuses:

Draft	Upon creation, an entity is always Draft. A Draft entity can be modified. A Draft entity cannot be used. It must be Active before it can be used.
Active	When an entity is Active, only the name and description can be modified. It is not possible to update the behavior of the entity.
Inactive	When an entity is Inactive, only the status can be modified. The only possibility is to go back to the Active status.

A Draft entity can become Active. An Active entity can become Inactive. An Inactive entity can become Active. However, an Active entity cannot "go back" to the Draft status. This prevent losing the history tracking of all actions that a user performed when it was active.

Correspondence Wizard

The **Correspondence Wizard** is used throughout Onboarding. It allows you to send messages to users and New Hires and to write a message using the HTML Editor.

1. Click **Send correspondence**. The **Correspondence Wizard - Message Edition** opens.

2. Fill the **From** and **To** fields. Enter recipient names in the **Cc** and **Bcc** fields, if applicable. Recipients in the **Cc** (carbon copy) and **Bcc** (blind carbon copy) fields also get the message; however, the names of the recipients in the **Bcc** field are not visible to other recipients. Separate names with a semicolon (;).

3. In the **Subject** field, type the subject of the message.

4. In the **Content** field, type the message using HTML Editor options.

5. Enter a reference or comments, if applicable.

6. Click **Continue**. The **Correspondence Wizard - Message Preview** page opens.

7. Review your message.

8. Click **Send**.

Language Configuration

The **Language Configuration** is used throughout Onboarding. It allows you to create elements in several languages.

Languages are configured by the system administrator and made available to users. Onboarding users do not have to activate languages.

The New Hire Portal (exclusively for New Hires), is available in all languages that Taleo supports. New hires will see the New Hire Portal in the language of the requisition they applied on, if properly configured in Onboarding. Also, all the necessary content (forms, correspondence, task descriptions, PDFs) related to the requisition will be available in the same language if the administrator has created them.

As for Administration pages - for setup and configuration changes as well as processes, tasks and correspondence definition - they are available in English and French. Therefore, administrators and managers can select the language of their choice to look at documents, forms, objects and correspondence at the login.

If a language is unavailable for the product, the system will use the default language instead.

Getting Started 2

Accessing the Onboarding Administration Page

The Onboarding Administration page is the main point of entry from which the administrator can access, manage and configure Onboarding components. Depending on your user type and permissions, not all of the sections may be displayed.

1. Click **Administration** in the Onboarding WebTop page.

Onboarding WebTop > **Administration**

Administration

The Administration section is the main point of entry from which the administrator can access Onboarding components. More info

Product Settings
This section allows you to manage the product settings.
Settings

Correspondence
This section allows you to manage message templates.
Message Templates

Documents
This section allows you to manage documents to be included in message templates.
Documents

User-defined Forms
This section allows you to manage forms to be filled by various persons involved in the onboarding process.
Forms

Processes and Task Definitions
This section allows you to manage onboarding processes and task requests to be sent to any person involved in the onboarding process.
Processes
Task Definitions

Security and Permissions
This section allows you to manage the existing roles and their associated permissions.
Roles and Permissions
Security Settings

User-defined Fields
This section allows you to manage user-defined fields and selections.
User-defined fields
User-defined Selections

New Hire Portal Configuration
This section allows you to configure the new hire portal.
Portals
Display Properties

Description of the Administration Page

Product Settings	Manages product settings. See "Product Settings" on page 9-0.
Documents	Manages documents to be included in message templates as well as in general and personalized documents in the New Hire Portal. See "Documents" on page 5-0.
Processes and Task Definitions	Manages onboarding processes and task requests to be sent to any "actor" (person or system) involved in the onboarding process (see "Tasks and Processes" on page 7-0). Gives access to the list of roles (see "Accessing the Role List Page" on page 7-15).
User-defined Fields	Manages user-defined fields (UDF) and selections. UDFs are used in forms and correspondences. See "User-Defined Fields and Selections" on page 3-0.
Correspondence	Manages message templates. See "Correspondence" on page 6-0.
User-defined Forms	Manages forms to be filled by various persons involved in the onboarding process. See "User-Defined Forms" on page 4-0.
Security and Permissions	Manages existing roles and their associated permissions. See "User Types and Permissions" on page 2-5 and "Security Settings" on page 2-14.
New Hire Portal Configuration	Configures the New Hire Portal and manages the New Hire user account. See "New Hire Portal" on page 8-0 and "Managing User Accounts" on page 8-8.
Product Resources	Manages product labels (view label IDs, refresh customized values, etc.). See "Product Resources" on page 10-0.

Understanding the Onboarding Process

Below is a detailed visual representation of an onboarding process. An onboarding process requires a number of different participants to complete the process as well as activities performed in parallel or in sequence and before and after the start date.

Of course, the process below is only portrayed as an example. The creation of a process offers a lot of flexibility and any number of different processes can be assembled as needed.
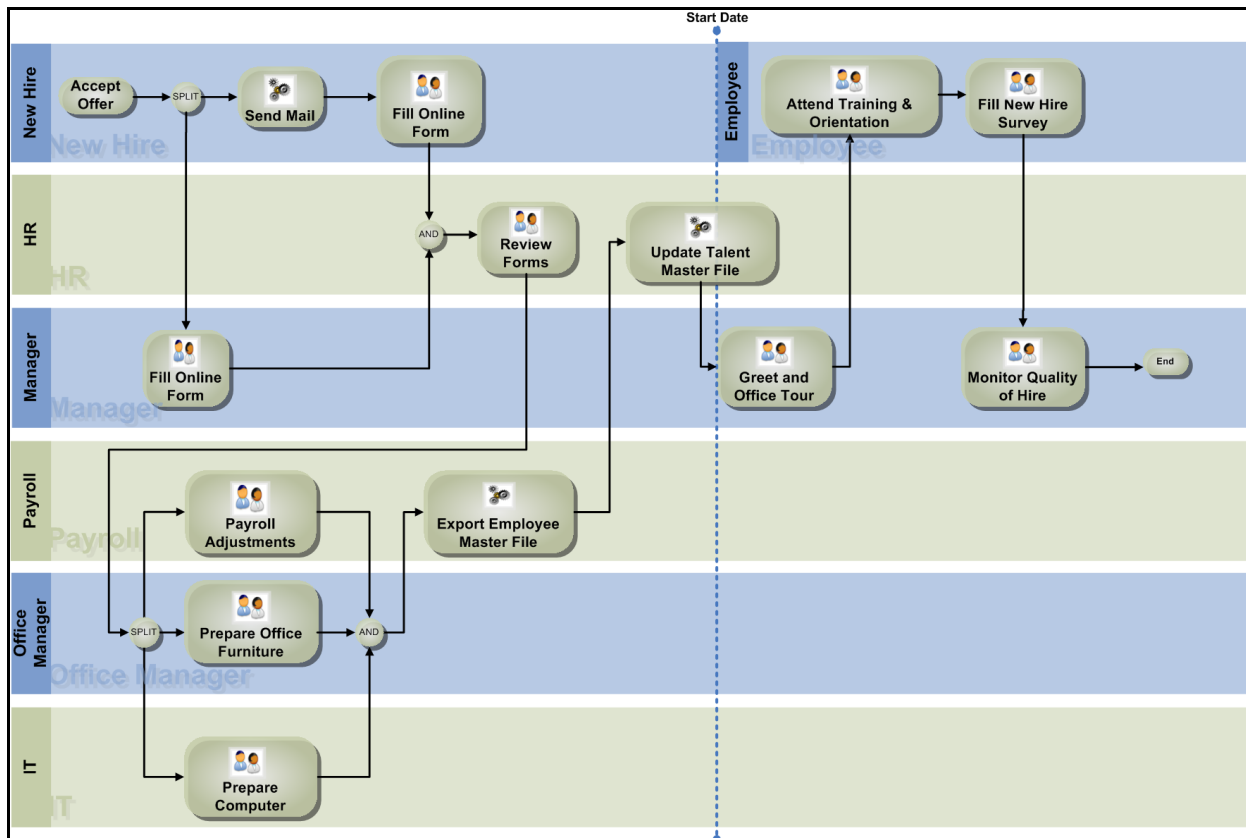
Before using Onboarding to create a process, you must first think about what your process will do and who will be involved.

The following scenario is very simple and should help you better understand the creation of an onboarding process. It is described in details below the diagram.
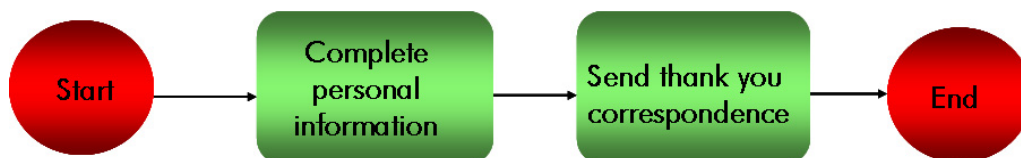
In this scenario, a process containing two steps is created:

- the New Hire is requested to complete the New Hire Personal Information Form (a task will appear in the New Hire Portal). For this step, a user-defined form containing a user-defined field with a selection is created.

- the recruiter is requested to send a correspondence to the New Hire to thank him/her for having completed his/her personal information. For this step, a correspondence is created.

To create a process for this scenario, the following activities are performed:

Create one user-defined field containing a selection. The user-defined field is entitled "Mode of Transportation" and provides the following choices of answers: Car, Bus, Other. See "Creating a User-Defined Field Containing a Selection" on page 3-8.
Create one user-defined form to capture New Hire personal information. See "Creating a User-defined Form" on page 4-9. Include the user-defined field.
Create one correspondence to thank the New Hire for having completed his/her personal information. See "Creating a Message Template" on page 6-3.
Create two tasks to link the two activities: • One task for the New Hire entitled "Complete personal information". • One task for the recruiter entitled "Send thank you correspondence". See "Creating a Task Definition" on page 7-3.
Create one process integrating the above two tasks. See "Creating a Process" on page 7-6.
Create one transition between the "Complete personal information" task and the "Send thank you correspondence" task. See "Creating a Transition" on page 7-8.

User Types and Permissions

User types and permissions are configured and managed both in the Administrator WebTop and in Onboarding. Some steps are performed in the Administrator WebTop while others are performed in Onboarding.

For instance, HR Administrator is a user type. The people who are granted the right to act as HR Administrators is controlled in SmartOrg within the Administrator WebTop. Then the permissions, what defines the list of actions they are allowed to perform, are configured in Onboarding Administration.

Onboarding WebTop > **Administration**

Administration

The Administration section is the main point of entry from which the administrator can access Onboarding components. More info

Product Settings
This section allows you to manage the product settings.
Settings

Documents
This section allows you to manage documents to be included in message templates.
Documents

Processes and Task Definitions
This section allows you to manage onboarding processes and task requests to be sent to any person involved in the onboarding process.
Processes
Task Definitions
Roles

User-defined Fields
This section allows you to manage user-defined fields and selections.
User-defined fields
User-defined Selections
User-defined Electronic Signatures
User-defined Reporting

Product Resources
This section allows you to manage the product resources (view resource IDs, refresh customized values, etc.).
Resource Administration

Correspondence
This section allows you to manage message templates.
Message Templates

User-defined Forms
This section allows you to manage forms to be filled by various persons involved in the onboarding process.
User-defined Forms

Security and Permissions
This section allows you to manage the existing user types and their associated permissions.
User Types and Permissions
Security Settings
Refresh Newhireportal Application Policy
Refresh Onboarding Application Policy

New Hire Portal Configuration
This section allows you to configure the new hire portal.
Portals
Display Properties
User Account Management
Images

To help you get more familiar with the concept, here is a table providing you with the important information regarding which action is performed in which application.

Action	Administrator WebTop	Onboarding Administration
Modifying permissions of a role.		X
Assigning a role to a user.	X	

To access the **User Types and Permissions** page:

1. In the Onboarding Administration page, click **User Types and Permissions**. The **User Types and Permissions** page opens. This page allows you to view the list of available user types.

2. To view the permissions of a specific user type, click on a user type.

To modify permissions of a specific user type:

1. Click on a user type.

2. Click **Edit** next to **Administration**, **Correspondence** as well as **Processes and Tasks** to modify the permissions as desired.

3. Click **Save**.

Click **Default** if you wish to activate default permissions.

List of User Types

User Type	Description
External User	Uses the Response Center to complete tasks assigned to him/her.
HR Administrator	Manages entities (email template, documents, process definition, task definition, user-defined form) and the New Hire Portal section via the Onboarding Administration.
HR Director	Views all onboarding processes. Cannot manage administrative entities.
Onboarding Supervisor 1, 2	Monitors their onboarding processes via Onboarding WebTop. Performs tasks assigned to him/her.
System Administrator	Manages system configuration.
User Manager	Manages roles and permissions.

List of Permissions

Permission	Description
Administration	
View product settings	Select **Human Resources** to allow a user type to view functional settings such as the content language, the working days, the From address. See <u>Product Settings</u>. Select **System** to allow a user type to view settings that have a direct impact on the behavior of the application. For example, the mail server name, the http proxy user name. Usually, these settings can only be modified by Taleo technical support. See <u>Product Settings</u>. When enabled, the module is available in the administration page.
Update product settings	Select **Human Resources** to allow a user type to update functional settings such as the content language, the working days, the From address. See <u>Product Settings</u>. Select **System** to allow a user type to update settings that have a direct impact on the behavior of the application. For example, the mail server name, the http proxy user name. Usually, these settings can only be modified by Taleo technical support. See <u>Product Settings</u>.
Manage security and permissions	Permission to manage the authorizations and all security settings. This permission enables the user to grant or revoke permission for all defined user types. It also allows users who have this permission to define the password and the sign in policy. This permission is granted, by default, to the User Manager user type only. When enabled, the Security and Permissions module in the Administration page is available.
Manage user-defined forms	When enabled, the User-defined Forms module in the Administration page is available.
Manage message templates	When enabled, the Correspondence module in the Administration page is available.
Manage text documents	When enabled, the Documents module in the Administration page is available. The documents produced with this module are used to create correspondence only (it does not refer to the Personalized documents available in the New Hire Portal, which can only be PDFs).
Manage New Hire Portals	When enabled, the New Hire Portal Configuration module in the Administration page is available.

Permission	Description
Manage New Hire user accounts	This permission allows users who have this permission to manage New Hire user accounts. This permission is granted by default to the User Manager user type and the HR Administrator user type.
Manage user-defined fields	When enabled, the User-defined Fields module in the Administration page is available.
Manage task definitions	When enabled, the Task Definitions link in the Processes and Task Definitions module in the Administration page is available.
Manage onboarding processes	When enabled, the Processes link in the Processes and Task Definitions module in the Administration page is available.
Correspondence	
Send correspondence	This permission allows users to send correspondences using the Correspondence Wizard.
Processes	
View processes	This permission allows users to view processes in Onboarding. The **View processes** and **Manage processes** permissions are interrelated. If one permission is enabled, the other one must also be enabled.
Manage processes	This permission allows users to cancel and suspend processes in Onboarding. The **Manage processes** and **View processes** permissions are interrelated. If one permission is enabled, the other one must also be enabled.
View and manage related documents	This permission allows users to see and access the section Attached Files in the New Hire Detail page seen by the Onboarding WebTop users. Once this permission enabled, a PDF document that gets associated with the New Hire via the Open PDF task would appear. There's also the possibility to associate other PDF documents from the document library to each New HireNew Hire, if desired. This permission also allows to view the Details link in the New Hire Details page.
Share processes or revoke the sharing of processes	This permission allows users to share and revoke the sharing of processes in Onboarding.
Delete processes	This permission allows users to delete processes in Onboarding.
Tasks	
View tasks	This permission allows users to view tasks in Onboarding.
Edit tasks	This permission allows users to edit, complete and cancel tasks in Onboarding.
Reassign tasks	This permission allows users to reassign tasks in Onboarding.

Permission	Description
Create tasks	This permission allows users to create tasks and reminders in Onboarding.
View related sources	This permission allows the user to display the links to the underlying Forms and Message Templates. Then the WebTop user who views the New Hire's steps and tasks can view the actual forms/emails that are part of the task. This is useful to view the data that was input into a form by the task assignee, or to read the email correspondence that was sent out.

Business Rules

There are different access level for the permissions: **I own or that have been shared with me**, **Assigned to me or that I have initiated** and **All**.

1. To grant the **Edit tasks** or **Reassign tasks** permissions (any access level), the **View tasks** permission must be granted (any access level).

    Furthermore, to grant the **All** access level for the **Edit tasks** or **Reassign tasks** permissions, the **All** access level must be granted for the **View tasks** permission.

2. To grant the **Manage processes** or **Share processes or revoke the sharing of processes** permissions (any access level), the **View processes** permission must be granted (any access level).

    Furthermore, to grant the **All** access level for the **Manage processes** or **Share processes or revoke the sharing of processes** permissions, the **All** access level must be granted for the **View processes** permission.

3. To grant the **Manage processes** or **Share processes or revoke the sharing of processes** permissions (any access level), the **Edit tasks** permission must be granted (any access level).

    Furthermore, to grant the **All** access level for the **Manage processes** or **Share processes or revoke the sharing of processes** permissions, the **All** access level must be granted for the **Edit tasks** permission.

User Types and Permissions

The table below indicates the permissions activated by default for each user type. Note that each page has a Default button, which reverts the permissions back to the original Taleo defaults for each user type if desired.

Onboarding WebTop User Types and Permissions

Path: Onboarding WebTop > Administration > User Types and Permissions

	Onboarding Supervisor 1	Onboarding Supervisor 2	HR Director	External User	HR Administrator	System Administrator	User Manager
Administration							
View product settings							
Human Resources						x	x
Systems							x
Update product settings							
Human Resources						x	x
Systems							x
Manage roles and permissions						x	x
Manage user-defined forms					x		
Manage message templates					x		
Manage text documents					x		
Manage the new hire portal					x		
Manage new hire user accounts					x		x
Manage user-defined fields					x		
Manage task definitions					x		
Manage onboarding processes					x		
Correspondence							
Send Correspondence	x	x	x		x		
Processes							
View Processes							
I own or that have been shared with me	x	x			x		
All			x				
Manage Processes							
I own or that have been shared with me	x	x			x		
All			x				
Share processes or revoke the sharing of processes							
I own or that have been shared with me	x	x			x		
All			x				
Tasks							
View tasks							
Assigned to me or that I have initiated	x	x		x			
All			x		x		
Edit tasks							
Assigned to me or that I have initiated	x	x		x			
All			x				
Reassign tasks							
I have initiated	x	x					
All			x				
Create tasks	x	x	x				

Delegate and Transfer

Onboarding also supports the capability to delegate and/or transfer ownership of responsibilities. This feature enables a temporarily or permanently departing user to be replaced by a new person with the right permissions.

In the past, most of the Taleo Recruiting responsibilities or tasks could be transferred or delegated in the event of a vacation or a departure of a user. However in Onboarding the administrator had to do it manually. Now these tasks are synchronized with all products (via SmartOrg).

There are a few things to consider before using this feature:

- The new user must have the same level of permissions as the user to be delegated from.
- All tasks and work items that would be assigned to the former user automatically get assigned to the new user until the specified period ends (in the case of a delegation).
- The delegation correspondence is sent only to the new user, and is not sent again if the ownership reverts back.
- For a transfer, all tasks and work items that currently belong to the former user at that moment now get moved to the new user. However if additional future tasks are assigned to the former user, these will remain with them.

Work items and tasks are transferred to the new user	Owns more items. More tasks and New Hires are displayed. Owns new processes and documents and can change them. Receives all new emails and reminders. Completions are tracked in their name. Past history remains with former user's name.
Work items and tasks are delegated to the new user	Can view more items. Can execute new tasks for New Hires. Can view all items and history. Receives all email reminders. Completions are tracked in their name. When delegations ends, their list shrinks.
Works items and tasks are delegated from the former user	Can still access, view and execute all their work. Is still the owner of all items.

Delegating Responsibilities

Delegation is performed for a specific period of time, after which the ownership reverts to the original user.

1. On the **User Accounts** page, click the name of the user who requires delegating their responsibilities.

2. In the **Account Information** section, click **Delegate**. The **Delegation** page opens.

3. Click **Search**. The **User Selector** opens. Only users with the same level of permission as the user to be delegated from are available in the list.

4. Select the appropriate user and click **Select**.

5. Specify the period when the delegation is valid and click **Save.**

6. A message in the **Account Information** section confirms the delegation for both user (new and former). It is also tracked in the **History** panel.

Transferring Responsibilities

As opposed to the delegation, a transfer of responsibilities is considered as permanent. In fact, no specification of dates is required.

1. On the **User Accounts** page, click the name of the user who requires transferring their responsibilities.

2. In the **Account Information** section, click **Transfer**. The **Transfer** page opens.

3. Click **Search**. The **User Selector** opens. Only users with the same level of permission as the user to be transferred from are available in the list.

4. Select the appropriate user and click **Select**.

    The transfer cannot be completed if the new user lacks any specific Onboarding roles that the former user held. In that case, the administrator must go to *Onboarding > Administration > Roles* and grant the missing role(s) to the user. Only then the administrator can go back to **SmartOrg** and complete the transfer successfully.

5. Click **Save**.

6. A message in the **Account Information** section confirms the transfer. It is also tracked in the **History** panel.

Security Settings

The **Security Settings** page is where you can view the list of modules for which you can set security and login settings. It is possible to edit settings for each module.

To access the **Security Settings** page:

1. In the Onboarding Administration page, click **Security Settings**. The **Security Settings** page opens. This page allows you to view the list of products for which you can set the security settings.

To view/edit the security settings of a module:

1. Click on the module's name. The **Security Settings** page opens allowing you to view security settings activated for the module as well as their value.

2. Click **Edit** next to **Sign In**, **Password** and **Forgot Password** to modify the settings.

3. Click **Save**.

List of Security Settings

Security Setting	Description
Sign In	
Allow new users to register in system	Values: Yes, No Default: No
Display the link "Forgot your user name?" to New Hires on their Portal	Values: Yes, No Default: No
Display the link "Forgot your password?" to New Hires on their Portal	Values: Yes, No Default: No
Activate the first login function (see <u>"First Login" on page 2-20</u>	Values: Yes, No Default: Yes
Show explicit error messages to New Hires at login	Values: Yes, No Default: No
Password	
Allow a password to be valid for X days (leave the field empty if you want passwords to be always valid)	Number of days before a New Hire must change their password. Null = always valid Default: 999
When a password change is required, prevent the reuse of the previous X passwords	Number of password changes required before a New Hire can use a password that they have used previously (0 = feature disabled). Values: 0, 1, 2, 3, 4, 5 Default: 0

Security Setting	Description
Require passwords that contain at least X characters	The password contains at least x characters. Values: 6 to 20 Default: 6
Require passwords that contain no more than X characters	The password must not contain more than x characters. Note: The system will start counting the number of characters from the maximum number of characters selected in *Require passwords that contain at least x characters*. For example, if you selected 10 characters, the system will indicate a possible value between 10 and 50. Values: 6 to 50 Default: 15
Require passwords that contain at least X letters of the Roman alphabet	The password contains at least x numbers of the Roman alphabet. Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 0, 1, 2, 3, 4, 5 Default: 0
Require passwords that contain at least X lowercase letters of the Roman alphabet	The password contains at least x lowercase letters of the Roman alphabet. Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 0, 1, 2, 3, 4, 5, 6 Default: 0
Require passwords that contain at least X uppercase letters of the Roman alphabet	The password contains at least x uppercase letters of the Roman alphabet. Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 0, 1, 2, 3, 4, 5, 6 Default: 0

Security Setting	Description
Require passwords that contain at least X numeric characters	The password must contain as least x digits (including letters, numbers, or special characters). Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 0, 1, 2, 3, 4 Default: 0
Require passwords that contain at least X characters other than letters and numbers (! # $ % & ( ) * + , - . / : ; < = > ? @ [ ] _ ` { | } ~)	The password must contain at least x special characters other than letters and numbers. Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 0, 1, 2, 3 Default: 0
Require passwords that contain no more than X identical consecutive characters	The password must not contain more than 2 identical consecutive characters. Note: The number of characters cannot exceed the number indicated in *Require passwords that contain at least x characters*. Values: 2, 3, 4, 5 Default: 10
Require passwords that do not contain the New Hire's first name	The password must not contain the New Hire's first name. Values: Yes, No Default: Yes
Require passwords that do not contain the New Hire's last name	The password must not contain the New Hire's last name. Values: Yes, No Default: Yes
Require passwords that do not contain the corresponding user name	The password must not contain the user name. Values: Yes, No Default: Yes

Security Setting	Description
Require passwords that do not contain the New Hire's email address	The password must not contain the New Hire's email address. Values: Yes, No Default: Yes
Forgot Password	
Use this method to change passwords	Access Code: An email containing an access code is sent to the New Hire once they have confirmed their email address. Security Questions: The New Hire is asked to answer the security question(s) previously entered in their profile. If the answer is correct, the New Hire is invited to enter a new password. Security Questions and Access Code: The New Hire is asked to answer the security question(s) previously entered in their profile. If the answer is correct, an email containing an access code is sent to the New Hire once they have confirmed their email address. Security Questions or Access Code: The New Hire is asked to answer the security question(s) previously entered in their profile. If the answer is correct and the New Hire has an email address, an access code is sent once they have confirmed their email address. If the New Hire does not have an email address and the answer to the security question is correct, the access is granted to the application and the New Hire is invited to change their password.

Security Setting	Description
	Security Questions and/or Access Code: When this option is activated, one of the following situation will happen: • If the New Hire has an email address and security questions are activated, they will have to answer the security questions and an access code will be emailed. • If the New Hire has an email address and security questions are not activated, they will receive an access code by email. • If the New Hire has no email address and security questions are activated, they will have to answer the security questions correctly to be able to access the application. • If the New Hire has no email address and security questions are not activated, they will be asked to contact the technical support. Contact System Administrator: The New Hire is asked to contact the system administrator. Only the system administrator could then generate a new password and communicate it to the New Hire. Default: Security Questions
Require X security questions	Determine the number of security questions the New Hire must answer. Values: 1, 2, 3 The value should be the same as in Recruiting.
Require answers that contain at least X characters (X must be greater than 0)	The answer contains at least x characters.
Number of incorrect attempts allowed per New Hire to enter the email address	Determine the maximum number of times a New Hire can enter incorrect information during sign-in before their account is locked. Values: 3, 5 Default: 5
Lock a New Hire's account when the number of incorrect attempts allowed to enter the email address is exceeded	Values: Yes, No Default: Yes

Security Setting	Description
Mask the security answer values	Values: Yes, No Default: Yes

First Login

First Login allows New Hires that have never created their own password in a career section (Recruiting) to log into the system. New hires that have a profile in Recruiting must use the same user name and password, even when they access the portal for the first time.

Since the release of Service Pack 4, the First Login functionality should not be used anymore.

User-Defined Fields and Selections 3

Overview

The User-Defined Fields section allows you to manage user-defined fields, selections, electronic signature and reports. User-defined fields can be used in user-defined forms, correspondences and documents.

In the scenario below, one user-defined field containing a selection is created. The user-defined field is entitled "Mode of Transportations" and provides the following choices of answers: Car, Bus, Other. The user-defined field is included in the New Hire Personal Information Form that will be created next.

```
  ┌───────┐      ┌─────────────┐      ┌──────────────┐      ┌───────┐
  │ Start │ ───► │  Complete   │ ───► │ Send thank you│ ───► │  End  │
  └───────┘      │  personal   │      │ correspondence│      └───────┘
                 │ information │      └──────────────┘
                 └─────────────┘
                       │
                 ┌──────────────┐
                 │ Create a user-│
                 │ defined field │
                 │ containing a  │
                 │ selection     │
                 └──────────────┘
```
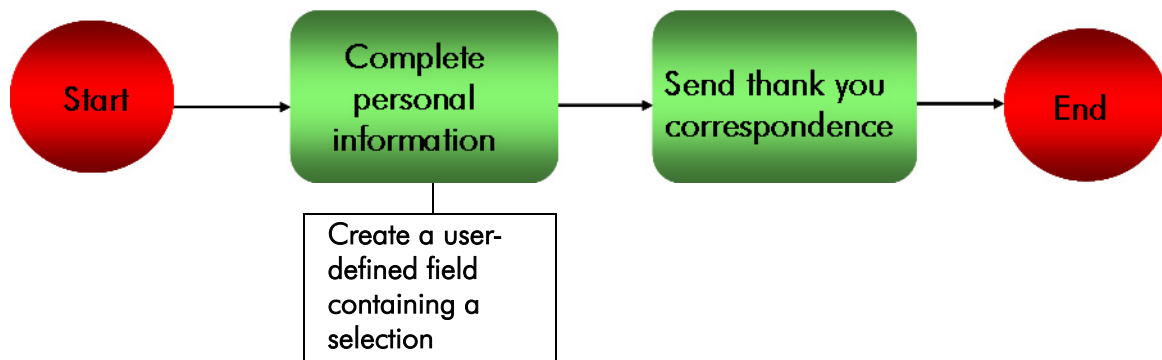
User-defined Fields Transfer from the Administrator WebTop

Defining UDFs in Onboarding is different than defining UDFs in Recruiting; these are not shared automatically.

 If you want user-defined fields to be synchronized, you must recreate the same user-defined fields in Onboarding by following these rules:

- The user-defined field must be classified in the same category (or object).
- The user-defined field must have the same name/code (name in the case of the Administrator WebTop and code in the case of Onboarding).
- The user-defined field must be of the same type/domain (type in the case of the Administrator WebTop and domain in the case of Onboarding).

The table below illustrates the correspondence that exists between Administrator WebTop and Onboarding user-defined fields.

Onboarding WebTop	Administrator WebTop
Assignment	N/A
Education	Candidate Education
Evaluation	N/A
Job Application	N/A
Offer	Offer
Talent Master File	Candidate
Work Experience	Candidate Work Experience

Onboarding UDFs and Selections can be created in two ways: manually in Onboarding, and automatically via TCC. What is not possible is for user-defined fields and selections defined in the Administrator WebTop to be automatically created in Onboarding.

The names of User-Defined Fields and their selections must be carefully named in Recruiting Enterprise, otherwise this can cause problems when starting Onboarding processes. Each user-defined field and each user-defined selection must have a unique name in Recruiting, no selection may have the same name as any other selection, even if they are choices under two different user-defined fields. This is related to creating custom Small vs. Large Selections in Recruiting.

For instance, two user-defined fields in Recruiting may be named "Office Needed?" and "Send T-Shirt?", however they both may not have the identical values "Yes/No" as their responses that users

may select. If these values are defined identically, then a New Hire's Onboarding process may never start, and may never become visible on the Onboarding WebTop.

When creating user-defined fields on the Recruiting side, if any selections are duplicated across all user-defined fields, the Onboarding process will not work. In the case where you have several Yes/No questions, Simple Selections cannot be used in Recruiting. Instead you must create large user-defined selections, which have codes to ensure that each Yes and each No answer do not get mixed up with each other during the transfer over to Onboarding.

Accessing the User-defined Fields Page

In the Administration page, click **User-defined fields**.

The User-defined Fields page allows you to select objects for which you want to create user-defined fields. Objects available are:

Object	Description
Assignment	Refers to the assignment of a New Hire to a specific job position at a specific time.
Education	Refers to New Hire's education-related information such as the institution attended, education level achieved, program, start date, graduation date, etc.
Evaluation	Refers to evaluations and surveys such as the quality of hires.
Job Application	Refers to job application-related information such as the hiring process steps.
Offer	Refers to offer-related information such as the salary, bonuses, vacation, expense accounts, etc.
Talent Master File	Refers to New Hire-related information such as personal information, address, phone number, email address, etc.
Work Experience	Refers to New Hire's work experience-related information such as the employer, job function, start date, supervisor's name, etc.

Available Objects for User-defined Fields

When selecting a specific object, the User-defined Fields page for the specific object appears. For example, User-defined Fields - Offer.

In the User-defined Fields page of a specific object, the following elements or actions are available:

- The **Refine by** list contains filters allowing you to display all user-defined fields or user-defined fields containing a specific keyword.
- The **Create** link allows you to create a user-defined field. See <u>"Creating a User-Defined Field" on page 3-5</u>.
- The **Delete** button in the **Actions** column allows you to delete specific user-defined fields.

Viewing Information Regarding a User-defined Field

In the User-defined Fields page, click on a user-defined field. The User-defined Field viewing page opens. This page contains read-only information about the user-defined field.

The **Properties** section displays information such as the code, name, domain and selection of the user-defined field. Click **Edit** to modify the properties. See <u>"Editing a User-defined Field" on page 3-6</u>.

Creating a User-Defined Field

1. In the Onboarding Administration page, click **User-defined fields**. The **User-defined Fields** page opens.

2. In the **Objects** list, select the object for which you want to create a user-defined field. The **User-defined Fields** page for the selected object opens. For information on objects, see <u>"Accessing the User-defined Fields Page" on page 3-4</u>.

3. Click **Create**. The **New User-defined Field** page opens.

4. Provide a code. This field is mandatory.

5. Select a domain. Possible domains are:

Domain	Description
Boolean	User-defined field of type True/False. In a user-defined form, it is represented with a check box.
Numerical	User-defined field containing numbers.
Date	User-defined field containing a date.
Date and Time Zone	User-defined field containing a date and a time zone.
Text	User-defined field containing numbers and letters.
Multilingual Text	User-defined field containing more than one value in different languages.
Other	Selections previously created. See <u>"Creating a User-Defined Field Containing a Selection" on page 3-9</u>.

6. Specify a name in all available languages. The name is mandatory. If you do not know the translation of the name, enter the name in the default language. For example, you can provide an English name in the Name (German) field.

7. Specify the type of selection. Possible choices are:

Selection	Description
No Selection	User-defined fields providing no selection.
Single	User-defined fields providing a selection of answers, but only one answer can be selected.
Multiple	User-defined fields providing a selection of answers and more than one answer can be selected.

8. Click **Save**. The new field appears in the **User-defined Fields** list and it is available when creating forms, PDFs, Correspondences and conditions, and in reporting and Taleo Connect exports.

Editing a User-defined Field

The User-defined Field view page allows you to view and edit user-defined field properties.

To edit the properties of a user-defined field:

1. In the **User-defined Field** page, click **Edit**. The **User-defined Field Editor** page opens.

2. Modify the name if desired. For information on each of the field, see "Creating a User-Defined Field" on page 3-5.

3. Click **Save**.

Reporting on User-defined fields

User-defined fields can be displayed in reports. As usual, the user creates user-defined fields and selections, per object, in Onboarding. After creation, the user can indicate which one to display, choose their sequence, and it automatically appears in the reporting universe.

User-defined fields can be used in user-defined forms, correspondences and documents. They can be created on 7 objects. See "Available Objects for User-defined Fields" on page 3-4.

It is very important to remember which data you chose to map to which field for reporting. For instance, which field is UDF1 or UDF2. If you change any sequence or mapping in Onboarding, there is no automatic corresponding change made to any reports that you may have built in the reporting universe. This means that the data will now appear in a different area than before, invalidating the report information, unless you also alter your report to pull the correct data from its newly remapped location.

Once their creation is completed, you must map them:

1. On the **User-Defined Reporting** page, click an object.

2. In the list of available item, select the fields and click **Add** in the order you want them to be sequenced.

3. On the right side of the selected items list, up and down arrows can help you modify the sequencing.

4. Click **Save**.

5. Confirm your choice by clicking **Yes** in the confirmation window.

That data is available for reporting, like all other data in the universe. However, Boolean type user-defined fields are not supported, but to replace them you can instead create user-defined selections with two values "Yes/No" or "True/False". As for the Date with Timezone type, they will be supported in a future release.

Up to 50 UDFs are reportable from Onboarding per object which means up to 50 per Offer, another 50 per Job Assignment, etc.

Accessing the User-defined Selections Page

In the Administration page, click **User-defined Selections**.

The User-defined Selections page allows you to manage the list of user-defined selections. A user-defined selection provides a list of possible answers for one or more user-defined fields.

In the User-defined Selections page, the following elements are available:

- The **Refine by** list contains filters allowing you to display all user-defined fields, user-defined fields that are active or user-defined fields containing a specific keyword.
- The **Create** link allows you to create a user-defined selection. See "Creating a User-Defined Field Containing a Selection" on page 3-9.
- The **Delete** button in the **Actions** column allows you to delete draft user-defined selections.

Viewing Information Regarding a User-defined Selection

In the User-defined Selections page, click on a user-defined selection. The **User-defined Selection** viewing page opens. This page contains read-only information about the user-defined selection.

The **Language Configuration** link allows you to configure languages. See "Language Configuration" on page 1-10.

The **Properties** section displays information such as the code of the user-defined selection. Click **Edit** to modify the properties. See "Editing a User-defined Selection" on page 3-11.

The **Elements** section displays elements associated to the selection. Click **Create** to create a new element (see "Creating Elements" on page 3-9), click **Delete** to delete an element, click **Reorder** to reorder elements, and click **Activate** or **Deactivate** to make the element available or not.

The **History** section provides information such as the date and time of an event, a description and details on an event, as well as the "actor" (person or system) who performed the event. See "History" on page 1-8.

Creating a User-Defined Field Containing a Selection
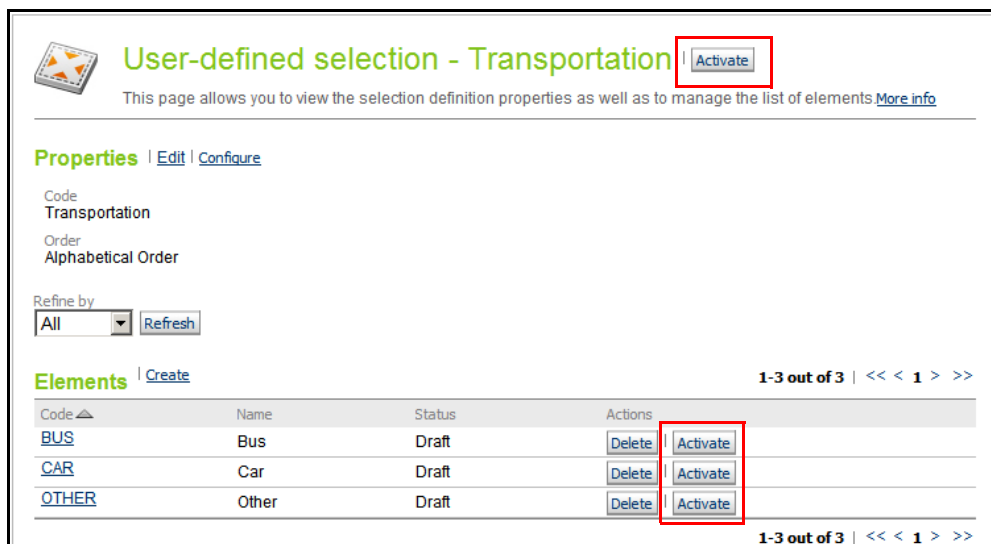
Creating the Selection

1. In the Onboarding Administration page, click **User-defined Selections**. The **User-defined Selections** page opens.

2. Click **Create**. The **New User-defined Selections** page opens.

3. Provide a code. The code is mandatory. For example, in our scenario, the code is "Transportation".

4. Specify the order of appearance i.e., sequential order or alphabetical order.

5. Click **Save**.

Once the user-defined selection is created, you must create elements, i.e. the choice of answers that will be available. See *"Creating Elements" on page 3-9*.

Creating Elements

1. Click **Create** next to **Elements**. The **New Element** page opens.

2. Provide a code and a name. These fields are mandatory.

3. Click **Save**. The new element appears in the **Elements** list.

4. Create as many elements as required. Once all elements are created, you must activate them by clicking the **Activate** button. For example, in our scenario, we created the following elements: Car, Bus and Other.

5. Once the user-defined selection is ready, click **Activate**.

Always click **Activate** to activate an element. An Active element can be used. See *"Status" on page 1-10*.

You now need to create the user-defined field. See *"Creating a User-Defined Field" on page 3-5*.

Reordering Elements of a Selection

1. In the **User-defined Selections** page, click **Reorder**. The **Reorder Elements** page opens.

2. Use the up and down arrows to reorder elements.

3. Click **Save**.

Editing a User-defined Selection

The User-defined Selection view page allows you to view and edit properties and elements of a user-defined selection.

To edit the properties of a user-defined selection:

1. In the **User-defined Selections** page, click on a selection.

2. Click **Edit** next to **Properties**. The **User-defined Selection Editor** page opens.

3. Make necessary changes. For information on each of the fields, see "Creating a User-Defined Field Containing a Selection" on page 3-9.

4. Click **Save**.

Electronic Signature

The electronic signature allows you to validate the identity of each New Hire or even of any Manager or other process participant, when they are submitting a specific set of information on a form. The administrator can configure and insert a tracked, validated electronic signature into forms and documents. The New Hire still has to read and fill specified forms as usual but at any point they may be asked to give some identifying information confirming their identity. For instance, the system can validate if the data entered matches the last four digits of the employee's SSN, his zip/postal code or even his Taleo password. If the required information is correct, the form can be submitted. Otherwise the form cannot be completed.

For fully legally compliant electronic signature, the IP address and timestamp are tracked. The History section also displays who provided the signature and when.

An electronic signature is defined the same way user-defined fields are. The Onboarding administrator defines an e-signature field and selects the value to validate against. Then they build a form inserting this specific signature field.

It is important to never reuse a signature field but instead define a single electronic signature which is intended to be used on each separate form. If the administrator places the same electronic signature onto two (or more) forms, then it can appear to the end-users as if the second form has already been signed, on the date when the first form was signed. Then a second signature would be required, which would overwrite the information about when the first form was really signed.

After the form has been signed and submitted by each user, the information about who signed it is available in the Forms pages at the bottom in the History section:

- Date and exact time it was signed.
- User name of who signed it.

For audit purpose, the IP address of the computer from which it was signed can be inserted as a token into PDFs or correspondences, be exported via TCC, or be viewed in a report (in a future release).

Up to 50 electronic signatures can be created based on the following elements:

- Birthdate (mm/dd/yyyy)
- Zip/postal code
- Any email address
- Last four digits of the SSN
- Taleo password
- Concatenated 3 initials
- First name or last name
- or a PIN.

A PIN is a Personal Identification Number. It is available in the Forms section named **NewHireLegalIdentifier**. It consists of a numeric field associated with every user, and it can be filled with any number desired in several ways:

- It can be imported using Taleo Connect after it has been generated for New Hires in an external system
- It can be filled in manually on a prior form by the New Hire or other user on their behalf.

In either case, the value must be stored successfully before the step at which it must be used on the electronic signature form. If a New Hire has no existing value to match, then they will be unable to submit their form when that step arrives.

Defining an Electronic Signature

1. On the **User-defined Electronic Signature Management** page, click **Create**. The **New Electronic Signature** page opens.

2. Fill the **Code** and **Name** fields. Then, in the **Signature Type** drop-down menu, select the value that will serve as the validation of the New Hire's or other participant's identity.

3. Click **Save**.

Adding an Electronic Signature to a User-defined Form

1. On the **User-defined Form** page, select the appropriate form and click it.

2. On the left side of the page, in the **Field Chooser** drop-down menu, select **ESignatureForForm**. All the created signatures are listed (by code).

3. Create a space to insert your signature with the help of the **Toolbox** above the **Field Chooser**.

4. Select your signature, drag it to the appropriate space in the form and drop it.

5. Click **Save**.

User-Defined Forms 4

Overview

The User-defined Forms section allows you to manage forms to be filled by various people involved in the onboarding process.

In the scenario below, one user-defined form was created to capture New Hire personal information. The form includes the user-defined field created earlier.
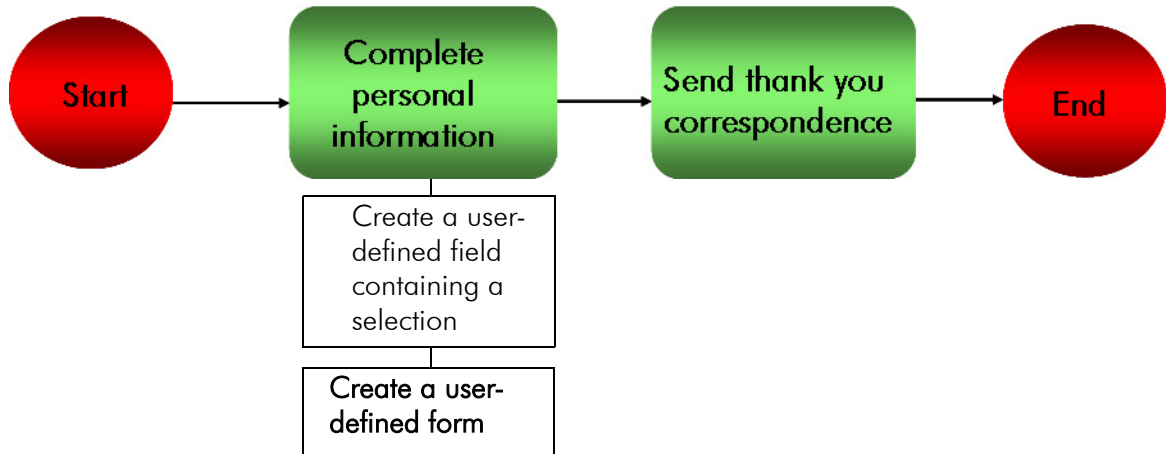
Accessing the User-defined Forms List

In the Administration page, click **User-defined Forms**.

The User-defined Forms list allows you to manage forms used in the onboarding processes.

The following elements are available:

• The **Refine by** list allows you to filter forms according to different criteria (Status, Keyword).
• The **Create** link allows you to create a user-defined form. See "Creating a User-defined Form" on page 4-9.
• The **Preview** link in the **Actions** column allows you to preview the user-defined form. See "Previewing a User-Defined Form" on page 4-11.
• The **View History** in the **Actions** column allows you view all events associated with a form. For example, actions performed (creation, activation and deactivation), fields that have been added or removed, language activation, form name changes, name of the person who made the changes.
• The **Activate** button in the **Actions** column allows you to activate a specific user-defined form. When an element is activated, it is available for use.
• The **Deactivate** button in the **Actions** column allows you to deactivate a specific user-defined form. When an element is deactivated, it can no longer be used.
• The **Delete** button in the **Actions** column allows you to delete a specific user-defined form.
• The **Duplicate** button in the **Actions** column allows you to copy an existing user-defined form.

Viewing Information Regarding a User-defined Form

In the User-defined Forms page, click on a user-defined form. The **User-defined Form Editor** page opens. This page contains read-only information about the user-defined form.

The **Language** section allows you to view a form in a specific language and create one in a new language. See "Language Configuration" on page 1-10.

The **Properties** section displays information such as the code, name and page name of the form. See "Properties" on page 4-5.

The **Page Content** section displays the form. See "Page Content" on page 4-5.

Description of the User-Defined Form Creation Page

The User-defined Form creation page contains the following options:

Toolbox

The **Toolbox** allows you to perform different actions such as adding rows and columns in the form, merging and splitting cells, deleting elements, etc.
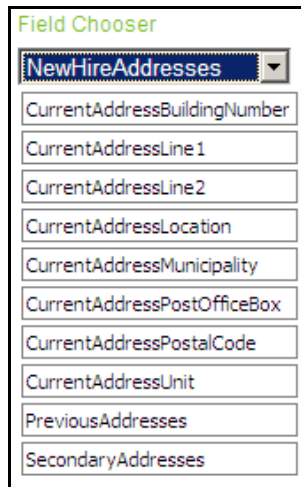
Icon	Description
	Inserts a row below the selected row. Position your cursor in a row, then click the icon. The row appears at the bottom of the table.
	Inserts a row above the selected row. Position your cursor in a row, then click the icon. The row appears just above the row where your cursor was positioned.
	Deletes the selected row. Position your cursor in a row, then click the icon. The last row of the table is deleted.
	Inserts a column to the right of the selected column. Position your cursor in a column, then click the icon. A column is inserted to the right of the selected column.
	Inserts a column to the left of the selected column. Position your cursor in a column, then click the icon. A column is inserted to the left of the selected column.
	Deletes the selected column. Position your cursor in a column, then click the icon. The column where your cursor is positioned is deleted.
	Merges the selected cell with the one to its right. Position your cursor in the desired cell, then click the icon. The cell is merged with the one to its right.
	Splits the selected cell into two columns. Position your cursor in the desired cell, then click the icon. The cell is split in two columns.
	Merges the selected cell with the one below it. Position your cursor in the desired cell, then click the icon. The cell is merged with the one to below it.
	Splits the selected cell in two rows. Position your cursor in the desired cell, then click the icon. The cell is split in two rows.

Icon	Description
⊞	Inserts text in the selected cell. Position your cursor in the desired cell, then click the icon. Text field default value appears in the cell. To modify the text, use the options available in the Selected Element Properties. See <u>"Selected Element Properties" on page 4-6.</u>
⊞	Inserts a table. You can insert a table in a cell and in a section.
⊞	Inserts a section. To modify a section title, click your mouse on the Default section title and make required changes in the Selected Element Properties section. See <u>"Selected Element Properties" on page 4-6.</u>
⊘	Deletes the element selected in a cell.

Field Chooser

The **Field Chooser** contains a list of predefined fields and user-defined fields that can be added to the form. A drag-and-drop feature allows you to easily drag the fields in the **Page Content**.

The list allows you to select a category of fields such as Work Experience, Education, New Hire Addresses, I9-Form, etc. Once you select a category, the related fields appear below.

Properties

The **Properties** section is where you specify the code, name and page name of the form. It also contains the **Add Page**, **Delete Page** and **Reorder Pages** options allowing you to add pages to the form, delete a page and reorder pages.

Page Content

The **Page Content** section is where you can add fields and sections in the forms as well as tables.
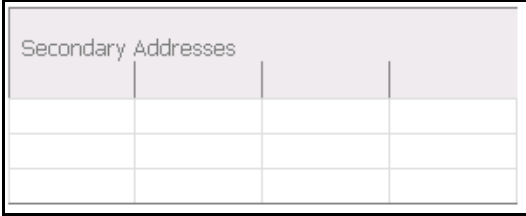
Selected Element Properties

The **Selected Element Properties** section allows you to configure fields added to the form.

Selected Element Properties	Description
Binding field	Data source to which the element is bound. The value displayed in the Binding field represents the data value (available in the first list of the Field Chooser) to which the element is associated. For example, the Annual Bonus field is bound to the AssignmentOfferForForm/ AnnualBonus. The value in the Binding field is not editable.
Field Type	Four different field types to choose from: Text Input, Text Area, Rich Text Format, Read-only Text.
Tooltip	Small pop-up window containing a descriptive text of the field label. It will be displayed to the end-user accessing the form.
CSS Style	Instructions regarding the Cascading Style Sheets 2.0 specifications applying to the label of the field, which will be displayed to the end-user accessing the form. It is important to enter valid instructions. For example, to put text in red, bold and with a yellow border, you must enter the following instructions: color: red; font-weight:bold; border:1px solid yellow

Selected Element Properties	Description
Field Label	Identification of the field, displayed tot he end-user accessing the form, according to the CSS formatting above, and the rich text formatting that is provided in the RTF editor.
Instructions	Special instructions regarding a field. This appears below the field when displayed to the end-user accessing the forms. For example, for the Work Phone Number field, you could put the following instruction: Do not forget your extension number.
Mandatory	Indicates, by selecting the Yes or No option, if the field must be completed. When a field is mandatory, a red square appears in front of the field.
Access	Indicates if the field is read-only or editable. When read-only is selected, a user is unable to modify the field. Default value is Editable.
Status	Indicates if the field is activated or deactivated (i.e., grayed out or not). The use of this field depends on the value selected in the Access field. Editable access + Activated status = field can be modified Current Address Line 1 123 wall st. Read-only access + Activated status = field not editable Current Address Line 1 123 wall st. Read-only access + Deactivated status = field not editable Current Address Line 1 123 wall st. Editable access + Deactivated status = field not editable Current Address Line 1 123 wall st.

Selected Element Properties	Description
Field Size	Indicates the number of elements displayed in a list. Field Size is used for multiple-selection fields. Default value is 1. For example, if the field size is 2, the list will display 2 values. Gender Unknown Male
Input Mask	Format of the input value. The following syntax must be used: 9 = any number a = any letter n = any letter or number | = logical or \9 = the 9 character \a = the a character \n = the n character \\| = the | character Any other symbol = the symbol (including a space) Possible formats for SSN and Zip/Postal codes: SSN: 999-99-9999 ZIP Code United States: 99999|99999-9999 Postal Code Canada: a9a9a9|a9a 9a9|a9a-9a9 Note: Make sure to not add a space before and after the | operator. For example, do not enter 99999 | 99999-9999
Header	Header of a table-type field. An unlimited number of rows can be added. Secondary Addresses In order for the user to add information, you must insert a button Add at top of the box. Once the user clicks the button a line is displayed and data can be written. To allow the user to delete data, a Delete button must be inserted at the end of the line.

Creating a User-defined Form

1. In the Onboarding Administration page, click **User-defined Forms**. The **User-defined Forms** list opens.

2. Click **Create**. The **User-defined Form** page opens.

3. Select the language in which you will create the form. See <u>"Language Configuration" on page 1-10</u>.

4. Provide a code, a name and page name for the form. These fields are mandatory.

5. Create the form as desired.

   5a) To add a section, position your cursor in an existing section, then click [icon] . A section entitled **Default section title** is inserted in the form, just below where your cursor was positioned. To modify the section title, click your mouse on **Default section title** and make required changes in the **Selected Element Properties** section:

   - **Tooltip:** Insert a short descriptive text for the field label.
   - **CSS Style:** Enter instructions regarding the Cascading Style Sheets 2.0 specifications.
   - **Value:** Use the HTML Editor options to format the text.

   Click your mouse on **Default section title** to see changes you made.

   5b) To add a table, position your cursor in the desired section of the form, then click [icon] . A table containing two columns and five rows is inserted in the form.

   5c) To modify a table, use the Toolbox options. See <u>"Toolbox" on page 4-3</u>.

   5d) To add a field, select a data value in the first list of the **Field Chooser**, identify the desired field in the second list, then drag and drop the field in the desired **Page Content** section.

   > User-defined fields are available in the **Field Chooser**.

   5e) To personalize the selected fields, use the options available in the **Selected Element Properties** section. For example, you can provide a tooltip for the field, modify the label, provide special instructions, etc. See <u>"Selected Element Properties" on page 4-6</u>.

   5f) To delete an element, use the erase icon [icon] available in the Toolbox.

6. Click **Save**. The new form appears in the **User-defined Forms** list and the status is Draft.

   > Always click **Activate** to activate a form. An Active element can be used. See <u>"Status" on page 1-10</u>.

Adding a New Hire Details Form to the Onboarding WebTop

In the New Hire Page of the Onboarding WebTop, a **Details** link allows you to display a form with information about the New Hire that isn't normally displayed in the **General Information** section.

1. Write down the **Code** corresponding to the form you want to use. It must be an activated form.

2. In the Product Settings, click **Onboarding**.

3. Locate **New Hire Details** and click **Edit**.

4. Enter the code corresponding to the form in the **Value** field.

5. Click **Save**.

> You must have the permission to **View and manage related documents** to see the setting and perform this action.

Previewing a User-Defined Form

In the User-defined Forms page, click **Preview** in the **Actions** column. The **User-defined Form Preview** page opens. From this page you have the ability to print the form.

Available User-defined Forms

A built-in form that looks just like the official U.S. Form I-9 is included with Onboarding tokens inserted already. It can be used to gather the right employment information fields from both employees and employers. Also, standard fields are available in Form Builder to support the information needed to fill in each New Hire's U.S. Form I-9.

Documents5

Overview

Documents represent the content of message templates and of PDF documents to be displayed in the New Hire portal. They are included in correspondences. See <u>"Creating a Message Template" on page 6-3</u>.

You can create two types of document:

- documents created from scratch with the help of the HTML editor
- documents containing a PDF file

Accessing the Document List Page

1. In the Administration page, click **Documents**.

The Document List page contains all available documents.

The following elements are available in the Documents page:

- The **Refine by** list allows you to filter documents according to different criteria (Name, Code, etc.).
- The **Create a text document** link allows you to create a text document with the HTML editor. See <u>"Creating a Text Document" on page 5-2</u>.
- The **Create a file-based document** link allows you to create a document based on a PDF file. See <u>"Creating a File-Based Document" on page 5-4</u>.
- The **Delete** button in the **Actions** column allows you to delete specific documents.

Viewing Information Regarding a Document

In the Document List page, click on a document. The **Document** viewing page opens. This page contains read-only information about the document.

The **Language** section allows you to view an document in a specific language and create one in a new language. See <u>"Language Configuration" on page 1-10</u>.

The **Properties** section displays information such as the code, name and status of the document. Click **Edit** to modify the properties.

The **Attached File** section displays the file name and the description of the document attached. This section is displayed in the case of a PDF document (an official U.S. government I-9 PDF for instance). Please note that even if the name of the PDF is displayed, the document can only be previewed in a New Hire portal.

The **Paragraphs** section displays paragraphs included in the document. This section is displayed in the case of an HTML document. The following actions are available:

Action	Description
Add	Adds a paragraph to the document. See <u>"Adding an Existing Paragraph" on page 5-2</u>.

Action	Description
Create	Creates a new paragraph. See <u>"Creating a New Paragraph" on page 5-3</u>.
Reorder	Reorders paragraphs included in the document. See <u>"Reordering Paragraphs in a Text Document" on page 5-3</u>.
Preview	Provides a preview of a paragraph. See <u>"Previewing a Text Document" on page 5-3</u>.
Remove	Removes a paragraph. See <u>"Removing a Paragraph in a Text Document" on page 5-4</u>.
Edit	Edits a paragraph. See <u>"Editing a Paragraph in a Text Document" on page 5-4</u>.

The **History** section provides information such as the date and time of changes to the document, description and details, as well as the "actor" (person or system) who performed it. See <u>"History" on page 1-8</u>.

Creating a Text Document

A text document is a document created from paragraph objects previously created in the HTML editor.

1. In the Onboarding Administration page, click **Documents**. The **Document List** page opens.

2. Click **Create a text document**. The **New Document** page opens.

3. Enter a code and a name for the document. The **Name** field is mandatory.

4. Click **Save**. The new document appears in the **Documents** list, the format is HTML and the status is Draft.

Paragraphs must now be added to the text document. You can add an existing paragraph (see <u>"Adding an Existing Paragraph" on page 5-2</u>) or you can create a new one (see <u>"Creating a New Paragraph" on page 5-3</u>).

Adding an Existing Paragraph

1. Open the text document you just created.

2. Click **Add** next to **Paragraphs**. The **Paragraph Selector** page opens.

3. Select a paragraph then click **Select**. The new paragraph appears in the **Paragraphs** list.

4. If you wish to add several paragraphs, repeat steps 2 and 3.

Once paragraphs have been added to the text document and the document is ready, you need to activate the text document in order to use it.

> Always click **Activate** to activate an paragraph. An Active element can be used. See <u>"Status" on page 1-10</u>.

Creating a New Paragraph

1. Open the text document you just created.

2. Click **Create** next to **Paragraphs**. The **New Paragraph** page opens.

3. Enter a code and a name for the paragraph. The **Name** field is mandatory.

4. Type the paragraph content in the **Text** field using HTML Editor options.

5. If you wish to include variables in the paragraph, select them it the **Available Variables** list. For example, if you wish to add the New Hire first name in the paragraph:

   5a) Click your mouse in the **Text** field, select **NewHirePersonalInfo** in the **Available Variables** list, then select **FirstName** in the list underneath. The **{NewHirePersonalInfo.FirstName}**automatically appears in the paragraph.

6. Click **Save**. The new paragraph appears in the **Paragraphs** list.

7. If you wish to create several paragraphs, repeat steps 2 to 6.

Once paragraphs have been added to the text document and the document is ready, you need to activate the text document.

> Always click **Activate** to activate an element. An Active element can be used. See "Status" on page 1-10.

Reordering Paragraphs in a Text Document

1. In the **Document List**, select a text document having the Draft status. The **Document** page opens.

2. Click **Reorder**. The **Reorder Paragraphs** page opens.

3. Reorder paragraphs as desired, using the up and down arrows.

4. Click **Save**.

Previewing a Text Document

1. In the **Document List**, select a text document. The **Document** page opens.

2. Click **Preview**.

Removing a Paragraph in a Text Document

1. In the **Document List**, select a text document. The **Document** page opens.

2. Click **Remove**.

Editing a Paragraph in a Text Document

1. In the **Document List**, select a text document having the Draft status. The **Document** page opens.

2. Click **Edit** in the **Paragraphs** section. The **Paragraph Editor** page opens.

3. Modify the paragraphs as desired. For information on each of the fields, see <u>"Creating a New Paragraph" on page 5-3</u>.

4. Click **Save**.

Creating a File-Based Document

A file-based document is a document containing an existing PDF file. You can insert tokens in this PDF and display it as a personalized document in the New Hire Portal and in the Attached Files for the WebTop.

1. In the **Onboarding Administration** page, click **Documents**. The **Document List** page opens.

2. Click **Create a file-based document**. The **New Document** page opens.

3. Enter a code and a name for the document. The **Name** field is mandatory.

4. Click **Save**.

A PDF file must now be attached to the file-based document. See <u>"Attaching a File" on page 5-4</u>.

Attaching a File

1. Open the file-based document you just created.

2. Click **Edit** next to **Attached File**. The **Attachments** page opens.

3. Select a PDF file using the **Browse...** button.

4. Enter a description.

5. Click **Save**.

Once the PDF has been added to the file-based document and the document is ready, you need to activate the document in order to use it.

> Always click **Activate** to activate an element. An Active element can be used. See <u>"Status" on page 1-10</u>.

> To edit a file-based document, Adobe Acrobat is required.

Pre-Filled PDF Forms

Administrators have the ability to take a PDF form (such as the I-9 form) and insert variables (better known as tokens) that will automatically pull information from Onboarding. For example, instead of typing the name of a New Hire, the name would automatically appear in the form.

Variables that can be inserted in PDF forms are the ones available when creating a user-defined form (*Path: Onboarding WebTop Administration/User-defined Forms/Create/Field Chooser*). However, these variables must be slightly modified as follows:

- replace the forward slash "/" by a dot".".

For example, NewHirePersonalInfoForForm/LastName must be modified as follows: NewHirePersonalInfoForForm.LastName

To insert variables in a PDF form:

1. Using Adobe Acrobat, open the PDF form in which you want to insert user-defined fields.

2. In the **Advanced** menu, select **Forms**, then **Edit Fillable Form**.

3. In the **Edit Fillable Form** window, select **Acrobat's Forms Tools** then click **OK**. The Forms toolbox appears.
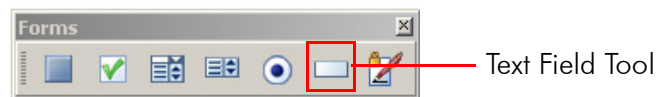
Text Field Tool

4. To insert a field, click the **Text Field Tool** icon in the Forms toolbox.

5. Draw a field. The **Text Field Properties** window appears.

6. In the **General** tab, enter the variable in the **Name** field. In the example below, the NewHirePersonalInfoForForm.LastName variable is used to extract the New Hire last name automatically.

Only variables available when creating a user-defined form can be added in the PDF form (*Path: Onboarding WebTop Administration/User-defined Forms/Create/ Field Chooser*).

Tip to insert variables:
Instead of typing the variable, copy the variable in Onboarding and paste it in the Name field of the Text Field Properties window.

7. Enter any other information, such as a tooltip.

8. Click **Close**.

Correspondence 6

Overview

The Correspondence section allows you to define message templates to be used by your organization during onboarding processes. The templates can be composed of HTML text, created here or assembled from pre-defined standard paragraphs. However, a PDF cannot be sent as correspondence.

In the scenario below, one correspondence was created to thank the New Hire for having completed his/her personal information.
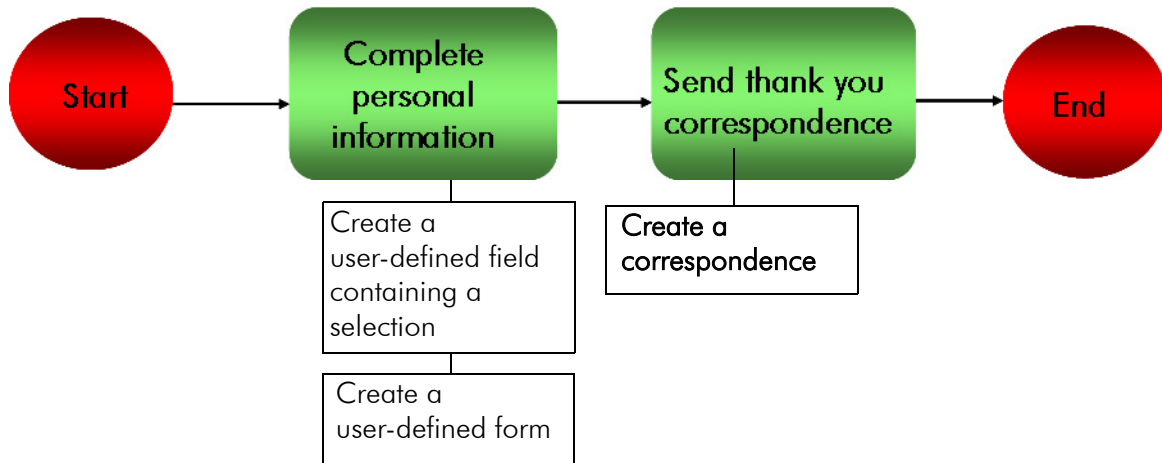
Accessing the Message Template List

In the Administration page, click **Message Templates**.

The Message Template List contains all available message templates. The following elements or actions are available in this page:

- The **Language** list allows you to select the language in which you want to view message templates.
- The **Refine by** list allows you to filter message templates according to different criteria (Name, Code, etc.).
- The **Create** link allows you to create message templates. See *"Creating a Message Template" on page 6-3*.
- The **Delete** button in the **Actions** column allows you to delete specific message templates.

Viewing Information Regarding a Message Template

In the Message Template List page, click on a message template. The **Template** viewing page opens. This page contains read-only information about the message template.

The **Language** section allows you to view an message template in a specific language and create it in a new language. See *"Language Configuration" on page 1-10*.

The **Properties** section displays information displays information such as the code, name and description of the message template. Click **Edit** to modify the properties.

The **Content** section displays the content of the message. The following actions are possible:

Action	Description
Select a document	To select a paragraph-based document from a list of available documents. See *"Adding Content from an Existing Document" on page 6-4*.
Custom Content	To create content from scratch that will be inserted in the message template. See *"Creating a Custom Content" on page 6-5*.
Preview	To obtain a preview of the message template.

The **History** section provides information such as the date and time of a change, the description and details, as well as the "actor" (person or system) who performed it. However this doesn't track which processes or tasks in which the template has been used, who it has been sent to, etc. See *"History" on page 1-8*.

Creating a Message Template

The creation of a message template consists of two specific steps: the definition of the message template basic information and the creation of the body (either paragraph-based document or HTML in the corresponding box).

1. In the Onboarding Administration page, click **Message Templates**. The **Message Template List** page opens.

2. Click **Create**. The **New Message Properties** page opens.

3. Enter a code, a name and a description for the message. The **Name** field is mandatory.

4. Indicate if you want the message to be sent as a read-only attachment.

> A read-only attachment option creates a HTML-style attachment to the email that cannot be altered. It is not a PDF, it is still an email but the body cannot be modified.

5. The **To, Cc, Bcc** fields can be left empty because they will be overwritten if the message template is used in a task and that an assignee is specified. In this case, only the assignee would receive the correspondence, regardless of whether any info is filled in these fields.

6. Enter the message subject. Variables can be added to the **Subject** field. For example, if you wish to add the task name in the **Subject** field:

    6a) Click your mouse in the **Subject** field, select **Task** in the **Available variables** list, then select **Name** in the list underneath. The **{Task.Name}** variable automatically appears in the **Subject** field.

7. Click **Save**. The new document appears in the **Templates** list and the status is Draft.

Content must now be added to your message template. You can add content from an existing document (see _"Adding Content from an Existing Document" on page 6-4_)or you can create it from scratch (see _"Creating a Custom Content" on page 6-5_).

Adding Content from an Existing Document

1. Open the message template you just created.

2. Click **Select a document**. The **Paragraph-based Document Selector** page opens.

3. Select a document from the list.

4. Click **Select**.

> Documents are created in the **Document List** page. See _"Documents"._

Once the content has been added to the message template and the message is ready, you need to activate the message in order to use it.

> Always click **Activate** to activate an element. An Active element can be used. See _"Status" on page 1-10_.

Creating a Custom Content

1. Open the message template you just created.

2. Click **Custom Content**. The **Message Template Content Editor** page opens.

3. Type your message in the allocated space using HTML Editor options. This editor includes rich text: branding logos and images, hyperlinks, formatting, fonts, styles, colors, etc.

4. If you wish to include variables in your message, select them it the **Available Variables** list. For example, if you wish to automatically add the name of the New Hire in the message:

    4a) Click your mouse in the text field, select **NewHirePersonalInfo** in the **Available Variables** list, then select **FirstName** in the list underneath. The **{NewHirePersonalInfo.FirstName}** automatically appears in the message.


5. Click **Save**.

Once the content has been added to the message template and the message is ready, you need to activate the message in order to use it.

> Always click **Activate** to activate an element. An Active element can be used. See *"Status" on page 1-10*.

Tasks and Processes 7

Overview

As system administrator, you must define appropriate onboarding processes for your company. An onboarding process is comprised of a certain number of steps and transitions to be performed in order to ensure the smooth integration of a new employee. You can target different Onboarding processes to different and specific audiences according to Organizations, Locations and Job Fields. Onboarding also allows to have a task library and conditional steps scheduled before and after a New Hire's start date. These steps should make sure that this New Hire's onboarding experience is a positive one.

In the scenario below, two tasks were created:

*   One task for the New Hire entitled "Complete personal information".
*   One task for the recruiter entitled "Send thank you correspondence"

Once tasks are created, a process can be created. A process includes steps which in turn include tasks.

Transitions are then created between steps. For example, in the scenario below, the "Complete personal information" task is performed before the "Send thank you correspondence" task.
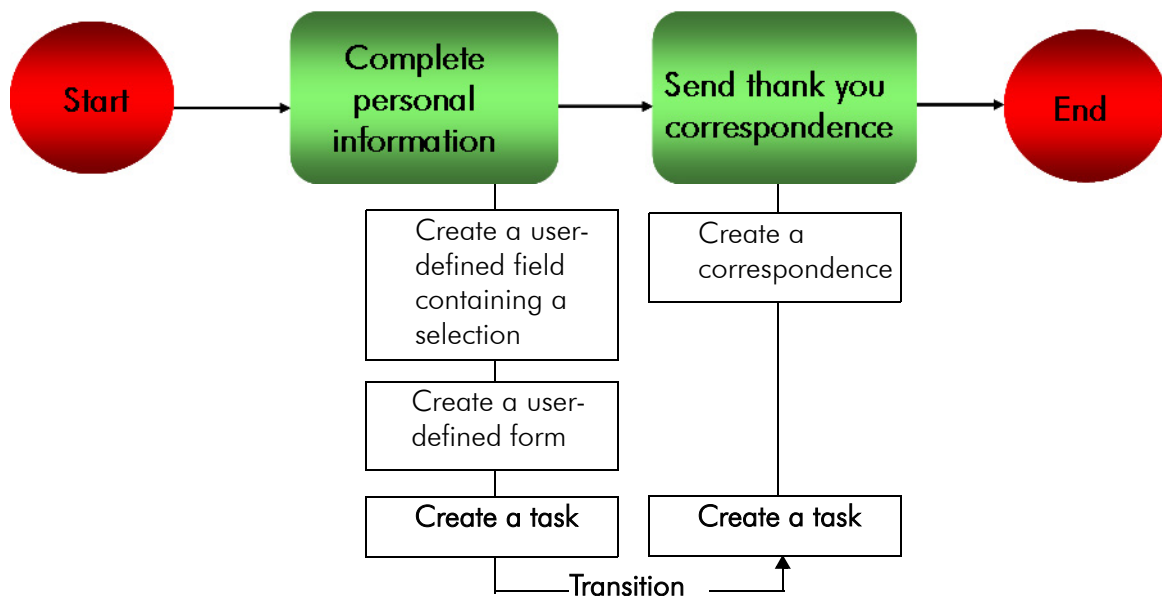
Accessing the Task Definition List Page

In the Administration page, click **Task Definitions**.

The Task Definition List page contains all available task definitions. The following elements or actions are also available:

- The **Language** list allows you to select the language in which you want to view task definitions.
- The **Refine by** list allows you to filter tasks according to different criteria (Draft, Active, Inactive, etc.).
- The **Create** link allows you to create a task. See "Creating a Task Definition" on page 7-3.
- The **Delete** button in the **Actions** column allows you to delete specific tasks.

Viewing Information Regarding a Task Definition

In the Task Definition List page, click on a task. The **Task Definition** page opens. This page contains read-only information about the task definition as well as the following elements:

The **Language** section allows you to view an element in a specific language and create an element in a new language. See "Language Configuration" on page 1-10.

The **Properties** section displays information such as the code, name, description and status of the task definition. Click **Edit** to modify the properties of the task definition. See "Editing a Task Definition" on page 7-2.

The **Notifications** section displays messages sent to the assignee and the owner of the task. See "Sending a Notification" on page 7-5.

The **Reminder** section displays information such as the assignee, the triggering time and due date relating to the reminder. Click **Create** to create a reminder. See "Creating a Reminder" on page 7-5.

The **History** section provides information such as the date and time of an event, a description and details on an event, as well as the "actor" (person or system) who performed the event. See "History" on page 1-8.

Editing a Task Definition

The Task Definition Editor page allows you to modify the properties of the task definition.

1. In the **Task Definition List** page, click on the desired task definition.

2. Click **Edit** next to **Properties**. The **Task Definition Editor** page opens.

3. Make changes in the fields as required. For more information on each of the fields, see "Creating a Task Definition" on page 7-3.

4. Click **Save**.

Creating a Task Definition

A task is an operation automated by the system. It describes the nature of the work to be done. Tasks are assigned to various assignees involved in a process. They trigger various actions that ensure an automatic progression of the process. A task can be used by several processes.

> Because tasks can be used by several processes, they have to be pre-created and stored in the library. They cannot be modified after their activation to allow their use in several different processes for many New Hires.

A task can perform five types of action:

- Ask a person to complete a form
- Send a correspondence
- Execute a task manually
- Open a PDF
- Make the system execute a task

1. In the Onboarding Administration page, click **Task Definitions**. The **Task Definition List** page opens.

2. Click **Create**. The **New Task Definition** page opens.

3. Enter a code, a name and a description for the task. The description is for internal administrative purposes and is shown to users for manual tasks only.

4. Enter guidelines if needed. This field allows displaying proper instructions regarding the task to New Hires and others viewing the task, if the new layout is used.

5. Indicate the type of task (for example, Send document, Notify payroll, etc.). The type could be used to produce reports by types of tasks, but for reference only since it has no effect on system functionality.

6. Assign a priority to the task (**Low, Normal, High**). This is used for reference only and is displayed to the assignee of the task in Onboarding.

7. Specify the type of action the task consists of. Possible choices are:

Type of Action	Description	Source Field
Send correspondence	A correspondence is sent to someone.	List of email templates. The **To, Cc** and **Bcc** values will most likely be define when creating the process. Any values inserted in the message template are superseded by these one.
Fill user-defined form	A person is asked to complete a user-defined form.	List of pre-created forms.

Type of Action	Description	Source Field
Execute the task manually	A task having only the completion option (cancel or complete). With this type of action, you can simply ask someone to perform a task and you will receive an acknowledgement of completion (tracking). Details regarding the task are contained in the task description field.	N/A
Open PDF	A PDF file is generated for the New Hire and they can open and/or print it. The manager or process owner can also access it in their record and export it via Taleo Connect if desired.	List of pre-created PDF document.
System Task	The system executes a task automatically, it doesn't require human intervention. It is used to start and close a process and send a verification request during an E-Verify process.	E-Verify options as mentioned in the previous column.

For example, in our scenario, **Fill user-defined form** was selected for the task "Complete Personal Information" and **Send correspondence** was selected for the task "Send Thank You Correspondence".

8.   In the **Related Source** field, select the source (a pre-created document) on which the action is based using the **Search** button. For example, in our scenario, the form "New Hire Personal Information Form" was selected for the task "Complete Personal Information" and the correspondence "Thank You Message" was selected for the task "Send Thank You Correspondence".

> If your task is a Fill user-defined form action, then the Search function will retrieve only the active user-defined forms that have been created. If your task is a Send correspondence action, then the Search function will retrieve only the active Message Templates that have been created.

9.   Click **Save**.

10. If you wish to set a notification, see *"Sending a Notification" on page 7-5*.

11. If you wish to set a reminder, see *"Creating a Reminder" on page 7-5*.

> It is important to remember the name of the new task definition at this point, since it will be useful when creating the process.

Sending a Notification

You can send a notification to the assignee to inform them that the task must be completed or to the owner of the process that it has already been completed.

1. Open the task you just created.

2. Click **Edit** next to **Notifications**. The **Task Notification Editor** opens.

3. Under **Task Assignment Correspondence (sent to assignees)**, click **Search** to select the message (created beforehand in the library) that will be sent to the assignee.

4. Under **Task Completion Correspondence (sent to owner)**, click **Search** to select the message that will be sent to the process owner.

5. Click **Save**.

Creating a Reminder

If a task is not completed on time as required, a reminder can be sent.

1. Open the task you just created.

2. Click **Create** next to **Reminders**. The **New Reminder** page opens.

3. Select assignees (**Assignees** or **Owner - process owner**).

4. Set a triggering time and a triggering unit. For example, you can set reminders to be sent every week after a task has become overdue by configuring a reminder at due date, one at 7 days later, one after 14 days, etc. Note that once the task is completed, future reminders will not be sent.

> Please make sure you set correctly the product setting named **Working Days** to avoid confusion with work days and weekends.

5. Select a notification message (message template) using the **Search** button.

6. Click **Save**. The new reminder appears in the **Reminders** list.

Accessing the Processes List Page

1. In the Administration page, click **Processes**.

The Processes page displays the list of processes available within your organization. The following elements are also available:

- The **Refine by** list allows you to filter processes according to different criteria (Draft, Active, Inactive, etc.).
- The **Create** link allows you to create a process. See <u>"Creating a Process" on page 7-8</u>.
- The **Delete** button in the **Actions** column allows you to delete specific processes.
- The **Preview** link allows you to obtain a visual representation of the process. See <u>"Obtaining a Graphical View of the Process" on page 7-17</u>.

Viewing Information Regarding a Process

In the Processes page, click on a process. The **Process** page opens. This page allows you to view the properties of this process and to manage the list of steps associated to it. The following actions are available:

Duplicate	Duplicates the process. See <u>"Creating a Process" on page 7-8</u>.
Preview	Provides a visual representation of the process. See <u>"Obtaining a Graphical View of the Process" on page 7-17</u>.
Edit	Modifies the process. See <u>"Editing a Process" on page 7-7</u>.

In the **Steps** section, you can create a new step (see <u>"Creating a Step" on page 7-8</u>), delete a process by clicking the **Delete** button and access a process by clicking its name.

In the **Organizations**, **Locations** and **Job Fields** sections, you can see to which OLFs the process is associated. The OLF association is used to present the right list of processes, based on the requisition OLF, when initiating an onboarding process in the Enterprise Edition application. You can associate several OLF to the process (see <u>"Associating a Process to Organizations, Locations and Job Fields" on page 7-16</u>) and you can also delete an association to an OLF by clicking the **Delete** button.

The **History** section provides information such as the date and time of an event, a description and details on an event, as well as the "actor" (person or system) who performed the event. See <u>"History" on page 1-8</u>.

A New Hire's Onboarding process will be automatically cancelled if the following is done in Recruiting:

- Reset Selection Process

- Change status to reject or decline for the candidate

- Revert of a previously hired candidate

Editing a Process

The Process Editor page allows you to create a new process.

1. In the **Processes** page, click on the desired process.

2. Click **Edit** next to **Properties**. The **Process Editor** page opens.

3. Make changes in the fields as required. For more information on each of the fields, see .

4. Click **Save**.

Creating a Process

A process contains steps. A step is additional information around every task and is created in context of each process when the reusable task is incorporated into the process.

1. In the Onboarding Administration page, click **Processes**. The **Processes** page opens.

2. Click **Create**. The **New Process** page opens.

3. Enter a code, a name and a description. The **Code** and **Name** fields are mandatory as opposed to **Description** which is used only for administrative purpose and is not displayed to New Hires.

4. Indicate if the process is a process or a sub-process.

5. Specify the owner of the process using the **Search** button. The owner is a person who has all the rights and ultimate responsibility for ensuring the process completion. The owner can be a specific person or a role (for example, the hiring manager).

6. Select supervisors. You can assign one or multiple supervisors to the process.

> The role of the supervisor is to ensure the process is performed correctly but it also allows to share the ownership of the process. Anything the owner can do, so can the supervisors (based on their individual permissions). Supervisors can be specific persons or roles. They can also be added directly in the New Hire's page with the button **Share**. Choosing any SmartOrg users from that page will add them to the person's process, under the heading "Supervisors".

7. Provide any information desired in the **Guidelines** field such as instructions or explanations that will help the New Hire understand the portal. If the field is left empty, the link will not appear at all on the New Hire Portal for people assigned to this process.

8. Click **Save.**

You now need to create a step for the process. See <u>"Creating a Step" on page 7-8</u>.

Creating a Step

The steps represent the individual units of work that need to be done by people who perform the tasks. The business logic is embodied within the transitions between these steps.

There are three types of step:

Task	The step will consist of a task selected from the defined library.
Sub-process	The step will consist of a sub-process. A sub-process is a small process used inside a large process. For example, if you always re-use the same sequence for internal request (such as computer, office space, phone and business card requests), but have some variability on the New Hire side, you could create a sub-process and re-use it in various processes to simplify management. However, any modifications made to a sub-process after it was used into a larger process will have no effect. The larger process will take the workflow of the subprocess as of the time that it gets incorporated.

Routing	The step will connect multiple parallel tasks together. Routing steps are like placeholder steps which don't contain any tasks to assign to any users; they are merely to facilitate the workflow design for steps that split into parallel branches and then reconnect as needed. Standard tasks of all types can also be used to handle branching and reconnecting if their transitions are built to do so.

To create a step, the process must be in **Draft** status.

1. Open the process you just created. The **Process** page opens.

2. Click **Create** next to **Steps**. The **Step Wizard** opens.

3. Select the type of step you want to create, then click **Continue**.

   For example, in our scenario, we selected **Task** and retrieved the "Complete Personal Information" task. Then we created added the "Send Thank You Correspondence" task.

4. If you selected **Task**:

   4a) Select a task using the **Search** button and click **Continue**.

   4b) Specify a name and enter a description. The **Name** field is mandatory.

   4c) Provide a duration. The duration represents the time required to perform the step. It helps calculate the due date of each step.

   Please make sure you set correctly the product setting named **Calendar Days** to avoid confusion with work days and weekends.

   4d) Specify assignees i.e., who performs the step (a specific person or a role). You can assign a task to more than one assignee. For example, you may need to assign a task to both the manager and the assistant manager. This feature, combined with the role creation feature (see "Creating a Role" on page 7-33), provides great flexibility in the process creation.

   You should use multiple assignees only when necessary. Having multiple owners for a task might create unwanted delays as there is no longer a clear ownership. However if your business processes and communication is clear, then everyone knows what they are expected to do and this can be a great tool.

4e)   Indicate when to execute the activity and what to do next.

When all previous steps have been completed	This option is selected by default. It is appropriate when there is only one immediately prior step in the workflow, or when there are many parallel steps converging on this step, and all are required before this current step should be assigned and made "In Progress".
When one of the previous steps has been completed	It is appropriate when the completion of only one step might allow the workflow to continue. E.g. if only certain conditions are true on the immediately-preceding parallel tasks, then only certain prior tasks will ever get assigned, and thus only certain or one of the prior tasks will ever get completed. If the given task waits for all prior to be completed, then the workflow will stall and never move forward.

4f)   Click **Finish**.

4g)   Create a transition. See "Creating a Transition" on page 7-10.

5. If you selected **Sub-process**:

5a)   Select a sub-process using the **Search** button and click **Continue**.

5b)   Specify a name and enter a description. The **Name** field is mandatory.

5c)   Indicate when to execute the activity and what to do next.

5d)   Click **Finish**.

5e)   Create a transition. See "Creating a Transition" on page 7-10.

6. If you selected **Routing**:

6a)   Specify a name and enter a description. The **Name** field is mandatory.

6b)   Indicate when to execute the step and what to do next.

6c)   Click **Finish**.

6d)   Create a transition. See "Creating a Transition" on page 7-10.

Creating a Transition

Transitions must be created to link the steps together.

You should create the transitions once you have completed the creation of all steps. Each transition is represented by an arrow in the process viewer. See "Obtaining a Graphical View of the Process" on page 7-17.

Create all steps first, then create transitions using the Create Transition link available in the Quick Access pane.

1. Open the appropriate. The **Step** page opens.

2. Click **Create** next to **Transitions**. (You can also click **Create Transition** in the **Quick Access** pane.) The **Transition Wizard** opens.

3. Indicate from where the transition start and where it goes. For example, in our scenario, "Complete Personal Information" was selected in the **From Step** field, and "Send Thank You Correspondence" was selected in the **To Step** field.

4. Click **Continue**.

5. Specify a name and enter a description. The **Name** field is mandatory.

6. Click **Finish**.

7. You can add a condition to the transition. See <u>"Adding a Condition" on page 7-11</u>.

8. To view the transition graphically, click **Preview Process** located on the left hand side of the window, under **Quick Access**.

The preview process is very helpful to get a fast picture of whether everything is connected together in the way you intended.

Adding a Condition

Once a transition is created, it is possible to add a condition. This means that the transition will be executed ONLY if the condition is met. It allows you to tailor your processes more finely, therefore you don't need to make/manage as many different processes.

Every piece of data in Onboarding can be used to drive the process forward depending on its value. For instance, you can create a condition to execute a specific task if the New Hire's location is A but not B or C. You can set different branch of the processes for different people or OLF values or any value including UDFs.

Also, dates can be used to drive or delay for a number of days and then execute the next task. A good example for the use of condition based on dates would be a process that needs to start a few days after the New Hire's first day of work.

Conditions are illustrated with a bold and thick arrow, but no written details are available in the preview. If no conditions are applied, the arrow line is lighter. See <u>"Obtaining a Graphical View of the Process" on page 7-17</u>.

1. Open the transition you just created. The **Transition** page opens.

2. Click **Create** next to **Conditions**. The **Conditions** page opens.

3. Enter a name for the condition. The **Name** field is mandatory.

4. Select a field.

5. Specify an operator. The table below contains some of the available operators:

Is	The element entered in the Value field must be found as is. For example: Field: AssignmentOffer/Annual Bonus Operator: Is Value: 10% The following task will only be reached if the annual bonus in the offer for this New Hire is exactly 10%.
Contains	The element (word or number) entered in the Value field must be found. For example: Field: OnboardingProcess/ProcessName Operator: Contains Value: Computer Setup The name of the onboarding process must contain the words "Computer Setup".
Is equal to	The resulting information must be equal to the value (a number) entered in the Value field.
Is not equal to	The resulting information must not be equal to the value entered in the Value field.
Is less than	The resulting information must be less than the value entered in the Value field.
Is greater than	The resulting information must be greater than the value entered in the Value field.
Is less than or equal to	The resulting information must be less than or equal to the value entered in the Value field.
Is greater than or equal to	The resulting information must be greater than or equal to the value entered in the Value field.

Below examples are conditions used for the following fields: • NewHireDemographicDescriptorForCondition / LicenceLocation • NewHireLegalIdentifierForCondition / Residency • PositionForCondition / JobField • PositionForCondition / Location • PositionForCondition / Organization	
Is	Returns true if Variable is one of the elements in the Collection. For example: User.city IS {Montreal, Toronto} would return true if User.city was Montreal or Toronto and false otherwise.
Is in	Returns true if Variable is in one of the elements in the Collection. For example: User.city IS_IN {Canada, USA} would return true if user.city was Montreal but false if it was Paris. Note that the IS_IN operator does not behave like the IS operator when the operand is one of the Collection member. For example: Salesman.region IS_IN {Ontario, Alberta} would return false if Salesman.region was Ontario. To express both the IS or IS_IN operators use the IS_OR_IS_IN operator.
Contains	Returns true if Variable contains one or more of the elements in the Collection. For example: Salesman.region CONTAINS {Toronto, Montreal} would return true if Salesman.region was Ontario, Quebec or Canada.
Contains all	Returns true if Variable contains all of the elements in the Collection. For example: Salesman.region CONTAINS_ALL {Toronto, Montreal} would return true if Salesman.region was Canada but would return false if it was Ontario.
Is or is in	Returns true if Variable IS or IS_IN Collection. This condition returns true if the IS condition or the IS_IN condition is true. For example: User.city IS_OR_IS_IN {Montreal, Toronto, USA} would return true if User.city was Montreal, Toronto, or New York.
Is or contains	Returns true if Variable IS or CONTAINS the Collection. This condition returns true if the IS condition or the CONTAINS condition is true. For example: Salesman.region IS_OR_CONTAINS {Toronto, Montreal} would return true if Salesman.region was Toronto, Montreal or Canada.
Is or contains all	Returns true if Variable IS or CONTAINS_ALL the Collection. This condition returns true if the IS condition or the CONTAINS_ALL condition is true. For example: Salesman.region IS_OR_CONTAINS_ALL {Toronto} would return true if Salesman.region was Canada or Toronto.

Is not	Returns the negation of Is. An example of this negation would be to create an alternate branch of the process which would apply to all the rest of the New Hires who did not fall into the other opposite conditions that were more specifically defined.
Is not in	Returns the negation of Is in.
Does not contain	Returns the negation of Contains.
Does not contain any	Returns the negation of Contains all.
Is not and is not in	Returns the negation of Is or is in.
Is not and does not contain	Returns the negation of Is or contains.
Is not and does not contain any	Returns the negation of Is or contains all.

6. Specify a value. Depending on the type of field selected, you can enter words or numbers (0 as well as positive and negative numbers). The **Value** field is mandatory.

In the case of a date, 0 means now.
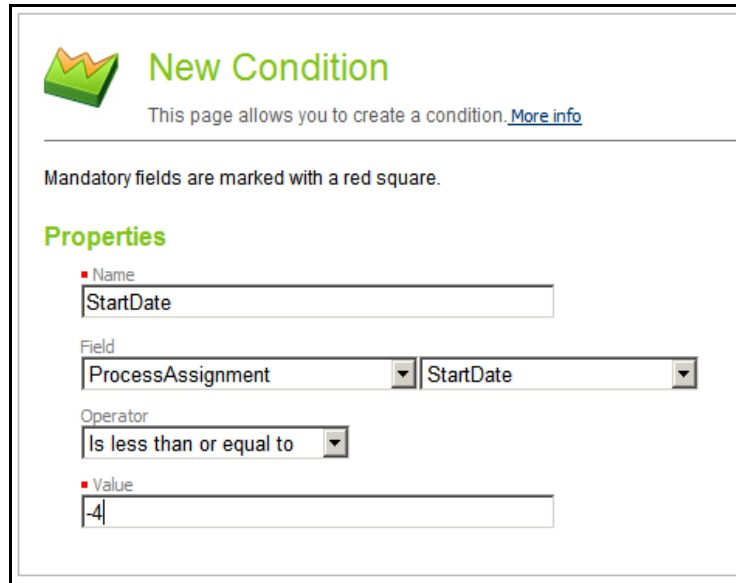
7. Click **Save**.

When a process is active, it is possible to edit a condition, that is delete a condition as well as edit all its properties (name, field, operator and value).

Set up the process and all its steps, transitions, and conditions, and then activate it all. If your testing shows that your conditions were not designed properly, it is possible to make changes even while the process is Active. However you cannot change the tasks nor transitions.

In the example below, a condition was created to send a correspondence four days before the start date.

The equation is: (**Field**) + (**Value**) [**Operator**] Today

In this example: (**ProcessAssignment/Start Date**) + (**-4**) **is less than or equal to** Today

When setting dates, always use **is less than or equal to**.

- When you want a task to wait and not be sent until 5 days before the New Hire's official Start Date for their job, use this: "<= -5". The negative sign indicates the countdown before start date. If preceding tasks finish early, the process will wait until 5 days before start, and then will assign this task. If preceding tasks finish late, this task will fire as soon as possible after 5 days before start date.

- When you want a task to wait and not be sent until 5 days after the New Hire's official Start Date for their job, use this: "<= 5". The positive number means that they have already been on the job for 5 days. If preceding tasks finish early, the process will wait until 5 days after Start Date, and then assign this task. If preceding tasks finish late, this task will fire as soon after 5 days as possible.

These date-based conditions can be configured to use Start Date or Process Start Date. Other dates such as "Expected Start Date" may be less reliable, and any changes that were made in recruiting TEE after the Onboarding process was started will not be transferred into Onboarding. (Start Date changes are immediately transferred from Recruiting into Onboarding.)

When calculating a condition start date, working days are considered. That is, if working days are from Monday to Friday, then Saturday and Sunday are not considered. For example, if Sat and Sun are not checked ON in the Calendar Days area of the Settings, then these days will not be counted. Therefore a task that is assigned on Thursday the 5th and is defined to take 2 days in duration, will have its due date automatically calculated to be Monday the 9th.

Associating a Process to Organizations, Locations and Job Fields

You can associate a process to organizations, locations and job fields to respond to specific requirements. For example, you could create a process for IT technicians working in the United States and another process for those working in Canada. Only processes matching the requisition OLF would be displayed in the Staffing WebTop as possible processes to initiate Onboarding.

The OLF association is used to present the right list of processes, based on the requisition OLF, when initiating an onboarding process in the Enterprise Edition application.

1. In the Onboarding Administration page, click **Processes**. The **Processes** page opens.

2. Click on a process. The **Process Page** opens.

3. To associate the process to an **Organization**, **Location** and/or **Job Field**, click the relevant **Add** buttons.

4. Select an element, then click **Select**.

Obtaining a Graphical View of the Process

Once a process is created, it is possible to obtain a visual representation of the process to help you validate the onboarding process you just created.

1. Open a process.

2. Click **Preview**.

For example, in our scenario, the process will look as follows:

Onboarding WebTop > Administration > Processes > Process - Thank you Correspondence > **Process Preview**

OBHuman – man

Start → Complete New Hire → Send Thank → End
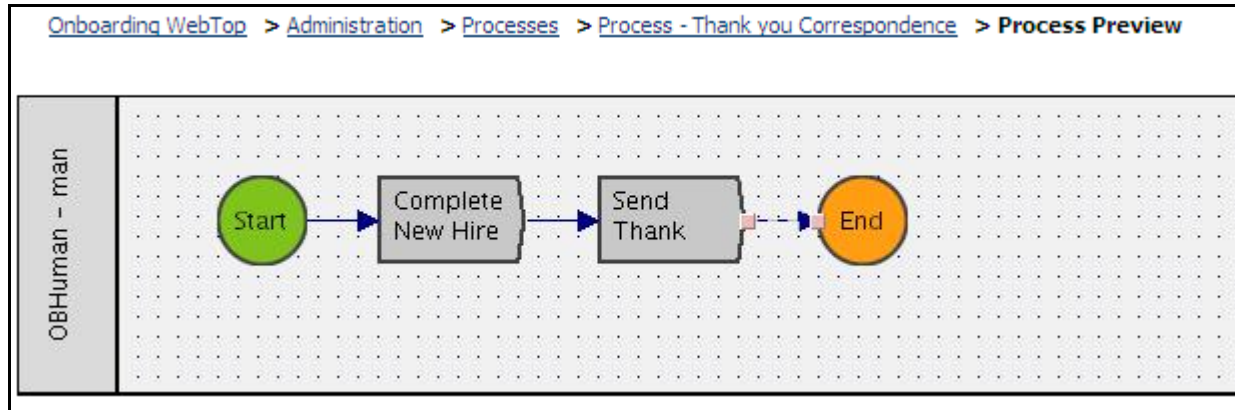
The start and the end are automatically generated by the preview mechanism to help you visualize the transitions among your tasks. For any task that has no following transition, an End circle is created. Therefore if different parallel branches are created, each of them could have an independent End, unless a later step/task which re-unifies the branches downstream has been created. When the process gets any last Task in its workflow completed in any branch, in other words when someone reaches any End circle, then the whole process is instantly completed. At this point, any remaining unfinished tasks can no longer be finished; they are no longer active for any assignee, because the workflow completed.

The three types of process steps are illustrated as follows:

Task

Sub-process

Routing
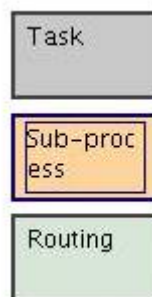
Transitions with one or multiple conditions are represented with a bold and thick black arrow. Transitions without conditions are represented with a lighter black arrow.
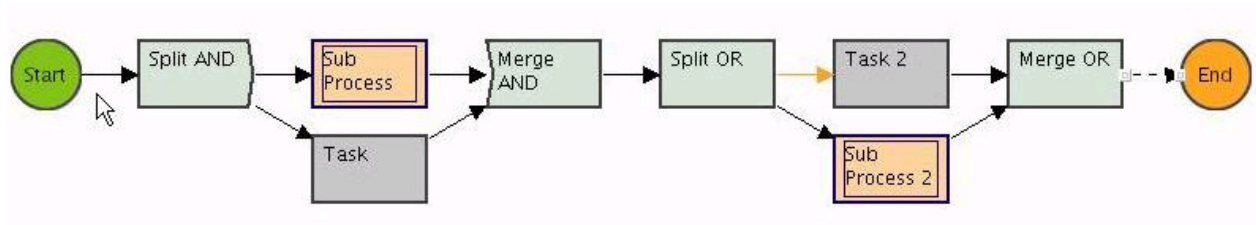
Integrating E-Verify Automation Sub-process

This sub-process relies on 4 forms, 3 system tasks and 1 Open PDF task. It is usually configured your Taleo consultant just as any regular process.
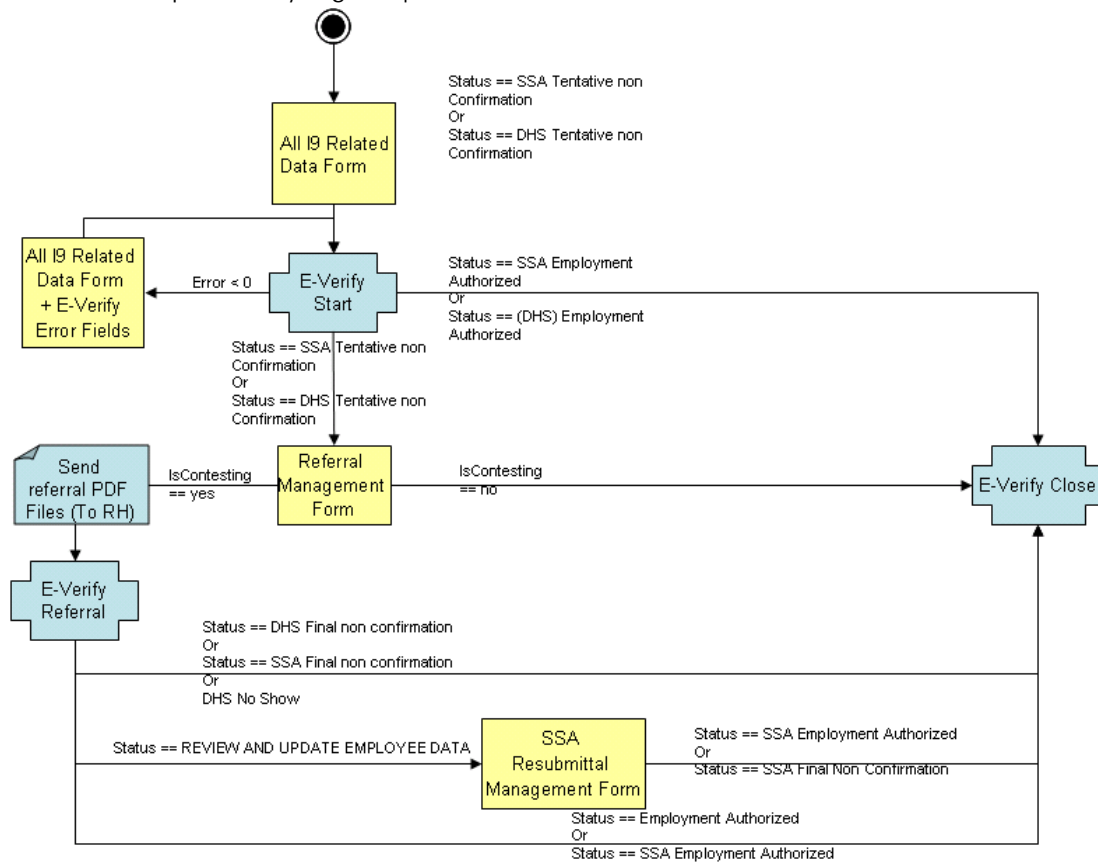
Below are tables describing in details the forms and tasks that are part of this built-in sub-process.

Types	Forms and Tasks	Definitions
Open PDF Task	All I-9 Related Data Form	This is the U.S. Form I-9 made available to whoever needs to collect the New Hire's personal data in order to verify work eligibility (Human Resources, hiring manager, task assignee, etc.). The layout is different from the U.S. Form I-9 Section 1 + 2 that is also provided with Taleo Onboarding. Either one can be chosen however this is a compact one-page version that has improved validation on the data fields and that is already built into the E-Verify sub-process. Also, like any form, it can be modified by your administrator to make desired changes, without affecting the sub-process.

Types	Forms and Tasks	Definitions
System Task	E-Verify Start	This task is executed automatically by Onboarding and submits an eligibility verification request to E-Verify. The System task will be "completed" as soon as it receives a definitive answer from E-Verify and it will wait (remain "In progress") as long as an answer is required.
Open PDF Task	U.S. Form I-9 Error	Once submitted to E-Verify Service, some errors could be reported. Then this form should be used to correct the wrong data or to add missing fields. The process will loop back to this form until E-Verify accepts the submitted data and creates a case for the current New Hire.
Fill User-defined Form	Referral Management Form	When receiving a Tentative Non Confirmation from E-Verify, the form must be used to enter the New Hire's decision whether to contest or not. The process will behave differently upon that decision because the New Hire will need additional forms to present at the DHS or SSA office.
Open PDF Task	Send Referral PDF Files	Once the New Hire has been informed regarding the tentative non-confirmation and decided to contest, he and the hiring manager will need the appropriate documents in order to go further.
System Task + In-person Visit	E-Verify Referral	A Referral is a request from E-Verify that the New Hire needs to be sent to, or referred to, the SSA office. Therefore this task informs E-Verify that the New Hire is about to visit a DHS or SSA office in order to contest the status decision.
Open PDF Task	SSA Resubmittal Management Form	A referral can result in a data resubmittal. Resubmittal is the request from SSA to submit their data again in their E-Verify case request, when the New Hire had to make updates during their visit to one of the SSA offices. This step allows matching new DHS data with the corresponding updates that will be performed from your side. The resulting status (SSA or DHS EMPLOYMENT AUTHORIZED, SSA or DHS FINAL NONCONFIRMATION, DHS NO SHOW) has to be entered in the system using the provided form. Before submitting that form, it is strongly recommended to also synchronize the New Hire's data updated from E-Verify WebTop by using the other input fields available in that form.
System Task	E-Verify Close	All E-Verify cases must be closed, either by the system task or manually.

Now, depending on your role in the process, you might have different tasks to complete.

Using the feature as...

Administrator

The administrator must register online and accept the electronic Memorandum of Understanding (MOU) that details the responsibilities of SSA, DHS, and the employer. Then, upon completion of the registration, all users have to register for individual accounts and are expected to take the online tutorial to get familiar with E-Verify web services.

Directly in Onboarding Administration, the administrator must:

• Configure their own passwords (via Taleo Support)
• Activate the module and grant the appropriate permissions to users (via Taleo Support)
• Create and test their Onboarding processes (containing the sub-process)
• Configure two different URLs for test and production
• Go live

> It is crucial to not use the production zone for testing just like you must not use the testing zone with real data.

Configuring passwords

The administrator must file a ticket with Taleo Support to obtain their passwords for both the test and production zone. However, these passwords expire after 90 days and it is very important to change them before they expire.

To create passwords:

Path: Onboarding WebTop > Administration > Settings

1. Click the **Onboarding** feature link. The **Product Settings - Onboarding** page opens.

2. Click **Edit** next to E-Verify Web Service Account Password (Test). The **E-Verify Web Service Account Password (Test)** page opens.

3. Enter your password in the **Value** Field.

4. Click **Save**. Your password is directly and automatically sent to the E-Verify service, and your account's password is successfully updated.

5. Repeat steps 1 to 4 for the **E-Verify Web Service Account Password (Prod)**.

> The reuse of any of the previous six passwords is not allowed. A password must contain 8 to 14-character and be composed of three of the four following categories: upper-case letters, lower-case letters, numbers, special characters (! @ $ % * ( ) < > ? : ; { } + - ~).

As mentioned earlier, passwords expire after 90 days. It is your responsibility to change them **before** they expire because there are no reminders available.

Changing an expired password

When a password expires:

- the tasks try several times to complete themselves, then are displayed as errors
- the overall Onboarding processes stall

To change a password:

1. Send an email to request a new password from E-Verify.

2. File a ticket with Taleo Support to deactivate the E-Verify functionality in Onboarding, update the password information manually in the system and reactivate E-Verify.

Because there is no communication with E-Verify anymore (a temporary situation caused by the expiration of your passwords), every E-Verify related task of every single New Hire will be in status **Error**. The task assignee must manually re-execute them by clicking the **Retry** action link (each individual Error task has a Retry link).

Activating E-Verify and granting permissions

When activating E-Verify, the new status appears on the Onboarding Processes table and a new section is displayed in each New Hire Details page on the WebTop.

Currently, E-Verify cannot be activated for only some subset of New Hires or locations. When enabled, WebTop users will see the functionality, and the status information will be shown for all New Hires even if their status is E-Verify Not Initiated and even of their process will never initiate it.

To activate E-Verify:

1. File a ticket with Taleo Support.

To grant permission to view and manage e-Verify web services:

Path: Onboarding WebTop > Administration > User Types and Permissions

1. Click the user type you wish to grant permissions. The **Permissions** page opens.

2. Click **Edit** next to Processes and Tasks. The **Permission Editor** page opens.

3. Check **View and manage E-Verify Services**.

4. Click **Save**.

Creating processes

The built-in sub-process offered in Onboarding is named **E-Verify Automation**. It contains the basic steps for an E-Verify process but you must create your own onboarding process and incorporate the

built-in sub-process. Then you can make adjustments such as fix forms, add Open PDF tasks to suit your needs, etc.

We recommend that you start by duplicating this built-in sub-process as the foundation for starting your own larger process. It is more flexible to use the E-Verify tasks and transitions as part of a main process, not a sub-process. This way, you can easily add steps before, after, and between the E-Verify steps that are provided, to meet your company's specific legal, regulatory, or general onboarding needs.

The diagram below is an example of how a complete E-Verify process might look.
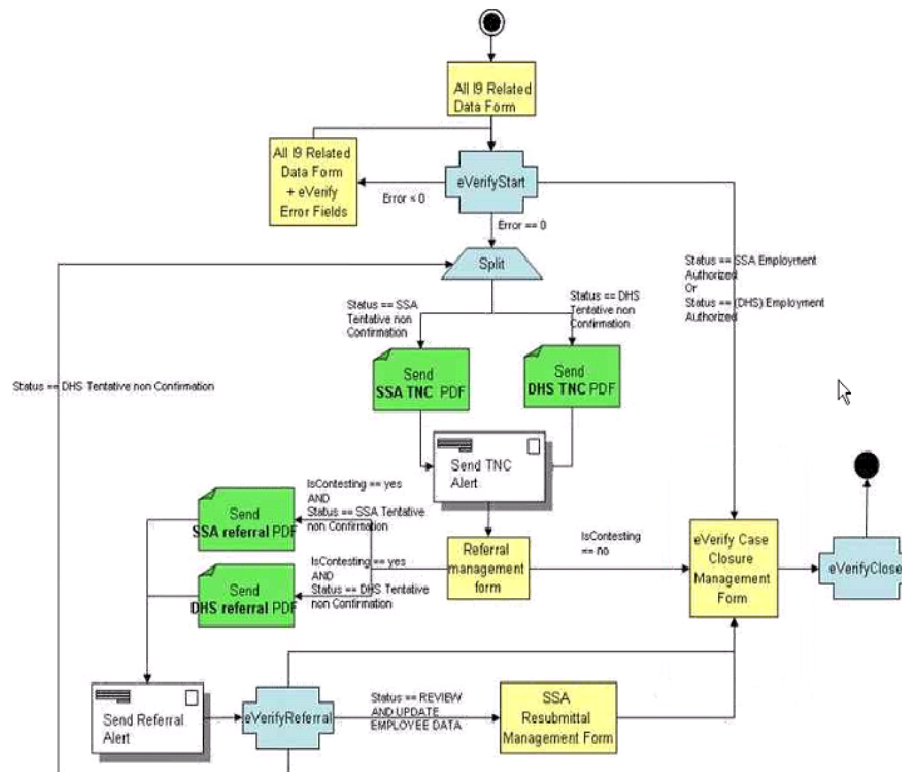
Since this is only a sub-process, there should be 2 additional branches after the E-Verify Close system task.

1. Successful authorization, which means that the onboarding process may continue

2. No authorization, which means the New Hire should be terminated

The white envelopes represent notifications and the green boxes are tasks assigned to open PDFs you might want to send Human Resources or some other person involved in the process. These are not part of the built-in sub-process and you need to add them manually if you want the documents to appear in the process at the appropriate time. To cover all scenarios, four PDFs are included as part of the Taleo Onboarding document library, with tokens already inserted:

•   E-Verify SSA-Tentative NonConfirmation Letter
•   E-Verify DHS-Tentative NonConfirmation Letter
•   E-Verify DHS-Referral Letter

- E-Verify SSA-Referral Letter

This can be helpful when:

- A Tentative Non-Confirmation status is received from DHS or SSA and the New Hire needs explanation PDFs.
- A New Hire plans to contest this status. Other DHS or SSA Referral PDFs are needed.

A last item should be added before the automated System task performs the closure, and that is the E-Verify Case Resolution form. This form allows the user specifying the case resolution code, and the possible values are:

- Resolved Authorized
- Resolved Unauthorized/Terminated
- Self-Terminated
- Invalid Query
- Employee Not Terminated

Configuring URLs to communicate with E-Verify accounts

The E-Verify service has two standard URLs that each customer receives: one for testing and one for real runtime verification of employment eligibility. Each of these has a user name and password associated with it, so that your Taleo Onboarding zone can successfully communicate with the service.

The test URL is used by default but when you are ready to switch into production mode you must add the string "{prod}", including brackets, into the description field of the overall process.

To configure URLs:

1. File a ticket with Taleo Support.

Incorporating the built-in sub-process into running processes in production

Once the setup and the configuration are completed, the process is ready to run and to be experienced by different users. However you may want to review the following important steps:

1. Duplicate the built-in sub-process as the foundation for starting your own larger process.

2. Continue normal other steps for the process in parallel, because the E-Verify process can be delayed by weeks in some cases, which could put a stop on the rest of the New Hire's paperwork or make Onboarding wait for this and possibly miss deadlines.

3. Insert the E-Verify Case Resolution form before the E-Verify Close system task and change the existing transitions to fit it in appropriately.

4. Insert the 4 PDF tasks with the right conditions at the right place in the sub-process.

5. Create the message tasks in the right place in the sub-process.

6. Add the string "{prod}" into the description of the process that contains the sub-process when ready to communicate with the E-Verify production URL.

7. Change passwords before they expire (<90 days).

The Process Owner

To better understand the process owner's role, it has been divided in three parts:

1. The initiation of the process

2. What to do when a Tentative Non-Confirmation status is received

3. How the case is resolved

Part 1

1. The sub-process starts with a task assigned to fill in the I-9 form.

The form is reassigned if it contains any errors. It must be corrected and resubmitted.

2. The form is submitted and the process owner automatically sees the E-Verify case number and additional information on the New Hire Details pages, and the status on the Onboarding WebTop page.

3. If the status is Employment Authorized, the Onboarding process continues.

4. If the status is Verification in Progress, then wait for automated updates.

5. If the status is Tentative Non-Confirmation:

    5a) A task is assigned to the process owner to explain why the status was not authorized immediately. For instance, there may be an error in the form, or in their SSA record or perhaps they aren't allowed to work in the U.S., etc.

    5b) The process owner communicate with the New Hire, who must decide if they contest the decision, and fill the form accordingly.

Part 2

1. If the New Hire decides not to contest, he shouldn't be hired.

    1a) PDFs explaining the situation to the New hire and the employer are available. Some of the values appear pre-filled in by Onboarding, others must be added manually by the task owner when being provided to the New Hire in person.

1b)   The Referral Management form must be completed and submitted with the **Not Contest** check box selected.

1c)   The case is resolved/closed automatically with E-Verify by the Onboarding process.

The user must use the E-Verify Case Resolution form to send the case-resolution code to E-Verify.

At this point, the process should move to a "non-hiring" branch to stop moving forward with normal onboarding steps.

2.   If the New Hire who has received a TNC chooses to contest the decision, the Referral Management form must be completed and submitted to E-Verify with the check box selected.

2a)   Now the SSA office expects a visit from the New Hire.

2b)   PDFs explaining the situation to the New hire and the employer are available. Some of the values appear pre-filled in by Onboarding, others must be added manually by the task owner when being provided to the New Hire in person.

2c)   After the New Hire's visit, E-Verify updates automatically the status.

Part 3

1.   Automatic updates arrive in Onboarding. They occur one time per hour for every open case. Onboarding continues to check for updates constantly during the several days or weeks that it may take for the New Hire to visit the SSA office and change their records, and then for the SSA to respond back to E-Verify with an update. Then Onboarding immediately gets the status and moves the process to the next step. Most of the time the next status to arrive will be a Final status, either positive or negative.

2.   If the status is Employment Authorized, the Onboarding process can move forward, for example to the Case Resolution form or to the next System Task which completes the process, and resolves the case with E-Verify. The overall Onboarding process continues.

3. If the status is No Show, the records were not changed because the New Hire didn't go to the SSA office. The E-Verify case can be resolved with the Closure Code reason of No Show (use the E-Verify Case Resolution form). As mentioned earlier, a different path should be added to your process to stop moving forward with normal onboarding steps.

4. If the status is Final Non-Confirmation, the New Hire should be terminated and the onboarding process should stop moving forward with normal onboarding steps.

5. When final statuses arrive, the cases are automatically closed after filling in the E-Verify Case Resolution form.

The New Hire

1. After submitting their I-9 Form, the manager contacts the New Hire if the E-Verify status is Tentative Non-Confirmation.

2. They must decide whether to contest the status and communicate the decision to their manager:

2a) If there is a TNC, the system will provide PDFs to explain the situation and to help the New Hire decide whether or not to contest.

The Onboarding system can only provide some of the information required in the form, therefore the manager has to fill the others fields manually. Below are 2 examples of PDFs that might be required through the process: the **Referral to the Social Security Administration (SSA)** and the **Notice to Employee of Tentative NonConfirmation**.

2b) The New Hire must contact the SSA or DHS, with the required form and any relevant identification, to fix the discrepancy with their record.

After working with the SSA or the DHS, the New Hire informs their manager if any information in their record has changed (and then they proceed with the Review-and-update step.

If the New Hire decides not to contest, they should be terminated.

Starting an Onboarding Process

Specific candidate information is sent to sent to Onboarding about each New Hire, the first time an Onboarding process is started for each person. The values, if any, within these seven areas are transferred or copied directly into new fields that are controlled and accessible within Onboarding:

Assignment	Position/Requisition	Application
• Start Date • Internal Application • Offer: Manager, Creation Date, Approved Date, Refused Date, Expiration Date, Expected Start Date, Offered On Date, Date Job Accepted, Notes, Annualized Salary, Frequency, Annual Bonus, Car Allowance, Commission Amount, Commission Type, Days Per Week, Expense Account, Hours Per Day, Relocation Amount, Relocation Type, Sign On Bonus, Stock Amount, Stock Type, Stock Option, Stock Option Type, Vacation, Vacation Type, Other Compensation, Other Bonus, Currency, Salary Pay Basis	• Position ID • Requisition Number • Requisition ID • Requisition Title • Hiring Manager • Hiring Manager Assistant • Recruiter • Recruiter Assistant • Organization • Job Field • Cie Location • Employee Status • Job Schedule • Job Level • Job Shift • Department Name • Department Number • Department Cost Center	• Locale • Candidate ID • Hiring Process Activity: First Name, Last Name, Employee ID, Creation Date

The Annualized Salary and Salary Pay Basis are independent from each other. For instance, changing the value of one field in an Onboarding form will not adjust the value of the other one.

The Department Name is a string representing the multi-level department (hierarchy) available in OLF. Because any changes could cause misspellings or non-existent departments to be inserted into this field, it is recommended to only display it as read-only in Forms. New Hires and Onboarding WebTop users shouldn't have the ability to overwrite this value.

Candidate/User	Experience	Education/Studies
• First Name • Last Name • Prefix • Suffix • Date of Birth • Driver License • Middle Initial • Emails: Personal, Correspondence • Phones: Home, Work, Mobile, Pager, Fax • Employee Number • Current Address • From/To Dates • Location • Time Zone ID • Social Security Number (Person Legal ID) • User name, Password • Security Questions and Answers	• Other Title • Other Employer Name • Job Description • Start Date • End Date • Current Employer • Employer Name • Other Employer Name	• Program Name • Other Program Name • Institution • Degree Type • Other Institution • Other Institution Name • Start Date • End Date

The security questions and answers, provided by the New Hire, are transferred when their Onboarding process is started. The Forgot Password settings in Recruiting and Onboarding must both be configured equally, with the same number of questions and answers. If one application requires more questions than the other, the New Hire will be asked to create more as soon as logging in the New Hire Portal. If the security questions and answers are modified in either one of the applications, they will be no longer synchronized.

Start a Process with Updated Data

This feature, performed in the Staffing WebTop, enables you to cancel a process, start it again and update the Onboarding information with the Recruiting data.
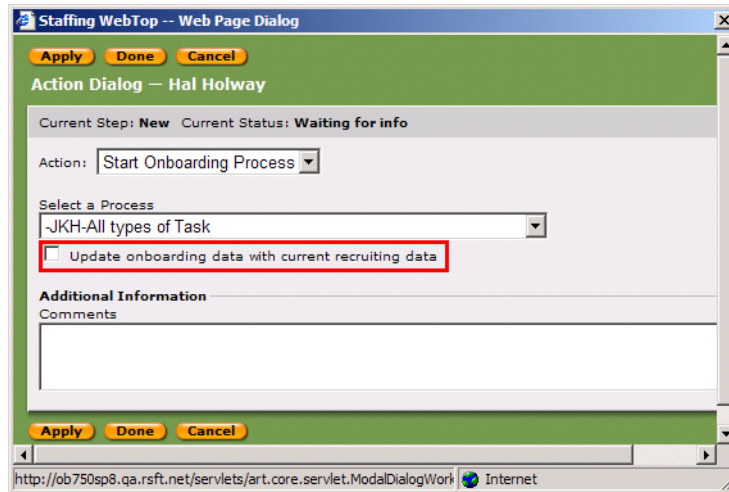
A whole new process is created, which allows all tasks to be reassigned, and the old process remains in the Onboarding WebTop in the status of Cancelled.

Restarting a process is the only way to correct the data in a single Onboarding task after it has been completed.

It is also possible to restart a process directly in the Onboarding WebTop. However, you can only restart the same process with all the same data, preserving all information about the New Hire in Onboarding. There are no changes made regarding any data that may have been modified in Recruiting about the New Hire, their offer, etc. Please consult the Taleo Onboarding User Guide for more information.

Cancelling and starting a process

Path: Staffing WebTop

1. In the **Candidates** tab, click the name of the appropriate New Hire.

2. Select **Cancel Onboarding Process...** in the **More Actions** drop-down list.

3. Click **Apply** in the **Web Page Dialog** window.

4. Select **Start Onboarding Process**.

5. Check **Update onboarding data with current recruiting data** if appropriate.

6. Click **Done**.

> The **Manage Onboarding Processes** permission is required.

Each and every time a process is started (including when it is started again after the original time), the candidate's current data for Assignment, Position, and Application are transferred into Onboarding. Any data which had been transferred in at the start of the old process is left with this process, and the new set of data is associated to the newly restarted process.

Additionally, using the option **Update onboarding data with current recruiting data,** the system overwrites Candidate, Experience and Education data fields listed on the following page. All data about the New Hire that may originate from Onboarding forms, previous processes, or that was imported via TCC, prior to running this process is erased. It will be updated with the information available in Recruiting at this point, and any field with or without a counterpart in Recruiting will be overwritten with the value (or with null). Also, even if a UDF in Onboarding has no corresponding UDFs in Recruiting, it will be erased.

> When restarting a process from the beginning, if you wish to preserve all data entered previously on all Onboarding forms and keep it intact, enabling you to review each step or submit them as they are, do not select the option **Update onboarding data with current recruiting data**.

Accessing the Role List Page

1. In the Administration page, click **Roles**.

The **Role List** page contains the list of roles available within your organization specific to Onboarding. The following elements or actions are also available:

- The **Refine by** list allows you to filter roles according to different criteria (Draft, Active, Inactive, etc.).
- The **Create** link allows you to create a role. See <u>"Creating a Role" on page 7-33</u>.
- The **Delete** button in the **Actions** column allows you to delete specific roles.

Viewing Information Regarding a Role

1. In the **Role List** page, click on a role. The **Role** page opens. This page contains read-only information about the role as well as the following elements:

- The **Properties** section displays information such as the code, name, description, status and default assignee. Click **Edit** to modify the properties of the role. See <u>"Editing a Role" on page 7-32</u>.
- The **Assignees** section displays the name of the assignees and the location to which they are associated. Click **Create** to create a new assignee. See <u>"Creating a Role" on page 7-33</u>.

Editing a Role

The Role page allows you to modify the properties of a role.

1. In the **Role List** page, click on the desired role.

2. Click **Edit** next to **Properties**. The **Role Editor** page opens.

3. Make changes in the fields as required. For more information on the fields, see <u>"Creating a Role" on page 7-33</u>.

4. Click **Save**.

Creating a Role

In addition to the standard roles already defined in Taleo Professional (that is, recruiter, manager, recruiter assistant and manager assistant), you have the possibility to create roles that are associated to users and locations. The whole purpose of these roles is to assign the right assignee to a standard task, in context, depending on the location of the Requisition into which the New Hire is being onboarded.

Let's say for example that a company has offices in various countries. The company has an IT department in each country, but the same onboarding process is used globally. It is possible to create a single process and a generic IT assignee for which a different user is defined for each country. When the process reaches the IT step, the assignee is resolved based on the location of the requisition. For example, if the requisition is located in Toronto, the assignee will be the Canadian assignee. If the requisition is located in San Francisco, the assignee will be the US one.

Business Rules:

If more than one user is associated to a specific location within a role, all matching users will receive the task because multiple assignees are now supported.

Below are two additional examples:

Local Coordinator Role 1
Default User: User7
User1 = Canada, Quebec, Quebec City, Road1
User2 = Canada, Quebec, Quebec City
User3 = Canada, Quebec
User4 = Canada
User5 = USA
User6 = ----- (no location specified)
If the requisition location is Canada, Quebec, Quebec City, Road1
Task gets assigned to: User 1
If the requisition location = Canada, Quebec, Quebec City
Task gets assigned to Multiple Users: User2 User3 User4
If the requisition location = Italy
Task gets assigned to: User6 (because no location is specified)

Local IT Role 2
Default User: User3
User1 = Canada, Quebec, Quebec City, Road1
User2 = Canada, Quebec, Quebec City
If the requisition location = Italy
Task gets assigned to: User3
Assigned to the Default User, because there is no user without location (unlike User6 in Coordinator Role 1).

1. In the Onboarding Administration page, click **Roles**. The **Role List** page opens.

2. Click **Create**. The **New Role** page opens.

3. Enter a code, a name and a description for the role. The **Code** and **Name** fields are mandatory.

4. Specify a default assignee using the **Search** button. The default assignee is used when no regional assignee exists or when the regional assignee is not valid for the location of the requisition.

5. Click **Save**.

You can now create other assignees.

1. In the **Role** page you just created, click **Create** next to **Assignees**.

2. In the **New Assignee** page, select an assignee using the **Search** button.

3. Click **Save**.

4. To assign the assignee to a location, in the **Assignee** page, click **Add** next to **Locations**.

5. Select a location in the Location Selector.

6. Click **Select**.

> Changes to the assignee list will affect future decisions about assigning tasks, however any tasks that are already assigned for current New Hires will not get reassigned.

New Hire Portal

Overview

The New Hire Portal is a page where newly hired employees can go to complete their tasks, fill out forms and access documents and sites that will be valuable to them. In the main page of the portal, New Hires see:

- Tasks assigned to them (for example, complete their profile to provide missing information)
- A list of pre-filled documents and information documents that they can access at their convenience
- Links that will provide them with useful information about their new employer or their new position.

An organization can build as many New Hire Portals as needed. The system administrator has the ability to customize the New Hire Portal display properties and to associate it to one or many organizations. Thus, each portal might have a distinct look and feel that reflects the organization's brands, color scheme, logos, etc.

Also, the system administrator has the ability to customize the New Hire Portal content by adding documents, links and instruction fields. The system administrator creates the portal content then associates it to the Organization, Location and Job Field (OLF) structure. As for the tasks section, the content comes from the processes.

The following pages provide information on the New Hire Portal.

Accessing the Portals Page

To access the Portals page:

1. In the Administration page, click **Portals**.

The **Portals** page allows you to access available portals. The following elements are available:

*   The **Refine by** list allows you to filter tasks according to different criteria (Draft, Active, Inactive, etc.).
*   The **Create** link allows you to create a portal. See <u>"Creating a New Hire Portal" on page 8-4</u>.
*   The **Delete** button in the **Actions** column allows you to delete specific portals.

To access a portal, click on the portal's name.

Viewing Information Regarding a Portal

The portal view page contains read-only information about the portal content.

The **Language** section allows you to view a portal in a specific language and create it in a new language. See <u>"Language Configuration" on page 1-10</u>.

The **Properties** section displays information such as the code, name, welcome message appearing at the top of the portal page, and instructions for the tasks, documents, links and footer. Click **Edit** to edit properties.

The **General Documents** and **Personalized Documents** sections display corporate documents attached to the portal. These documents are PDFs that can contain embedded tokens with personal data. Click **Reorder** to reorder documents (see <u>"Reordering Documents and Links in a Portal" on page 8-3</u>) in the list, click **Add** to add more documents (see <u>"Adding Documents and Links to the Portal" on page 8-4</u>), click **Remove** to remove a document.

> You should display the PDFs with personal data (and embedded tokens) into the **Personalized Documents** section, and leave generic corporate or policy or even extra-curricular documents in the **General Documents** section.

The **Links** section displays hyperlinks to URLs anywhere on the internet or anywhere that the New Hire can access in the intranet. Click **Reorder** to reorder the links in the list (see <u>"Reordering Documents and Links in a Portal" on page 8-3</u>), click **Create** to create a new link (see <u>"Adding Documents and Links to the Portal" on page 8-4</u>), click **Delete** to delete a link.

The **Organizations**, **Locations** and **Job Fields** (OLF) section displays to which OLF elements the portal is associated. In other words, for requisitions that are associated to OLF this is the portal that will be displayed to the New Hire. Click **Add** to add an OLF (see <u>"Associating a Portal to Organizations, Locations and Job Fields" on page 8-5</u>). Click **Remove** to remove an OLF.

The **History** section provides information such as the date and time of an event, a description and details on an event, as well as the "actor" (person or system) who performed the event. See <u>"History" on page 1-8</u>.

Reordering Documents and Links in a Portal

1. In the portal view page, click **Reorder** next to **General Documents**, **Personalized Documents** or **Links**.

2. Select the document or link you wish to move.

3. Click on the up or down arrow to move the document or link.

4. Click **Save**.

Creating a New Hire Portal

1. In the Onboarding Administration page, click **Portals**. The **Portals** page opens.

2. Click **Create**. The **New Portal** page opens.

3. Enter a code and a name for your portal. These fields are mandatory.

4. Enter the welcome message that is displayed on the portal's welcome page using the HTML Editor options. You can enter text as well as illustrations such as your organization logo.

5. Enter instructions for the task, document, link and footer sections, if needed, using the HTML Editor options.

6. Click **Save**.

7. Add documents and links to the portal. See *"Adding Documents and Links to the Portal" on page 8-4*.

8. Associate the portal to one or more OLFs. If the field is left empty, the portal will apply to all New Hires being onboarded for all requisitions. See *"Associating a Portal to Organizations, Locations and Job Fields" on page 8-5*.

9. Set display properties. See *"Setting Display Properties" on page 8-6*.

> Always click **Activate** to activate an element. An Active element can be used. See *"Status" on page 1-10*.

Adding Documents and Links to the Portal

The New Hire Portal can contain documents and links useful to the new employee which will all be launched into a new window above the New Hire Portal.

General Documents	Corporate documents that New Hires must read and that inform them of important information relevant to their job. For example, an Employee Handbook, company holidays, department/division specific content. Documents are in PDF format only.
Personalized Documents	Documents containing personal information. Depending on the organization's request, New Hires might have to print these documents and bring them back to the office or simply keep them for their own reference. Documents are in PDF format only.
Links	For example, links to the company's Web site, the Intranet, a pre-recorded welcome message from the CEO, online training or orientation. The complete domain name including the http prefix is required. For example, http://www.taleo.com (and not www.taleo.com).

To add documents and links:

1. Open the portal you created.

2. Click **Add** beside **General Documents**. The **File-based Document Selector** page opens.

3. Select documents and click **Select**. The document appears under **General Documents**.

4. Click **Add** beside **Personalized Documents**. The **File-based Document Selector** page opens.

5. Select documents and click **Select**. The document appears under **Personalized Documents**.

6. Click **Create** beside **Links**. The **New Link** page opens.

7. Enter a name for the link as well as the URL address and a description. The **Name** and **URL** fields are mandatory. The complete domain name including the http prefix is required. For example, http://www.taleo.com (and not www.taleo.com).

8. Click **Save**. The link appears under **Links**.

Associating a Portal to Organizations, Locations and Job Fields

The content of a portal can be associated to Organizations, Locations and Job Fields (OLF). For example, you could create a portal for IT technicians working in the United Stated and another portal for those working in Canada.

- Requisition's OLF governs the Portal that each New Hire sees.
- If no portals match the New Hire's requisition's OLF, then they will see a generic portal (one that the Administrator hasn't associated to any OLF).
- Portals cannot be associated directly to any specific Onboarding process.

To associate the New Hire portal to the OLF:

1. Click **Add** beside **Organizations**. The **Organization Selector** page opens.

2. Select the desired organisation.

3. Click **Select**.

4. Click **Add** beside **Locations**. The **Location Selector** page opens.

5. Select the desired location.

6. Click **Select**.

7. Click **Add** beside **Job Fields**. The **Job Field** page opens.

8. Select the desired job field.

9. Click **Select**.

Setting Display Properties

The Display Properties page allows you to configure display properties of the portal to meet the look and feel of various brands. For example, you could add a logo, a header or footer and a new background color that will be shown on every page of the portal even the forms the New Hire sees. The look and feel of the portal is associated to Organizations only.

On the other hand, the content of the portal is defined during the creation process (see "Creating a New Hire Portal" on page 8-4) and it is associated to the Organization, Location and Job Fields (OLF).

To set display properties:

1. In the Onboarding Administration page, click **Display Properties**. The **Display Properties** page opens.

2. Click **Create.** The **New Display Properties Set** page opens.

3. Enter a code and a name. These fields are mandatory.

4. Specify a theme (CSS). A theme can have specific background colors to reflect the branding of your organization, your organization logo, etc.

> To obtain new themes for your organization, communicate with your Taleo representative.

5. Create a header and a footer using the HTML Editor options. You can enter text as well as illustrations such as your organization logo.

6. Click **Save**.

7. If you wish to associate the display properties to a specific organization, click **Add** next to **Organizations**. The **Organization Selector** page opens.

8. Select organizations you want to associate with the display properties.

9. Click **Select**.

> Always click **Activate** to activate an element. An Active element can be used. See "Status" on page 1-10.

Below is an example of a New Hire Portal.

Taleo ✕ Talent Drives Performance™

Going beyond simple staffing efficiency, enterprise talent management drives significant cost reductions, more effective acquisition of higher quality talent, retention of key players in critical roles, reduced risk, and improved *workforce productivity.*

| Sign out

New Hire Portal > **New Hire Portal**

Dan N Kalikow

Job Title
ReqJKH-Space

Location
Massachusetts

Contact Information

Jodie K Holway
—
Send an email

New Millennium is a great place to work!

My Onboarding Tasks

Tasks completed: 1 out of 2

The following tasks are assigned to you, so please click to complete each one.

F-All Details
Hello New Hire: Please click to open and then fill in all the fields of this form, then click "Submit".

Due Date: Dec 31, 2008
Status: In progress

✓ M-Task

Due Date: Dec 31, 2008
Status: Completed

Documents

These documents are just for your information:
You can view or print them, but you don't need to enter any information here online.

Personalized Documents
TestPDF

Links

Enjoy your travels to all of these useful links, which are just for your education!

GoogleMaps

Thanks for joining us here at New Millennium -- we are so glad you did!

Copyright © 2007 Taleo Corporation. Human Resources Management Solution . All Rights Reserved

1	This space is for a logo. The logo can be hosted by Taleo or elsewhere on the web, and its the Theme that specify where to find it. See "Setting Display Properties" on page 8-6.
2	Personalized documents that can contain embedded tokens with personal data. See "Personalized Documents" on page 8-4.
3	General documents on the organization that New Hires must read. See "General Documents" on page 8-4.
4	Links to other relevant information. See "Links" on page 8-4.

5	Personalized header. See *"Setting Display Properties" on page 8-6*.
6	Welcome message. See *"Creating a New Hire Portal" on page 8-4*.
7	Personalized footer. See *"Setting Display Properties" on page 8-6*.
8	Personalized instructions. See *"Creating a New Hire Portal" on page 8-4*.

Hosting an Image

Hosting an image allows you to manage your own image and logos shown in the New Hire Portal and email correspondence. You can upload images without requiring external support and store them on the Taleo server.

- Only jpg, gif and png format are supported
- The maximum size for a single image is 20 k and 25 m for the images total

To host an image:

1. In the **Images** page, click **Create**. The **New Image** page opens.

2. Fill the **Code** and **Description** fields.

3. Click **Browse**.

4. From your computer, find the image to upload, select it and click **Open**.

5. Click **Save**.

6. In the **Preview** section, click **Show** to visualize your image.

In the image properties, there is a URL linked to your image. To use your image in the New Hire Portal or email correspondence, copy this URL in the HTML editor when appropriate.

Managing User Accounts

The User Account Management section allows you to view the list of New Hire accounts, modify information regarding the account and perform certain actions such as generating a password, locking an account, etc.

1. In the Onboarding Administration page, click **User Account Management**. The **New Hire Accounts** page opens.

2. To obtain information regarding a user, click the user name.

3. To modify information regarding a user, click **Edit** in the **User Account** viewing page. The **User Account Editor** page allows you to modify the first name, last name, email address, user name, hone phone number and employee ID and validity period

> The **User Name** is the most important information in the **User Account Editor** page. If you start a process for a candidate who never applied through a Career Section, this candidate will not have a user name. You will be able to provide the candidate's user name by accessing the **User Account Editor** page.

Generating a Password

You might wish to generate a new password if, for example, a New Hire does not have his/her user name handy or does not have an email address to receive the temporary access code.

1. In the Onboarding Administration page, click **User Account Management**. The **New Hire Accounts** page opens.

2. Click the **View** link of the user for whom you want to generate a new password. The **User Account** page opens.

3. Click **Generate Password** then click **Yes** to the message that appears. A new password is provided.

Deactivating an Account

You might wish to deactivate an account if, for example, a New Hire is no longer working for your company. When you cancel the onboarding process, the New Hire no longer has access to the portal. However, you might want to deactivate the account if you are not sure the process has been cancelled, if you temporary do not have access to it through the onboarding system, if you do not have the possibility to see all processes and the owner of the process is not performing the cancelled action right away.

1. In the Onboarding Administration page, click **User Account Management**. The **New Hire Accounts** page opens.

2. Click the **View** link of the user for whom you want to deactivate the account. The **User Account** page opens.

3. Click **Deactivate Account** then click **Yes** to the message that appears. The account is deactivated. The account status indicates **Inactive**.

Locking an Account

You might wish to lock an account if, for example, a employee leaves the company and you do not have the time nor the permission to cancel a process. This way you can lock the employee account and close the process later on.

1. In the Onboarding Administration page, click **User Account Management**. The **New Hire Accounts** page opens.

2. Click the **View** link of the user for whom you want to lock the account. The **User Account** page opens.

3. Click **Lock Account** then click **Yes** to the message that appears. The account is locked. The account status indicates **Locked by**.

Product Settings 9

Overview

The Product Settings section allows you to manage product settings.

To access product settings:

1. In the Onboarding Administration page, click **Settings**. The **Product Settings** page opens.

In the Product Settings page, settings are organized in different features such as Correspondence, Languages, etc. To view the settings of a specific feature, simply click on the feature's name.

The Product Settings page of a specific feature provides an overview of the feature's properties as well as any history on changes that were made. Each feature's property has a name, a value, a description, the date when it was released as well as a security level. Available security levels are:

*   Public: The setting is available to system administrators.
*   Protected: The setting is read-only. Modifications can only be made by Taleo.
*   Private: The setting is available to Taleo Support employees only.

Product Resources

10

Overview

Path: Onboarding/Administration/Product Resources

The Product Resources section allows you to view product resources (view resource IDs, refresh customized values, etc.).

Product Resources IDs have been associated to standard fields. Each field has a Global Resource ID and a specific ID per context.

All system administrators have the permission to view Resource IDs. The permission cannot be granted to other user types and cannot be removed from system administrators.

To view the Resource ID of a standard field:

1. In the **Onboarding WebTop** page, click **Product Resources**. The **Resource Administration** page opens.

2. Click **Show Identifiers**. You will notice that a series of number appears in front of each standard field available in the Onboarding Administration module. This is the Resource ID.

3. Note the field labels and the resource IDs that you wish to have modified then submit a request to Taleo.