Oracle Taleo Enterprise
Onboarding Configuration Guide
Feature Pack 13B
Part Number: E47791-01

September 16, 2013
Onboarding Configuration Guide

Part Number: E47791-01

Copyright © 2013, Oracle and/or its affiliates. All rights reserved.

This software and related documentation are provided under a license agreement containing restrictions on use and disclosure and are protected by intellectual property laws. Except as expressly permitted in your license agreement or allowed by law, you may not use, copy, reproduce, translate, broadcast, modify, license, transmit, distribute, exhibit, perform, publish, or display any part, in any form, or by any means. Reverse engineering, disassembly, or decompilation of this software, unless required by law for interoperability, is prohibited.

The information contained herein is subject to change without notice and is not warranted to be error-free. If you find any errors, please report them to us in writing.

If this is software or related documentation that is delivered to the U.S. Government or anyone licensing it on behalf of the U.S. Government, the following notice is applicable:

U.S. GOVERNMENT END USERS: Oracle programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, delivered to U.S. Government end users are "commercial computer software" pursuant to the applicable Federal Acquisition Regulation and agency-specific supplemental regulations. As such, use, duplication, disclosure, modification, and adaptation of the programs, including any operating system, integrated software, any programs installed on the hardware, and/or documentation, shall be subject to license terms and license restrictions applicable to the programs. No other rights are granted to the U.S. Government.

This software or hardware is developed for general use in a variety of information management applications. It is not developed or intended for use in any inherently dangerous applications, including applications which may create a risk of personal injury. If you use this software or hardware in dangerous applications, then you shall be responsible to take all appropriate fail-safe, backup, redundancy and other measures to ensure its safe use. Oracle Corporation and its affiliates disclaim any liability for any damages caused by use of this software or hardware in dangerous applications.

Oracle and Java are registered trademarks of Oracle Corporation and/or its affiliates. Other names may be trademarks of their respective owners.

Intel and Intel Xeon are trademarks or registered trademarks of Intel Corporation. All SPARC trademarks are used under license and are trademarks or registered trademarks of SPARC International, Inc. AMD, Opteron, the AMD logo, and the AMD Opteron logo are trademarks or registered trademarks of Advanced Micro Devices. UNIX is a registered trademark of The Open Group.

This software or hardware and documentation may provide access to or information on content, products and services from third parties. Oracle Corporation and its affiliates are not responsible for and expressly disclaim all warranties of any kind with respect to third-party content, products, and services. Oracle Corporation and its affiliates will not be responsible for any loss, costs, or damages incurred due to your access to or use of third-party content, products, or services.
Documents
  Document........................................................................................................... 40
    Creating a Text Document........................................................................... 40
    Paragraph Storage in Reusable Library.................................................... 40
    Creating a File-based Document.................................................................. 43
    Updating Documents in an Existing Onboarding Process............................. 45

Correspondence
  Message Template.............................................................................................. 47
    Forgot Password Message Template............................................................ 48
    Creating a Message Template....................................................................... 48
    Editing the Properties of a Message Template............................................. 49
    Adding an Attachment to a Message Template............................................ 49
    Removing an Attachment from a Message Template..................................... 50
    Activating a Message Template.................................................................... 50
    Deactivating a Message Template............................................................... 50
    Deleting a Message Template....................................................................... 51
    Duplicating a Message Template.................................................................. 51
  Paragraph........................................................................................................... 52
    Adding a Paragraph to a Message Template............................................... 52
    Creating a Paragraph for a Message Template.......................................... 53
    Ordering Paragraphs in a Message Template.............................................. 53
    Editing a Paragraph in a Message Template............................................... 54
    Previewing a Paragraph in a Message Template.......................................... 54
    Activating a Paragraph in a Message Template.......................................... 54
    Deactivating a Paragraph in a Message Template....................................... 55
  Variable.............................................................................................................. 56
    Adding a Variable............................................................................................ 56

User-Defined Fields and Selections
  User-defined Fields........................................................................................... 58
    User-defined Field.......................................................................................... 58
    Job Type Field from Recruiting is Available in Onboarding.......................... 60
    User-defined Fields in Onboarding vs Recruiting......................................... 60
    User-defined Field Reporting......................................................................... 62
  User-defined Selections..................................................................................... 64
    User-defined Selection.................................................................................... 64
Electronic Signatures

Configuring an Electronic Signature..........................................................................................68
Date and Time Setting for Electronic Signatures........................................................................70
Configuring an Electronic Signature..........................................................................................71
Adding an Electronic Signature to a Form..................................................................................71
Adding an Electronic Signature in a PDF....................................................................................72

User-defined Forms

User-defined Forms....................................................................................................................74
Configuring User-defined Forms.................................................................................................74
Static Hyperlinks in User-defined Forms....................................................................................83
User-defined Form History Tracking..........................................................................................84
U.S. Form I-9..................................................................................................................................84
New Hire Details Form................................................................................................................85
Relationship between Forms and PDFs......................................................................................86
Tokenized PDF Document............................................................................................................86

New Hire Portal

New Hire Portal.........................................................................................................................92
Creating Content for Different New Hire Experiences...............................................................92
Where to Configure Each Element of the New Hire Portal.......................................................94
Creating Portals..........................................................................................................................100
Display Properties.....................................................................................................................107
Themes.........................................................................................................................................110
Modifying New Hire Portal Themes..........................................................................................111
Custom New Hire Portal Themes...............................................................................................112
Custom New Hire Portal Themes for the Original Layout.........................................................116
Password and User Name Synchronization between Career Section and the New Hire Portal....119
New Hire Accounts....................................................................................................................121
New Hire Account.......................................................................................................................121

Images and HTML Editors

Rich Text, Graphic and Video with the HTML Editor..................................................................127
Linking a Video in the HTML Editor..........................................................................................127
Deleting an Image......................................................................................................................128
Uploading an Image...................................................................................................................128
Using an Image..........................................................................................................................128

External Services

External Services.........................................................................................................................130
Setting up Your System for External Services..........................................................................130
Configuring External Service Details.......................................................................................132
Troubleshooting External Services..........................................................................................136

Processes and Tasks
Preface

- Revision History.................................................................................................................. 2
- Technical Configuration and Software Performance.............................................................. 3
# Revision History

<table>
<thead>
<tr>
<th>Date</th>
<th>Modification</th>
<th>Revised Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 16, 2013</td>
<td>Initial publication.</td>
<td></td>
</tr>
</tbody>
</table>
Technical Configuration and Software Performance

For the latest information, refer to the *Taleo Enterprise Technical Configuration and Software Performance Guide* document for the applicable release.
Basic Concepts
Onboarding Overview

About Taleo Onboarding

Taleo Onboarding provides an automated, customizable system for transitioning candidates to become new hires in their new roles.

Onboarding refers to the overall process of bringing a new employee into an organization, including:

- Carrying forward important information acquired in the candidate selection process.
- Notifying all appropriate personnel of their involvement and assigning tasks as required.
- Assisting with legal compliance duties.
- Getting the new hire all the information and materials they will need to become productive.

Taleo Onboarding speeds up time for contribution by new employees and contractors by streamlining and automating the onboarding process, while reducing excessive paperwork and assisting with policy and legal compliance. It bridges the gap between promise and productivity with tools such as the New Hire Portal, specialized correspondence, fully customizable forms, and automated workflows.

Understanding the Onboarding Process

Taleo Onboarding utilizes processes to transition new hires to their new roles and the company. A process is a series of steps (typically performed by multiple stakeholders), all of which must be completed for a new hire to join your organization and become productive.

An organization can use any number of different processes to serve a variety of business units and locations. For example, the onboarding process at a corporate office might be very different from one at a field office. A process can have any number of steps. Processes can also be similar but have steps in a different order. Processes can be tied to organizations, locations and job fields (OLF). A single process can involve numerous stakeholders such as a human resources manager, a hiring manager and the new hire or employee.

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. Below is a visual representation of an onboarding process. Of course, the process 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.
The following list describes the details of the onboarding process depicted in the visual image above.

1. The new hire accepts the offer.
2. The hiring manager completes an online form regarding the offer.
3. An email is sent to the new hire.
4. The new hire completes an online form.
5. Human resources reviews the forms.
6. Payroll makes payroll adjustments; office manager prepares office furniture; IT prepares computer.
9. Employee arrives on start date.
11. New hire attends orientation and training.

Components of a process:

- Processes are created in Onboarding Administration.
- Processes contain steps.
- Steps contain tasks. A task can be a form, a message or even a link to an external service.
- Steps are linked by transitions.
- Transitions can contain conditions. A condition, such as a certain number of days before the start date, must be met before the corresponding step can be performed.

The following scenario is very simple and should help you better understand the creation of an onboarding process. It is described in detail 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 with a task that 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 hiring manager containing a checklist of preparations for the new hire's first day. 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 answer choices: Car, Bus, Other. The user-defined field is included in the user-defined form.
- Create one user-defined form to capture new hire personal information.
- Create one correspondence containing a checklist of preparations for the new hire's first day.
- Create two tasks:
  - One task for the new hire entitled “Complete personal information”.
  - One task for the recruiter entitled “Send new hire checklist”.
- Create one process integrating the above two tasks.
- Create one transition between the “Complete personal information” task and the “Send new hire checklist” task.

**Steps**

A process contains steps. A step is information about the assignee and sequence of each task. Steps are created for each process as a container for reusable tasks. The tasks are generic; the step contextualizes the task into the process.

The steps represent the individual units of work done by people who perform the tasks. Business logic is embedded within the transitions between the steps, to ensure the correct routing of the work to be done.

<table>
<thead>
<tr>
<th>Step Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>The step consists of a task.</td>
</tr>
<tr>
<td>Sub-process</td>
<td>The step consists of a sub-process. A sub-process is a small process used inside a larger process</td>
</tr>
<tr>
<td>Routing</td>
<td>The step connects multiple parallel tasks together. Routing steps are like placeholder steps which do not contain any tasks to assign to any users.</td>
</tr>
</tbody>
</table>
Tasks

Tasks are specific assignments that assignees complete as part of a step in an onboarding process. Tasks are assigned to various assignees involved in a process. Completed tasks trigger various actions that ensure an automatic progression of the process.

Every task has properties and usually a related source. Properties are the task description. A related source is the item used to execute the task. Manual tasks do not have a related source.

Each task can be configured to have a standard or customized email sent to assignees when it first goes into the In Progress status when it gets assigned. Additionally, each task can have a standard or customized email sent to Process Owner upon task completion.

Once tasks are completed and submitted, they cannot be reversed. However, tasks can be accessed for viewing and printing once they are complete. Completed tasks can be accessed from the New Hire page on the Onboarding WebTop. The Task List on the Onboarding WebTop can also be filtered to display completed tasks.

Onboarding processes can contain five different types of tasks, each with a different associated action. The task types are:

- Form Task
- PDF Task
- Manual Task
- Correspondence Task
- Request External Service

All tasks can be completed by a new hire or assignee except the Request External Service task, which is completed by a Taleo approved third-party vendor.

Task Definitions and Actions

<table>
<thead>
<tr>
<th>Task Type Action</th>
<th>Description</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Correspondence</td>
<td>An email message is sent to one or more recipients. The recipients can include an Additional Recipients list if the normal assignees of the task are not sufficient.</td>
<td>Correspondence</td>
</tr>
<tr>
<td>Fill user-defined form</td>
<td>Assignees are asked to complete a user-defined form. Once the form fields have been completed, the user can either save it as a draft or submit. Saving a draft will save the information in Onboarding but the form will not be submitted, it will have an In Progress status and the process will not progress. Only the task assignee can view a form in draft status. Submitting the form will complete the task and update process progression.</td>
<td>Form</td>
</tr>
<tr>
<td>Execute the task manually</td>
<td>A task with only the completion option. With manual tasks an assignee performs a task outside Onboarding and records its completion using the WebTop. Details regarding the task are contained in the task description field.</td>
<td>None</td>
</tr>
<tr>
<td>Open PDF</td>
<td>A PDF file that can contain specific tokens gets assigned to the assignee as a task. The assignee can complete the task simply by opening or saving the PDF. After it gets assigned to any assignee, then WebTop</td>
<td>PDF</td>
</tr>
</tbody>
</table>
Task Type | Action | Description
---|---|---
 | Request External Service | A third party is the approved vendor for a specific service or product, such as I-9 form completion or help with tax form completion. When this type of task is part of the onboarding process, it makes a request to a third-party provider to perform the type of service configured. See Passport Request and Results.
 | | External Service Request Fields

### Transitions

Transitions link steps together.

Transitions control the flow of the process by regulating the order in which steps occur within the process. They apply business logic to determine step order when multiple possible paths occur in the onboarding process.

### Process Owner

The process owner has the responsibility of ensuring process completion. The owner can be an Onboarding Role, like the hiring manager, a Functional Role, or a specifically named user.

The intent of having a process owner is that there is a single responsible party for viewing, managing, and sharing processes. With the appropriate user type and permission, the process owner can view and execute all the tasks within the new hire's process, regardless of who is the assignee of each task. The process owner can reassign any task to a different assignee while a new hire's process is running, to prevent or recover from bottlenecks. The process owner's name and contact information can be configured to display on the New Hire Portal in case of questions, if the administrator has set this value in the Product Settings.

### Functional Roles as Process Owners

If an onboarding process names a Functional Role as the process owner, the best matching user will be assigned as the process owner. There may also be users assigned to a Functional Role for a specific Organization, Location, and Job Field structure. Each functional role must have a Default Assignee. Onboarding will assign a user configured by OLF or a non-default assignee with no OLF as an Onboarding process owner before selecting a Default Assignee. The Default Assignee for a Functional Role will only be used if there is no other appropriate user available to fill the Onboarding process owner role.

### Supervisor

The Supervisor is any person/people who are assigned to do almost all of the same things as the Process Owner. Anything the owner can do, the supervisors can do based on their individual permissions. A supervisor can be a role, like the hiring manager, or a specifically named user.

There are two ways for someone to be a supervisor:

- The administrator assigns users as supervisors for a process. This method happens in advance of assigning the process to a new hire. It occurs when the process is being configured by the Onboarding administrator.
- After the process has started running, an additional supervisor can be manually added by clicking the Share button on the New Hire page.
Login

Login and Product Access

When users open the Taleo Enterprise solution, the User Sign In page is displayed.

Users must select the language in which they want to use the application. If users change the default language on the Sign In page, the page is displayed in the new language and subsequent Taleo product pages are presented in that language. After selecting a language, users can also instruct the system to "remember" their selection so that the next time they sign in, the User Sign In page will be presented in the language they selected.

If single sign-on (SSO) is not enabled within an organization, users must enter a user name and password on the User Sign In page before being able to see the list of Taleo products to which they have access. The user name and password are provided by system administrators. Users can modify their password.

Once a user's credentials have been entered and accepted, the Welcome Center or table of contents page is displayed. The Taleo products available for use are dependent on which products were purchased by the organization and on the user's user type and permissions.

Accessing a Taleo Application

**Prerequisite**
You must have received a user name and password from your system administrator.

**Steps**

1. Select the language in which you want to use the application.
2. Enter your user name and password.
3. Click Sign In.

Using the Forgot Password Link

**Prerequisite**
You must have a valid username and email address in your user profile.

**Steps**

1. Click Forgot Your Password?
2. Enter your username and email address.
3. Click OK.

**Result**
If the request comes from an authorized user, an email is sent to the supplied address with a code to access the application.

**Next Step**
You must click the link provided in the email, enter your username and access code, and provide a new password.
Accessing Onboarding from Recruiting

The Onboarding application can be launched directly from the Recruiting Center.

Recruiters and Hiring Managers may have the ability to start an onboarding process for a candidate from the Recruiting Center. Candidate Selection Workflows that manage the hiring process can be set up to enable the user to launch a candidate into Onboarding at the appropriate step in the Recruiting Center.

Recruiting Center users with appropriate permission have an Onboarding channel available on their main page listing Onboarding processes. Clicking on the process name takes the user into the Onboarding WebTop.

<table>
<thead>
<tr>
<th>Onboarding Channel Link</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding</td>
<td>Channel heading that launches the Onboarding WebTop.</td>
</tr>
<tr>
<td>Delayed</td>
<td>View onboarding processes with status of Delayed.</td>
</tr>
<tr>
<td>Post Start Date</td>
<td>View onboarding processes with status of Post Start Date.</td>
</tr>
<tr>
<td>Pre Start Date</td>
<td>View onboarding processes with status of Pre Start Date.</td>
</tr>
<tr>
<td>In Progress</td>
<td>View onboarding processes with status of In Progress.</td>
</tr>
</tbody>
</table>

Recruiting Center users with appropriate permission have a Task channel available from their main page with a section dedicated to Onboarding tasks. This section shows the number of tasks for each subcategory of tasks listed. Clicking on these links takes the user into the Onboarding WebTop.

The following subcategories of Onboarding tasks may be listed in the Task channel of the Recruiting Center:

- Due Today
- Overdue
- My Opened Tasks

Additionally, with an appropriate user type and permissions, a user can access Onboarding from the Home icon list on the Recruiting Center Core Navigation Bar.

Launching Onboarding from the Recruiting Center Onboarding Channel

**Prerequisite**

User is logged into the Recruiting Center and has the permissions necessary to view the Onboarding Channel.

**Steps**

Click the desired link on the Onboarding Channel.

**Result**

The Onboarding WebTop is launched displaying the processes according to the link clicked.

**Next Step**

The user can perform actions or view information in the Onboarding WebTop.
Launching Onboarding from the Recruiting Center Task Channel

**Prerequisite**
User is logged into the Recruiting Center and has the permissions necessary to view the Onboarding Channel.

**Steps**
Click the desired link on the Task Channel.

**Result**
The Onboarding WebTop is launched displaying the tasks according to the link clicked.

**Next Step**
The user can perform actions or view information in the Onboarding WebTop.

Launching Onboarding from the Recruiting Center Home Icon

**Prerequisite**
User is logged into the Recruiting Center and has the permissions necessary to access Onboarding.

**Steps**
1. Click the Home icon arrow.
2. Click Onboarding

**Result**
The Onboarding WebTop is launched.

**Next Step**
The user can perform actions or view information in the Onboarding WebTop.
Getting Help

Online Help
The administration module offers an online help that provides comprehensive information about concepts or tasks to perform.

The online help, represented by this icon or the Help link, is available in the auxiliary navigation bar located in the top right-hand corner of all pages. When clicking the icon or link, a table of contents of available help topics is displayed. It is also possible to search the help database to locate specific subjects.

More Info
The More Info link is another method of accessing online help.

A More info link is located at the end of the description in the top header of pages in Onboarding. Clicking this link will open a window containing context-sensitive, online help for that page.

Tooltip
A tooltip is a short, explanatory text which appears when you “hover” your mouse over a button, a link, a table cell heading or icon without clicking it.

Toolips are available throughout the system and they give you additional information about an action before performing it.

Web Support
The Web Support link gives users access to My Oracle Support.

The Web Support link is available in the auxiliary navigation bar of all pages of the application if it was enabled by the system administrator.
Navigation Tools

Welcome Center

The Welcome Center is a home page that is displayed to users immediately after they log in and provides "one-click" access to Taleo products.

The Welcome Center contains an auxiliary navigation bar, a core navigation bar, a Quick Access panel, and a Communications panel.

- The auxiliary navigation bar contains links to additional resources such as the online help and the Sign Out link.
- The core navigation bar is a set of tabs that provide direct links to Taleo products. A user might have a tab for any or all of the following products: Performance, Recruiting, Compensation, Analytics, Learn, and Configuration.
- The Quick Access panel provides an alternative "one-click" access to the same products available in the core navigation bar and also provides a selection of modules within products for example, Onboarding, Transitions.
- Finally, Taleo clients can create information of interest to all Taleo product users in the organization for display in the central communications panel. Alternatively, they can create distinct sets of information and associate an information set with a configuration profile.

If the Welcome Center is enabled, it replaces the table of contents page.

Auxiliary Navigation Bar

The auxiliary navigation bar is the bar located at the top right of pages.

If enabled, the auxiliary navigation bar is available at all times for users to see and access.

<table>
<thead>
<tr>
<th>Team Support</th>
<th>Home</th>
<th>Resources</th>
<th>Talent Grid</th>
<th>Sign Out</th>
</tr>
</thead>
</table>

The auxiliary navigation bar may contain the following elements (if enabled and if users were granted access to them):

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Home    | - If you have access to multiple Taleo products and you click Home, the Welcome Center is displayed.  
- If you have access to Recruiting only and you click Home, the Recruiting Center front page is displayed. |
| Resources | May include:  
- Training: Access to online training materials.  
### Core Navigation Bar

The Recruiting Center core navigation bar provides access to specific recruiting features.

The core navigation bar is located just above the central panel. If enabled, the core navigation bar is available at all times for users to see and access.

![Core Navigation Bar](image)

The core navigation bar may contain the following elements (if enabled and if users were granted access to them):

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Home Icon" /> Recruiting</td>
<td>If your organization has multiple Taleo products, clicking the Home icon displays the Welcome Center. If your organization has no other Taleo products apart from Recruiting, clicking the Home icon displays the Recruiting Center. The arrow provides direct links to Taleo products as well as to specific modules within the products.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Access to the Tasks list.</td>
</tr>
<tr>
<td>Requisitions</td>
<td>Access to the Requisitions list.</td>
</tr>
<tr>
<td>Candidates</td>
<td>Access to the Candidates list.</td>
</tr>
<tr>
<td>Offers</td>
<td>Access to the Offers list.</td>
</tr>
<tr>
<td>Libraries</td>
<td>Access to requisition templates, questions, disqualification questions, competencies, evaluation categories, evaluation questions, evaluation questionnaires.</td>
</tr>
</tbody>
</table>

### Configuration

The display of the core navigation bar is enabled by the following setting.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Core Navigation Bar</td>
<td>When the setting is set to Yes, the core navigation bar is displayed. When set to No, only the Recruiting tab is displayed.</td>
<td>Yes</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profile</td>
</tr>
</tbody>
</table>
Configuration Menu

The Configuration menu gives system administrators access to all administration components of Taleo Enterprise products in one centralized menu.

The Configuration menu is composed of sub-administration menus divided into two main sections:

- **Central Configuration**: Elements in the Central Configuration menu are used to manage content, data, settings, and configurations that are used across multiple products.
- **Specific Configuration**: Elements in the Specific Configuration menu are used to manage content, data, settings, and configurations that are targeted to a specific product or product area.

Depending on the products activated within your organization, the Configuration menu may include these elements.

<table>
<thead>
<tr>
<th>Central Configuration</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operations</td>
<td>Operation Modes and Release Notes.</td>
</tr>
<tr>
<td>General Configuration</td>
<td>Settings and Welcome Center Content.</td>
</tr>
<tr>
<td>Selection Lists</td>
<td>Standard selections used in different products such as Education Levels, Employee Statuses, etc.</td>
</tr>
<tr>
<td>Roles</td>
<td>Role definitions of both hierarchical and functional roles. Both role types are used for the Dynamic Approval Routing feature. In addition, functional roles are used in defining Onboarding tasks.</td>
</tr>
<tr>
<td>Dynamic Approval Routing</td>
<td>Approval workflow definitions for requisitions and offers according to specified business rules.</td>
</tr>
<tr>
<td>Security</td>
<td>Security policies, message templates related to access and passwords, and legal agreements presented to users when signing in an application. Note that agreements for career sections are managed under Career Section Administration.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Competency tools used in Taleo Performance for Rating Models, Competencies, Guidance Plans, etc.</td>
</tr>
<tr>
<td>Synchronization Tool</td>
<td>A tool to export configuration elements, such as career sections, application flows, etc., from a source database to a target database.</td>
</tr>
</tbody>
</table>

### Specific Configuration

- **SmartOrg**
- **Recruiting**
- **Career Section**
- **Onboarding**
- **Transitions**
Specific Configuration

- Taleo Performance
- Evaluation Management
- Reporting and Analytics

Configuration

The *Access Administration* permission is required to access the Configuration menu.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Administration</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Administration</td>
</tr>
</tbody>
</table>

Onboarding Administration Menu

The Onboarding Administration menu allows system administrators to fully configure the Onboarding product as well as the New Hire Portal.

The Onboarding Administration menu is accessed via the Configuration menu and allows system administrators to configure the following elements:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Settings</td>
<td>Configuration of Onboarding settings.</td>
</tr>
<tr>
<td>Documents</td>
<td>Configuration of documents to be included in message templates and in new hire portals.</td>
</tr>
<tr>
<td>Processes and Task Definitions</td>
<td>Configuration of onboarding processes and task requests to be sent to any person involved in the onboarding process.</td>
</tr>
<tr>
<td>New Hire Portal Configuration</td>
<td>Configuration of the new hire portal, security settings and user accounts.</td>
</tr>
<tr>
<td>Correspondence</td>
<td>Configuration of message templates.</td>
</tr>
<tr>
<td>User-defined Forms</td>
<td>Creation of user-defined forms to be filled by various persons involved in the onboarding process.</td>
</tr>
<tr>
<td>User-defined Fields</td>
<td>Configuration of fields and selections.</td>
</tr>
<tr>
<td>Services</td>
<td>Configuration of services provided by partners.</td>
</tr>
<tr>
<td>Product Resources</td>
<td>Display of resource ID.</td>
</tr>
</tbody>
</table>

Configuration

The *Access Administration* permission is required to access the Configuration menu.
Basic Concepts

User Type Permission

<table>
<thead>
<tr>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Administration</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Administration</td>
</tr>
</tbody>
</table>

There is no specific permission to access the Onboarding Administration menu. If a user is granted a permission in the Onboarding Administration category such as Manage User-defined Forms, the user will be able to access the Onboarding Administration menu (Configuration > [SmartOrg] Administration > User Types > Recruiting > Onboarding > Administration).

Quick Access in Onboarding

The Quick Access feature provides shortcuts within Taleo Onboarding.

The Quick Access pane contains dynamically generated links to areas within Onboarding. These page links are relevant to the page of the application the user is viewing and vary according to permissions.

Recently Viewed Items

The Recently Viewed Items list provides shortcuts to previously viewed Onboarding pages.

The Recently Viewed Items pane contains links to the last eight pages accessed by the user. These pages may have been accessed during the current session or a previous session. It can be pages where modifications were made or pages that were viewed only.

Breadcrumb Trail

The Breadcrumb Trails shows the path of pages the user accessed while navigating through Onboarding.

The Breadcrumb Trail is located at the top of most Onboarding pages. It shows the pages that the user accessed, in the order they were accessed. The Breadcrumb Trail is displayed in hyperlinks to enable one-click access to previously viewed pages.
## Navigation Icons

When information is spread across multiple pages, navigation icons are available.

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Displays the previous page.</td>
</tr>
<tr>
<td></td>
<td>Goes to the previous 10 pages.</td>
</tr>
<tr>
<td></td>
<td>Displays the next page.</td>
</tr>
<tr>
<td></td>
<td>Goes to the next 10 pages.</td>
</tr>
</tbody>
</table>
Onboarding User Types and Permissions

Specific user types are used for Taleo Onboarding and user type permissions can be granted to the system administrator and Onboarding users.

Three default user types are provided with the system. The system administrator can also create new user types.

<table>
<thead>
<tr>
<th>Default Onboarding User Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding Administrator</td>
<td>Manages the configuration of the Onboarding WebTop and the New Hire Portal.</td>
</tr>
<tr>
<td>Onboarding Basic</td>
<td>Allowed to perform only basic activities, such as execute tasks assigned only to himself or herself.</td>
</tr>
<tr>
<td>Onboarding Power</td>
<td>Allowed to perform all activities on the Onboarding WebTop, such as execute tasks assigned to himself or herself and others, restart processes, attach and view PDF files, send ad-hoc correspondence, create self-assigned tasks, as well as many other actions.</td>
</tr>
</tbody>
</table>

Onboarding user type permissions are grouped into three categories: Administration, New Hire, and Tasks.

<table>
<thead>
<tr>
<th>Category</th>
<th>Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>View Human Resources Product Settings</td>
<td>Allows users to view functional settings such as the content language, the working days, and the From address.</td>
</tr>
<tr>
<td>Administration</td>
<td>Update Human Resources Product Settings</td>
<td>Allows users to update functional settings such as the content language, the working days, and the From address.</td>
</tr>
<tr>
<td>Administration</td>
<td>View System Product Settings</td>
<td>Allows users to view settings that have a direct impact on the behavior of the application. For example, the mail server name or the http proxy user name. Usually, these settings can only be modified by Taleo technical support.</td>
</tr>
<tr>
<td>Administration</td>
<td>Update System Product Settings</td>
<td>Allow users to update settings that have a direct impact on the behavior of the application. For example, the mail server name or the http proxy user name. Usually, these settings can only be modified by Taleo technical support.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage User-defined Forms</td>
<td>Enables the User-defined Forms feature in the Onboarding Administration menu. Users are then able to create, edit and delete user-defined forms.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Message Templates</td>
<td>Enables the Message Templates feature in the Onboarding Administration menu. Users are</td>
</tr>
<tr>
<td>Category</td>
<td>Permission</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------</td>
<td>---------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Text Documents</td>
<td>Enables the Documents feature in the Onboarding Administration menu. Users are then able to create, edit and delete text documents and PDF documents. Text documents are composed of text paragraphs and may contain tokens. Variables can be added to PDF documents to automatically pull information from a new hire candidate file. These PDF documents can then be associated with the &quot;Open PDF&quot; task or directly with the new hires themselves.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage New Hire Portals</td>
<td>Enables the Portals and Display Properties features in the Onboarding Administration menu. Users are then able to create, edit and delete new hire portals.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage New Hire User Accounts</td>
<td>Allows users to edit and delete new hire user accounts.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage User-defined Fields</td>
<td>Enables the User-defined Fields and User-defined Selections features in the Onboarding Administration menu. Users are then able to create, edit and delete user-defined fields and selections. They can also configure user-defined fields that appear in reports.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Task Definitions</td>
<td>Enables the Task Definitions feature in the Onboarding Administration menu. Users are then able to create, edit and delete onboarding tasks.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Onboarding Processes</td>
<td>Enables the Processes feature in the Onboarding Administration menu. Users are then able to create, edit and delete onboarding processes.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage service configuration</td>
<td>Manages the Services feature in the Onboarding Administration menu, which allows the system to connect with external service providers.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Send Correspondence</td>
<td>Allows Onboarding users to send ad hoc correspondences at any time from the New Hire page.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View processes I own or that have been shared with me</td>
<td>Allows Onboarding users to view processes for which they are the process owner or one of the supervisors for the processes that they have shared in Onboarding.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Manage processes I own or that have been shared with me</td>
<td>Allows Onboarding users to manage processes for which they are the process owner or one of the supervisors.</td>
</tr>
<tr>
<td>Category</td>
<td>Permission</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>New Hire</td>
<td>Share processes I own or that have been shared with me</td>
<td>Allows Onboarding users to explicitly allow another user to view a new hire's process temporarily.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View all processes</td>
<td>Allows Onboarding users to view processes for new hires.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Manage all processes</td>
<td>Allows Onboarding users to suspend, restart, or cancel processes for new hires, and to change the assigned users, their hiring manager, recruiters or assistants, while the process is running.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Share all processes</td>
<td>Allows Onboarding users to share and revoke the sharing of processes in Onboarding.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View and manage related documents</td>
<td>Allows users to display the Attached Files section in the New Hire Detail page seen by Onboarding users. Once this permission is enabled, a PDF document that gets associated with the new hire via the Open PDF task would appear. There is also the possibility to associate other PDF documents from the document library to each new hire, if desired.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Delete processes</td>
<td>Allows Onboarding users to delete processes in Onboarding.</td>
</tr>
<tr>
<td>Tasks</td>
<td>View tasks assigned to me or that I have initiated</td>
<td>Allows Onboarding users to view tasks in Onboarding for which the logged-in user is an assignee. Three options are available for this permission.</td>
</tr>
<tr>
<td>Tasks</td>
<td>View tasks (Read-only)</td>
<td>This option relates to the &quot;View tasks assigned to me or that I have initiated&quot;. When selected, for all tasks assigned to the user or that the user has initiated, the user can just view them.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Edit tasks assigned to me or that I have initiated</td>
<td>This option relates to the &quot;View tasks assigned to me or that I have initiated&quot;. Allows users to edit tasks in Onboarding for which the logged-in user is an assignee.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Create and edit tasks</td>
<td>This option relates to the &quot;View tasks assigned to me or that I have initiated&quot;. When selected, for all tasks assigned to the user or that the user has initiated, the user can edit them or create new tasks.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Reassign tasks I have initiated</td>
<td>Allows Onboarding users to reassign tasks in Onboarding that they have initiated.</td>
</tr>
<tr>
<td>Category</td>
<td>Permission</td>
<td>Description</td>
</tr>
<tr>
<td>------------</td>
<td>-----------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tasks</td>
<td>View related sources of tasks assigned to me or</td>
<td>Allows Onboarding users that view the new hire's steps and tasks to view the actual forms and PDFs that are part of the task assigned to them or that they have initiated. This is useful to view the data that was input into the fields by the task assignees. It also allows the viewer to see all the Passport Request information and the More Details hyperlink to the partner website, for tasks that are the External Service Request type.</td>
</tr>
<tr>
<td></td>
<td>that I have initiated</td>
<td></td>
</tr>
<tr>
<td>Tasks</td>
<td>Manage tasks in processes for which I am the</td>
<td>Users who have the user type with this permission selected and who are supervisors of a process can view and/or manage the tasks in the process just as the process owner can.</td>
</tr>
<tr>
<td></td>
<td>supervisor (same capabilities as the owner)</td>
<td></td>
</tr>
<tr>
<td>Tasks</td>
<td>View all tasks</td>
<td>Allows Onboarding users to view all tasks in Onboarding, that is all statuses and assigned to all users.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Edit all tasks</td>
<td>Allows Onboarding users to edit all tasks in Onboarding, that is to change the title or due-date of the assigned task. This is not related to executing a task, because the task's assignee(s) can always execute it.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Reassign all tasks</td>
<td>Allows Onboarding users to reassign all tasks in Onboarding to other users who will complete them.</td>
</tr>
<tr>
<td>Tasks</td>
<td>View related sources of all tasks</td>
<td>Allows Onboarding users that view the new hire's steps and tasks to view the actual forms and PDF documents that are part of the task. This is useful to view the data that was input into the fields by the task assignees.</td>
</tr>
<tr>
<td>Tasks</td>
<td>Access Response Center</td>
<td>Allows Onboarding users to access their assigned tasks in a simplified WebTop view, rather than the full WebTop with tasks, processes, filters, or other items. This simple view shows only the open tasks for the logged-in user. These tasks disappear off the list when completed.</td>
</tr>
</tbody>
</table>
Settings

Settings

Settings are used to configure features and elements in Taleo products.

There are two types of settings:

- **Global settings**: Settings related to multiple Taleo products.
- **Product settings**: Settings specific to each Taleo product, for example, Recruiting, Transitions, Onboarding and Performance for example.

This table provides paths to access global settings and product specific settings.

<table>
<thead>
<tr>
<th>Settings</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Global settings</td>
<td>Configuration &gt; [General Configuration] Settings</td>
</tr>
<tr>
<td>SmartOrg settings</td>
<td>Configuration &gt; [SmartOrg] Settings</td>
</tr>
<tr>
<td>Recruiting settings</td>
<td>Configuration &gt; [Recruiting] Settings</td>
</tr>
<tr>
<td>Career Section settings</td>
<td>Configuration &gt; [Career Section] Settings</td>
</tr>
<tr>
<td>Onboarding settings</td>
<td>Configuration &gt; [Onboarding] Settings</td>
</tr>
<tr>
<td>Transitions settings</td>
<td>Configuration &gt; [Transitions] Settings</td>
</tr>
<tr>
<td>Taleo Performance settings</td>
<td>Configuration &gt; [Taleo Performance] Settings</td>
</tr>
<tr>
<td>Reporting and Analytics settings</td>
<td>Configuration &gt; [Reporting and Analytics] Settings</td>
</tr>
</tbody>
</table>

Settings are configured by system administrators. A default value is set by Taleo prior to application delivery. System administrators can decide to change the value that will be applied throughout the application. If for a given setting a user can change the value, the user’s value overrides the value set by the system administrator.

A setting is assigned one of the following security levels:

<table>
<thead>
<tr>
<th>Security Level</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Public</td>
<td>System administrators can view and change the setting.</td>
</tr>
<tr>
<td>Protected</td>
<td>System administrators can view the setting, but changes can only be done by Taleo.</td>
</tr>
<tr>
<td>Private</td>
<td>System administrators cannot view nor change the setting. Only Taleo can view and change the setting.</td>
</tr>
</tbody>
</table>

For a list of all available settings, refer to the document entitled *Taleo Enterprise 13B Settings*. 
# Onboarding Settings

The following table presents settings specific to Onboarding and that are available via the Settings feature in the Onboarding Administration menu.

<table>
<thead>
<tr>
<th>Setting Name</th>
<th>Description</th>
<th>Security Level</th>
<th>Default Value</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Activate Secure Login</td>
<td>Security protection on all pre-authentication pages by preventing browser from caching all credentials (login/password, access code, secret question/answer). When this setting is enabled, the Back button in browser may not work properly in some situations.</td>
<td>Private</td>
<td>No</td>
<td>Suppose that you set the Activate Secure Login to Yes and configured the message template in the Passport Service used for inviting new hires (typically General Validation Request) to open in the same window (as opposed to a new window). When New Hire Portal users click a task item that uses the template and they click the link, they are redirected to the Passport partner’s site. If the users later attempt to return to the task list and the New Hire Portal by clicking the Back button in their browser, this action is unsuccessful. The users must log into the New Hire Portal again if they wish to go there. This is by design. On the other hand, if the setting is set to No and the message template in the Passport Service used for inviting new hires is configured to open in a new window, clicking the Back button typically returns the user to the task list and the New Hire Portal.</td>
</tr>
<tr>
<td>Antivirus Timeout</td>
<td>Maximum time taken by the antivirus to perform a virus check.</td>
<td>Private</td>
<td>5000 Milliseconds</td>
<td></td>
</tr>
<tr>
<td>Antivirus Zone URL</td>
<td>URL address of the virus checker.</td>
<td>Private</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Application Languages</td>
<td>List of application languages, presented according to the organization’s preferences.</td>
<td>Protected</td>
<td>English</td>
<td>These are the languages in which Taleo Onboarding can be viewed.</td>
</tr>
<tr>
<td>Automatically Delete Old Onboarding Processes</td>
<td>Deletes completed and canceled new hire processes.</td>
<td>Public</td>
<td>0</td>
<td>After the initial setting is made, the automatic delete process will run twice per month.</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Indicates which contact to display in the New Hire Portal.</td>
<td>Public</td>
<td>Process Owner</td>
<td>There are 5 choices of whose information can be displayed in the New Hire Portal: Recruiter,</td>
</tr>
<tr>
<td>Setting Name</td>
<td>Description</td>
<td>Security Level</td>
<td>Default Value</td>
<td>Notes</td>
</tr>
<tr>
<td>------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Default Currency</td>
<td>The default currency for monetary values.</td>
<td>Private</td>
<td>USD</td>
<td>This is not used today in Onboarding.</td>
</tr>
<tr>
<td>Default Display Properties</td>
<td>Display properties shown by default.</td>
<td>Public</td>
<td>-1</td>
<td>Before each new hire logs in to view their specific tailored portal and display properties, the Default Display Properties allow branding and theme to be shown on the sign in pages. Fill this field with the code (not the name) of the desired display properties that have been created in the Onboarding Administration module.</td>
</tr>
<tr>
<td>Delete New Hires</td>
<td>Delete new hires when deleting processes (if the new hires are not associated to other processes).</td>
<td>Private</td>
<td>Yes</td>
<td>Note that the permission to delete processes is controlled in the SmartOrg User Types feature. The Delete New Hires setting controls whether or not the overall information for the corresponding new hire should get deleted when their process is deleted or not.</td>
</tr>
<tr>
<td>Display &quot;Save As Draft&quot; Button in Forms</td>
<td>Indicates if the button &quot;Save as Draft&quot; is displayed in the forms.</td>
<td>Public</td>
<td>Yes</td>
<td>For organizations that have experienced an issue with forms becoming &quot;locked&quot; or unusable due to Save as Draft button, this setting prevents the feature from being displayed.</td>
</tr>
<tr>
<td>eSignature Timestamp Display Property</td>
<td>Controls whether all eSignature dates should be displayed with or without the exact time that the signature was captured.</td>
<td>Public</td>
<td>Date</td>
<td>The date will always be formatted using a default short date style. The time will be displayed using Greenwich Mean Time (GMT) timezone format.</td>
</tr>
<tr>
<td>E-Verify Activation</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify URL (PROD)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>Setting Name</td>
<td>Description</td>
<td>Security Level</td>
<td>Default Value</td>
<td>Notes</td>
</tr>
<tr>
<td>-------------------------------------------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------</td>
<td>----------------------------------------------------------------------</td>
</tr>
<tr>
<td>E-Verify URL (TEST)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service Account Password (PROD)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service Account Password (TEST)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service Account Username (PROD)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service Account Username (TEST)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service URL (PROD)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>E-Verify Web Service URL (TEST)</td>
<td></td>
<td>Protected</td>
<td></td>
<td>This capability should no longer be used.</td>
</tr>
<tr>
<td>Enable New Hire Portal to Display New Layout</td>
<td>Enable new hire portal to display new layout, including percentage completed and header across the whole width of the page. This setting requires that all Display Properties must use the theme &quot;newhireportal_v2&quot; or other similar themes based on this CSS.</td>
<td>Protected</td>
<td>Yes</td>
<td></td>
</tr>
<tr>
<td>From Address</td>
<td>Email address used in the &quot;From&quot; field.</td>
<td>Public</td>
<td></td>
<td></td>
</tr>
<tr>
<td>From Address Alias Level</td>
<td>Alias associated with the email address used in the &quot;From&quot; field.</td>
<td>Public</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Mail Server</td>
<td>Mail server name.</td>
<td>Private</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Maximum Batch-Print Size</td>
<td>The maximum size allowed for a PDF generated for printing based on the attached files selected in the new hire page.</td>
<td>Private</td>
<td>0</td>
<td>The value in megabytes of the batch of PDF files generated to be printed at a single time. The maximum size allowed is 10 MB.</td>
</tr>
<tr>
<td>Maximum PDF File Size</td>
<td>Maximum size of PDF attachments to corporate documents.</td>
<td>Protected</td>
<td>500 Kilobytes</td>
<td>These PDFs can be associated with tasks of type “Open PDF” within an Onboarding process, and they can also be attached directly in the New Hire Portal,</td>
</tr>
</tbody>
</table>
### Configuring a Setting

**Prerequisite**
The security level of the setting must be Public.
The Manage Settings user type permission is required.
For global settings:

**Configuration > [General Configuration] Settings**

For product settings:

**Configuration > [Product name] Settings**

**Steps**

1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Edit next to the name of the setting.
4. Make changes.
5. Click Save.

**Resetting a Setting Value to Default Value**

**Prerequisite**

The security level of the setting must be Public.
The Manage Settings user type permission is required.
For global settings:

**Configuration > [General Configuration] Settings**

For product settings:

**Configuration > [Product name] Settings**

**Steps**

1. Locate the setting using the Refine by list or the Feature column.
2. Click the name of a setting.
3. Click Reset next to the name of the setting.

**Result**

The default value of the setting is restored and the change is reflected in Transitions.
Security Policies

Security Policy for New Hires

Security policies are settings related to the sign in, password and forgot password procedures for new hires. Settings for the following features can be modified:

- Sign in
- Password
- Forgot password

A History section provides information on actions performed on security settings such as the date and time, a description and details on the action, as well as the “actor”, which is the person or system who performed the action.

For details on security policy settings, look at the list entitled Security Policy Settings for New Hires.

Security Policy Settings for New Hires

<table>
<thead>
<tr>
<th>Security Policy - Sign In Settings</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Allow new users to register in system</td>
<td>Yes, No (default).</td>
</tr>
<tr>
<td>Display the link &quot;Forgot your user name?&quot;</td>
<td>Yes, No (default). When Yes is selected, the Forgot your User Name link is displayed in the Sign In page.</td>
</tr>
<tr>
<td>Display the link &quot;Forgot your password?&quot;</td>
<td>Yes, No (default). When Yes is selected, the Forgot your Password link is displayed in the Sign In page.</td>
</tr>
<tr>
<td>Activate the first login function</td>
<td>Yes (default), No. When Yes is selected, the First Login link is displayed in the Sign In page. The First Login link allows new hires to define their own password for entering the New Hire Portal. However, this link is not useful for people who already have a user name and password from Recruiting, even if it is their first time logging into Onboarding. For new hires who created their own passwords when they entered the Career Section, the First Login link is never necessary. This link should only be displayed if there is a significant number of new hires who do not have any password in the Onboarding system, either because they were captured in the Recruiting Center or because they were imported directly into Onboarding without a password via Taleo Connect Client.</td>
</tr>
<tr>
<td>Show explicit error messages to users at login.</td>
<td>Yes, No (default). When Yes is selected, more explanations are given in the error message.</td>
</tr>
<tr>
<td>Setting</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Allow a password to be valid for X days (leave the field empty if you want passwords to be always valid)</td>
<td>Number of days before a user must change his/her password. Putting no values means that the password is always valid.</td>
</tr>
<tr>
<td>When a password change is required, prevent the reuse of the previous X passwords</td>
<td>Number of password changes required before a user can use a password that he/she has used previously. Putting 0 means that the feature is disabled. 0 (default value).</td>
</tr>
<tr>
<td>Require passwords that contain at least X characters</td>
<td>6 to 20.</td>
</tr>
<tr>
<td>Require passwords that contain no more than X characters</td>
<td>6 to 50. The system will start counting the number of characters from the maximum number of characters selected in the setting “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.</td>
</tr>
<tr>
<td>Require passwords that contain at least X letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
</tr>
<tr>
<td>Require passwords that contain at least X lowercase letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
</tr>
<tr>
<td>Require passwords that contain at least X uppercase letters of the Roman alphabet</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
</tr>
<tr>
<td>Require passwords that contain at least X numeric characters</td>
<td>0 to 20. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
</tr>
<tr>
<td>Require passwords that contain at least X characters other than letters and numbers (! # $ % &amp; ( ) * + , . / : ; &lt; = &gt; ? @ [ ] _ ` {</td>
<td>} ~)</td>
</tr>
<tr>
<td>Require passwords that contain no more than X identical consecutive characters</td>
<td>2, 3, 4, 5. The number of characters cannot exceed the number indicated in the setting “Require passwords that contain at least x characters”.</td>
</tr>
<tr>
<td>Require passwords that do not contain the user's first name</td>
<td>Yes, No (default).</td>
</tr>
<tr>
<td>Require passwords that do not contain the user's last name</td>
<td>Yes, No (default).</td>
</tr>
<tr>
<td>Require passwords that do not contain the corresponding user name</td>
<td>Yes (default), No.</td>
</tr>
<tr>
<td>Require passwords that do not contain the user's email address</td>
<td>Yes, No (default).</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Use this method to change passwords</td>
<td>For details, see below.</td>
</tr>
<tr>
<td>Require X security questions</td>
<td>Determines the number of security questions the new hire must answer. Values: 1, 2, 3. Important Note: There is a similar setting in the Security Policies feature of the Central Configuration Menu to configure the number of security questions.</td>
</tr>
</tbody>
</table>
Security Policy - Forgot Password Settings

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Require answers that contain at least X characters (X must be greater than 0)</td>
<td></td>
</tr>
<tr>
<td>Number of attempts allowed per user to answer the security question</td>
<td>Determines the maximum number of times a new hire can enter incorrect information during sign-in before their account is locked.</td>
</tr>
<tr>
<td>Lock a user's account when the number of attempts allowed to answer the security question is exceeded</td>
<td>Yes (default), No.</td>
</tr>
<tr>
<td>Mask the security answer values</td>
<td>Yes (default), No.</td>
</tr>
</tbody>
</table>

Details regarding the setting “Use this method to change passwords”

The change password procedure contains six options of authentication:

<table>
<thead>
<tr>
<th>Options of the “Use this method to change passwords” Setting</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Code</td>
<td>An email containing an access code is sent to the new hire once the new hire has confirmed his/her email address. This email also contains a link to a URL where the new hire must enter that access code, and then will be invited to enter a new password.</td>
</tr>
<tr>
<td>Security Questions</td>
<td>The new hire is asked to answer the security question(s) previously entered in his/her profile. These questions and answers could have been created originally within the Recruiting Center, and transferred over into Onboarding when the process was launched. If the answer is correct, the new hire is invited to enter a new password.</td>
</tr>
<tr>
<td>Security Questions and Access Code</td>
<td>The new hire is asked to answer the security question(s) previously entered in his/her profile. These questions and answers could have been created originally within the Recruiting Center, and transferred over into Onboarding when the process was launched. If the answer is correct, an email containing an access code is sent to the new hire once the new hire has confirmed his/her email address.</td>
</tr>
<tr>
<td>Security Questions or Access Code</td>
<td>The new hire is asked to answer the security question(s) previously entered in his/her profile. These questions and answers could have been created originally within the Recruiting Center, and transferred over into Onboarding when the process was launched. If the answer is correct and the new hire has an email address, an access code is sent to</td>
</tr>
</tbody>
</table>
### Options of the “Use this method to change passwords” Setting

<table>
<thead>
<tr>
<th>Option</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>the new hire once the new hire has confirmed his/her 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 his/her password.</td>
<td></td>
</tr>
<tr>
<td>Security Questions and/or Access Code</td>
<td>When this option is activated, one of the following situation will happen. See the Security Questions and/or Access Code table.</td>
</tr>
<tr>
<td>Contact System Administrator</td>
<td>The new hire is asked to contact the system administrator. Only the system administrator can then generate a new password and communicate it to the new hire.</td>
</tr>
</tbody>
</table>

### Details regarding the “Security Question and/or Access Code” option

<table>
<thead>
<tr>
<th>The new hire has an email address</th>
<th>Security questions were activated</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Yes</td>
<td>Yes</td>
<td>The new hire will have to answer the security questions correctly and an access code will be emailed.</td>
</tr>
<tr>
<td>Yes</td>
<td>No</td>
<td>The new hire will receive an access code by email.</td>
</tr>
<tr>
<td>No</td>
<td>Yes</td>
<td>The new hire will have to answer the security questions correctly to be able to access the application.</td>
</tr>
<tr>
<td>No</td>
<td>No</td>
<td>The new hire will be asked to contact the technical support.</td>
</tr>
</tbody>
</table>
Other Tools

History

Onboarding events are displayed in History.

History sections are available on multiple pages of Onboarding. Actions that are performed on a page are recorded as events in History. The three most recent are displayed automatically, however all events are available for viewing.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date and Time</td>
<td>Date and time when an event occurred.</td>
</tr>
<tr>
<td>Event</td>
<td>The event or action performed on an element.</td>
</tr>
<tr>
<td>Details</td>
<td>Information regarding the event.</td>
</tr>
<tr>
<td>By</td>
<td>The actor, person or system, who performed the event. Additional information about the actor is available for viewing.</td>
</tr>
</tbody>
</table>

Displaying Additional History Events

**Steps**

1. Click More.

**Result**

The History page is displayed with a complete list of events.

**Next Step**

The user may obtain additional information about the actor that performed the event.

Viewing User Information from History

**Steps**

1. Click More, if necessary
2. Click the name of actor listed.

**Result**

The User Information page is displayed.

List Sorting

Onboarding sorts columns in a predetermined order when a list appears on a page or when sorting is enacted by a user.

Sorting is available on some columns in Onboarding. A tooltip appears over those lists that can be used for sorting.
### Languages

Taleo products are available in different optional languages.

Taleo products are available in different optional languages. Not all languages are available for all Taleo products and languages must be activated by the system administrator before they can be used in an application.

The preferred language of a user is set in the user's account by the system administrator. The preferred language is used by the system as the default content language which is the same across all Taleo products. If a product does not support the same set of content languages, it will have its own preference configuration.

In Taleo applications, the languages in which an element is available are indicated in the Activated Languages field. When creating or editing an element, the user can chose the base language as well as the languages in which an element will be available. The base language of an element is the item's reference language, usually used as a reference for other languages or fallback display in list mode. The user's preferred language is used as the default base language when the user creates an element. The base language of an element can be changed at any time by the user. A language must be activated before it can be designated as a base language.

When multiple languages are used for an element, the icon is displayed. Hovering the mouse over the icon displays the languages activated for the element. When only one language is used for an element, the name of the language is displayed. When only one language is used in your company, there is no special indicator.

### Configuration

The organization content languages in Onboarding are set by the following protected setting. These are the languages in which the New Hire Portal can be viewed, and thus the languages in which the system administrator needs to create content, such as forms, message templates, and PDFs, that will potentially be viewed by new hires.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Name</th>
<th>Possible Values</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
</table>
| Organization Content Languages | English | Configuration > [Onboarding] Settings
The application languages in Onboarding are set by the following protected setting. These are the languages in which the Onboarding WebTop can be viewed. Also, this setting has some effect on the Onboarding Administration module to display in the chosen languages; however, the only languages that are fully supported by the Onboarding Administration module for configuring Onboarding are English and French.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Name</th>
<th>Possible Values</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Application Languages</td>
<td></td>
<td>English</td>
<td></td>
<td>Configuration &gt; [Onboarding] Settings</td>
</tr>
</tbody>
</table>

When configuring a specific user, for example a manager, a recruiter, an HR user that will access the Onboarding WebTop and any other Taleo application, a preferred content language and a preferred correspondence language can be set in the user's account.

<table>
<thead>
<tr>
<th>User Account Preferences</th>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Content Language</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Accounts &gt; General Preferences</td>
</tr>
<tr>
<td></td>
<td>Correspondence Language</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Accounts &gt; General Preferences</td>
</tr>
</tbody>
</table>

**Selecting the Base Language**

**Prerequisite**

The element must be in Edit mode and the language must be active before it can be set as the base language.

**Steps**

1. Open an element.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select the Base option for the desired language.
4. Click Save.

**Result**

The word Base appears next to the language in the Language drop-down list of the element.

**Next Step**

You will need to complete the required fields (usually the Name) in the new base language.

**Activating a Language**

**Prerequisite**

The element must be in Edit mode.

**Steps**

1. Open the element that you want to make available in another language so its fields are in edit mode.
2. Select Configure next to the Language drop-down list.
3. In the Language Configuration page, select Active from the Status drop-down list for each required language.
4. Click Save.

**Result**
Activated languages appear in the Language drop-down list of element.

**Next Step**
Once a new language has been made active, some fields related to the element (most usually the Name) will need to be provided for each new active language.

### Deactivating a Language

**Prerequisite**
The element must be in Edit mode and the language must not be the base language.

**Steps**
1. Open an element.
2. Select Configure next to the Language drop-down list.
3. For each language, select Not Used in the Status drop-down list.
   
   If the language to deactivate is the Base language, you will need to select another active language as the base language.
4. Click Save.

**Result**
Selected languages no longer appear in the Language drop-down list of the element.

### System Status

A status indicates the current state of an element in the system.

Elements can have one of the following statuses:

- **Draft**: A Draft element can be modified. A Draft element cannot be used. The status must be made Active before it can be used.
- **Active**: When an element is Active, only the name and description can be modified. It is not possible to update the behavior of the element.
- **Inactive**: When an element is inactive it can be modified. An inactive element cannot be used. The status must made be active before it can be used.

A Draft element can become Active. An Active element can become Inactive. An Inactive element can become Active. However, an Active element cannot return to Draft status.
Application Time-out

A security feature warns users when the application has not been used for more than thirty minutes even if a user is still signed into the application. When the time-out delay is reached, a message notifies users that the time-out delay for the application is imminent.

Two scenarios are possible:

- User takes action: When the application has been idled for thirty minutes, a message notifies the user that the application requires attention. Clicking “Access the application” directs the user to the application. When the user accesses the application, he/she can reset the application and a message indicates the remaining time before the session expires.
- User does not take action: If the user does not reset the application within the defined delay, a message is displayed, indicating that the user has been signed out of the application and has to sign in again to use the application.

The time-out delay is set by default to thirty minutes. The reminder displayed before time-out is set by default to ten minutes before time-out. The delay and reminder are controlled by private settings.

Configuration

A private setting (Reminder Delay Before Timeout) allows the configuration of the application time-out for Recruiting, Onboarding, Transitions, Performance and Configuration products. Contact Oracle Support for details.
Documents

- Document.................................................................40
Document

Documents are used in message templates and in documents to be displayed to participants in Onboarding processes.

You can create two types of documents:

- Text documents containing paragraphs you created using the HTML Editor,
- File-based documents containing a PDF file. You have the ability to insert variables in the PDF and display it as a personalized document in the New Hire Portal and in the Onboarding WebTop. PDF files cannot be password protected.

All documents created via the Onboarding Documents feature can be used in a variety of places throughout the Onboarding process:

- Within a task in a process, for assignees to open and view in order to complete that task.
- In the Documents section of the New Hire Portal.
- In the Attached Files section of Onboarding.
- As an attachment to any message template that can be sent within a process.

Documents can be prepopulated with variables that get transformed to display specific information about a new hire. For example, you could take a document, such as the I-9 form, and insert Taleo variables that will automatically pull information from the employee's file, such as their name, address or other personal data.

**Configuration**

The following permission is required to create, edit and delete text documents.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Text Documents</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Onboarding</td>
</tr>
</tbody>
</table>

Creating a Text Document

**Prerequisite**

The Manage Text Documents permission is required.

*Configuration > [Onboarding] Administration > Documents*

**Steps**

1. Click *Create a text document*.
2. Enter a code and a name for the document.
3. Click *Save*.

**Next Step**

Adding paragraphs. You can add existing paragraphs or you can create new paragraphs.

Paragraph Storage in Reusable Library

Newly created paragraphs can be immediately stored in the reusable library.
Onboarding Administrators can create paragraphs directly in the Paragraph List reusable library for use in Text Documents and Message Templates. The paragraph library can be accessed from the Paragraph List link in the Quick Access box on the Document page. Once the paragraph is created, saved, and status is set to Active, it can be added to any Document or Message Template. Draft paragraphs will only be available in the library view and only paragraphs with a draft status can be deleted.

Once a paragraph is added to a document or message template, it can be edited. Edits are only visible in the document or message template where the change was made. The original paragraph remains intact in the paragraph library.

Adding a Paragraph to a Text Document

Prerequisite
The Manage Text Documents permission is required.

Configuration > [Onboarding] Administration > Documents

Steps
1. Open a text document.
2. Click Add.
3. Select a paragraph.

Result
The paragraph appears in the Paragraphs section of the document.

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

Creating a New Paragraph for a Text Document

Prerequisite
The Manage Text Documents permission is required.

Configuration > [Onboarding] Administration > Documents

Steps
1. Open a text document.
2. Click Create.
3. Enter a code and a name.
4. Type the paragraph content in the Text field using HTML Editor options.
5. To include variables in the paragraph, copy the variable then paste it in the text box.
6. Click Save.

Result
The paragraph appears in the Paragraphs section of the document.

Next Step
Adding the paragraph to a text document.
Reordering Paragraphs in a Text Document

Prerequisite
The Manage Text Documents permission is required.
The text document must have the Draft status.

Configuration > [Onboarding] Administration > Documents

Steps
1. Select a text document.
2. Click Reorder.
3. Reorder paragraphs using the up and down arrows.
4. Click Save.

Editing a Paragraph Included in a Text Document

Prerequisite
The Manage Text Documents permission is required.
The text document must have the Draft status.

Configuration > [Onboarding] Administration > Documents

Steps
1. Select a text document.
2. Click Edit.
3. Make changes.
4. Click Save.

Removing a Paragraph Included in a Text Document

Prerequisite
The Manage Text Documents permission is required.
The text document must have the Draft status.

Configuration > [Onboarding] Administration > Documents

Steps
1. Select a text document.
2. Click Remove.
3. Click Yes.

Previewing a Text Document

Prerequisite
The Manage Text Documents permission is required.

Configuration > [Onboarding] Administration > Documents
Steps
1. Open a text document.
2. Click Preview.

Next Step
Activating the text document.

Duplicating a Text Document

Prerequisite
The Manage Text Documents permission is required.

Configuration > [Onboarding] Administration > Documents

Steps
1. Select a text document.
2. Click Duplicate.
3. In the message box:
   • Select Create Copy if you want to create a copy of the paragraphs that the original document contains and link the document copy to this new set of paragraphs.
   • Select Link Copy if you want to link the document copy to the original set of paragraphs.
4. Complete the fields.
5. Click Save.

Creating a File-based Document

Prerequisite
The Manage Text Documents permission is required.

Configuration > [Onboarding] Administration > Documents

Steps
1. Click Create a file-based document.
2. Enter a code and a name.
3. Click Browse to select on your computer the desired PDF file that has been created and optionally already has Onboarding variables in it.
4. Enter a description of the PDF file.
5. Click Save.

Next Step
Activate the document.

Viewing of PDF Files Attached to Documents

In Configuration, Onboarding administrators can display a PDF file attached to a document.

The Onboarding document library typically contains a great number of documents and many of those documents might have file attachments. Unsurprisingly, administrators can have difficulty often remembering the kind of information a specific file attachment contains. Now administrators can click the file name of a PDF file in the Attached File section of a document in Onboarding Administration and Adobe Acrobat will display the content of the file.
Variable values are not rendered when the content of the file attachment is displayed in the document library. This is because neither the document, nor the file attachment are assigned to a process in the document library.

Activating a Document

**Prerequisite**
The Manage Text Documents permission is required.
The document must have Draft status.

*Configuration > [Onboarding] Administration > Documents*

**Steps**
1. Select a document.
2. Click Activate.

**Result**
The status of the document is now Active. You can use the document in message templates and in a New Hire Portal.
Deactivating a Document

Prerequisite
A document that contains an obsolete PDF should be deactivated.
The Manage Text Documents permission is required.
The document must have Active status.

Configuration > [Onboarding] Administration > Documents

Steps
1. Select a document.
2. Click Deactivate next to the document name.

Result
The status of the document is now Inactive. Once a document is deactivated, it can no longer be attached to objects within the system. However people who already have the document attached to their file will still be able to see it.

Deleting a Document

Prerequisite
The Manage Text Documents permission is required.
The document must have Draft status.

Configuration > [Onboarding] Administration > Documents

Steps
1. In the Actions column, click Delete next to the desired document.
2. Click Yes in the message box.

Updating Documents in an Existing Onboarding Process

There are two different recommended methods for updating documents depending on whether the documents are used to disseminate general information or if it was a document used to create an employment agreement with the new hire.

To replace a PDF document that is used for general information, replace the file in the Taleo Document properties. This will update the document on all historical, current, and future process instances. This can be done without taking the process off line or duplicating the process.

If a document cannot be updated for current or historical process instances, because it's been agreed to by the candidate in a specific way, follow the steps to update the document for future processes. The steps can be done without taking the process off line or duplicating the process.

- Create a new Taleo Document and upload the new PDF
- Update the Related Source for the new PDF in the task definition.
Correspondence

- Message Template........................................................................................................47
- Paragraph.....................................................................................................................52
- Variable.......................................................................................................................56
A message template is an e-mail that is sent to one or more recipients in a process.

Message templates are used whenever a notification or an e-mail is sent via the application. They can be associated with tasks within an Onboarding process, they can be sent to indicate when a task has gotten assigned or gotten completed, and they can be used as Reminders before or after a task's due date. They can contain the URLs which hyperlink the assignees directly into the work which they must complete.

Several elements are configured when creating message templates.

**Properties:** In the Properties section of a message template, the following elements are defined:

- Code
- Name
- Description
- Message Format: There are three types of message formats:
  - HTML text
  - Read only attachment
  - Plain text

- The message header contains the To, Reply To, Cc, Bcc, and Subject fields where variables can be dragged and dropped. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any email variables placed in the message header will be in addition to that assignee. However, you can choose additional recipients within the message template so that these people will always receive this message whenever the associated task assignee receives it.

**Content:** There are two types of content:

- Custom content: It is built by adding text and rich text formatting to the message. Variables can also be used to personalize parts of the message. You can pull in user-defined fields in these messages as well which can contain values that were previously filled out in a user-defined form.
- Document-based content: It is built by selecting one of the documents that is active and available in your system. This method is not typically used with most message templates.

**Attachments:** Files can be attached to message templates. By default, the attached file maximum size is 0.1 Mb, and the attached files maximum total size is 500 Mb. The maximum number of attachments allowed is by default 5. These attached documents can be files of any type, including checklists in Word, spreadsheets in Excel, documents in PDF, or materials in any format. These attached files cannot contain personalized tokens or fields from the Transitions database, unlike the PDF documents which the Transitions administrator uploads into the Documents feature.

System administrators can attach a file to a message template, add the message template to a correspondence task and add the task to an Onboarding process that involves new hires and recruiters. The file attachment is included in the completed task and new hires can click the corresponding link to read and accept a disclaimer message and then view the file. In the Onboarding WebTop, if users display the completed task (status: Completed) and click the link to the file attachment displayed in the Related Source field, the file is displayed.

**Variables:** Variables are strings of text that automatically call information from the system and display it in the message. Variables are very useful in the creation of messages. Variables are most often used in the body of a message but they can also be inserted in the To, Cc, Bcc, and Subject fields. Standard variables are provided with the system and represent a specific value in the database. For example, a message template contains the standard variable {NewHirePersonalInfo.LastName}. Just before sending the message to a candidate, the system will replace the variable by the new hire's last name.
By default, all variables are listed in the Available Variables list. However, a shorter list of variables can be displayed by entering a few letters contained in a variable. The system then automatically suggests variables containing these letters. For example, if entering the letters “add”, the system could suggest the following variables: “Candidate.Address”, “Candidate.Address2”, “ElectronicSignature.IpAddress”. Once the right variables are displayed, you can drag and drop the desired variables in the paragraph. To return to the default list of variables, you just need to remove the letters they entered.

There are two separate variables that can be used to display a new hire's start date in a message template. One variable is {Assignment.StartDate} and the other is {Assignment.StartDateNoTime}. The former is used when the date is to be displayed with the time. The latter is used when only the date is displayed, without the time.

If you do not find the variables you need in the list of standard variables, you can create custom variables by following these rules:

- Custom variables must be enclosed in curly braces { }.
- Custom variables must contain valid characters: capital letters (A-Z), numbers (0-9) and the underscore symbol (_).
- Custom variables must contain no spaces.

Message templates cannot be contextualized in the same way that messages within Recruiting can be contextualized. All emails are sent based on the Onboarding process in which they are placed, so they may be sent only if they are in a task that gets triggered within the workflow. If the contextualized conditions prevent a given correspondence task from being assigned, then the associated message template will not be sent.

Forgot Password Message Template

The Forgot Password message template is a system template that uses a specific set of tokens. The Forgot Password message template is available for creating correspondence to send to new hires that may have forgotten their password. There is a specific set of tokens for use with this template that are able to be resolved before new hire information is contextualized.

These tokens are:

- ForgotPasswordFields.FullName
- ForgotPasswordFields.EmailAddress
- ForgotPasswordFields.ForgotPasswordURL
- ForgotPasswordFields.ForgotPasswordURLLink
- ForgotPasswordFields.SecurityCode
- ForgotPasswordFields.UserName
- ForgotPasswordFields.FirstName
- ForgotPasswordFields.LastName
- ForgotPasswordFields.MiddleName

Creating a Message Template

**Prerequisite**

The Manage Message Templates user type permission is required.

**Configuration**

**Steps**

1. Click Message Templates.
2. Click *Create*.

3. Enter the appropriate information.
   
   If needed, variables can be used in the To, Cc, Bcc and Subject fields.

4. Click *Save*.

5. Back to the Template page, add at least one paragraph to the template by clicking *Add* or *Create*.

6. Click *Save*.

**Result**

The message template is displayed in the Message Templates page. It can be configured into a task by the system administrator, or into a notification before and after a task, or sent ad-hoc as correspondence from the Onboarding WebTop.

**Next Step**

Activate the message template.

---

**Editing the Properties of a Message Template**

**Prerequisite**

The *Manage Message Templates* user type permission is required.

It is a best practice to deactivate the message template before modifying it. When edits are completed, the message template should be reactivated.

**Configuration**

**Steps**

1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Edit*.
4. Modify the information.
5. Click *Save*.

**Result**

Modifications made to the code, name, description, message format and variable(s) used in the message are automatically reflected in messages sent using this template.

---

**Adding an Attachment to a Message Template**

**Prerequisite**

The *Manage Message Templates* user type permission is required.

By default, the attached file maximum size is 0.1 Mb, and the attached files maximum total size is 500 Mb.

By default, the maximum number of attachments allowed is 5.

**Steps**

1. Click *Message Templates* for the desired product.
2. Click on the message template.
3. Click *Add*.
4. Enter information in the fields.
5. Click *Browse*... to select a document.
6. Click *Save*.

**Result**
The attachment appears in the Attachments section of the message template if the size is below or equal to the maximum size allowed for attachments.

---

**Removing an Attachment from a Message Template**

**Prerequisite**
The *Manage Message Templates* user type permission is required.

**Steps**
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Remove*.

**Result**
The attachment no longer appears in the Attachments section of the message template.

---

**Activating a Message Template**

**Prerequisite**
The *Manage Message Templates* user type permission is required.
The message template must have an Inactive or Draft status.

**Configuration**

**Steps**
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Activate*.

**Result**
The status of the message template is Active. It can be configured into a task by the system administrator, or into a notification before and after a task, or send ad-hoc as correspondence from the Onboarding WebTop.

---

**Deactivating a Message Template**

**Prerequisite**
The *Manage Message Templates* user type permission is required.
The message template must have the Active status.

**Configuration**

**Steps**
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click **Deactivate**.

**Result**

The status of the message template is Inactive. After the message template is deactivated, no new usages can be created; however, anyone whose process is already using that message template will still continue to use it as configured.

### Deleting a Message Template

**Prerequisite**

The *Manage Message Templates* user type permission is required.

**Configuration**

**Steps**

1. Click **Message Templates** for the desired product.
2. Click **Delete** next to the message template to delete.
3. Click **Yes**.

**Result**

The message template is permanently deleted from the database.

### Duplicating a Message Template

**Prerequisite**

The *Manage Message Templates* user type permission is required.

Editing of system generated message templates is limited to optimize system performance. In several cases, such templates may not be duplicated, and often the context cannot be modified.

**Steps**

1. Click **Message Templates** for the desired product.
2. Click **Duplicate**.
3. Make changes.
4. Click **Save**.

**Result**

The message template appears in the Message Templates page.
Paragraph

A paragraph is a block of text added to a message template.

Paragraphs can be supplied with the system, for example message templates supplied with the system have default paragraphs attached to them. They can also be duplicated; when duplicating a message template, paragraphs can be duplicated. They also can be created from scratch.

Paragraphs can be accessed from two places:

- Paragraphs List: The Paragraphs list is available via the Paragraphs link in the product administration menu and in the Quick Access box within the Message Templates feature. A paragraph created via the Paragraphs list is available for new and existing message templates.
- Message Template: A paragraph created directly in a message template is only available for that message template and is not available in the Paragraph List.

**Important Note:** To create a paragraph that can be reused by other message templates, the paragraph must be created via the Paragraphs feature available via the Paragraphs link in the product administration menu or in the Quick Access box within the Message Templates feature.

Edits made to a paragraph in the Paragraph library will affect all templates using the paragraph, regardless of whether the edits are made directly from within a message template or from within the Paragraphs list.

Paragraphs cannot be created if more than one language is activated for the message template.

Paragraph content is created by typing text and/or by adding variables. Variables automatically call information from the new hire and display it in the template. For example, if the `{Candidate.LastName}` variable is used, then the last name of the candidate will be automatically included by the system in the outgoing message.

By default, all variables are listed in the Available Variables list. However, a shorter list of variables can be displayed by entering a few letters contained in a variable. The system then automatically suggests variables containing these letters. For example, if entering the letters “add”, the system could suggest the following variables: “Candidate.Address”, “Candidate.Address2”, “ElectronicSignature.IpAddress”. Once the right variables are displayed, the system administrator can drag and drop the desired variables in the paragraph. To return to the default list of variables, the system administrator just needs to remove the letters they entered.

### Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Access Correspondence Manager configuration</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Administration</td>
</tr>
</tbody>
</table>

### Adding a Paragraph to a Message Template

**Prerequisite**

The *Manage Message Templates* user type permission is required.

The paragraph must be created and activated.

**Configuration**
Steps
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Add*.
4. Select a paragraph or chose to create a new one.
5. Click *Select*.

Result
The paragraph appears in the Paragraphs section of the message template.

Next Step
Order paragraphs.

Creating a Paragraph for a Message Template

Prerequisite
The *Manage Message Templates* user type permission is required.

Configuration

Steps
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Create*.
4. Enter information in the fields.
5. Type the content of the paragraph in the Text box.
6. Insert variables in the Text box if desired.
7. Click *Save*.

Result
The paragraph appears in the Paragraphs section of the message template.

Next Step
Order paragraphs.

Ordering Paragraphs in a Message Template

Prerequisite
The  user type permission is required.

Configuration

Steps
1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. Click *Reorder*.
4. Select a paragraph to move to a different position.
5. Use arrows to move the paragraph.
6. Click Save.

Result
The paragraphs are displayed in the new order in the Paragraphs section of the message template.

Editing a Paragraph in a Message Template

Prerequisite
The Manage Message Templates user type permission is required.
Deactivate the message template before modifying a paragraph.
Note that any edits will affect all templates that use the paragraph, so edit with care. User may chose to duplicate the paragraph and then edit the new version only.

Configuration

Steps
1. Click Message Templates for the desired product.
2. Click on a message template.
3. In the Paragraphs section, click Edit.
4. Modify the information in the fields.
5. Click Save.

Result
The paragraph is saved with the modified information.

Previewing a Paragraph in a Message Template

Prerequisite
The Manage Message Templates user type permission is required.
You must be in the active language of the message template.

Configuration

Steps
1. Click Message Templates for the desired product.
2. Click on a message template.
3. Click Preview.

Result
A preview of the content of the paragraph is displayed.

Activating a Paragraph in a Message Template

Prerequisite
The Manage Message Templates user type permission is required.
The paragraph must have the Inactive status.

**Configuration**

**Steps**

1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. In the Paragraphs section, click on the paragraph.
4. Click *Activate*.

**Result**

The status of the paragraph is Active and is now available for selection when adding a paragraph in a message template.

**Deactivating a Paragraph in a Message Template**

**Prerequisite**

The *Manage Message Templates* user type permission is required.

The paragraph must have the Active status.

**Configuration**

**Steps**

1. Click *Message Templates* for the desired product.
2. Click on a message template.
3. In the Paragraphs section, click on a paragraph.
4. Click *Deactivate*.

**Result**

The status of the paragraph is Inactive and the paragraph can no longer be selected in a template. The paragraph is not permanently deleted from the data base.
Variable

Variables are strings of text replaced by contextual data that you can include in a message or a paragraph. Variables, sometimes referred to as tokens, are very useful in the creation of customized messages. Variables are most often used in paragraphs within the body of a message but they can also be inserted in the To, Cc, Bcc, and Subject fields.

Standard variables are provided with the system and represent a specific value in the database. For example, a message template contains the standard variable {NewHirePersonalInfo.LastName}. Just before sending the message to a candidate, the system will replace the variable by the new hire's last name.

There are two separate variables that can be used to display a new hire's start date in correspondence. One variable is {Assignment.StartDate} and the other is {Assignment.StartDateNoTime}. The former is used when the date is to be displayed with the time. The latter is used when only the date is displayed, without the time.

Adding a Variable

Prerequisite

Configuration

Steps

1. Select a message template.
2. To add a variable in the To, Cc, Bcc, and Subject fields, click Edit.
3. To add a variable in a paragraph, click on a paragraph.
4. Scroll the list of variables to find the desired variable.
   To display a short list of variables matching a specific keyword, you can enter the keyword in the Available Variables field. For example, entering new hire would display all variables containing the word new hire.
   To display the complete list of variables, remove the keyword you entered.
5. In the list of variables, select the variable, including curly braces, with your cursor.
6. Drag the variable in the desired location.

Result

When sending the message, the variable is replaced by contextual data.

The system may be unable to replace a variable because the data is missing; the variable place holder will be left blank.
User-Defined Fields and Selections

- User-defined Fields..................................................................................................................58
- User-defined Selections.............................................................................................................64
User-defined Fields

User-defined Field

A user-defined field is used to capture any additional information that is needed about a new hire.

User-defined fields can be used in user-defined forms, message templates, documents, conditions on transitions, reports and Taleo Connect Client exports.

The system administrator can create user-defined fields for the following categories:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>Refers to the assignment of a new hire to a specific job position at a specific time.</td>
</tr>
<tr>
<td>Education</td>
<td>Refers to new hire's education-related information such as the institution attended, education level achieved, program, start date, or graduation date. This type of user-defined field can only be used as part of a multi-row table and has certain limitations: it can be shown in a form as editable or read-only, but cannot be shown in a correspondence nor a PDF; it may require extra post-processing to use via Reporting or via Taleo Connect Client exports.</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Refers to evaluations and surveys such as the quality of hires. This type of user-defined field can only be used as part of a multi-row table and has certain limitations: it can be shown in a form as editable or read-only, but cannot be shown in a correspondence nor a PDF; it may require extra post-processing to use via Reporting or via Taleo Connect Client exports.</td>
</tr>
<tr>
<td>Job Application</td>
<td>Refers to job application-related information such as the hiring process steps.</td>
</tr>
<tr>
<td>Offer</td>
<td>Refers to offer-related information such as the salary, bonuses, vacation, or expense accounts.</td>
</tr>
<tr>
<td>Talent Master File</td>
<td>Refers to new hire related information such as personal information, address, phone number, or email address.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Refers to new hire's work experience-related information such as the employer, job function, start date, or supervisor's name. This type of user-defined field can only be used as part of a multi-row table and has certain limitations: it can be shown in a form as editable or read-only, but cannot be shown in a correspondence nor a PDF; it may require extra post-processing to use via Reporting or via Taleo Connect Client exports.</td>
</tr>
</tbody>
</table>

The following types of user-defined field can be created:

<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Boolean</td>
<td>User-defined field of type True/False. In a user-defined form, it is represented with a check box.</td>
</tr>
<tr>
<td>Numerical</td>
<td>User-defined field containing whole numbers. If a number contains punctuation such as decimal point or leading zeros, the field type of text must be used.</td>
</tr>
<tr>
<td>Type</td>
<td>Description</td>
</tr>
<tr>
<td>------------------</td>
<td>-----------------------------------------------------</td>
</tr>
<tr>
<td>Date</td>
<td>User-defined field containing a date.</td>
</tr>
<tr>
<td>Date and Time Zone</td>
<td>User-defined field containing a date and a time zone.</td>
</tr>
<tr>
<td>Text</td>
<td>User-defined field containing numbers and letters.</td>
</tr>
<tr>
<td>Multilingual Text</td>
<td>User-defined field containing more than one value in different languages.</td>
</tr>
<tr>
<td>Other</td>
<td>Any other user-defined selections.</td>
</tr>
</tbody>
</table>

A user-defined field may or may not allow a user to make a selection:

<table>
<thead>
<tr>
<th>Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>No Selection</td>
<td>User-defined fields providing no selection. For example, text fields where the user must type in a value or date fields.</td>
</tr>
<tr>
<td>Single</td>
<td>User-defined fields providing a selection of answers, but only one answer can be selected.</td>
</tr>
<tr>
<td>Multiple</td>
<td>User-defined fields providing a selection of answers and more than one answer can be selected.</td>
</tr>
</tbody>
</table>

Creating a User-defined Field

**Prerequisite**

The *Manage User-defined Fields* permission is required.

*Configuration > [Onboarding] Administration > User-defined Fields*

**Steps**

1. Click on the category for the new user-defined field.
2. Click *Create*.
3. Enter a code and a name in all available languages.
   - 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 (French) field.
4. Specify a type of selection.
5. Click *Save*.

**Result**

The new field appears in the User-defined Fields list. It is available when creating user-defined forms, message templates, and documents. It is also available in reports and in Taleo Connect Client exports.

Deleting a User-defined Field

**Prerequisite**

The *Manage User-defined Fields* permission is required.

Note that there is no warning message when deleting a user-defined field. Therefore, before deleting a field, verify that the field is no longer being used.
Configuration > [Onboarding] Administration > User-defined Fields

Steps
1. Click the category containing the user-defined field.
2. Click Delete.

Result
The field can no longer be used in user-defined forms, message templates, documents, reports, conditions and in Taleo Connect Client exports.

Editing a User-defined Field

Prerequisite
The Manage User-defined Fields permission is required.

Configuration > [Onboarding] Administration > User-defined Fields

Steps
1. Click on the category containing the user-defined field.
2. Click a field.
3. Click Edit.
4. Make changes.
5. Click Save.

Job Type Field from Recruiting is Available in Onboarding

The Job Type field in the Recruiting requisition is transferred to Onboarding.

A requisition in Taleo Recruiting may be associated to one specific Job Type. When a candidate is hired and the Onboarding process for the new hire is launched, the Job Type value transfers into the Onboarding field, PositionForForm.JobType and is then available for use. It can be used as any other Onboarding field, such as added to user-defined forms, tokenized PDFs, correspondences, and transition conditions.

Taleo recommends adding this field as read-only. Just like all other Recruiting fields that are transferred to Onboarding, if the value of PositionForForm.JobType for a new hire changes in Onboarding, the value for Job Type is not updated in the Recruiting Requisition.

Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• Manage Onboarding Processes</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types</td>
</tr>
<tr>
<td></td>
<td>• Manage User-defined Forms</td>
<td>&gt; Recruiting &gt; Onboarding &gt; Onboarding Administration</td>
</tr>
<tr>
<td></td>
<td>• Manage Text Documents</td>
<td></td>
</tr>
</tbody>
</table>

User-defined Fields in Onboarding vs Recruiting

User-defined fields in Onboarding are different than user-defined fields in Recruiting.

Certain objects in Recruiting can have user-defined fields (UDFs) defined to track additional information about a candidate. Also, certain objects in Onboarding can have UDFs defined to track additional information about a new hire. However, the candidate UDFs are different from the new hire UDFs. They each must be created
separately, and the following specific rules control how and when the information from Recruiting UDFs may transfer over into Onboarding UDFs:

- The user-defined field must be classified in the corresponding category.
- The user-defined field must have the same name and/or code, name in the case of Recruiting and code in the case of Onboarding.
- The user-defined field must be of the same type/domain, type in the case of Recruiting and domain in the case of Onboarding.

The table below illustrates the correspondence that exists between the user-defined fields that can be created for these main areas within Recruiting and Onboarding. If any Recruiting area is not listed in this table, such as Requisition, this means that none of its UDFs are transferred into Onboarding.

<table>
<thead>
<tr>
<th>Onboarding</th>
<th>Recruiting</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>N/A</td>
</tr>
<tr>
<td>Education</td>
<td>Candidate Education</td>
</tr>
<tr>
<td>Evaluation</td>
<td>N/A</td>
</tr>
<tr>
<td>Job Application</td>
<td>N/A</td>
</tr>
<tr>
<td>Offer</td>
<td>Offer</td>
</tr>
<tr>
<td>Talent Master File</td>
<td>Candidate</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Candidate Work Experience</td>
</tr>
</tbody>
</table>

Onboarding user-defined fields and selections can be created in two ways: manually in Onboarding and automatically via Taleo Connect Client. What is not possible is for user-defined fields and selections defined in Recruiting Administration to be automatically created in Onboarding.

The user-defined fields and their selections must be carefully named in Recruiting Administration, 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 Administration, 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 or become visible on the Onboarding.

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. When you have several Yes or 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 answer and each No answer does not get mixed up with each other during the transfer over to Onboarding.

When a candidate's Onboarding process is launched from Recruiting, all of the matching UDFs are transferred over one time. Subsequent changes to these UDFs either in Recruiting or Onboarding are independent. Updates on either side have no effect on the other side. Only if a candidate gets their onboarding process launched again from Recruiting, using the check box option "Update Onboarding with Recruiting data", will the current Recruiting UDFs get recopied into Onboarding instead of any preexisting values for that new hire.
User-defined Field Reporting

User-defined fields can be displayed in reports.

To be able to report on user-defined fields, you must first create user-defined fields. Once created, you can indicate which fields to display, choose their sequence, and the fields automatically appear in the reporting universe.

Reports are organized the same way as user-defined fields; the same categories are used:

<table>
<thead>
<tr>
<th>Category</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>Refers to the assignment of a new hire to a specific job position at a specific time.</td>
</tr>
<tr>
<td>Education</td>
<td>Refers to new hire's education-related information such as the institution attended, education level achieved, program, start date, or graduation date.</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Refers to evaluations and surveys such as the quality of hires.</td>
</tr>
<tr>
<td>Job Application</td>
<td>Refers to job application-related information such as the hiring process steps.</td>
</tr>
<tr>
<td>Offer</td>
<td>Refers to offer-related information such as the salary, bonuses, vacation, or expense accounts.</td>
</tr>
<tr>
<td>Talent Master File</td>
<td>Refers to new hire related information such as personal information, address, phone number, or email address.</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Refers to new hire's work experience-related information such as the employer, job function, start date, or supervisor's name. Note that this type of user-defined field can only be used as part of a multi-row table and has certain limitations: it can be shown in a form as editable or read-only, but cannot be shown in a correspondence nor a PDF; it may require extra post-processing to use via Reporting or via Taleo Connect Client exports.</td>
</tr>
</tbody>
</table>

Up to 100 user-defined fields, per category, are reportable. That is 100 for Assignment and 100 Education, for example.

User-defined fields are available for reporting, like all other data in the Universe. However, boolean type user-defined fields are not currently supported and will be added in a future release. As for the Date with Timezone type, it will also be added in a future release.

It is very important to remember which data you chose to map to which field for reporting; for example, 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.

Selecting User-defined Fields for Reports

Prerequisite

The Manage User-defined Fields permission is required.

Configuration > [Onboarding] Administration > User-defined Reporting
Steps

1. Click a report category.
2. In the list of available items, select the desired fields and click Add.
3. Use the up and down arrows to modify the sequence.
4. Click Save.
5. Click Yes to confirm.

Result

That data is available for reporting.
User-defined Selections

User-defined Selection

A user-defined selection is a field that provides a list of possible answers.

A user-defined selection contains elements that are possible entries to the field.

User-defined selection elements can be disabled and enabled after initial activation.

After user-defined selection elements have been in active use, they can be deactivated for future use. This allows an organization to change its list of possible responses over time, as older elements become obsolete. Yet the prior responses of older new hires must be preserved on their completed forms.

Whenever an end-user is asked to make a choice among the elements in a user-defined selection, they are always presented with the currently active elements.

For instance, if user-defined elements A, B, and C are currently active, then a task assignee who fills out a form is presented with choices A, B, and C. Later, if element A gets deactivated and element D gets added, a subsequent task assignee who fills out the same form is presented with choices B, C, and D.

However, later in that first assignee's process, they were given another form and another opportunity to revise that answer, they would see the currently-available choices B, C, D. They would no longer be permitted to actively choose the user-defined element A after its deactivation. The first assignee may get a later opportunity to fill in a form that contains the same user-defined field. At that time, they will still see the original value A that they chose. But if they wish to revise that answer, they would see the currently available choices B, C, D.

Creating a User-defined Selection

Prerequisite

The Manage User-defined Fields permission is required.

Configuration > [Onboarding] Administration > User-defined Selections

Steps

1. Click Create.
2. Enter a name and code.
3. Specify the order of appearance of the selection.
   - Sequential order:
   - Alphabetical order:
4. Click Save.

Next Step

Creating elements as the choices of entries that will be available.

Creating an Element for a Selection

Prerequisite

The Manage User-defined Fields permission is required.
Steps
1. Click a user-defined selection.
2. Click Create.
3. Enter a code and a name.
4. Click Save.

Next Step
Repeat the above steps for all the elements you wish to create for the selection. Create as many elements as required.
Activate the elements.

Reordering Elements in a Selection
Prerequisite
The Manage User-defined Fields permission is required.

Steps
1. Click a user-defined selection.
2. Click Reorder.
3. Use the up and down arrows to reorder elements.
4. Click Save.

Activating an Element in a Selection
Prerequisite
The Manage User-defined Fields permission is required.

Steps
1. Click a user-defined selection.
2. Click Activate.

Deactivating an Element in a Selection
Prerequisite
The Manage User-defined Fields permission is required.
The element must be Active.

Steps
1. Click a user-defined selection.
2. Click Deactivate.
3. Click Yes.

Result
Once a user-defined selection is deactivated, it is no longer able to be chosen by future views.

Deleting an Element in a Selection

Prerequisite
The Manage User-defined Fields permission is required.

Configuration > [Onboarding] Administration > User-defined Selections

Steps
1. Click a user-defined selection.
2. Click Delete.
3. Click Yes.

Activating a User-defined Selection

Prerequisite
The Manage User-defined Fields permission is required.

Configuration > [Onboarding] Administration > User-defined Selections

Steps
1. Click a user-defined selection.
2. Click Activate.

Result
Once a user-defined selection is activated, it can be used. If the user-defined selection is chosen by a user, it will show in message templates, forms, PDF documents, reports, and Taleo Connect Client exports.

Deactivating a User-defined Selection

Prerequisite
The Manage User-defined Fields permission is required.
The user-defined selection must be activated.

Configuration > [Onboarding] Administration > User-defined Selections

Steps
1. Click a user-defined selection.
2. Click Deactivate.

Result
Once a user-defined selection is deactivated, it is no longer able to be chosen by future views.
Electronic Signatures

- Configuring an Electronic Signature

68
Configuring an Electronic Signature

Electronic signature allows a customer to validate the identity of a new hire, manager, or other process participant when they are submitting a specific set of information on a form.

The system administrator can configure and insert an electronic signature into forms and documents. New hires still have to read and complete specified forms as usual, but at any point they may be asked to give specific information confirming their identity. For instance, the system can validate if the data entered matches the last four digits of the employee's social security number, zip/postal code or even their Taleo password. If the required information is correct, the form can be submitted. If the information is not correct, the form cannot be submitted and the unsuccessful entry is logged. All information entered by a user for identification into an Esignature field is masked from view with asterisks.

The electronic signature feature in Taleo Onboarding is flexible and extensive. Onboarding is delivered with 50 configurable e-signature fields. The system administrator configures an electronic signature field by naming it and selecting the value to validate against. The newly configured name will not appear in the user-defined form builder, PDF document variables, or text documents but is available for reporting. Forms and documents are built using the predefined e-signature codes.

The value assigned to an e-signature can be one of the following:

<table>
<thead>
<tr>
<th>Esignature Type</th>
<th>Used by</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Birth date</td>
<td>New hires only</td>
<td>Must be typed in mm/dd/yyyy format only, with the new hire typing each number and slash directly into the field to be accepted as a valid e-Signature.</td>
</tr>
<tr>
<td>Zip/postal code</td>
<td>New hires only</td>
<td>Format used to gather zip code in Onboarding must match the format used for entry into e-Signature.</td>
</tr>
<tr>
<td>E-mail address</td>
<td>All</td>
<td>Can match any one of three possible email address that can potentially exist in Onboarding.</td>
</tr>
<tr>
<td>Last four digits of the SSN</td>
<td>New hires only</td>
<td>SSN transfers from Recruiting to Onboarding and will validate properly if no dashes or spaces were entered. Alternately, the SSN can be entered directly into Onboarding at the beginning of the process, using a field with an input mask allowing only 9 digits.</td>
</tr>
<tr>
<td>Taleo password</td>
<td>All</td>
<td>Any changes to a user's password made in Recruiting after the Onboarding process has been launched will not update to that user in Taleo Onboarding.</td>
</tr>
<tr>
<td>Initials</td>
<td>All</td>
<td>If the assignee has a middle name then the first initial of the first, middle, and last name must be typed into the field without periods or spaces between them. If the assignee does not have a middle name then the first initial of the first and last name must be typed into the field.</td>
</tr>
<tr>
<td>First name</td>
<td>All</td>
<td></td>
</tr>
<tr>
<td>Last name</td>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>
Esignature Type | Used by | Notes
--- | --- | ---
User secret identifier | New hires only | Value originates from the NewHireLegalIdentifierForForm/PersonalSignature field which must be used on a form prior to using it for an e-signature.

The value entered by the user into the Esignature field can only be compared with existing data. This data can originate differently:

- It can be imported using Taleo Connect Client 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 using it on the electronic signature form. If a new hire has no existing value to match, he or she will be unable to submit the form.

**Using an Electronic Signature on a Form**

Each of the 50 available e-signatures should only be used on one form in a single process. It is important not to reuse an electronic signature in the same process for the same person. Instead, you must define a specific electronic signature which is intended to be used on a specific form. If you place an electronic signature in two forms, then it can appear to the users as if the second form has already been signed. For example, if you use Signature1 in a I-9 form, you cannot use it in the Sexual Harassment form in the same process. You would need to select Signature2 and configure it for use on the Sexual Harassment form.

In addition, you should not repurpose any e-signatures within the same population (for example, within a geographical region).

If you choose to reuse an e-signature, always consider carefully the possible impact on Taleo Connect exports and reporting.

There are four related fields for each of the 50 available configurable e-signatures in Taleo Onboarding. These fields help legal departments consider how to best meet their regulatory and compliance needs. They can be inserted as a variable into PDFs, exported via Taleo Connect Client, or be viewed in a report. To maintain confidentiality, Esignature variables are not available for correspondence.

The following table describes the four Esignature fields.

<table>
<thead>
<tr>
<th>Field</th>
<th>Completed by</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esignature[Number]</td>
<td>Assignee</td>
<td>Typed information that will be compared against the specified Esignature value. Should be made a mandatory field and will be displayed masked with asterisks.</td>
</tr>
<tr>
<td>Esignature[Number]Date</td>
<td>Automatically by Onboarding</td>
<td>Timestamp indicating when form containing the e-signature was submitted. Can be displayed on form as a read-only field for viewing after submission.</td>
</tr>
<tr>
<td>Esignature[Number]IPAddress</td>
<td>Automatically by Onboarding</td>
<td>Address captured is from either the submitting computer or that computer network's firewall. May be displayed on form as a read-only field for viewing after submission.</td>
</tr>
<tr>
<td>Esignature[Number]FullName</td>
<td>Automatically by Onboarding</td>
<td>This is a read-only field used for viewing after submission in place of the actual Esignature[Number] value.</td>
</tr>
</tbody>
</table>

After submitting the form with a correct e-signature filled in, a History event is logged at the bottom of the step, showing who successfully provided the e-signature and the timestamp of submission. Other events are also logged, such as failed e-signature attempts due to wrong data provided and failed attempts due to missing the
necessary e-signature information from Onboarding to validate. Additionally, when any user views a form after it was submitted it will be locked and cannot be edited.

Using an Electronic Signature on a PDF

A corresponding PDF document can be created using Adobe Acrobat Professional for any Taleo Onboarding form that contains an e-signature. Tokens for the both Esignature[Number] and Esignature[Number]Date are available for inclusion in the PDF. However, caution must be used to ensure that the same Esignature fields are selected for the PDF as were used on the Taleo user-defined form. Once entered on the PDF, custom formatting can be applied to these fields using the Adobe program.

A PDF with an e-signature can be displayed in various areas of the Onboarding WebTop and New Hire Portal. If the user's e-signature was valid when submitted, then the Esignature field will display the first name and last name of the signer, not the actual value they entered. If added to the form, the Esignature date field will display the timestamp of successful submission of the form. If the submission attempt was not successful, then any user who can view this PDF sees both fields still empty.

Reporting on E-signatures

Information gathered on forms with e-signatures can be included in reports.

The following Esignature fields are available in reports:

<table>
<thead>
<tr>
<th>Field</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Esignature[Number]</td>
<td>Information that was successfully entered into the form by the assignee.</td>
</tr>
<tr>
<td>Esignature[Number]Date</td>
<td>Timestamp indicating when form containing the e-signature was submitted. Implies that the e-signature was successfully received.</td>
</tr>
<tr>
<td>Esignature[Number]IPAddress</td>
<td>Address captured is from either the submitting computer or that computer network's firewall. This information may be required by law depending on the state or province.</td>
</tr>
<tr>
<td>Esignature[Number]FullName</td>
<td>Full name of the assignee associated with the Esignature value.</td>
</tr>
<tr>
<td>Esignature Code</td>
<td>Code given by the Taleo system which is the word &quot;Signature&quot; followed by a number.</td>
</tr>
<tr>
<td>Esignature Name</td>
<td>Name that was given to the e-signature at the time of configuration.</td>
</tr>
</tbody>
</table>

Date and Time Setting for Electronic Signatures

The Esignature[Number]Date field date and time can be displayed either with just the date or with the date and time on signed forms.

The Esignature[Number]Date field is a timestamp of when a document was signed by a New Hire or WebTop assignee using an electronic signature field. It is available as a variable that can be included on Message Templates, Forms, and PDF documents. When it is included, it can be set to be displayed in two different ways, either by date alone or by date and time. The date will always be formatted using a default short date style. The time will be displayed using Greenwich Mean Time (GMT) timezone format. This setting will apply to all electronic signature fields, including existing fields on forms that have already been signed.

The default value is Date and will apply to all Esignature[Number]Date fields.

Example:
When the short date is chosen to be displayed without the time, it will be displayed according to the short date format for the locale. For a US locale, it will be displayed as MM/dd/yy. Regardless of locale, the time part will always be formatted as HH:mm:ss GMT appearing after the date.

**Configuring an Electronic Signature**

**Prerequisite**

Onboarding has been preloaded with 50 electronic signatures.

The *Manage User-defined Forms* permission is required.

*Configuration > [Onboarding] Administration > User-defined Signatures*

**Steps**

1. Click a precoded electronic signature from the User-Defined Electronic Signature Management list.
2. Rename the signature using a meaningful name.
3. Select the Signature Type.
4. Click *Save*.

**Result**

The electronic signature can be added to a form.

**Next Step**

Create a form or PDF that will use the electronic signature.

**Adding an Electronic Signature to a Form**

**Prerequisite**

The *Manage User-defined Forms* permission is required.

*Configuration > [Onboarding] Administration > User-defined Forms*

**Steps**

1. Click a user-defined form.
2. Create a space in the form to insert the electronic signature.
   - For example, you might need to add a row.
3. In the Field Chooser menu, select *ESignatureForForm*.
   - All created signatures are listed by code.
4. Drag and drop the desired electronic signature in the form.
5. Click the field to activate properties.
6. Select *Yes* from the Mandatory property list.
   - If this is an Esignature date field, the Access property should be set to Read-only.
7. Click *Save*.

**Result**

The form with the electronic signature can be used in a process.

**Next Step**

Create a process that will use the form containing the electronic signature.
Adding an Electronic Signature in a PDF

Prerequisite
Adobe Acrobat Professional is required to insert electronic signatures into PDF documents. Note that this procedure may differ according to the version of Adobe Acrobat Professional being used. The procedure below is described using version 7.0.

Steps
2. In the Tools menu, select Advanced Editing, then Text Field Tool.
3. Draw a box using your cursor.
4. In the Text Field Properties window, under the General tab, type the code of the Esignature field in the Name field and replace the forward slash “/” by a dot “.”.
   If you named Signature1 as "NondisclosureAgreementEsig" then it will still be found as "ESignatureForForm.ESignature1" and its corresponding Date will be "ESignatureForForm.ESignature1Date".
5. Enter any other information to appear on the PDF.

Result
Electronic signature field values will appear on the PDF.

Next Step
The PDF document containing an electronic signature can be used in the New Hire Portal and the Onboarding WebTop.
User-defined Forms

- User-defined Forms ................................................................. 74
- Relationship between Forms and PDFs .................................... 86
User-defined Forms

A user-defined form is one or more pages of information containing standard and/or custom fields that can be used in a specific context.

User-defined forms are used the same way throughout the application. User-defined forms can be edited or created from scratch. It is possible to customize the layout of the form, field labels, and other objects.

When defining the form, the system administrator provides a name, a code and a description to facilitate future references. Then, rows, columns, and sections can be added to the form via the Toolbox. Fields are then inserted in the form. A list of available fields appears on the left hand side of the window, in the Field Chooser. To insert fields, the system administrator must select the field, then drag and drop the field in the desired section.

Each field included in the form can have different properties which can be edited by selecting the field and scrolling to the Selected Element Properties section at the bottom of the form. Some fields have limited properties available according to best practices. For example, PositionForForm/Department Name Field Type can be set to either Read-only Text or URL because it is best practice for a WebTop user or new hire not to edit this field.

Once created, user-defined forms can be previewed to see how the information will be displayed to users. It is also possible to configure user-defined forms in all the languages activated for a company. Forms can be translated as required, but if no translation is provided, the form is displayed in the base language.

User-defined forms must be activated before they can be used.

Configuring User-defined Forms

User-defined forms are configured by the system administrator in the User-defined Forms feature of the Administration menu of the product for which the user-defined form will be used.

When defining the form, the system administrator provides a name, a code and a description to facilitate future references. Then, rows, columns, and sections can be added to the form via the Toolbox. Fields are then inserted in the form. A list of available fields appears on the left hand side of the window, in the Field Chooser. To insert fields, the system administrator must select the field, then drag and drop the field in the desired section. Each field included in the form can have different properties which can be edited by selecting the field and scrolling to the Selected Element Properties section at the bottom of the form.

When wanting to capture a new hire's start date on a form there are two choices. Use AssignmentForForm/StartDate to display or enter the date and time an employee started the job. Use the read-only field, AssignmentForForm/StartDateNoTime to only display the new hire start date.

The field NewHireAddressesForForm/CurrentAddressMunicipality, corresponds to the City field in the Recruiting Center and is recommended for use in user-defined forms in lieu of NewHireAddressesForForm/CurrentAddressCity.

Once created, user-defined forms can be previewed to see how the information will be displayed to users. It is also possible to configure user-defined forms in all the languages activated for a company. Forms can be translated as required, but if no translation is provided, the form is displayed in the base language.

User-defined forms must be activated before they can be used.
Creating a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
1. Click Create.
2. Provide a code, a name, and a page name.
3. Add rows, columns, and sections using the Toolbox features.
4. In the Field Chooser list, select fields, then drag and drop them in the desired section.
5. Edit the properties of a field by selecting the field and scrolling to the Selected Element Properties section at the bottom of the form.
6. Click Save.

Result
The form appears in the User-defined Forms list.

Next Step
Previewing the form.

Configure the form in all the languages activated for your company.

Activate the form.

Adding Fields to a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
1. Click a form.
2. Select a field from the Field Chooser list.
3. Drag and drop the field in the desired section.
4. Edit the properties of a field by selecting the field and scrolling to the Selected Element Properties section at the bottom of the form.
5. Click Save.

Next Step
Edit the properties of the fields.

Fields with Subcategory Items

The indented field categories in the field chooser create a table on user-defined forms to accommodate multiple lines of text and may include subcategory fields.

Several fields in Onboarding must accommodate many separate lines of input from the form assignee. When these fields are dragged onto forms, a table is created in the Form Builder to allow the inclusion of child fields into the table as columns. Add and Delete buttons need to be added to allow form users to enter new rows of information or delete rows of information.
Fields that support multiple lines of text are only available for user-defined forms and are not available for inclusion on PDFs or correspondence.

All fields with subcategory items appear in the Field Chooser as indented items. These fields are:

- PreviousAddress
- SecondaryAddress
- NewHireAssets
- NewHireEvaluation
- HiringProcessStep
- DirectDeposit
- Relative
- EmergencyContact
- Education
- WorkExperience
- Competency
- Reference

Field variables with subcategories must not be added to PDFs because those fields will not be rendered.

Adding Fields with Subcategory Items on a User-defined Form

**Prerequisite**

The Manage User-defined Forms permission is required.

**Configuration** > [Onboarding] Administration > User-defined Forms

**Steps**

1. Select a subcategory field from a main category in the Field Chooser list.
2. Drag and drop the field onto the form.
   
   A table is displayed on the form labeled with the field name.
3. Select the indented field to display subcategory fields.
4. Drag and drop the fields from the subcategory list into the columns of the table.
   
   More columns can be added to the table using the toolbox.
5. Drag and drop **add** to the gray title area of the table.
6. Drag and drop **delete** to the rightmost column of the table.

**Next Step**

Editing the properties of the fields.

External Service Request Fields for Forms

Passport partner fields can be configured on a form, showing all of a new hire's results for every external service request, past or current, for that partner.

Forms for specific, activated Passport Partners are built using the Onboarding Form Builder. The Onboarding administrator can build a table in the form by dragging and dropping the fields from the category ServiceRequestDataforForms onto the form. The available fields can include the following:

- Results fields
- Input parameters
- Standard fields
Each field creates a new table column.

The table is built dynamically each time the form is clicked on to view, with a separate table for each Passport partner. The table rows represent one request, displaying the past values for the included fields, with the table sorted with the latest request in the top row.

A link to the partner website can be placed on the form to allow the new hire or the hiring manager to visit the partner website for more information.

When complete the form can be activated and included in an onboarding process.

By contrast, fields in the ServiceResult category displays only the latest result data for a new hire. It can be used on forms, PDFs, and message templates similar to other Onboarding fields.

**Configuration**

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage User-defined Forms</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Onboarding &gt; Onboarding Administration</td>
</tr>
</tbody>
</table>

For Passport partner UDFs to be available for forms, the partner must be activated on the zone. This may require a zone restart.

**Adding External Service Request Fields on a Form**

**Prerequisite**

The *Manage User-defined Forms* permission is required.

The Passport partner must be activated.

*Configuration > [Onboarding] Administration > User-defined Forms*

**Steps**

1. Click a form.
2. Drag *ServiceRequestDataforForms* onto the form.
3. Click *ServiceRequest*.
4. Drag desired fields into table columns.
   - More columns can be added to the table using the toolbox.
5. Click *Save*.

**Result**

This is the result for this task.

**Next Step**

Edit the properties of the fields.

**User-defined Form Change Considerations**

Changes made to a user-defined form used in a process will take effect immediately.

Immediate changes apply to future tasks and for tasks where the changed form is currently In Progress. The changes to the form will also apply for past tasks. Anytime the form is accessed after a change is made, even in a completed task or a completed process, the form will now appear with the changes incorporated.
Good practices for changing a form might be:

- make any changes if the form is not yet in use.
- if the change is cosmetic, making changes is likely acceptable whether or not it is in use.
- if the desired change is important and the form is in use, create a duplicate of the form and make changes there. Then create a duplicate of the whole process and substitute the new form in place of the old form. This will have no effect on new hire processes that are currently ongoing in the old process, but the new process should now be selected instead for future launching from the Recruiting Center.

**Editing the Properties of a Field in a User-defined Form**

**Prerequisite**

The *Manage User-defined Forms* permission is required.

**Configuration > [Onboarding] Administration > User-defined Forms**

**Steps**

1. Click a user-defined form.
2. In the Page Content section, click a field.
3. In the Selected Element Properties section, located at the bottom of the form, modify the properties of the field.
4. Click *Save*.

**Selected Element Properties**

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

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Binding field</td>
<td>The Binding field refers to the 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.</td>
</tr>
</tbody>
</table>
| Field Type    | There are different field types to choose from: Text Input, Text Area, Rich Text Format, Read-only Text. When working with a date, the field can be text or:  
  - Date Drop-down list.  
  - Date input-utilizes a calendar picker with keyboard short-cut keys available.  
    - Control-Forward and Ctrl-Back changes the calendar by month  
    - Ctrl-Up and Ctrl-Down changes the calendar by year, in the current month  
    - Escape key does the Cancel action  
    - Enter key does the Done action |
<p>| Tooltip       | Tooltips are small pop-up windows containing a descriptive text of the field label. Tooltips display when the user hovers over a title. |
| CSS Style     | Cascading Style Sheets or CSS provide formatting and style instructions which apply to the label of the field. 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 |
| Field Label   | The Field Label is the name used to identify a field, according to the CSS formatting above. The rich text editor allows further customization. |</p>
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Instructions</td>
<td>The instructions are messages or warnings regarding how a field performs or specifics on what the user should enter in the field. For example, for the Work Phone Number field, you could put the following instruction: Do not forget your extension number. Instructions appear below the field.</td>
</tr>
<tr>
<td>Mandatory</td>
<td>By selecting the Yes or No option you can specify if the field is mandatory meaning the field must be completed by the assigned participant when the process is running for each new hire, otherwise the form cannot be submitted successfully. A mandatory field is indicated by a red square in the upper left of the field title.</td>
</tr>
<tr>
<td>Access</td>
<td>Access indicates if the field is read-only or editable. When read-only is selected, a user is unable to modify the field. The default value is Editable.</td>
</tr>
<tr>
<td>Status</td>
<td>The status indicates if the field is activated or deactivated. The use of this field depends on the value selected in the Access field.</td>
</tr>
<tr>
<td></td>
<td>• Editable access + Activated status = field can be modified</td>
</tr>
<tr>
<td></td>
<td>• Read-only access + Activated status = field not editable</td>
</tr>
<tr>
<td></td>
<td>• Read-only access + Deactivated status = field not editable</td>
</tr>
<tr>
<td></td>
<td>• Editable access + Deactivated status = field not editable</td>
</tr>
<tr>
<td>Field Size</td>
<td>Field size indicates the number of elements displayed in a list. Field Size is used for multiple-selection fields. For example, if the field size is 2, the list will display 2 values. The default value is 1.</td>
</tr>
<tr>
<td>Input Mask</td>
<td>Format of the input value. The following syntax must be used:</td>
</tr>
<tr>
<td></td>
<td>9  = any number</td>
</tr>
<tr>
<td></td>
<td>a  = any letter</td>
</tr>
<tr>
<td></td>
<td>n  = any letter or number</td>
</tr>
<tr>
<td></td>
<td>l  = logical or</td>
</tr>
<tr>
<td></td>
<td>\9 = the 9 character</td>
</tr>
<tr>
<td></td>
<td>\a = the a character</td>
</tr>
<tr>
<td></td>
<td>\n = the n character</td>
</tr>
<tr>
<td></td>
<td>\l = the l character</td>
</tr>
<tr>
<td></td>
<td>Any other symbol = the symbol (including a space)</td>
</tr>
<tr>
<td></td>
<td>Possible formats for SSN and Zip/Postal codes:</td>
</tr>
<tr>
<td></td>
<td>SSN: 999-99-9999</td>
</tr>
<tr>
<td></td>
<td>ZIP Code United States: 999999999999-9999</td>
</tr>
<tr>
<td></td>
<td>Postal Code Canada: a9a9a9a9a 9a9a9a9a-9a9</td>
</tr>
<tr>
<td></td>
<td>Note: Make sure not to add a space before and after the</td>
</tr>
<tr>
<td>Header</td>
<td>The is the header or top of a table-type field. An unlimited number of rows can be added.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
Adding an Image to a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
1. Click a form.
2. Add a text field to the form.
3. Place cursor in new text field and Click Enlarged View.
4. Click Insert or edit image.
5. Enter URL of image location.
   Enter image property information, if desired.
   Small images may be manually uploaded to Configuration > [Onboarding] Administration > New Hire Portal Configuration > Images and hosted by Taleo.
6. Click OK.
7. Click Save.

Result
The image appears on the form.

Adding a Page in a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
1. In a user-defined form, click Add Page.
2. Add rows, columns and sections using the Toolbox features.
3. In the Field Chooser list, select fields, then drag and drop them in the desired section.
4. Edit the properties of a field by selecting the field and scrolling to the Selected Element Properties section at the bottom of the form.
5. Click Save.

Result
A new page is added to the user-defined form. Navigate between pages by using the page indicator.

Reordering Pages in a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.
The user-defined form must contain more than one page.
Steps
1. In a user-defined form, click Reorder Pages.
2. Use the up and down arrows to position the pages.
3. Click Save.

Deleting a Page in a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Steps
1. In a user-defined form, click Delete Page.
2. Click Yes.

Result
The page is deleted from the user-defined form.

Previewing a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Steps
Click Preview.

Result
The page containing the form is displayed.

Next Step
Activate the form.
Print the form.

Activating a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Steps
Click Activate.

Result
The status of the user-defined form is changed to Active in the Status column of the User-defined Forms list. The user-defined form can be used in an onboarding process.
Deactivating a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.
The status of the user-defined form must be Active.
The user-defined form must not be in use.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
In the User-defined Forms page, click Deactivate.

Result
The status of the user-defined form is changed to Inactive in the Status column of the User-defined Forms list. The user-defined form is unavailable when building an onboarding process.

Duplicating a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
Click Duplicate.

Result
The new user-defined form appears in the User-defined Forms list with the extension (copy). The user-defined form is in Draft status and cannot yet be used in tasks or processes.

Next Step
Edit the user-defined form.

Printing a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.

Configuration > [Onboarding] Administration > User-defined Forms

Steps
1. Click Preview.
2. Click Print Preview.
3. Click Print.
4. Select a printer and click Print.

Deleting a User-defined Form

Prerequisite
The Manage User-defined Forms permission is required.
The status of the user-defined form must be Inactive.

(Configuration > [Onboarding] Administration > User-defined Forms)

Steps

1. Click **Delete**.
2. Confirm the deletion.

Result

The user-defined form no longer appears in the User-defined Forms list. The user-defined form can no longer be included in a new Onboarding process.

**Static Hyperlinks in User-defined Forms**

Fields in user-defined forms can contain static hyperlinks.

Standard fields or user-defined fields contained in a form can display a clickable hyperlink. In a user-defined form, the URL field type available in the Selected Element Properties can be used to create static hyperlinks in user-defined forms.

**Adding a Static Hyperlink in a User-defined Form**

**Prerequisite**

The **Manage User-defined Forms** permission is required.

(Configuration > [Onboarding] Administration > User-defined Forms)

**Steps**

1. Click a user-defined form.
2. Click a field.
3. In the Selected Element Properties section, under Field Type, select URL.
4. In the Selected Element Properties section, under Access Type, select Read-only.

Access must be set to read-only to ensure the user cannot change the value of the URL.

**Adding a Static Hyperlink in a User-defined Form Using a Text Field**

**Prerequisite**

The **Manage User-defined Forms** permission is required.

(Configuration > [Onboarding] Administration > User-defined Forms)

**Steps**

1. Click a form.
2. Add a text field to the form.
3. Place cursor in new text field and Click **Enlarged View**.
4. Enter text or an image. Follow the steps below to insert an image.
   a) Click **Insert or edit image**.
   b) Enter URL of image location.
Enter image property information, if desired.

Small images may be manually uploaded to Configuration > Onboarding > Administration > New Hire Portal Configuration > Images and hosted by Taleo.

5. Select the text or image for the hyperlink.
6. Click **Hyperlink**.
7. Enter destination URL.
   Select Open in New Window for Target if the destination page is to open in a new browser window.
8. Click **OK**.
9. Click **OK**.
10. Click **Save**.

**User-defined Form History Tracking**

The History feature for user-defined forms presents most changes made to a form.

The Forms History here in the Administration area does not show history of assignees who are completing this form within processes. This history only shows modifications to the form definition itself. Updates or additions within text fields are not explicitly described.

The History section presents the following information:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date and Time</td>
<td>Date and time when an event occurred.</td>
</tr>
<tr>
<td>Event</td>
<td>Event or action performed on an element.</td>
</tr>
<tr>
<td>Details</td>
<td>Information regarding the event.</td>
</tr>
<tr>
<td>By</td>
<td>The actor, person or system, who performed the event.</td>
</tr>
</tbody>
</table>

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

**U.S. Form I-9**

These forms look just like the official U.S. government form I-9 and are available in Onboarding to capture U.S. employment information.

The following I-9 forms are available in the User-defined Forms section. A System administrator can modify the forms as required:

- **U.S. Form I-9 Employee** - this replicates the details found in Section 1 of Form I-9, which contains employee information and verification related fields to be filled out by the new hire.
- **U.S. Form I-9 Employer** - this replicates the details found in Section 2 of Form I-9, which contains information on the documents provided by the new hire and includes confirmation by the employer that the information in the form is accurate.
- **U.S. Form I-9 Sections 1+2** - combines both Section 1 and Section 2 of Form I-9 onto one form.

The U.S. Form I-9 is mandatory for newly hired U.S. employees. Passport partners are available to handle the full I-9 process if desired; contact your Taleo representative.
User-defined forms, even these which are provided with Onboarding, cannot be exported and saved long-term; instead, their companion PDFs are intended for this purpose. See *Relationship Between Forms and PDFs.*

**New Hire Details Form**

A form can be created to display extended details on the Onboarding WebTop beyond what is available on the New Hire Page.

The New Hire Page is a page of standard information about each new hire and their process. This page is built-in as part of the Onboarding WebTop product. To display a larger set of information, a New Hire Details form can be linked from the New Hire page using a link called Details. The Details link is located in the General Section of the New Hire Page.

The New Hire Details form is a user-defined form that can be configured with any available Onboarding fields to provide more comprehensive information about the new hire. Regardless of the form name, the name of the link will always be Details.

Only one New Hire Details form can be used and will apply to all new hires in all processes and all Organizations, Locations, and Job Fields. All information on the form is shown read-only.

The user-defined form must be activated after it is created. The setting New Hire Details, activates the Details link on the New Hire Page and configures the user-defined form for use as the New Hire Details Form.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Possible Values</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire Details</td>
<td>New Hire Details Form Code</td>
<td>None</td>
<td>Configuration &gt; [Onboarding] Settings</td>
</tr>
</tbody>
</table>
Relationship between Forms and PDFs

An online, user-defined form is required to capture information for PDF documents.

For some business needs, capturing new hire information on a dynamic form within Onboarding is not sufficient; instead, particular data with particular formatting must be retained long-term and updates are not permitted. An example might be a particular government form or an electronically-signed employee agreement. Because the Onboarding system is designed to display the most recently-updated information in any field at any time, it becomes necessary to create and save a snapshot of certain information at a point in time if the business needs to preserve it as-is.

Adobe PDF documents can be uploaded to Onboarding to display current information fields about a new hire and then these PDFs can be saved outside of the Taleo system. By exporting or saving them, these PDFs can no longer receive any new information from the Onboarding database when the new hire's fields get updated in the future. Therefore, the PDF is no longer dynamic, and serves as a reliable record of the information and electronic signatures provided, as of the moment of export.

Tokenized PDF Document

A tokenized PDF document will automatically extract information from Onboarding.

PDF documents can be prepopulated with variables retained in the system. Variables can be added using Adobe Acrobat Professional or Adobe Acrobat 3D. For example, you could take a PDF document, such as the I-9 form, and insert variables that will automatically extract information from a new hire candidate file. Instead of showing a blank PDF and asking a new hire to print and fill in their name on paper, each new hire or WebTop user who views a PDF during their process will see that it contains all the information prefilled in for them, using the data that is currently stored in the Onboarding system.

Capturing Form Information for PDFs Workflow

Two distinct phases are involved to create forms aligned with PDFs for capturing new hire information, configuration and runtime.

Configuration

In the Form Builder, the Onboarding Administrator creates a form that will be used at runtime to capture the data that they will want to show on the PDF for long-term static use. This form only needs to gather input from those fields which are not expected to be already filled by Recruiting or Taleo Connect.

In Adobe Acrobat Professional or Adobe Acrobat 3D the Onboarding administrator creates the PDF that will display all those fields which are desired for long-term static use. This PDF contains tokens, created with fields analogous to the items on a user-defined form. Every single token available in the system and that can be placed onto an Onboarding form can also be placed in a PDF document. When using a variable, it must be slightly modified by replacing the forward slash “/” with a dot “.”. For example, NewHirePersonalInfoForForm/LastName must be modified to become NewHirePersonalInfoForForm.LastName.

Field variables with subcategories must not be added to PDFs because those fields will not be rendered.

- The Onboarding administrator puts the user-defined form on a task: Creating a Task.
- The Onboarding administrator puts the form task into a process: Processes.
- The Onboarding administrator uploads the PDF into a document with different possible configurations: Creating a Document Containing a PDF File.
- As a PDF task into a process, to have its completion tracked for any assignee and will be available for export at runtime.
- In a portal displayed to targeted new hires in the section called Documents and will not be available for export, but can be saved and printed by the new hire.

**Runtime Use**

Each new hire process goes through steps and any form tasks get assigned to their assignees.

Assignees open their forms, view any preexisting data in any fields, update any fields, and submit the form and its data into the Onboarding database.

Next time any PDF associated with that new hire's process gets viewed by anyone, it will contain the updated current values for all fields that are shown on it.

- When an Open PDF task is viewed later in the process by any assignee, it will display the current values for these tokens. An assignee merely opening the PDF is sufficient to make the task Complete.
- When this PDF document is viewed later in the process by anyone with permission to view Related Sources for tasks, they too will see the current values for its tokens.
- When the new hire on their new hire portal views their list of Documents, this PDF will contain the current values for its tokens.
- A WebTop user can manually associate any PDF document from the Onboarding list into the Attached Files section of the New Hire page and then this too will display this new hire's current values in any tokens. This page is only visible to WebTop users with the permission to view processes.

As soon as the PDF Document is associated with the new hire's process, it can be exported from Onboarding via Taleo Connect containing that new hire's data in its tokens.

- The Open PDF task must be at least In Progress to make it ready to export the PDF via Taleo Connect, though the task does not need to be in the status Complete before export occurs.
- Manually associating the PDF Document with one given new hire's page is also sufficient to make it exportable.
• Merely displaying the PDF to the new hire in the Documents section of the new hire portal is not sufficient to make it exportable for later storage via Taleo Connect, however the new hire can save the filled-in PDF locally or print it.

Completed user-defined forms can also be viewed and printed, by the new hire or any task assignees after submitted, but these forms are not as easy as PDFs to closely control the formatting. These forms cannot be exported via Taleo Connect for long-term storage.

**Updated Fields on User-defined Forms**

At any point during a new hire's Onboarding process after a PDF is ready for them, another form could seek to update the fields that were contained in that PDF. If the assignee changes the data in these fields, any previously completed PDF will instead show the updated data when viewed or exported after the moment of this change.

For this reason, it is recommended to do most or all of the following, if the business needs to rely on the accuracy of PDF data for long-term storage:

• Export the PDFs as soon as they are expected to be complete. For example, export them if they are completed around Day 3 even if the new hire process is configured to run through the employee's ninetieth day.
• Ensure that no later form offers any opportunity to update the fields that will be shown on the PDFs.
• Export the PDFs before any subsequent process could be run for one given new hire. For example, if they might get terminated and then rehired for a later job, some of the fields might get updated on forms in the new process and some of these may be shared between old and new processes.
Common Onboarding Field Types and Corresponding Acrobat Fields

To successfully view accurate information in field in a tokenized PDF document, the fields in the PDF document must match the field types in the user-defined form.

<table>
<thead>
<tr>
<th>Onboarding Field Type</th>
<th>Corresponding Adobe Field</th>
<th>Description</th>
<th>Adobe Form Toolbar Button</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text Input</td>
<td>Text</td>
<td>Values entered into an online form by a task assignee or exist in the Onboarding database and will display in the PDF document.</td>
<td>![Text Button]</td>
</tr>
<tr>
<td>Text Area</td>
<td>Check Box</td>
<td>Create a check box field in the PDF document for every selection choice. Multiple selections are allowed.</td>
<td>![Check Box]</td>
</tr>
<tr>
<td>Rich Text Format</td>
<td>Radio Button</td>
<td>Create a radio button field in the PDF document for every selection choice. Multiple selections are not allowed, only one radio button may be selected.</td>
<td>![Radio Button]</td>
</tr>
<tr>
<td>URL</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Read-only Text</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Inserting Variables in a PDF Document

Prerequisite

Adobe Acrobat Professional or Adobe Acrobat 3D is required to insert variables.

This procedure may differ according to the version of Adobe Acrobat Professional being used. The procedure below is described using Adobe Acrobat 3D Version 8.0.

If using Adobe Acrobat 3D Version 8.0, show the Forms toolbar in Tools, select Forms, then Show Forms Toolbar.

Create a document in Word and save as a PDF file type, leaving an area to create fields.

Steps

1. Using Adobe Acrobat 3D, open a PDF document.
2. Click the appropriate field type button.
   
   Clicking on the field type button highlights the existing fields of that type and allows insertion of the field type onto the document.

3. Double click on the document at the location of field insertion.
   
   When the field is inserted the field properties box automatically displays.

4. In the field properties box, under General, type the name of the token in the Name field and replace the forward slash “/” with a dot “.”.
5. If inserting a check box or a radio button, in the field properties box, under *Options*, type the name of the label in the Export Value field that was entered into the Onboarding Form Builder.

6. Enter any other information into the field properties box, such as a tooltip under *General* or formatting values under *Appearance*.

7. Click *Close*.

**Result**

The PDF document contains tokens that will automatically extract information from the new hire and insert it in the document. The names of the variables themselves will never be displayed to the viewer of the PDF. If no data exists for a given new hire, the area will appear empty in the finished PDF when displayed.

**Next Step**

Upload the tokenized PDF into the Onboarding Document Library.

---

**Getting Help in Adobe Acrobat**

Adobe Acrobat provides Help within the product that can be utilized when building a form.

This information may differ according to the version of Adobe Acrobat Professional being used. This information is described using Adobe Acrobat 3D Version 8.0. Access Help using *Help > Complete Adobe Acrobat 3D Version 8 Help > Forms*.

Review the following topics:

- Creating and editing forms
- Laying out new form fields
- Form fields behaviors

If additional assistance is needed, Adobe offers online support at *Help > Online Support*...
New Hire Portal

- New Hire Portal ................................................................. 92
- New Hire Accounts .......................................................... 121
New Hire Portal

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.

New hires join an organization using the Taleo Onboarding New Hire Portal, a page that can have numerous configurations. The New Hire Portal displays tasks assigned to the new hire. It can also display a tailored welcome message, hyperlinks to any internal or external resources, and personalized PDF documents.

An organization can build as many New Hire Portals as needed. The content of the New Hire Portal can be customized and associated to one or many organizations, locations, and job fields. It can also have a distinct look and feel that reflects the organization's brand, color, and logos.

The information shown on the New Hire Portal page is configured by the Onboarding administrator in different areas. When configuring a New Hire Portal, the Onboarding administrator has the ability to:

• create the portal which may contain a welcome message, links, documents, and four other rich text areas.
• customize display properties which include rich text headers, footers, and the specific theme used on the portal.
• configure the theme which controls the background images and the fonts, colors, and sizes of everything on the page except what is contained in the rich text areas.
• configure words shown on the page, with the exception of tasks, documents, links, and rich text areas, using Resource Administration. See Resource Administration in the New Hire Portal.

The main page of the New Hire Portal and child-pages such as forms, guidelines, and prelogin pages are dynamically created when a new hire logs into the portal. The page displayed is composed of contributions from different, independent sources. Previews of individual sections are available through Onboarding Administration. To test the complete New Hire experience, create a test new hire with all the attributes that match the portal to be tested. Log in as the test new hire to see all the different pieces dynamically assembled into New Hire Portal pages.

Configuration

The following permission is required to create, edit, and delete New Hire Portals.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage New Hire Portals</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Recruiting &gt; Onboarding</td>
</tr>
</tbody>
</table>

Creating Content for Different New Hire Experiences

The content of a New Hire Portal can be tightly targeted to new hires.

Several elements of the New Hire Portal can be targeted independently to display only certain subsets to new hires:

• Portals: can be associated to organizations, locations, and job fields.
• Display Properties: can be associated to organizations.
• Themes: one theme per display property. Each theme can be reused in more than one set of display properties.
• Processes: can be associated to organizations, locations, and job fields. Among all available processes, the desired process can be selected for each new hire individually when they get launched into Onboarding. When a process is then assigned to a new hire, only the steps that are relevant to him or her are displayed.
Some examples of content creations workflows are provided that can be either followed independently or combined.

- **Single Consistent New Hire Experience in One Language**
- **Single Consistent New Hire Experience in Multiple Languages**
- **Different Forms and Documents for Multiple Locations**
- **Two Branded Subsidiaries with Consistent Forms and PDFs**

**Single Consistent New Hire Experience in One Language**

A company wants to use one logo, one set of colors, one set of forms and PDFs, and one language for all their new hires.

When a new hire gets launched into an onboarding process, they will see the same experience with contributions from all the new hire portal elements. Regardless of the Organization, Location, and Job Field of their requisition, all new hires will see the same header, logo, colors, tasks, documents, links, and terminology.

- **Create one display property** containing the company logo, header, and footer.
- **Create one theme** if company-specific fonts and colors are needed beyond the default.
- **Create one portal** and do not contextualize it to any Organization, Location, or Job Field.
- **Submit changes to labels** to Taleo Support. Any label change will be seen by all new hires.
- **Create one onboarding process** and do not contextualize it to any Organization, Location, or Job Field.

**Single Consistent New Hire Experience in Multiple Languages**

A company wants to use one logo, one set of colors, one set of forms and PDFs, and needs to support multiple languages.

When a new hire gets launched into an onboarding process, they will see the New Hire Portal in the language defined as his or her preference.

- **Configure application languages**.
- **Create one display property** containing the company logo, header, and footer translations in all languages.
- **Create one theme** if company-specific fonts and colors are needed beyond the default.
- **Create one portal** and do not contextualize it to any Organization, Location, or Job Field. Configure variations of its rich text areas, documents, and links in all languages.
- **Submit changes to labels** and provide necessary translations for all languages to Taleo Support. Any label change will be seen by all new hires in that language.
- **Create one onboarding process** and configure all of its forms, PDFs, guidelines, and task descriptions in all languages. Do not contextualize it to any Organization, Location, or Job Field.

**Different Forms and Documents for Multiple Locations**

A company wants to use different sets of forms and documents to support several locations.

When recruiters launch the Onboarding process for each candidate, they will only be able to select the active processes that have been contextualized for the Location that matches the requisition. When new hires visit their New Hire Portal, they will see the header, footer, branding, theme, welcome message per above, plus only those tasks which are targeted towards the Location of their requisition.

- Create several Locations in SmartOrg.
- Create requisitions in Recruiting associated with each desired Location.
- **Create one display property** containing the company logo, header, and footer.
- **Create one theme** if company-specific fonts and colors are needed beyond the default.
- **Create one portal** and do not contextualize it to any Organization, Location, or Job Field.
- **Submit changes to labels** to Taleo Support. Any label change will be seen by all new hires.
- **Create several onboarding processes** and contextualize them to each Location.
- Within each process, **use conditions** to assign specific tasks to new hires in each location. These will all be displayed to new hires in the My Tasks section of the New Hire Portal.

## Two Branded Subsidiaries with Consistent Forms and PDFs

A company has two different subsidiaries with different company name branding and color schemes; both subsidiaries need to onboard their new hires with the same standard forms and PDFs.

Automatically, the new hire's portal will display a combination of all the right new hire portal elements, the logo and the header from the corresponding organization's display properties, the right tasks from the single process, and the right documents, and links from the single portal.

- Create two Organizations in SmartOrg.
- Create requisitions in Recruiting associated with the desired Organization.
- **Create two display properties** each containing the company logo, header, and footer.
- **Create a theme for each subsidiary.** If the color or fonts of all text on the page must be changed from the default and each subsidiary's colors are different. If the colors are not different, create only one theme.
- **Create one portal** and do not contextualize it to any Organization, Location, or Job Field. Configure variations of its rich text areas, documents, and links in all languages.
- **Submit changes to labels** to Taleo Support. Any label change will be seen by all new hires.
- **Create one onboarding process** and do not contextualize it to any Organization, Location, or Job Field.

### Where to Configure Each Element of the New Hire Portal

The table describes where to configure each element of the New Hire Portal. A diagram following the table also indicates where each element appears on the New Hire Portal.

<table>
<thead>
<tr>
<th></th>
<th>Element (* = appears on every page)</th>
<th>Configured in the portal</th>
<th>Configured in the display properties</th>
<th>Configured in the theme (CSS)</th>
<th>Configured in the process</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>Header*</td>
<td></td>
<td>x</td>
<td></td>
<td></td>
<td>May include text, images, logos, rich HTML. Width guidelines: 924 px but expandable. Height guidelines: unlimited. The Guidelines and the Forms pages always display the Header and Footer from Display Properties.</td>
</tr>
<tr>
<td>2</td>
<td>Logo*</td>
<td></td>
<td>x (in original layout)</td>
<td></td>
<td></td>
<td>In original layout, size-constrained to 160 px x 73 px. This element is obsolete if using the enhanced layout; incorporate any logo and branding desired into the header element.</td>
</tr>
<tr>
<td>3</td>
<td>Guidelines</td>
<td></td>
<td></td>
<td>x</td>
<td></td>
<td>Guidelines link is displayed only if a value is entered in the appropriate field when</td>
</tr>
<tr>
<td>Element (* = appears on every page)</td>
<td>Configured in the portal</td>
<td>Configured in the display properties</td>
<td>Configured in the theme (CSS)</td>
<td>Configured in the process</td>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------------------</td>
<td>--------------------------------------</td>
<td>-------------------------------</td>
<td>--------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>building the process. Text color, font and size of the link are controlled in the theme. The word Guidelines can be changed in Resource Administration. The contents of the Guidelines pages are controlled by the rich text entered in the Guidelines field, which may vary by process.</td>
<td></td>
</tr>
<tr>
<td>4 Sign Out*</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>Text color, font, and size controlled in the theme. Words on the page can be changed using Resource Administration.</td>
<td></td>
</tr>
<tr>
<td>5 Breadcrumb*</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>Text color, font, and size controlled in the theme.</td>
<td></td>
</tr>
<tr>
<td>6 New Hire and Contact Info boxes</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>Contact information set in the process and also in the public product setting Contact Information for the zone. Text color, font, and size controlled in the theme.</td>
<td></td>
</tr>
<tr>
<td>7 Color, Background*</td>
<td></td>
<td></td>
<td></td>
<td>x</td>
<td>Page, information boxes, table/cell outlines, background colors, as well as text colors, and all colors controlled in the theme.</td>
<td></td>
</tr>
<tr>
<td>8 Welcome Message</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>May include text, images, logos, rich HTML. Width guidelines: 682 px but expandable. Height guidelines: unlimited.</td>
<td></td>
</tr>
<tr>
<td>9 Section Titles (New Hire Portal, My Onboarding Tasks, Personalized Documents, General Documents, Links)</td>
<td>x</td>
<td></td>
<td></td>
<td>x</td>
<td>Text color, font, size controlled in the theme. Section title displayed if there is content in the section. The words in the titles can be changed using Resource Administration.</td>
<td></td>
</tr>
<tr>
<td>10 Section Instructions (Tasks, Personalized Documents, General Documents, Footer)</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>May include text, images, logos, rich HTML. Displayed if using new layout. Width guidelines:</td>
<td></td>
</tr>
<tr>
<td>Element (* = appears on every page)</td>
<td>Configured in the portal</td>
<td>Configured in the display properties</td>
<td>Configured in the theme (CSS)</td>
<td>Configured in the process</td>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>-------------------------------------</td>
<td>--------------------------</td>
<td>-------------------------------------</td>
<td>-------------------------------</td>
<td>---------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>682 px but expandable. Height guidelines: unlimited.</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>11 Task List</td>
<td></td>
<td>x</td>
<td>x</td>
<td></td>
<td>Name of tasks currently In Progress or Completed, assigned to the new hire. Controlled by the specific process launched for that new hire. Order of display controlled in the enhanced layout by using the Sequence field on the process. Text color, font, size controlled in the theme. Theme also controls icons for Complete and Overdue tasks.</td>
<td></td>
</tr>
<tr>
<td>12 Task Description</td>
<td></td>
<td></td>
<td>x (in enhanced layout)</td>
<td></td>
<td>Description created in Task Definition and copied into each process which uses the task, in any language. Only displayed in the enhanced layout.</td>
<td></td>
</tr>
<tr>
<td>13 Task Completeness Graphic</td>
<td></td>
<td>x (in enhanced layout)</td>
<td></td>
<td></td>
<td>Calculated based on the number of currently completed tasks versus total currently assigned tasks. Only displayed in the enhanced layout.</td>
<td></td>
</tr>
<tr>
<td>14 Personalized Documents</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>This section can contain any PDFs that have been previously uploaded into the Onboarding Administration area for Documents. These PDFs contain variables that are replaced by specific data about each new hire. Please note that unique documents per new hire cannot be uploaded into the New Hire Portal.</td>
<td></td>
</tr>
<tr>
<td>15 General Documents</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>This section can contain any PDFs that have been previously uploaded into the Onboarding Administration area for Documents. These</td>
<td></td>
</tr>
<tr>
<td>Element (* = appears on every page)</td>
<td>Configured in the portal</td>
<td>Configured in the display properties</td>
<td>Configured in the theme (CSS)</td>
<td>Configured in the process</td>
<td>Notes</td>
<td></td>
</tr>
<tr>
<td>--------------------------------------</td>
<td>--------------------------</td>
<td>-------------------------------------</td>
<td>-----------------------------</td>
<td>--------------------------</td>
<td>-------</td>
<td></td>
</tr>
<tr>
<td>Links</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>Contained a URL and a name for the link. When the new hire clicks on the link, a new browser page opens.</td>
<td></td>
</tr>
<tr>
<td>Footer*</td>
<td>x</td>
<td></td>
<td></td>
<td></td>
<td>May include text, images, logos, rich HTML. Width guidelines: 924 px but expandable. Height guidelines: unlimited.</td>
<td></td>
</tr>
</tbody>
</table>

PDFs usually do not contain variables that are replaced by specific data about each new hire; they usually contain generic information such as policy manuals or instructions.
New Hire Portal Enhanced Layout and Original Layout

An enhanced layout and an original layout are available for the New Hire Portal.

The enhanced layout and the original layout provide different ways to organize the elements of the New Hire Portal. The enhanced layout is more powerful and feature-rich. The enhanced layout was introduced in version
7.5 SP8, but either can be used for all the portals on a zone. Note that all New Hire Portals in a zone must use either the enhanced layout or the original layout.

For the enhanced layout to be available, the following private setting must be enabled: \textit{Enable New Hire Portal to Display New Layout}.

The enhanced layout provides the following elements:

\textbf{Rich Text Instructions Areas}

Four areas are available to insert instructions for the following sections: Tasks, Documents, Links, and Footer. These fields appear in Administration even if the enhanced layout is not turned on, but the entered text is not shown. The text is only shown if the enhanced layout is enabled.

\textbf{Guidelines Link}

The Guidelines link is not shown if there are no guidelines to display. It is not possible to create multilingual guidelines. Therefore, you have two choices: create the guidelines with several languages all concatenated or leave the guidelines blank so that other viewers do not see the English text.

\textbf{New Hire Information}

Ability to display information about the new hire in a box located in the left-column, above the Contact Information box. The displayed values, transferred from Recruiting to Onboarding, include the Name, Location, and Job Title of the new hire.

\textbf{Header and Footer}

The header and footer are generated by the display properties. Once the private setting \textit{Enable New Hire Portal to Display New Layout} is enabled, the text and any graphics you insert in the corresponding rich text fields will span the whole width of the page.

\textbf{Task Sequence}

Ability to set a sequence for the steps added to a process. The numbers provided do not have any relevance to the transactions and logic among the tasks; transitions and conditions still drive the order in which the tasks are assigned. This feature only controls the display. The sequence number is not displayed to the New Hire.

\textbf{Icons for Task Statuses}

Icons provide a better visual indication of each task's completion status. They are shown next to each task in the New Hire Portal and they change according to the status. A check mark is displayed for Completed and an exclamation point is displayed for Overdue.

\textbf{New Hire Progress}

A progression bar graphically shows how many tasks have been completed as compared to how many are currently assigned to the new hire at this point in their onboarding process. The total number does not refer to the tasks for all assignees, only for the new hire. If additional tasks are assigned later on, the percentage changes dynamically.

\textbf{Building a New Hire Portal}

\textbf{Prerequisite}

The \textit{Manage New Hire Portals} permission is required.

Below is a typical set of building blocks to build a new hire portal. Some steps may be optional.

\textbf{Steps}

1. Decide how many tasks need to be part of the Onboarding process.
You need to decide whether the same set of tasks are applicable to new hires from every Organization-Location-Job Field, which should be assigned to the new hires themselves instead of WebTop users, and in what sequence.

For details, see *Processes and Tasks*.

2. Decide how many different PDF documents need to be shared with new hires.

You need to decide whether the same set of PDF documents is useful to new hires from every Organization-Location-Job Field or whether they need to be subsetted down into different New Hire Portals.

For details, see *Documents*.

3. Create the links area for additional materials that are hosted elsewhere and match this up with the sets of PDF documents that are part of the one or more New Hire Portals.

4. Create a Welcome Message and rich text instructions for each section if desired.

5. Decide on the branding in the header and decide on the disclaimers or copyright or fine print in the footer.
   Decide whether or not this needs to be different for various Organizations.

For details, see *Display Properties*.

6. Decide whether the colors and branding on the header and footer and in the Instructions section are sufficient to achieve the appropriate look and feel of the New Hire Portal or whether the company really wants to make further changes to the fonts, colors, background, or layout of the pages.

If further changes are required, you need to design a CSS and have it uploaded by Taleo Support as a Custom Theme that gets associated with the Display Properties.

### Creating Portals

A portal displays content for a new hire and may contain a welcome message, documents, links, and other rich text areas.

When creating a portal, the system administrator configures the following elements:

**Welcome Message**

The welcome message appears at the top of the New Hire Portal page. The welcome message may contain text as well as illustrations. The content of the welcome message may be formatted using the *HTML Editor*.

**Instructions**

Personalized instructions can be added in the Tasks, Documents, Links, and Footer sections. Instructions in the indented section footer can be used to give any final instructions, or to show any additional graphics, or to display anything at all that the system administrator desires to show to new hires.

The instructions may be formatted using the *HTML Editor*.

Note that instructions appear in the New Hire Portal only if the *Enable New Hire Portal to Display New Layout* private setting was enabled.

**General Documents and Personalized Documents**

Any PDF document can be added to a portal. In order to add a document to a portal, the document needs to have been previously uploaded in the system via the Documents feature in the Onboarding Administration menu.

PDF documents are displayed to new hires. They can be viewed online by clicking the document title. A new browser window opens to display the document. New hires can be requested to read these documents, to print them for future references, or to print out and sign them on paper to bring to their employer.
The General Documents and Personalized Documents sections both display PDF documents that may contain variables that are prefilled with dynamic data from the Onboarding database. As a best practice, the General Documents section is used for corporate documents and policies that new hires must read and that inform them of important information relevant to their job. An example of this type of document is an Employee Handbook or company holiday calendar. Personalized Documents are documents that may contain more variables with a new hire personal date or that leave more space to be filled in on paper later after printing the document.

There is no tracking to indicate whether or not a new hire opened a PDF document. Also, it is not possible to request a new hire to type information in a PDF document online in order to upload this data back into Onboarding. PDF documents are generated only for display. Any information that a new hire types into the PDF document cannot get communicated back into Onboarding. The only way to update information about a new hire in Onboarding is via any assigned user-defined form at runtime for any assignee, either the New Hire, the WebTop user, or the external user.

**Links**

A link is a hyperlink to a URL giving new hires access to internet and intranet sites. For example, links to the company's Web site, a prerecorded welcome message from the CEO, online training, or orientation. When clicking a link, a new browser window opens to display the website or information that is linked to that URL.

Since a portal can be targeted to a specific organization, location, or job field, the Onboarding administrator can select a list of URLs that are relevant specifically to new employees in that area.

If an Onboarding process starts before the new hire is within your corporate firewall, any hyperlinks which reference intranet sites will not be accessible to them at first.

**Organizations, Locations, Job Fields**

The content of a portal can be associated to various Organizations, Locations, and Job Fields (OLF). A portal collection of rich text, documents, and links can be targeted to a given OLF, independently of any targeting for any headers and footers and any processes. For example, you could create a portal for IT technicians working in the United States and another portal for those working in Canada.
Creating the Portal Content

Prerequisite

The Manage New Hire Portals permission is required.
Steps

1. Click *Create*.
2. Enter a code and a name.
3. Enter the welcome message. You can enter text as well as any graphics, hyperlinks, bullets, or rich HTML. Use the HTML Editor options to format the text.
4. Enter instructions for the tasks, documents, and links. Enter content for the indented section footer. Use the HTML Editor options to format the text.
5. Click *Save*.

Next Step

Add documents and links.

Associate the portal to Organizations, Locations and Job Fields.

The Onboarding administrator may request to enable the *Enable New Hire Portal to Display New Layout* private setting for the instructions to appear on the New Hire Portal.

Adding a Document to a Portal

Prerequisite

Documents available for selection need to have been previously loaded in the system via the Documents feature.

The *Manage New Hire Portals* permission is required.

Steps

1. Click on a portal.
2. Click *Add* next to General Documents or Personalized Documents.
3. Select one or several documents.
4. Click *Select*.

Next Step

Reorder documents.

Reordering Documents in a Portal

Prerequisite

The *Manage New Hire Portals* permission is required.

Steps

1. Click on a portal.
2. In the General Documents or Personalized Documents section, click *Reorder*.
3. Reorder documents using the up and down arrows.
4. Click *Save*. 
Removing a Document from a Portal

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Remove.

Result
The document is not deleted from the Onboarding system; it is only no longer displayed on the Portal.

Adding a Link to a Portal

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click on portal.
2. Click Create.
3. Enter a code. This is a unique identifier. The code is not displayed to the new hire.
4. Enter a name. This is the label/text of the hyperlink that appears on the New Hire Portal.
5. Enter the URL. The complete domain name including the http prefix is required. For example, http://www.taleo.com not www.taleo.com.
6. You may enter a description that appears as a tooltip.
7. Click Save.

Next Step
Reorder links.

Reordering Links in a Portal

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Reorder.
3. Reorder links using the up and down arrows.
4. Click Save.
Removing a Link from a Portal

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Remove.

Associating a Portal to Organizations, Locations, Job Fields

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Add.
3. Select one or more element.
4. Click Select.

Result
When a portal is associated to an Organization, Location, or Job Field (OLF), documents, links, and instructions get displayed to certain groups of new hires. When new hires get launched into Onboarding to join the company on a requisition that is working in that OLF, they will see the appropriate documents, links, and instructions intended for them, shown around the specific set of assigned tasks that comes from their process.

Dissociating a Portal from Organizations, Locations, Job Fields

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Remove.

Previewing a Portal

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Portals

Steps
1. Click a portal.
2. Click Preview.
3. A new browser appears, showing this portal.

**Result**

The Preview does not contain every element as seen by users. It does not include any display properties nor any specifically assigned tasks.

### Activating a Portal

**Prerequisite**

The *Manage New Hire Portals* permission is required.

**Configuration** > *Onboarding* > Administration > Portals

**Steps**

1. Click a portal.
2. Click *Activate*.

**Result**

The status of the portal is now active. The information in this portal will now be shown to new hires whose requisition is in the associated OLF when they view their New Hire Portal page.

### Deactivating a Portal

**Prerequisite**

The *Manage New Hire Portals* permission is required.

There is no warning indicating whether or not a portal is in use by any current new hires.

**Configuration** > *Onboarding* > Administration > Portals

**Steps**

1. Click a portal.
2. Click *Deactivate*.

**Result**

The status of the portal is now Inactive. Any new hires whose requisition is in the associated OLF will no longer see this collection of documents, links, and instructions when they view their New Hire Portal page.

**Next Step**

Delete the portal if you no longer need it.

### Deleting a Portal

**Prerequisite**

The *Manage New Hire Portals* permission is required.

**Configuration** > *Onboarding* > Administration > Portals

**Steps**

1. Click *Delete*.
2. Click *Yes*.

**Result**

The portal is no longer available to use.
Display Properties

The display properties represent the header, footer, and theme of the new hire portal.

Display properties consist of the following elements:

- Theme controls the general font type and size, any background images, and the color scheme. For details, refer to Themes.
- Header may contain text, any graphics, bullets, rich HTML, or logos.
- Footer may contain text, any graphics, bullets, rich HTML, or logos.

Display properties have an effect on the look of every page of the New Hire Portal, even the forms the new hire sees.

Display properties can also be set for prelogin pages that appear before a new hire logs in the New Hire Portal, that is the Login page and Forgot Password page. This can extend the company brand to all pages and it removes confusion for new hires by adding graphical identity to the prelogin experience. Only one set of display properties can be created for prelogin pages.

Display properties can be associated to Organizations only, whereas the portal content can be associated to Organizations, Locations, and Job Fields. This means that a new hire whose requisition is associated with these organizations will see a New Hire Portal with this header, footer, and theme. Since display properties cannot yet be associated to Locations nor Job Fields, the system administrator cannot, for instance, show a different header or footer per each different location where onboarding new employees.

Creating Display Properties for the New Hire Portal

Prerequisite

The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Display Properties

Steps

1. Click Create.
2. Enter a code and a name.
3. Type the name of the theme.
   The theme is optional. The desired theme must have already been uploaded into the zone by Taleo Support.
4. Create a header. You can enter text as well as any graphics, hyperlinks, bullets, or rich HTML. Use the HTML Editor options to format the text.
5. Create a footer. You can enter text as well as any graphics, hyperlinks, bullets, or rich HTML. Use the HTML Editor options to format the text.
6. Click Save.

Next Step

You may want to associate display properties to organizations.

Creating Display Properties for Prelogin Pages

Prerequisite

The Manage New Hire Portals permission is required.
Steps

1. Create display properties:
   a) Click Create.
   b) Enter a code and a name.
   c) Take note of the code as you will need it later.
   d) Enter a theme if desired.
   e) Enter a header and a footer. You can enter text as well as any graphics, hyperlinks, bullets, or rich HTML. Use the HTML Editor options to format the text.
   f) Click Save.

2. Configure the Default Display Properties setting:
   a) In the Onboarding Administration menu, click Settings.
   b) Click on Default Display Properties.
   c) Click Edit.
   d) In the Value field, enter the code of the display properties you just created.
   e) Click Save.

Associating Display Properties to Organizations

Prerequisite
The Manage New Hire Portals permission is required.

Steps

1. Click on a set of display properties.
2. Click Add.
3. Select one or several organizations.
4. Click Select.

Result
When display properties are associated to an organization, new hires who are being onboarded for a requisition associated to a given organization will be shown the tasks for their process on a page that contains the header, footer, and theme that was targeted for them by the display properties. If there are no specific display properties associated with their requisition's organization, then the generic display properties will be shown. If there are no appropriate display properties at all for that new hire's organization, then they will see no header and no footer, just the system's built-in theme.

Dissociating Display Properties from Organizations

Prerequisite
The Manage New Hire Portals permission is required.

Any display properties can be disassociated at any time. There is no warning indicating whether or not the display properties are in use by any current new hires. After it gets disassociated, any new hires who had been viewing their new hire portals with this header, footer, and theme will not see this specific information any longer, but they will still see the associated tasks from their current process.
Onboarding Configuration Guide

Configuration > [Onboarding] Administration > Display Properties

Steps
1. Click a set of display properties.
2. Click Remove.

Activating Display Properties

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Display Properties

Steps
1. Click a set of display properties.
2. Click Activate.

Result
The status of the display properties set is Active and display properties can be viewed by the appropriate new hires.

Deactivating Display Properties

Prerequisite
The Manage New Hire Portals permission is required.

Any display properties can be deactivated at any time. There is no warning indicating whether or not the display properties are in use by any current new hires. After it gets deactivated, any new hires who had been viewing their new hire portals with this header/footer/theme will not see this specific information any longer, but they will still see the associated tasks from their current process.

Configuration > [Onboarding] Administration > Display Properties

Steps
1. Click a set of display properties.
2. Click Deactivate.

Result
The status of the display properties set is Inactive and display properties can no longer be used for a new hire portal. Once deactivated, any new hires who had been viewing their new hire portals with this header, footer, and theme will not see the header, footer, or theme any longer, but they will still see their targeted rich text messages and tasks, documents, and links.

Previewing Display Properties

Prerequisite
The Manage New Hire Portals permission is required.

Configuration > [Onboarding] Administration > Display Properties

Steps
1. Click a set of display properties.
2. Click Preview.

Result
You can see how the display properties will appear in the new hire portal. However, this is not an exact representation.

Themes
The Theme controls the font type and size, background images, and the color scheme of a New Hire Portal.

A theme is a file that must be uploaded by Taleo to become available for use in an Onboarding zone. This file must be in the form of a Cascading Style Sheet (CSS) and it controls the way the HTML code is managed for each new hire’s page. Each zone may have up to 20 themes.

Once a theme is created, the system administrator is responsible for specifying the theme used for a New Hire Portal by typing the name of the theme in the Display Properties feature. If no theme is specified, a default theme provided by Taleo is used. Taleo provides six built-in themes. Two of them can be used with the enhanced layout, three with the original layout. For details, also see New Hire Portal Enhanced Layout and Original Layout.

<table>
<thead>
<tr>
<th>Theme</th>
<th>Enhanced Layout or Original Layout</th>
<th>Properties</th>
</tr>
</thead>
<tbody>
<tr>
<td>newhireportal_v2b</td>
<td>Enhanced Layout</td>
<td>Mainly gray and blue, improved Firefox support</td>
</tr>
<tr>
<td>newhireportal_v2a</td>
<td>Enhanced Layout</td>
<td>Mainly gray and blue, improved Internet Explorer 8 support</td>
</tr>
<tr>
<td>newhireportal_v2</td>
<td>Enhanced Layout</td>
<td>Mainly gray and blue</td>
</tr>
<tr>
<td>newhireportal</td>
<td>Original Layout</td>
<td>Mainly green</td>
</tr>
<tr>
<td>nhpwebcentric</td>
<td>Original Layout</td>
<td>Mainly green</td>
</tr>
<tr>
<td>demoimage</td>
<td>Original Layout</td>
<td>Mainly green. Expects a logo named “logonhp.gif” to be manually uploaded to the zone.</td>
</tr>
</tbody>
</table>

Different versions of Taleo Onboarding rely upon different CSS by default when the Theme field in the Display Properties page is left blank when using the enhanced layout.

- In 7.5 SP8 to 7.5 SP13, newhireportal_v2.css is the default.
- In 7.5 SP13 through 10 SP2, newhireportal_v2a.css is the default.
- in 10 SP2 and later, newhireportal_v2b.css is the default.

The newhireportal theme is used when the Theme field in the Display Properties is left blank and when the Enable New Hire Portal to Display New Layout setting is disabled.

Applying a Theme to Display Properties

Prerequisite
The Manage New Hire Portals permission is required.

The CSS needs to have been properly uploaded into the zone by Taleo Support and they will provide the exact name of the theme to type here.

Configuration > [Onboarding] Administration > Display Properties
Steps
1. Open a set of display properties.
2. Click Edit.
3. In the Theme field, type the name of the theme.
4. Click Save.

Modifying New Hire Portal Themes

A custom CSS should contain the specific values to be changed from what is already displayed by default to new hires and be submitted to Taleo support.

There are several methods for examining, viewing, and creating new CSS files.

To examine the existing CSS files and to experiment with what specific changes could be desirable, different tools are appropriate for each browser:

- Firefox by using the Firebug add-on.
- Internet Explorer 8 and higher by pressing F12.
- Google Chrome by pressing F12.

To create the custom CSS which will be applied atop all the existing CSS in the New Hire Portal pages, a tool such as notepad can be used. This simple file should contain only the new values to override the existing CSS in the product, rather than duplicating all the information in the other existing CSS. This file must be given the extension .css and must be submitted to Taleo Support on a ticket.

For guidance on modifying the theme of your New Hire Portal, contact your Taleo representative. Taleo Technical Services can also provide assistance for creating or adjusting the CSS in a custom theme if additional expertise is required.

Fonts, Colors, and Backgrounds

Fonts, colors, and backgrounds can be modified in a new hire portal theme.

**Sample Theme Modifications**

<table>
<thead>
<tr>
<th>Sample Value</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>background: url(“https:...”);</td>
<td>Define with a URL pointing to a self-hosted image. Small images may be manually uploaded to Configuration &gt; [Onboarding] Administration &gt; New Hire Portal Configuration &gt; Images and hosted by Taleo. Flash images or videos are not allowed to be embedded in any New Hire Portal, however an animated gif will work properly, embedded within the theme or the rich text areas.</td>
</tr>
<tr>
<td>background-color: grey;</td>
<td>By default, the background color is grey and white. Define with a standard color name, hexadecimal or RGB value.</td>
</tr>
<tr>
<td>Color: blue;</td>
<td>By default, the text is black, blue and purple. Define with a standard color name, hexadecimal or RGB value.</td>
</tr>
<tr>
<td>font-size: 2.4em;</td>
<td>Taleo uses em measure but a different measure can be used. Usually, 1em corresponds to a readable format for the font used. If 1em is too big for the text body, 0.8em which corresponds to 11 points, can be used.</td>
</tr>
<tr>
<td>font-family: verdana, sans-serif;</td>
<td>Multiple fonts can be named for use as a substitute if the primary font is not available in the user's browser.</td>
</tr>
<tr>
<td>font-weight: bold;</td>
<td>The text is not bold by default.</td>
</tr>
</tbody>
</table>
Custom New Hire Portal Themes

Custom themes for the enhanced layout can be created and sent to Taleo for use in the New Hire Portal.

If any changes are desired to the provided themes, it is only necessary to provide to Taleo the new styles that contradict any of the default values. See *Custom Theme Sample Values for an Enhanced Layout*. The specific styles in your custom CSS will override default values, while anything not mentioned in your custom CSS will remain as-is using the default look and feel.

Customers' web design departments can work with Taleo consultants to define each theme, and it may require several iterations of design, upload, and testing before the desired look is achieved. For guidance on modifying the theme of your New Hire Portal, contact your Taleo representative. Taleo Technical Services can also provide assistance for creating or adjusting the CSS in a custom theme if additional expertise is required.

The CSS for the enhanced layout can be divided into sections to produce a custom theme.

- Sign Out
- New Hire Information
- Breadcrumb
- Task List
- Document List
- Link List
- General

When applying a custom theme, it is recommended to configure the latest available New Hire Portal layout in Display Properties. As newer default version of layouts are developed, it is considered best practice to reconfigure the custom theme with the latest enhancement; migrating the association with the custom CSS. Additionally, if upgrading to a new version of Onboarding, it is suggested that New Hire Portals using any custom theme should be tested.

### Custom Theme Sample Values for an Enhanced Layout

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>HTML with Sample Values</th>
</tr>
</thead>
</table>
| Sign Out and Guidelines  | The Guidelines link will only display if a value is entered in the appropriate field when building the process. | ```
.utilities
{
    display: block;
    background-color: #a5aebb;
    margin: 1px 0 0 0;
}
``` |
| New Hire Information     | The additional elements are the background color and the border. The font and style of the titles, content, and hyperlinks can also be controlled. | ```
.nhp-block-left
{
    vertical-align: top;
    background: #e4e7eb;
``` |
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>HTML with Sample Values</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>display: block; padding: 0; margin: 0 0 10px 0; width: 225px; border: 1px solid #9da6b5;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.header-block-left { display: block; margin: 0px; background-color: #a5aebb; padding: 6px 10px 0px 10px; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.block-title { color: black; font-size: 1.3em; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.entity-label { font-size: 13px; color: #7f7f7f; display: block; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.entity-value { font-size: 13px; display: block; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.nhp-block-left a, .nhp-block-left a:link, .nhp-block-left a:visited { text-decoration: underline; font-size: 1.3em; color: blue; font-family: Tahoma, Verdana, sans-serif; }</td>
</tr>
<tr>
<td></td>
<td></td>
<td>.nhp-block-left a:hover, .nhp-block-left a:active {</td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
<td>HTML with Sample Values</td>
</tr>
<tr>
<td>--------------</td>
<td>------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------------</td>
</tr>
</tbody>
</table>
| Breadcrumbs  |                                                                              | `.breadcrumb a, .breadcrumb a:link, .breadcrumb a:visited
{        |                                                                               |
|             | text-decoration: underline;
|             | font-size: 1em;
|             | color: blue;
|             | font-family: Tahoma, Verdana, sans-serif;
|             | background-color: transparent;
|             | }                            |
|             | `.breadcrumb a:hover, .breadcrumb a:active
{        |                                                                               |
|             | color: purple;
|             | }                            |
|             | `.bgbreadcrumb
{        |                                                                               |
|             | display: block; margin: 0 0 10px 0;
|             | padding: 10px 14px;
|             | background-color: transparent;
|             | border-bottom: 1px solid #dddddd;
|             | }                            |
| Task List    | Font color and size of this section can also be controlled. In addition, the task sequence can be managed by administrators when adding steps to a process in Onboarding Administration. | `MyOnboardingTasks1 (508)
[section-title
{        |                                                                               |
|             | display: block;
|             | font-size: 1.6em;
|             | color: black;
|             | font-weight: bold;
|             | padding: 0 0 6px 0;
|             | }                            |
|             | progressBar .htmleditor
{        |                                                                               |
|             | font-family: Arial, Times New Roman, Verdana, Sans-Serif;
|             | font-size: 11pt;
<p>|             | }                            |
|             | List .list-column                                                            |</p>
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>HTML with Sample Values</th>
</tr>
</thead>
<tbody>
<tr>
<td>Onboarding</td>
<td></td>
<td><code>{ padding: 6px 0 6px 0; vertical-align: top; border: 0; margin: 0; border-bottom: 1px solid #da6b5; }</code></td>
</tr>
<tr>
<td>Configuration</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Guide</td>
<td>Document List</td>
<td><code>{ font-weight: bold; display: inline; font-size: 1.2em; margin: 3px 6px 0 0; text-align: right; }</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td><code>{ display: inline; font-size: 1.2em; margin-top: 3px; text-align: right; }</code></td>
</tr>
<tr>
<td>Font color and</td>
<td></td>
<td>documentsListTitle .section-title</td>
</tr>
<tr>
<td>size can be</td>
<td></td>
<td><code>{ display: block; font-size: 1.6em; color: black; font-weight: bold; padding: 0 0 6px 0; }</code></td>
</tr>
<tr>
<td>controlled in</td>
<td></td>
<td>typeName .section-group-feature</td>
</tr>
<tr>
<td>this section.</td>
<td></td>
<td><code>{ font-size: 1.2em; color: #000000; font-weight: bold; display: inline; }</code></td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Section</td>
<td>Description</td>
<td>HTML with Sample Values</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>-------------------------</td>
</tr>
</tbody>
</table>
| Link List | Font color and size can be controlled in this section. | Links  
.section-title  
{ display: block;  
font-size: 1.6em;  
color: black;  
font-weight: bold;  
padding: 0 0 6px 0;  
} |
| General | The general section refers to the background and the different action links found in the New Hire Portal. | html  
{  
background-image: none;  
background-color: #ffffff;  
}  
body  
{  
background-image: none;  
font-family: Tahoma, Verdana, sans-serif;  
background-color: transparent;  
}  
links  
a, a:link, a:visited  
{  
text-decoration: underline;  
font-size: 1.3em; color: blue;  
}  
a:hover, a:active  
{  
color: purple;  
} |

**Custom New Hire Portal Themes for the Original Layout**

Custom themes for the original layout can be created and sent to Taleo for use in the New Hire Portal.

Customers' web design departments can work with Taleo consultants to define each theme, and it may require several iterations of design, upload, and testing before the desired look is achieved. For guidance on modifying
the theme of your New Hire Portal, contact your Taleo representative. Taleo Technical Services can also provide assistance for creating or adjusting the CSS in a custom theme if additional expertise is required.

The CSS for the original layout can be divided into sections to produce a custom theme.

- Layout
- Job Title and Contact Information
- Section Title
- Subsection Title
- Header

---

**Theme Sample Values for Original Layouts**

<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>HTML with Sample Values</th>
</tr>
</thead>
</table>
| Logo                     | This logo is used only in the top left corner with a place holder of 160 x 73 pixels. Provide the URL with the appropriate logo. | .logo
{  
  Background: url("http://pages.videotron.com/dix/PMGTaleo2.jpg")
o-no-repeat;
} |
| Job Title and Contact Information | These boxes contain the job title and contact information. The additional elements are the background color and the border. Font and style | .nhp-block-left
{  
  background: RGB(204,204,235);  
} |
<table>
<thead>
<tr>
<th>Section</th>
<th>Description</th>
<th>HTML with Sample Values</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>of the titles, content, and hyperlink, can also be controlled.</td>
<td><code>border: 1px solid #000099;</code>&lt;br&gt;{&lt;br&gt;.block-title&lt;br&gt;{&lt;br&gt;color: #000099;&lt;br&gt;font-size: 1.6em;&lt;br&gt;font-family: georgia, serif;&lt;br&gt;}&lt;br&gt;.nhp-block-left a, .nhp-block-left a:link, .nhp-block-left a:visited&lt;br&gt;{&lt;br&gt;font-size: 1.6em;&lt;br&gt;color: blue;&lt;br&gt;font-family: verdana, sans-serif;&lt;br&gt;}&lt;br&gt;.nhp-block-left a:hover, .nhp-block-left a:active&lt;br&gt;{&lt;br&gt;color: violet;&lt;br&gt;}`</td>
</tr>
<tr>
<td>Section Title</td>
<td>This is used to control the font color and size of the three sections in the main page of the New Hire Portal: My Onboarding Tasks, Documents and Links.</td>
<td><code>section-title&lt;br&gt;{&lt;br&gt;font-size: 2em;&lt;br&gt;color: RGB(102,153,153);&lt;br&gt;font-weight: bold;&lt;br&gt;}</code></td>
</tr>
<tr>
<td>SectionSubtitle</td>
<td>This is used to control the font color and size of the subtitle under the three sections My Onboarding Tasks, Documents and Links.</td>
<td><code>list-header&lt;br&gt;{&lt;br&gt;background-color: #483D8B;&lt;br&gt;font-size: 1.6em;&lt;br&gt;color: white;&lt;br&gt;font-family: sans-serif;&lt;br&gt;}&lt;br&gt;section-group&lt;br&gt;{&lt;br&gt;background-color: light blue;&lt;br&gt;}&lt;br&gt;a, a:link, a:visited&lt;br&gt;{&lt;br&gt;}</code></td>
</tr>
</tbody>
</table>
Password and User Name Synchronization between Career Section and the New Hire Portal

Passwords and user names changed in Career Section are automatically updated in the New Hire Portal. Passwords and user names changed in the New Hire Portal are automatically updated in Career Section.

When a new hire is onboarded, the password and user name they used in the Career Section is synchronized with the New Hire Portal. The new hire is then able to log into the New Hire Portal without having to create a new password or user name. If a recruiter resets a candidate password or user name when they are onboarded, the password or user name will be immediately reset in both the Career Section and the New Hire Portal. If a new hire decides to change his/her password or user name in the Career Section, that change will be immediately updated in the New Hire Portal.
If a new hire's password or user name is reset in the New Hire Portal, it is also reset in Career Section. If a new hire decides to change his/her password or user name in the New Hire Portal, that change will be updated in the Career section.

**Configuration**

The feature is not configurable.
New Hire Accounts

New Hire Account

New hire accounts are managed in the Onboarding User Account Management feature. This feature allows the system administrator to view the list of new hire accounts, modify information regarding the account and perform certain actions such as generating a password or locking an account.

The New Hire User Account contains the following information:

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
<th>Notes</th>
</tr>
</thead>
<tbody>
<tr>
<td>Personal Information</td>
<td>• Prefix, first name, middle name, last name, suffix&lt;br&gt;• Employee ID&lt;br&gt;• Email address&lt;br&gt;• Home phone number</td>
<td>Employee records are also maintained in external systems like the company's HRIS. In those systems, the employee is given a unique ID. The Employee ID field is necessary in order to create the employee record in Taleo when being fed over from an external system. However, the Employee ID is NOT necessary within Taleo Onboarding. The Email address field is automatically filled with the email address of the candidate when starting an onboarding process. The email address is editable. However, any changes made to it are not transferred in the candidate file in Taleo Recruiting. In Taleo Onboarding, each new hire has three separate fields for storing different email addresses:&lt;br&gt;• Corporate Address&lt;br&gt;• Personal Address&lt;br&gt;• Correspondence Address&lt;br&gt;By default, any email message sent to a new hire is sent to the Corporate Address. If this field is empty, the message is sent to the Personal Address. If this field is empty, the message is sent to the Correspondence Address. The email address displayed in the User Account Editor page is the address that was provided by the candidate when he or she applied in the Recruiting Candidate Section. It is stored in the Correspondence Address field of Taleo Onboarding. Updating this email address will not have any effect on Taleo Recruiting, since changes to Onboarding information never have an effect on Recruiting data. When a new hire is launched into Onboarding, the Corporate Address field is empty on purpose. A form can be used to input the new corporate address created for a new hire. Once created, the email address is saved into Taleo and all email messages are sent to that address.</td>
</tr>
<tr>
<td>Account Information</td>
<td>• User name&lt;br&gt;• Password and Confirm Password&lt;br&gt;• Password validity period&lt;br&gt;• Force user to change password at next login&lt;br&gt;• Send email with password to the user</td>
<td>The user name chosen by the candidate in the Career Section is transferred in Onboarding when the Onboarding process is launched. This user name can then be used by the new hire from then onward. Any changes made to the Onboarding user name do not affect the Career Section user name. Any changes made to the Career Section user name after Onboarding has been launched for the first time do not affect the Onboarding user name. If you do want an updated user name from the Career Section to get transferred into Onboarding after the first time Onboarding has been launched for a given new hire, there are two ways to update it: (1) manually make the change in the Onboarding User Account</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
<td>Notes</td>
</tr>
<tr>
<td>---------</td>
<td>-------------</td>
<td>-------</td>
</tr>
<tr>
<td></td>
<td>Management feature using the User Name field, or (2) restart the whole Onboarding process from the Recruiting Center with the option &quot;Overwrite Onboarding with Recruiting data&quot; turned on. This will have the effect of erasing all data that had been entered directly in Onboarding in the past about this new hire, including the old user name, and will replace this with any data that is held on the recruiting side.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>The password chosen by the candidate in the Career Section is transferred in Onboarding when the Onboarding process is launched. This password can then be used by the new hire from then onward. Any changes made to the Onboarding password do not affect the Career Section password. Any changes made to the Career Section password after Onboarding has been launched for the first time do not affect the Onboarding password. If you do want an updated password from the Career Section to get transferred into Onboarding after the first time Onboarding has been launched for a given new hire, there are two ways to update it: (1) manually make the change in this User Account Management feature using the Password field, or (2) restart the whole Onboarding process from the Recruiting Center with the option &quot;Overwrite Onboarding with Recruiting data&quot; turned on. This will have the effect of erasing all data that had been entered directly in Onboarding in the past about this new hire, including the old password, and will replace this with any data that is held on the recruiting side. By default, the password validity period is unlimited. However, this does not mean that the new hire may continue to log into the New Hire Portal forever; the new hire can log into the New Hire Portal only while his or her process is in progress. Any new hire who tries to log into the New Hire Portal after their process is completed or canceled will not be allowed to access the portal nor its tasks, forms, documents, or links.</td>
<td></td>
</tr>
</tbody>
</table>

**Viewing Information on a New Hire Account**

**Prerequisite**
The Manage New Hire User Accounts permission is required.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Search for a new hire account using the View filter or the Refine by filter.
2. Click on the user account.
3. Click Show to view the information.

**Editing the Personal Information of a New Hire Account**

**Prerequisite**
The Manage New Hire User Accounts permission is required.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Edit next to Personal Information.
3. Edit the information.
4. Click Save.

Generating a New Hire Password

**Prerequisite**
The Manage New Hire User Accounts permission is required.

You may need to generate a password if, for example, the user does not have his or her user name handy or does not have an email address to receive a temporary access code.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Generate Password.
3. Specify if you want to send an email to the new hire containing the new password.
4. Click Yes in the confirmation message box.

**Result**
The password is generated and it is displayed on the screen. If you chose to send an email to the candidate, the password is still displayed on the screen and the candidate will receive the password by email.

Forcing a Password Change at Next Login

**Prerequisite**
The Manage New Hire User Accounts permission is required.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Edit next to Account Information.
3. Select the option *Force user to change password at next login*.
4. Click Save.

**Result**
When logging in the New Hire Portal, the new hire will have to change his or her password.

Setting a Password Validity Period

**Prerequisite**
The Manage New Hire User Accounts permission is required.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Edit next to Account Information.
3. Specify if the password is always valid or valid for a specific period.
   Use the calendar icon to specify a date.
4. Click Save.

Activating a New Hire Account

**Prerequisite**
The Manage New Hire User Account permission is required.
The status of the new hire account must be Inactive.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Activate.
3. Click Yes in the confirmation message box.

**Result**
You may want to Deactivate a new hire's account to prevent the new hire from logging into the New Hire Portal for a period of time. Then this is useful when it's time to reactivate them.

Deactivating a New Hire Account

**Prerequisite**
The Manage New Hire User Account permission is required.
The status of the new hire account must be Active.

*Configuration > [Onboarding] Administration > User Account Management*

**Steps**
1. Click on a new hire account.
2. Click Deactivate.
3. Click Yes in the confirmation message box.

**Result**
The new hire account is deactivated. This function can be used, for example, to prevent a new hire from logging into the New Hire Portal for a period of time.

Locking a New Hire Account

**Prerequisite**
The Manage New Hire User Account permission is required.

You may need to lock a user account if, for example, the user was fired. As soon as the onboarding process for a person gets canceled, the person is no longer able to access his account. However, you may want to lock or deactivate an account immediately because it may take a bit longer to cancel the process, or if the process has some additional alternative non-hiring steps that should be allowed to continue for a while.
Configuration > [Onboarding] Administration > User Account Management

**Steps**

1. Click on a new hire account.
2. Click Lock.
3. Click Yes in the confirmation message box.

**Result**

The new hire can no longer access the New Hire Portal.

---

**Unlocking a New Hire Account**

**Prerequisite**

The Manage New Hire User Account permission is required.

**Steps**

1. Click on a new hire account.
2. Click Unlock.
3. Click Yes in the confirmation message box.

**Result**

The new hire can access the New Hire Portal as long as he or she has an Onboarding process in progress.

---

**Deleting a New Hire Account**

**Prerequisite**

The Manage New Hire User Account permission is required.

**Steps**

1. Click Delete next to the new hire account.
2. Click Yes in the confirmation message box.

**Result**

The new hire's information is removed from the system. However, the basic user name and password are retained and the user may be recovered later, if needed.
Images and HTML Editors

- Rich Text, Graphic and Video with the HTML Editor.................................127
Rich Text, Graphic and Video with the HTML Editor

The HTML Editor enables rich text content to be configured for display on the New Hire Portal and in correspondence.

The HTML Editor allows system administrators to create rich text areas that provide appealing and informative information to new hires and email recipients. The HTML Editor is used to create content for:

- display properties in the header and footer.
- portals in the welcome message and instructions.
- message templates in the body of email messages.

The HTML Editor is a WYSIWYG editor allowing system administrators to create text using bold, underline, italics and fonts of different styles, colors and sizes. It also allows the use of images, hyperlinks, bullets, spelling checker, and other elements.

The HTML Editor provides a Source mode that toggles the appearance of the HTML Editor to display the actual HTML instead of the WYSIWYG output. This allows system administrators to insert their own HTML designs into these text areas.

Clicking the square screen icon button in the lower right of the toolbar shows an expanded view of the text area, providing a better view of work for large text areas.

Note that certain types of HTML cannot be added into these HTML areas, due to security concerns against running dynamic and potentially malicious code and scripts. The following elements will not be saved within the HTML Editor when Save is clicked:

- Flash images
- Video clips
- Other dynamic content

However, many other appealing types of HTML can be added in these areas, without being stripped out when Save is clicked:

- images of any shapes or sizes, hosted on any Web server accessible by the new hires.
- images hosted by Taleo. See Uploading an image.
- animated gif files, which can resemble videos and provides motion on the page.

Any image can be displayed in the HTML Editor and it can also be made to behave as a hyperlink. You can therefore present a video experience within a New Hire Portal. See Linking a Video in the HTML Editor.

Linking a Video in the HTML Editor

Prerequisite

The HTML Editor is available in the Display Properties, Portals and Message Templates features.

Steps

1. In the HTML Editor, insert an image taken from the opening shot of the desired video clip.
2. Create a hyperlink on this image. This will launch a new browser window containing the URL of the place where the actual video is hosted.
Hosting services can be used to house the actual video, or public sites such as YouTube.

3. Click Save.

Result

When new hires click on the image of the video, a new window appears where they can watch the video without losing the original browser that was displaying the New Hire Portal.

Deleting an Image

**Prerequisite**

*Configuration > [Onboarding] Administration > Images*

**Steps**

1. Click *Delete*.

Uploading an Image

**Prerequisite**

Images can be used in New Hire Portals and in correspondence.

Only jpg, gif and png formats are supported.

File size limit for one image is 20 Kb. File size limit for all images in a zone is 25 Mb.

*Configuration > [Onboarding] Administration > Images*

**Steps**

1. Click *Create*.
2. Enter a code and a description.
3. Click *Browse* to upload the image.
4. Click *Save*.
5. Click *Show* next to Preview to view the image.

Using an Image

**Prerequisite**

Ensure you have uploaded images into the system.

**Steps**

1. In the Images area, copy the URL where the uploaded image is hosted.

   For example: https://taleo.bigbank/images/imagemame.png

2. From the area where the image should be displayed in the HTML Editor, select the image tool and place the URL on the page.
External Services

Services provided by certified third parties, that engage users outside of the Taleo system, can be integrated into the onboarding process.

An organization can choose to have services executed by an external provider. An external service can supply services such as collecting information for tax withholding purposes.

Services must be certified and integrated by Taleo before they can be used in an onboarding workflow. Once the service is made available, users with the manage service configuration permission can activate and deactivate services and modify them as required.

When a service is active, any onboarding administrator can create tasks to interact with it. Values returned from the external service can be used as conditions to drive or direct subsequent tasks. External services tasks are added with other tasks to create the Onboarding workflow.

Users can create a specific message template with a link for the new hire to visit an external services website to complete a task, if required. If no message template is specified or activated a generic, default message template will be sent. New hires may be asked to provide their standard Taleo user name and password which gives them access to, and authenticates their use of, external services websites.

External services accept standard and customized settings. The standard settings include result validity period, sender identifier, expectant reply time constraint and request time out time constraint. Taleo consultants add custom settings to a service, enabling administrators to use the them in onboarding workflows. For instance, a service may want to include a company identifier to be used in each new hire interaction, so a Taleo consultant will add that setting to the service.

Once a new hire has completed their tasks, the results can be viewed in user-defined forms and can also be used to drive conditional workflows. When setting up your forms, selecting the ServiceResult category displays all fields relating to the providers. By placing these fields in your form, along with making them a URL field type, the results can be viewed by assignees and task owners. Similar to forms, in the condition editor you can also make use of the ServiceResult fields.

Setting up Your System for External Services

The system administrator and Taleo Support are required for setting up external services.

The following set up is required in the Onboarding Configuration module:

- Adding an External Service
- Granting User Permissions

Adding and Activating External Services

A system administrator cannot add an external service. External services are added by Taleo support.

Activating an External Service

Prerequisite

The Manage service configuration user type permission must be granted in the SmartOrg User Type feature.

The external service must be inactive.
Configuration > [Onboarding] Administration > Services

Steps

1. Click the name of an external service.
2. Click *Edit* to display the external service properties page.
3. Click *Activate*.
4. Click *Save*.

Deactivating an External Service

**Prerequisite**

The *Manage service configuration* user type permission must be granted in the SmartOrg User Type feature.

Onboarding Administration > Services

Steps

1. Click the name of an external service.
2. Click *Deactivate*.

Result

The external service is unavailable for use.

Granting User Permissions

Both Recruiting and Onboarding specific user permissions are required to use external services.

While these user permissions are required to work with external services in the configuration module, some actions can still only be performed by Taleo Support.

Granting Permission to Configure Services

**Prerequisite**

*Configuration > [SmartOrg] Administration > User Types*

Steps

1. Select the required user.
2. Select Recruiting.
3. Click *Edit*.
4. Select Screening/Request services from Taleo partners
5. Click *Save*.
6. Click *Edit* and select Administration/Manage service configuration.
7. Click *Save*.
Reference: External Services User Permissions

In order to configure external services, the appropriate user permissions are required.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Request services from Taleo partners</td>
<td>This screening permission is required for the user and that the partner will use for authentication, so the partner can communicate with passport web services.</td>
<td>Yes</td>
</tr>
<tr>
<td>Manage service configuration</td>
<td>This displays the Services section in the Onboarding configuration module.</td>
<td>Yes</td>
</tr>
</tbody>
</table>

Configuring External Service Details

An external service is composed of multiple mandatory and optional details that must be configured correctly for an external service to work as expected.

The main external service details are as follows:

- **Properties and Settings** - the options available in these sections are the same regardless of the external service and include some mandatory values.
- **External Service Fields** - while the supported field types are the same regardless of the service, the fields themselves are service specific.
- **External Service Correspondence and Forms** - these enable WebTop users to receive data from and communicate with external services.

Properties and Settings

Properties and settings provide configuration options that are applied globally to the external service.

The properties provide name and description fields, in addition to the type of service and whether it is active. A service can accept four standard, generic settings or Taleo consultants can add customized settings to suit the service and implementation specific considerations. Once added, system administrators can set their values. The four settings are:

- Validity period
- Candidate must answer email within [hours]
- SenderID
- Delay to wait before timing out a request [hours]

Editing Service Properties and Settings

**Prerequisite**

The *Manage service configuration* user type permission must be granted in the SmartOrg User Type feature.

*Onboarding Administration > Services*
Steps

1. Click the name of a service.
2. Click Edit.
3. Modify the properties and settings as required.
4. Click Save.

External Service Fields

Fields are used for sending data to and from the external service.

External Service Input Fields

Input fields are created as default values, to be used in each new hire transaction based on the service.

The external service controls which input fields are available for each implementation. The values that can be entered into these fields are dependent on what the external service provider offers. The administrator can enter values into these fields while defining the Onboarding task. At runtime these are the initial default values for each new hire.

The Input Fields are unique for each service.

Result Fields

A result field is similar to a User Defined Field which receives each new hire's results after they complete their interactions with the external service provider.

A result field is a field for which a partnering service will send one result value per service request. Result fields are specific to the service, therefore depending on the service used, the result fields displayed will differ from one service to another.

The result fields are used to build User-defined forms and conditions. They can also be added to PDFs, emails and conditions.

Only Taleo consultants can create or amend result fields.

Result Set Fields

This section of the Services detail page is not used at this time.

Correspondence

Each new hire may need to visit the external service provider's site in order to interact with the service. The Onboarding administrator can configure a message template which will be sent to the new hire, if required, containing an explanation and a clickable invitation.

This message template can contain any personalized tokens as usual, and it also must contain a URL token which leads to the external service. This URL must use the token {ServiceURL.ExternalServiceUrl}. When the new hire gets assigned this task and receives this email correspondence, they must click on the link in the email. This will launch a web browser with an authentication page just like the new hire portal, and then they will be brought directly browser to visit the service.
If no specific message template is provided for each external service task, or if the selected message template is not active, then Onboarding's generic built-in default will be sent to the new hire instead.

**Editing Correspondence**

**Prerequisite**
The administrator must have *Manage service configuration* and all applicable correspondence user type permissions.

*Configuration > [Onboarding] Administration > Services*

**Steps**
1. Click the name of a service.
2. Click *Edit*.
3. Add to or modify correspondence as required.
4. Click *Save*.

**Selecting External Services Message Template**

**Prerequisite**
The *Manage service configuration* user type permission must be granted. The message template to be selected must be activated to be used within a workflow.

*Onboarding Administration > Services*

**Steps**
1. Select service to which the message template will be added.
2. Click *Edit*.
3. Click *Select*.
4. Select message template.
5. Click *Select*.
6. Click *Save*.

**Result**
The message template added to the Correspondence section, if activated, will be sent by the system. If the message template is not activated the generic, default message is sent.

**External Services Tokens**

Tokens are available to display the result values received for new hires from external services and to provide hyperlinks to details on the new hire kept on the external services site.

External service partners return various result fields to an Onboarding form for each new hire, during or after their service has been completed. This information can be displayed in a message template or on a form by using tokens with the proper service name, accessed via the ServiceResult category of the Field Chooser. For instance, Tax Partner ABC may send back two results fields and these tokens may be named 'ServiceResult/UDFResult_TaxPartnerABC:TaxResult1' and 'ServiceResult/UDFResult_TaxPartnerABC:TaxResult2'. Placing these tokens onto a form in read-only or using them in a message template will ensure that each new hire's results are shown to the assignee of these tasks.

Hyperlinks are useful when information is accessible only via the partner's site. Sometimes the service providers retain additional details about each new hire and they always retain any PDFs or other files that were generated while performing their services. This information cannot be viewed within Taleo Onboarding, however;
hyperlinks can be added to any Onboarding form, which will bring the form assignees directly to the service provider website to access this information. Typically this token is given the name 'More Details' by the service provider. For information on using hyperlinks, see *Adding a Static Hyperlink in a User-defined Form*.

The number and type of tokens available is wholly dependent on which services are used in your Onboarding implementation.

**Reference: External Service Details**

List of settings available for external services.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the specific service.</td>
<td>Properties</td>
</tr>
<tr>
<td>Description</td>
<td>Description of the specific service.</td>
<td>Properties</td>
</tr>
<tr>
<td>Provider Name</td>
<td>Name of the external services provider.</td>
<td>Properties</td>
</tr>
<tr>
<td>Provider Description</td>
<td>Description of the external services provider.</td>
<td>Properties</td>
</tr>
<tr>
<td>Type</td>
<td>This relates to the screening user type permission designation of Taleo partners and is reserved for internal use.</td>
<td>Properties</td>
</tr>
<tr>
<td>Status</td>
<td>Once deployed to a zone by Taleo Support, this indicates whether the service is active and available.</td>
<td>Properties</td>
</tr>
</tbody>
</table>
| Validity Period          | The length of time that any prior results are valid, before a new request gets initiated to the service provider. In some situations, one new hire might get assigned to visit the same partner more than one time. For instance, he or she is being onboarded again for another job or his or her prior Onboarding process was restarted. This setting controls whether a new request will be sent to the partner or whether the previously-received results from this partner will be used because they are new enough to be still acceptably valid. There are three possible values:  
  - Always Valid: the original results will be reused forever.  
  - Defined by Partner: the partner determines the length of time until a new request is necessary  
  - Defined by User: the setting now displays a field for inputting the number of days, to be used anytime this service is called in any task in this zone  
The Validity Period is calculated starting at the moment when either the user clicks the ServiceURL in the email or the KioskLink in the form at the start of the prior transaction or at the Results-Returned Date at the end of the prior transaction. | Settings |
<p>| Candidate must answer email within (in hours) | This indicates the maximum length of time a new hire has to answer the email sent as part of the external service task. If the new hire | Settings |</p>
<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>senderId</td>
<td>Alphanumeric value used to identify the email sender for the service.</td>
<td>Settings</td>
</tr>
<tr>
<td>Delay to wait before timing out a request (in hours)</td>
<td>When an action is initiated to contact the external service provider, this setting indicates how long Taleo will try to establish a successful connection.</td>
<td>Settings</td>
</tr>
<tr>
<td>Code</td>
<td>This is the system name used for the fields.</td>
<td>Input Fields/Results Fields/Result Set Fields</td>
</tr>
<tr>
<td>Name</td>
<td>This is the name associated with the field. Each active language in your system can have a specific value for the name.</td>
<td>Input Fields/Results Fields/Result Set Fields</td>
</tr>
<tr>
<td>Domain</td>
<td>This is the type of value that can be used by the fields, such as number, text, boolean or currency.</td>
<td>Input Fields/Results Fields/Result Set Fields</td>
</tr>
</tbody>
</table>

**Troubleshooting External Services**

You can troubleshoot issues dealing with the interaction between the external service and the onboarding process flow only. All other external service problems are handled by Taleo Support.

If an error is due to the onboarding process as it applies to the external service an Onboarding Administrator can attempt to fix the problem. You should first go to the process flow and check the history section for external service error information. There you could tell if a service has been mistakenly deactivated or never activated initially. After correcting the problem you would go to the task itself and click the Retry button to restart the process at the breaking point.

If you see an external services task in the Steps list that has an Error or Canceled status, viewing the history may indicate that an Error Occurred event has taken place. Such as, The following error occurred while requesting the service "Check Credit History" to provider ABC Check: "The previous service request is still active (90891209)". If that has led to a Cancelled status, you can access the task and click Retry, however, if it leads to another error occurred event then it may mean Taleo Support will be required.

Caution, only 2 retries are allowed. If you go over the allotted number of tries the problem must be elevated to Taleo Support and the process must be restarted from the beginning.

If the error is due to issues around the external service you must contact Taleo Support for assistance. Taleo Support has access to a detailed history of each step of the transactions with external services. They can diagnose any errors, contact the external service or advise you on how to correct the situation.
Processes and Tasks

- Processes and Tasks Overview................................. 138
- Tasks...................................................................... 139
- Processes.................................................................. 146
Processes and Tasks Overview

An onboarding process is comprised of steps and transitions that need to be performed, referencing available tasks, ensuring that new hires are integrated successfully into your company.

Once you have created a suitable library of tasks, you can then begin creating processes that use these tasks. It is the steps and transitions that reference the tasks for inclusion in your process. These steps should make sure that this new hire's onboarding experience is a positive one.
Tasks

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 by pulling in the task to specific steps within the process.

Tasks have to be precreated and stored in the library. Because tasks can be used by several processes they cannot be modified after their activation. You must first deactivate a task to modify it.

Creating a Task

A task consists of a mandatory definition, detailing its action, and optional notifications and reminders.

The task definition indicates which of six action types the task is going to perform:

- Ask assignees to complete a form
- Send a correspondence
- Ask a person to execute a task manually
- Ask a person to open a PDF
- Make the system execute a task
- Make a request of a third-party provider, via an external service

Notifications are used to inform the assignee that the task must be completed or the owner of the process that the task has been completed.

Reminders are used for tasks that are not completed on time and can be sent to assignees or process owners.

Creating a Task Definition

Prerequisite


Steps

1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines as required.
   Guidelines are displayed to new hires when the task is assigned to them, if using the enhanced layout in the New Hire Portal.
4. Select a type and priority.
   Priority is displayed to assignees in the New Hire Portal and WebTop, while type can be used to generate reports by type of tasks.
5. Select the action the task will perform and the associated related source, from amongst active sources.
   For details on the Action types, see Task Definition Action Types.
6. Click Save.
Next Step
After completion, if required you can configure a notification and/or a reminder.

Creating a Task Reminder

Prerequisite

Steps
1. Select the task.
2. Click Create.
3. Select whether you wish to send the reminder to the assignee or the process owner.
   Your selection can help in case an escalation is needed, such as if a task becomes seriously overdue.
4. Set Triggering Time and Triggering Unit and whether it should occur before or after the due date.
5. Click Search to select the reminder message.
6. Click Save.

Result
The Reminder is added to the Reminder list.

Deleting a Task Reminder

Prerequisite
The task is deactivated.


Steps
1. Select the task.
2. Click Deactivate.
   A delete button appears in the Actions column of the Reminders list.
3. Click Delete.
4. Click Activate.

Result
The Reminder is deleted.

Creating a Task Notification

Prerequisite

Steps
1. From the Task Definition list, select the task definition.
2. Click Edit.
3. Click Search for Task Assignment Correspondence, sent to assignees, or Task Completion Correspondence, sent to owner, to select the appropriate message template.
4. Click Save.

Editing a Task Definition

**Prerequisite**

*Configuration > [Onboarding] Administration > [Processes and Task Definitions] Task Definitions*

**Steps**

1. From the Task Definition List, select the task definition.
2. Click *Edit*.
3. Make changes to the settings as required.
4. Click *Save*.

### Task Definition Action Types

<table>
<thead>
<tr>
<th>Type of Action</th>
<th>Description</th>
<th>Related Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Send Correspondence</td>
<td>An email message is sent to one or more recipients, which can include the Additional Recipients list if the normal assignees of the task are not sufficient.</td>
<td>List of existing message templates. The normal assignees consist of anyone on the To, CC, BCC lines in the Message Template, along with anyone to whom this task gets assigned when it is built into a process. Additional recipients can only be specific free-form email addresses and not tokens that represent roles. An example of an additional recipient would be a mentor. For information about correspondence tasks specific to mentors see <em>Mentors for New Hires</em>.</td>
</tr>
<tr>
<td>Fill user-defined form</td>
<td>Assignees asked to complete a user-defined form.</td>
<td>List of existing, user-defined forms.</td>
</tr>
<tr>
<td>Execute the task manually</td>
<td>A task with only the completion option (cancel or complete). With manual tasks you can simply ask someone to perform a task and you will receive an acknowledgment of completion (tracking). Details regarding the task are contained in the task description field.</td>
<td>N/A</td>
</tr>
<tr>
<td>Open PDF</td>
<td>A PDF file, that can contain specific tokens, gets assigned here by the administrator to the assignee as a task. The assignee can complete the task simply by opening the PDF. After it gets assigned to the new hire, then WebTop users can access it on the New Hire page. It can also be exported via Taleo Connect Client.</td>
<td>List of precreated PDF documents.</td>
</tr>
<tr>
<td>System Task</td>
<td>Reserved for future use.</td>
<td>Reserved for future use.</td>
</tr>
<tr>
<td>Request External Service</td>
<td>A third party is the approved vendor for a specific service or product, such as I-9 form completion or help with tax form completion. When this type of task is part of the onboarding process, it makes a request to a third-party provider to perform the type of service configured here.</td>
<td>Once Request External Service is selected the user is presented with new fields relevant to the service. The Administrator chooses among any activated external service providers and then they can</td>
</tr>
<tr>
<td>Type of Action</td>
<td>Description</td>
<td>Related Source</td>
</tr>
<tr>
<td>----------------</td>
<td>-------------</td>
<td>----------------</td>
</tr>
<tr>
<td></td>
<td>configure any of the Input Fields that are requested or required by that selected partner.</td>
<td></td>
</tr>
</tbody>
</table>

**Certified Passport Partners Can Support Multiple Assignees**

Passport partners that have been certified for multiple assignees can provide services that require participation from multiple people in different roles.

The Passport partner determines how many different phases and participants are needed to complete an activity that will fulfill the Onboarding task. The Taleo Certification Lab helps the partner get certified to support the required invitations and updates. The Passport service must be configured on the Onboarding zone to align appropriate messages with the specific people involved in task participation. The service must then be assigned to a task in an Onboarding process.

When the process is implemented for a new hire and the task associated with the Passport service is started, each participant in the task activity gets notifications at the appropriate activity time. The notification, by email and also by task for the new hire on the New Hire Portal, can invite them to visit the partner site. All participants in the Passport task activity can receive updates anytime during the task activities, if provided by the partner. When participants complete their work, the Passport task becomes complete and the Onboarding process continues.

If the Passport partner needs an Onboarding WebTop user, recruiter, manager, or other role to participate in an activity to fulfill an Onboarding task, the participant receives an email to visit partner site. The email contains a URL to the partner site and the recipient is authenticated using Taleo credentials. Once at the partner site the participant can complete forms, view partner's dashboard or other pertinent information.

If the Passport partner needs a new hire's participation in an activity to fulfill an Onboarding task, the new hire will receive an email with a clickable link and a task on the New Hire Portal with identical information as in the email. The invitation email and the New Hire Portal task contains a URL to partner site. The new hire is authenticated using Taleo credentials at the partner site to complete forms or other required activity. The task remains in the New Hire Portal until the whole passport task is complete.

**Limitations**

There are several limitations that may be changed in future product releases:

- No reminder task appears on the WebTop task list.
- If an invitation recipient is defined as a functional role, and there are multiple appropriate invitees configured for the Organization, Location, and Job Field for the task, only one person will receive the email.
- Task activities cannot be transferred or delegated after emails are sent to participants. Users can only be replaced by restarting Onboarding processes.
- Interim notifications can only be sent by partners, if provided.

**Configuration**

Partners must get certified to use Invitations in Onboarding. Invitations are messages used to communicate with task activity participants and contain either participation invitations or information updates. An Invitation is configured by the Onboarding Administrator with a specific message template and an assignee recipient for the specific activity within the task. The messages are received by each assignee at the appropriate time to complete the Onboarding task. Assignees can be an explicit user or a functional role. Choosing a functional role will only send the Invitation to one person in that role. If no Message Template is chosen, the default, new hire appropriate, General Validation Request will be sent.
New Hire Can Receive Passport Invitations on New Hire Portal

In the New Hire Portal, new hires can open correspondence tasks that contain a URL to partner Web sites. New hires typically have to complete tasks at these external service sites.

When an Onboarding process requires new hires to complete a Passport task, the new hires have a corresponding correspondence task. The users click the task to view the invitation to access the external service partner's Web site. The invitation typically uses the General Validation Request message template.

If the message contains a link to the Passport partner's Web site and the new hires click the link, they are redirected to the partner's Web site. Whether the site is displayed in a separate window or not is determined by the configuration of the message template. Whether user authentication at the site is automatic or not is at the discretion of the partner.

New hires might want to return to the task list from a Passport partner's Web site. If they click the Back button in their browser, this action might be unsuccessful when they have been redirected to the site from the main window and the Activate Secure Login setting in Configuration is set to Yes. To return to the task list, the users might have to log into the New Hire Portal again.

On the other hand, if the message template used for inviting new hires is configured to open the Passport partner's Web site in a separate window and the Activate Secure Login setting in Configuration is set to No, clicking the Back button typically returns the user to the task list and the New Hire Portal.

The task status is "In Progress" until the new hire completes the entire task. The progress can be monitored on the Onboarding WebTop by viewing the associated system task. Once the new hire completes the Passport task, the latter is deleted from the task list on the New Hire Portal.

Configuration

When configuring the service in the zone, Onboarding administrators can create a message template to explain the work the new hire must perform. They can then select the template for use. This template must contain the correct URL to the partner's Web site for proper task completion. If no message template is chosen, the default template is used.
Mentors for New Hires

Onboarding customers can automate the mentoring process to help welcome and assimilate a new hire.

New hire mentoring programs formally pair the new hire with more experienced employees to help the new hire obtain information, get advice and learn the company culture. Studies show that new employees who are paired with a mentor are twice as likely to remain in the job and are more productive quicker than those who do not receive mentorships.

The new hire can also be paired with another new hire or a peer to encourage communication and provide camaraderie.

Mentoring is also used to prepare new or veteran employees for leadership or executive roles.

Creating Forms to Assign Mentors

Onboarding Administrators can use the following tokens to create mentor forms:

- MentorEmail
- MentorFirstName
- MentorFullName
- MentorInitial
- MentorLastName
- MentorPrefix
- MentorSuffix
- MentorTitle

Assigning Mentor to New Hire

When the Onboarding process is running for each new hire, the form assignee must provide information about their mentor by typing in the name, e-mail address, and any additional information.

Mentors do not have to be first entered as users in the Taleo system, as Hiring Managers or Recruiters are entered. They can be anyone within the organization or anyone desired at all. Users can use mentor tokens to assign a mentor to each new hire. These tokens are found in the User-defined form editor category of “Requisition Owners.”

Mentors are Not Assigned Tasks

Because mentors may not in the system you cannot directly assign tasks to them.

Using Mentor tokens in Forms, PDFs, and Correspondence

The information that has been entered for each new hire can now be used just like any information about them or the process. The name or title or e-mail address of the mentor can be displayed on forms or PDFs, or can be used to e-mail the new hire to introduce their new mentor.

Sending Correspondence to Mentors

The token {RequisitionOwners.MentorEmail} can be used by the Onboarding Administrators on Message Templates. The token can be used on the TO, CC or BCC line in order to send messages to the mentor. However, because tasks cannot be assigned directly to mentors, please note that there must be a different assignee in addition. In other words, when the Onboarding Administrators creates the step during implementation, a regular
SmartOrg user must be designated as the task assignee. This person will also receive the correspondence, in addition to the mentor who was listed on the Message Template recipient line.

**Retrying a Canceled Task from the Onboarding Webtop**

Regardless of how well a task has been configured, there are instances when tasks will be canceled and you need to attempt to retry them.

Once a process has begun and is being tracked from the Onboarding WebTop, if an error occurs and it is canceled, you can retry the task.

**Retrying Canceled Tasks**

**Steps**

1. Wait until the overall situation which caused all of the errors is corrected, for example the password is refreshed.
2. Find each Step that is in Canceled status.
3. Open Canceled steps to find Tasks in Error status.
4. Click *Retry*.

**Result**

The task should go into the status of In Progress and progress to Completed status. If the overall error situation persists, then the task reverts to Error status. The Retry button is only available twice, to execute each task a maximum of three times. After this limit is reached, the individual tasks can no longer be executed at breaking points, instead the whole onboarding process must be canceled and restarted.
Processes

An onboarding process is comprised of steps and transitions that are performed in order to ensure the smooth integration of a new employee.

Appropriate onboarding processes for your company must be defined. You can target different onboarding processes to specific audiences according to Organizations, Locations and Job Fields.

A process includes steps which in turn include tasks. Once tasks are created and you have a suitable task library, a process can be created. In a single process, multiple steps can be configured to be assigned concurrently or you can specify that a task must be complete before the process continues.

Transitions must be created between steps. For example, you could specify that the “Complete personal information” task is to be performed before the “Send thank you correspondence” task. This could guarantee that you will have the new hire's information needed to populate the correspondence.

You can also configure steps to be assigned based on whether or not some condition is met, by adding a condition to a transition. This enables steps to take place based on conditions, such as whether the value contained in the new hire's job field is that of a salesperson or regional manager.

Process Statuses

Processes can be in Active, Inactive, or Draft status.

The status of a process effects the availability of a process for a new hire when the onboarding process is first launched, if changes can be made to a process, or if it can be deleted.

Active

An Active process is available to launch for new hires. Taleo Connect can only launch processes that are Active.

An Active process cannot be modified in any substantial way. Steps within it cannot be changed or removed. To test a process, it must be activated. If changes are needed a duplicate process must be created. The duplicate will be created in Draft mode where changes can be made.

Inactive

A process that is in Inactive status cannot be seen or selected in Recruiting for candidates to be onboarded. Any new hires currently going through a process will not be affected if the process status changes to Inactive while they are being onboarded. Inactive process cannot be modified in any substantial way.

Draft

When processes are created initially they are in Draft status. A process that is in Draft status cannot be seen or selected in Recruiting for candidates to be onboarded. Processes in Draft status may be modified. Only processes in Draft status can be deleted.

Process Owner

The process owner has the responsibility of ensuring process completion. The owner can be an Onboarding Role, like the hiring manager, a Functional Role, or a specifically named user.

The intent of having a process owner is that there is a single responsible party for viewing, managing, and sharing processes. With the appropriate user type and permission, the process owner can view and execute all the tasks within the new hire's process, regardless of who is the assignee of each task. The process owner can reassign any task to a different assignee while a new hire's process is running, to prevent or recover from bottlenecks. The
process owner’s name and contact information can be configured to display on the New Hire Portal in case of questions, if the administrator has set this value in the Product Settings.

**Functional Roles as Process Owners**

If an onboarding process names a Functional Role as the process owner, the best matching user will be assigned as the process owner. There may also be users assigned to a Functional Role for a specific Organization, Location, and Job Field structure. Each functional role must have a Default Assignee. Onboarding will assign a user configured by OLF or a non-default assignee with no OLF as an Onboarding process owner before selecting a Default Assignee. The Default Assignee for a Functional Role will only be used if there is no other appropriate user available to fill the Onboarding process owner role.

**Supervisor**

The Supervisor is any person/people who are assigned to do almost all of the same things as the Process Owner. Anything the owner can do, the supervisors can do based on their individual permissions. A supervisor can be a role, like the hiring manager, or a specifically named user.

There are two ways for someone to be a supervisor:

- The administrator assigns users as supervisors for a process. This method happens in advance of assigning the process to a new hire. It occurs when the process is being configured by the Onboarding administrator.
- After the process has started running, an additional supervisor can be manually added by clicking the Share button on the New Hire page.

**Creating a Process**

**Prerequisite**

*Configuration > [Onboarding] Administration > [Processes and Task Definitions] Processes*

**Steps**

1. Click *Create*.
2. Enter the Code, Name, and a description.
3. From the Type list, select Process or Sub-process.
4. Specify the process owner, by searching for a role or specific user.
5. Select none, one or multiple Supervisors.
6. In the Guidelines field, enter instructions as needed, which will appear in the New Hire Portal.
7. Click *Save*.

**Editing a Process**

**Prerequisite**

*Configuration > [Onboarding] Administration > [Processes and Task Definitions] Processes*

**Steps**

1. Select the process to be edited.
2. Click *Edit*.
3. Make changes in fields as required.
4. Edit the steps and their transitions and conditions as required.
   - Note: the process must be deactivated or in draft state for this step.
5. Click *Save*. 
Associating a Process with Organizations, Locations and Job Fields

Prerequisite

*Onboarding Administration > Processes > [specific process]*

Steps

1. Select the process.
2. To associate the process to an Organization, Location or Job Field, click *Add* where relevant.
3. Select element.
4. Click *Select*.
5. Click *Save*.

Result

This process is only available to be used by a Taleo Recruiting user for a new hire when the requisition and process OLFs match. Processes that are not associated with OLFs can be used with new hires regardless of the associated requisition.

Deleting a Process

Prerequisite

The process must be in Draft status.

*Configuration > [Onboarding] Administration > [Processes and Task Definitions] Processes*

Steps

Click *Delete*.

Steps

A process contains steps. A step is information about the assignee and sequence of each task. Steps are created for each process as a container for reusable tasks. The tasks are generic; the step contextualizes the task into the process.

The steps represent the individual units of work done by people who perform the tasks. Business logic is embedded within the transitions between the steps, to ensure the correct routing of the work to be done.

<table>
<thead>
<tr>
<th>Step Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>The step consists of a task.</td>
</tr>
<tr>
<td>Sub-process</td>
<td>The step consists of a sub-process. A sub-process is a small process used inside a larger process</td>
</tr>
<tr>
<td>Routing</td>
<td>The step connects multiple parallel tasks together. Routing steps are like placeholder steps which do not contain any tasks to assign to any users.</td>
</tr>
</tbody>
</table>

Step Types

The first part of creating a step is to decide which type it will be.
<table>
<thead>
<tr>
<th>Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>The step will consist of a task selected from defined lists.</td>
</tr>
<tr>
<td>Sub-process</td>
<td>The step will consist of a sub-process. A sub-process is a small process used inside a larger process. For example, if you always reuse the same sequence for internal requests 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 reuse it in various processes to simplify management. Any modifications made to a sub-process after it was used in a larger process will have no effect. The larger process will take the workflow of the sub-process at the time that it gets incorporated.</td>
</tr>
<tr>
<td>Routing</td>
<td>The step will connect multiple parallel tasks together. Routing steps are like placeholder steps that do not contain any tasks to assign to any users. They are used to facilitate the workflow design for steps that split into parallel branches and then reconnect as needed. Standard tasks can also be used to handle branching and reconnecting, if their transitions are built to do so.</td>
</tr>
</tbody>
</table>

**Understanding Step Execution**

The three execute step options available for a task step, along with four different workflow scenarios, impact how you should execute steps.

The three options available for executing task steps should enable you to account for your company's specific process requirements, depending on whether certain steps are mandatory or optional and if subsequent steps can be repeated. The following scenarios should be considered, and used as best practice models, when implementing your step execution workflow:

- **All steps are required** - when there are multiple prior steps that transition into one main step and it should execute only after all prior steps are completed, then When all previous steps have been completed, must be selected. This means that the main step cannot begin until each prior individual step is complete.

- **One mutually exclusive step is required** - when there are multiple prior steps that all transition into one main step, but they are mutually exclusive based on conditions, then only one of these prior steps will ever be completed. In this instance, When One, and only one, of the previous steps has been completed, should be selected. This means the main step does not have to have to wait for all of the previous steps to be completed, as this will never occur and only result in stalling the overall process.

- **One or more steps may be completed** - when multiple prior steps all transition into one main step and one or more of them may eventually be completed, but you only want the main step to be executed once and then allow the process to progress further, When One, and only one, of the previous steps has been completed should be selected. This means that when the any of the prior steps is first completed, the main step can execute. Subsequently, if another prior step is completed it does not initiate a repeat execution of the main step.

- **One or more dependent steps may be completed** - when multiple prior steps transition into one main step and one or more of them may eventually be completed, and you want the main step to be executed each time one of the prior steps gets completed, you must select When one of the previous steps has been completed. This can be useful in an instance where someone wanted to receive an email anytime one of a group of prior tasks assignees completed their work.

Note: You must be sure not to view step execution options in isolation. While repeating a step may not impact the relationship between it and the prior step that caused it, it could have unwanted downstream implications for repeating other tasks.

**Creating a Task Step Using Step Wizard**

**Prerequisite**

To create a step, the process must be in Draft status.
**Onboarding Administration > Processes > [specific process]**

**Steps**

1. Select the process and click **Create** to display Step Wizard.
2. Select Task and click **Continue**.
3. Use Search button to select predefined task and click **Continue**.
4. Complete fields as needed.
5. To specify the order with which the tasks display, in the Sequence field enter desired numerical value. This action will only affect the display of the tasks. The true order in which the tasks are performed is determined by the transitions set.
6. In Duration field, enter the number of days required to perform the step. This will help calculate the due date of the step.
7. Select one or multiple Assignees who are to perform the step.
8. From the Execute Step list select when the task is to be performed.
   See **Understanding Step Execution** for more details.
9. From the After step execution list, you must select Execute all subsequent steps.
   **Note:** The After Step Execution option of Execute one of the subsequent steps is reserved for future use.
10. Click **Finish**.

**Next Step**

Create Transition if required.

---

**Creating a Sub-process Step Using Step Wizard**

**Prerequisite**

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

**Onboarding Administration > Processes > [specific process]**

**Steps**

1. Select the process.
2. Click **Create** to display Step Wizard.
3. Select Sub-process and click **Continue**.
4. Use Search to select predefined Sub-process and click **Continue**.
5. Complete fields as needed.
6. From the Execute Step list select when the sub-process is to be performed.
   See **Understanding Step Execution** for more details.
7. From the After step execution list, you must select Execute all subsequent steps.
   **Note:** The After Step Execution option of Execute one of the subsequent steps is reserved for future use.
8. Click **Finish**.

**Next Step**

Create transition if required.

---

**Understanding Routing Steps**

Routing steps are used to facilitate the workflow for steps that split into parallel branches and then reconnect as needed.
The example above considers that new hires may need certain things in order to proceed with their job, and in this instance it is the manager determines this. Such as, do they need to fill out forms for a company car and/or relocation expenses. The configuration of the above example leads to the following routing workflow:

- Create one form that gets assigned to the manager, which presents two UDFs that both have yes/no answers: Do the new hire need a car? Des the new hire need relocation reimbursement?
- Next build transitions with conditions that proceed from the form and cover each possible answer combination. These transitions need to have specific conditions that handle no-no, yes-no, no-yes, and yes-yes.
- For no-no, no additional forms must be assigned, and the transition should go straight into router step 'Does Nothing'.
- For yes-no, the transition should lead to one task (NH Form Car Preferences) and then that task should transition back into that same router step.
- For no-yes, the transition should lead to the other task (NH Form Relocation Preferences) and then that task should transition back into that same router step.
- For yes-yes, there should be two transitions out of the manager's form, in order to assign both the car and relocation tasks in parallel.
- Subsequently, each of these two tasks should have a transition to another small, yes-yes router. Only these two tasks feed into this router. The setting on this router must be to execute when all of the previous steps are completed, as we know that both are appropriate for the type of new hire who requires a company car and relocation expenses.
- Finally, this yes-yes router must have a transition out from it, into the final car-relocation router. The setting on this car-relocation router must be to execute when one and only one of the previous tasks is completed. This is because we know that each new hire will only execute one of the four inbound paths (no-no, yes-no, no-yes, yes-yes) and so only one of the prior tasks will ever get executed in a single process.
Creating a Routing Step Using Step Wizard

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

Onboarding Administration > Processes > [specific process]

Steps
1. Select the process.
2. Click Create to display Step Wizard.
3. Select Routing and click Continue.
4. Complete fields as needed.
5. To specify the order with which the tasks show on the New Hire page, in the Sequence field enter desired numerical value.
6. Use the drop down menus to select when the task is to be performed and what to do next.
7. Click Finish.

Next Step
Create Transition if required.

Transitions
Transitions must be created to link steps together.

You should create the transitions once you have completed the creation of all steps, as transitions are used to define the From step and the To step and require that the steps are in place as they are created from within a step.

When using the Process Viewer, transitions are represented by an arrow.

To Create a Transition

Prerequisite

Onboarding Administration > Processes > [specific process]

Steps
1. Select the process and step to access the Step page.
2. Click Create next to Transitions to access the Transition Wizard.
3. Indicate where the transition starts and where it goes next.
4. Click Continue and complete the fields as required.
5. Verify From Step and To Step.
6. Click Finish.

Next Step
You can add a condition to the transition.

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 quick visual of whether everything is connected together as intended.
Transition Conditions

You can add a condition to the transition between two steps, to control when and whether the next step should occur.

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 enables you to further tailor your process, expanding the scope of scenarios the process can handle.

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 X but not Y or Z. You can set different branches of the processes for different people. You can use organization, location or field values to drive the process, including customized user-defined fields.

Conditions are indicated in the preview process graphic mode with a bold or thick arrow, but no written details are available on the condition in the preview mode. If no conditions are applied, the arrow line depicting the transition is lighter in weight.

You should 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 in Active status. However you cannot change the tasks or transitions.

Once a process has been enabled, it cannot be modified for the most part. This is to ensure that all new hires associated with a process advance through the same series of steps. One exception to this is that the conditions on transitions between steps can be modified even while a process has Active status. Consequently, there is no need to create a duplicate (with Draft status) of the process if changes to the conditions to existing transitions between steps are required. This was actually the behavior prior to version 12C and has been restored in version 13A.

Time Based Condition

Time based conditions can be used to start or delay a process for a number of days before executing the next task.

When setting dates, always use is less than or equal to as the operator.

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 formula: “<= -5”. The negative sign indicates the countdown before start date, while the equals sign indicates when it should begin. 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, due to the inclusion of the '<' character.

- 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.

- In date formulas, 0 or zero means now or the current date.

For example, to set a condition to send a correspondence four days before the start the field values for this equation would be:

<table>
<thead>
<tr>
<th>Field</th>
<th>Process Assignment / Start Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Operator</td>
<td>Is less than or equal to</td>
</tr>
</tbody>
</table>
These date-based conditions can be configured to use AssignmentForCondition.StartDate, which refers specifically to the start date for the job, Process Start Date or LastPreviousStepEndDate.

LastPreviousStepEndDate is useful for waiting until a certain number of days after the immediately preceding task is completed. This means that negative numbers cannot be used with LastPreviousStepEndDate, as it is impossible to trigger a task days before its preceding task is supposed to be completed. Other dates such as “Expected Start Date” may be less reliable, and any changes that were made in Recruiting after the Onboarding process was started will not be transferred into Onboarding. However, Start Date changes are immediately transferred from Recruiting into Onboarding.

When calculating a condition start date, only working or business days are considered. That is, if working days are from Monday to Friday, then Saturday and Sunday are not considered in the equation. For example, if Saturday and Sunday 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.

**Conditions Based on Null Values**

Taleo Onboarding accepts null values for transition conditions for processes.

When creating a condition for a transition between steps in an onboarding process, an Onboarding administrator can select the operators of null or not null for the field specified in the condition. This allows the new hire or any other form assignee to either answer or not answer a question on a form that may or may not be applicable to them, with the lack of answer value being considered in the condition logic. Taleo Onboarding can then move forward through the onboarding process according to whether or not there is a value in the condition field.

Example:

If an onboarding process uses a form that includes a field asking the new hire to request a workplace accommodation, such as a screen reader or ramp, the condition for the transition could be set to null or not null for that field. This step has two possible transitions out to two possible steps. If the new hire needs an accommodation and enters the information, the field value would reflect not null. The transition would then go to a step that addresses filling the accommodation request. If the new hire does not need an accommodation and does not enter any information, the field value would be null. With this value, the transition would bypass the accommodation fulfillment step and skip to the next step in the process.

**Setting Hold Until Prior Task Completion**

You can make a task wait until a prior task completes by using the token LastPreviousStepEndDate.

By using the token LastPreviousStepEndDate from the CurrentProcess group, you can specify that a task will wait until a prior task hits its completion mark. You can also specify the number of days you want the process to wait before restarting.

**Creating a Condition**

**Prerequisite**

*Configuration > Onboarding Administration > Processes*
Steps

1. Open the process and access the transition.
2. Click Create.
3. Enter a descriptive name for the condition.
4. Select a field.
5. Based on the selected field, specify the appropriate operators and values.
6. Click Save.

Operators

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains</td>
<td>The element, word or number, entered in the Value field must be found anywhere in the field. For example:</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>Field: OnboardingProcess/ProcessName</td>
</tr>
<tr>
<td></td>
<td>Operator: Contains</td>
</tr>
<tr>
<td></td>
<td>Value: Computer Setup</td>
</tr>
<tr>
<td></td>
<td>The name of the onboarding process must contain the words &quot;Computer Setup.&quot;</td>
</tr>
<tr>
<td>Is</td>
<td>The element, word or number, entered in the Value field must be an exact match for the whole field.</td>
</tr>
<tr>
<td></td>
<td>For example:</td>
</tr>
<tr>
<td></td>
<td>Field: AssignmentOffer/Annual Bonus</td>
</tr>
<tr>
<td></td>
<td>Operator: Is</td>
</tr>
<tr>
<td></td>
<td>Value: 10%</td>
</tr>
<tr>
<td></td>
<td>The following task will only be reached if the annual bonus in the offer for this new hire is exactly 10%.</td>
</tr>
<tr>
<td>Is null</td>
<td>Value field is empty</td>
</tr>
<tr>
<td>Is not null</td>
<td>Value field is not empty</td>
</tr>
<tr>
<td>Is equal to</td>
<td>The resulting information must be equal to the numerical value entered in the Value field.</td>
</tr>
<tr>
<td>Is not equal to</td>
<td>The resulting information must not be equal to the value entered in the Value field.</td>
</tr>
<tr>
<td>Is less than</td>
<td>The resulting information must be less than the value entered in the Value field.</td>
</tr>
<tr>
<td>Is greater than</td>
<td>The resulting information must be greater than the value entered in the Value field.</td>
</tr>
<tr>
<td>Is less than or</td>
<td>The resulting information must be less than or equal to the value entered in the Value field.</td>
</tr>
<tr>
<td>equal to</td>
<td></td>
</tr>
<tr>
<td>Is greater than or</td>
<td>The resulting information must be greater than or equal to the value entered in the Value field.</td>
</tr>
<tr>
<td>equal to</td>
<td></td>
</tr>
</tbody>
</table>

Below examples are conditions used for the following fields:

- NewHireDemographicDescriptorForCondition / LicenceLocation
- NewHireLegalIdentifierForCondition / Residency
- PositionForCondition / JobField
- PositionForCondition / Location
- PositionForCondition / Organization
<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Is</td>
<td>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.</td>
</tr>
<tr>
<td>Is in</td>
<td>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.</td>
</tr>
<tr>
<td>Contains</td>
<td>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.</td>
</tr>
<tr>
<td>Contains all</td>
<td>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.</td>
</tr>
<tr>
<td>Is or in</td>
<td>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.</td>
</tr>
<tr>
<td>Is or contains</td>
<td>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.</td>
</tr>
<tr>
<td>Is or contains all</td>
<td>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.</td>
</tr>
<tr>
<td>Is not</td>
<td>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.</td>
</tr>
<tr>
<td>Is not in</td>
<td>Returns the negation of Is in.</td>
</tr>
<tr>
<td>Does not contain</td>
<td>Returns the negation of Contains.</td>
</tr>
<tr>
<td>Does not contain any</td>
<td>Returns the negation of Contains all.</td>
</tr>
<tr>
<td>Is not and is not in</td>
<td>Returns the negation of Is or is in.</td>
</tr>
<tr>
<td>Is not and does not contain</td>
<td>Returns the negation of Is or contains.</td>
</tr>
<tr>
<td>Is not and does not contain any</td>
<td>Returns the negation of Is or contains all.</td>
</tr>
</tbody>
</table>
Revisiting Tasks by Looping

You can make a process backtrack to pick up the process from a previous step but you must anticipate these likely backtrack points and build them into your overall process.

Onboarding processes cannot be reversed, but steps can be configured to lead back to prior steps based on whether or not each new hire record currently meets certain conditions. Using any standard field or user-defined field as a decision point, a given task can have a transition to one downstream task if the decision field is "true", and have a transition to a different task if the decision field is currently false. This different or secondary task can eventually have a transition back to the original task, forming a loop. When the information in the new hire's decision field finally is true, then the main downstream task can be successfully assigned, and the process stops looping and moves further along towards the end.

As an example, there is a possibility that the company may not be ready for the new hire to start on their prearranged start date, so a loop can be defined that allows pushing back that start date a few times if needed. As the start date approaches, a form can get assigned to the Manager, asking whether they are ready for next week's start date or not. If yes, the process proceeds to the next downstream tasks as usual. If no, the process follows a transition to a different step, which waits for 7 days and may do other activities. Then a task asks the manager again: Are we ready for the new hire to start next week? If no, then the process follows the same loop back to the waiting step. If yes, then the process exits the loop and proceeds to the next downstream task as usual.

In the diagram above, the new hire and the manager both fill in a form. Then data from these forms is shown to the required reviewer. If the reviewer can make changes to the data themselves, looping is unnecessary. But if the reviewer can only see the info in read-only and they need to work with the new hire or the manager to make any corrections, then the workflow can anticipate this and include a loop back.

If the reviewer decides that either a new hire or a manager correction is necessary, they will fill in two UDFs that were created for this purpose. Based on these choices, the transitions cause an “earlier” form to be reassigned to its proper assignee. As soon as that assignee submits that form again, the same transition out of it gets triggered, and the reviewer gets another chance to review the newly-corrected data. The loop is achieved, and the process appears to be “returning to a prior step” while still following the normal Onboarding rules.
Transition List

Taleo Onboarding displays a spreadsheet-like view of an entire onboarding process including information about each step and transition to assist administrators who are configuring and reviewing processes.

There are two tabs on the Process page of Onboarding Administration. One tab is labeled Steps and the other Transitions. The entire process can be accessed through either of these tabs. When the Steps tab is active, the process steps are shown with a description, a possible assigned sequence for viewing on the list, and a Delete button.

The Transitions tab will list the process by transition. Each row in the Transitions list can be collapsed or expanded, controlling the level of detail given for each transition.

The information listed for each transition in the collapsed state is described in the following table:

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>The name of the transition as a link to the Transition page.</td>
</tr>
<tr>
<td>From Step</td>
<td>The originating step when entering the transition.</td>
</tr>
<tr>
<td>To Step</td>
<td>The landing step when leaving the transition.</td>
</tr>
<tr>
<td>Conditions</td>
<td>Possible entries:</td>
</tr>
<tr>
<td></td>
<td>• Yes</td>
</tr>
<tr>
<td></td>
<td>• No</td>
</tr>
<tr>
<td>Required</td>
<td>Possible entries:</td>
</tr>
<tr>
<td></td>
<td>• All-All conditions must be valid.</td>
</tr>
<tr>
<td></td>
<td>• One-At least one of the conditions must be valid.</td>
</tr>
<tr>
<td>Actions</td>
<td>Deletes the transition.</td>
</tr>
</tbody>
</table>

When the Transition is expanded, detailed information is provided for both the originating step and the landing step that encompass the transition. The information listed for each step when the transition is expanded is described in the following table:

<table>
<thead>
<tr>
<th>Row</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignees</td>
<td>The name or role of the assignee.</td>
</tr>
<tr>
<td>Task</td>
<td>The name of the task as a link to the Task Definition page, if not part of a routing step.</td>
</tr>
<tr>
<td>Execute Step</td>
<td>Description of when the step will be executed.</td>
</tr>
<tr>
<td>After step execution</td>
<td>Description of what will occur after the step is executed.</td>
</tr>
</tbody>
</table>

Process Preview is available for a graphic representation of all processes in Taleo Onboarding.
Process Preview

Once a process is created, it is possible to obtain a visual representation of the process by clicking the Preview Process link in the Quick Access box. This system generated flow chart can help you validate the onboarding process you just created.

The start and the end are automatically generated by the system to help you visualize the transitions among your tasks. For any task that has no following or next 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 or task which reunifies the branches downstream has been created.

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.

You are urged to preview your developing process often to ensure that any errors can be caught and corrected.

Process Flow Chart Elements

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Circle with arrow to the right</td>
</tr>
<tr>
<td>End</td>
<td>Circle with arrow with dotted line coming from the left</td>
</tr>
<tr>
<td>Tasks</td>
<td>Rectangle</td>
</tr>
<tr>
<td>Sub Process</td>
<td>Rectangle with small rectangle inside</td>
</tr>
<tr>
<td>Steps that Split a Process, in which all steps must be executed before that step is executed</td>
<td>Rectangle with right side convex</td>
</tr>
<tr>
<td>Steps that Merge a Process, in which all steps must be executed after that step is executed</td>
<td>Rectangle with left side concave</td>
</tr>
<tr>
<td>Transition</td>
<td>Arrow. It is thin if no condition, thick if conditions applied.</td>
</tr>
</tbody>
</table>

Restarting an Onboarding Process

This feature, performed in Taleo Recruiting or Onboarding, enables a user to cancel a process and start it over. A whole new process is created, all tasks are assigned again, and the old process is given a status of Canceled.

Restarting a process gives the user with the correct user type and permissions, the opportunity to start an onboarding process over from the beginning. When the new process is created, all the tasks from the original process are copied to the new process. All Onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

There are three ways to restart an onboarding process, each with a slightly different effect on the data that is stored in Onboarding.

- Start the process again from Recruiting with Updated Data, to undo any changes that had been made in the prior Onboarding process up to this point.
- Start the process again from Recruiting without Updated Data, which updates only the information about Assignment, Position, and Application that are used in Onboarding.
- Restart the process from Onboarding WebTop, which leaves intact all the existing information in Onboarding that had been used in the prior Onboarding process up to this point.
Start the Process Again from Recruiting without Updated Data

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

Start the Process Again from Recruiting with Updated Data

Using the option Update onboarding data with current recruiting data, the system overwrites all of the Candidate, Experience and Education data fields, as well as the Assignment, Position, and Application areas. All data about the New Hire that may originate from Onboarding, such as forms, previous processes, or data that was imported via Taleo Connect Client, prior to performing the cancellation of the Onboarding process and starting again, 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 user-defined field in Onboarding has no corresponding user-defined field in Recruiting, it will be erased.

When canceling an Onboarding process and restarting it from Recruiting, to preserve all data entered previously on all Onboarding forms and keep it intact, enabling a review of each task to submit them as they are, do not select the option Update onboarding data with current recruiting data.

Restart the Process from Onboarding WebTop

Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting. All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

Restarting a Process from Recruiting

Prerequisite
You must cancel the process in Recruiting before restarting.

Taleo Recruiting > Candidates

Steps
1. Click the name of the appropriate New Hire.
2. From My Actions, select Cancel Onboarding Process.
4. Check Start Onboarding and optionally, check Update onboarding data with current recruiting data.
5. From the drop-down list, optionally, add comments.
6. Click Done.

Restarting a Process from the Onboarding WebTop

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.

Steps
1. Access the New Hire page by clicking on the new hire name.
2. Click Cancel.
**Result**

Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting.

**Next Step**

All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

**Automatically Delete Old Onboarding Processes**

Completed and canceled new hire processes can be automatically deleted from Onboarding.

Automatically Delete Old Onboarding Processes is a public setting that Onboarding administrators can configure to determine when to delete obsolete new hire processes. These processes are associated with a specific new hire and have been either completed or canceled. The administrator determines the number of days processes have aged beyond their completion or cancellation date as the criteria for deletion. The number of days is entered as the setting value, with zero representing no automatic deletion of processes.

After the initial setting is set and activated, the first purge occurs 14 days later and a new purge is performed automatically twice per month thereafter. All completed and canceled processes that have reached at least the configured age are automatically deleted. Therefore, it is recommended to complete any process-related Taleo Connect exports before the setting is configured and saved and again before any other subsequent automatic deletions. Processes that are deleted through the automatic deletion process are not recoverable.

When a new hire's completed or canceled process has reached the defined age value in days, the process is automatically deleted. All the tasks associated with the process are also deleted, as are all history entries related to the process. Personalized PDFs and forms for the new hire can be generated no longer. However, the new hire's Onboarding user account is not deleted. New hire data is retained in the database and is available for reporting purposes.

**Configuration**

<table>
<thead>
<tr>
<th>Setting</th>
<th>Possible Value</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically Delete Old Onboarding Processes</td>
<td>0</td>
<td>0</td>
<td>Configuration &gt; [Onboarding] Settings</td>
</tr>
</tbody>
</table>
Product Resources

- Resource Administration in the New Hire Portal..................................................163
Resource Administration in the New Hire Portal

Resource administration is available for the New Hire Portal.

Each New Hire Portal resource that has an ID can have its text changed or modified. Accessing the IDs is slightly different in the New Hire Portal than in the other Taleo applications. There are two different methods that can be used for access, by direct access to the New Hire Portal or through Onboarding Administration.

- An Onboarding administrator can access the New Hire Portal through a direct URL that will provide a link to Resource Administration. If using this method, there must be an onboarding process running in the portal. This process gives access to all available Resource IDs in the New Hire Portal.
- An Onboarding administrator can access Resource Administration through the New Hire Portal Preview. New hire portals can be previewed by accessing either Configuration > [Onboarding] Administration > Portals. Although this is an easier method to access New Hire Portal Resource IDs, not all IDs can be accessed using this method, only those associated with Display Properties.

Note that any change made in Resource Administration for a given string in a given language, affects all users who view that language. For example, the word ABC can be shown to English-speakers and Bon Jour to French speakers; but there is no way to show ABC to an English sales organization and XYZ to an English Research and Development organization.

**Configuration**

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Display resource identifiers</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Functional Domains &gt; Configuration &gt; Resource Management</td>
</tr>
</tbody>
</table>

**Displaying Resource Identifiers**

**Prerequisite**

The Display Resource Identifiers user type permission is required.

*Configuration > [Product] Administration > Resource Administration*

**Steps**

1. Click Show Identifiers.
2. Close this window.

**Result**

Starting with the next page that is displayed, resource IDs will be displayed in front of each element of the application.

**Displaying Resource Identifiers in the New Hire Portal**

**Prerequisite**

The *Display Resource Identifiers* user type permission is required.

There must be an onboarding process running in the New Hire Portal.
The resource identifiers must be hidden.

**Steps**
1. Login to the New Hire Portal.
3. Click *Show Identifiers*
4. Click Back or change the URL in the browser to http://YOURZONENAME/newhireportal/index.jsf.

**Result**
Resource IDs will be displayed in front of each element of the New Hire Portal.

---

**Hiding Resource Identifiers**

**Prerequisite**
Resource Identifiers must be displayed.

The Display Resource Identifiers user type permission is required.

**Configuration** > [Product] Administration > Resource Administration

**Steps**
1. Click Hide Identifiers.
2. Close this window.

**Result**
Starting with the next page that is loaded, resource IDs will no longer be displayed in front of each element of the application.

---

**Hiding Resource Identifiers in the New Hire Portal**

**Prerequisite**
The *Display Resource Identifiers* user type permission is required.

There must be an onboarding process running in the New Hire Portal.

The resource identifiers must be displayed.

**Steps**
1. Login to the New Hire Portal.
2. Manually change the URL in the browser to http://YOURZONENAME/newhireportal/
   ResourceConsole.js.s.
3. Click *Hide Identifiers*
4. Click Back or change the url in the browser to http://YOURZONENAME/newhireportal/index.jsf.

**Result**
Resource IDs will no longer be displayed in front of each element of the New Hire Portal.

---

**Refreshing Resource Values**

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.
**Blocking Resource Value Refresh**

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.

**Configuration > [Product] Administration > Resource Administration**

**Steps**
1. Click Block Refresh.
2. Add a comment.
3. Click Save.
4. Close the window.

**Result**
It will no longer be possible to have the application reflect any changes applied to a value.

**Unblocking Resource Value Refresh**

**Prerequisite**
Two user type permissions are required: Manage Resources and Display Resource Identifiers.

**Configuration > [Product] Administration > Resource Administration**

**Steps**
1. Click Unblock Refresh.
2. Close the window.

**Result**
Any changes applied to resource values will be reflected in the application when refreshing the values.

**Next Step**
Refresh resource values.
Network Data

• Network Data Management...........................................................................................................167
• Filtering Network Data Elements..............................................................................................168
• Activating a Network Data Element...........................................................................................169
• Activating All Network Data Elements......................................................................................170
• Deactivating a Network Data Element.......................................................................................171
• Deactivating All Network Data Elements..................................................................................172
• Synchronizing the Database with the NDA Central Database...................................................173
Network Data Management

Network data management gives system administrators limited control over network data elements. Network data elements are data common to all Taleo products. With network data management, system administrators can activate, deactivate, filter, and synchronize network data elements within four network data element categories: certifications, employers, institutions, and programs. The values within each category constitute the network data elements.

Data element synchronization is done between the customer's database and NDA central, the master data repository.

Example:

For example, the Employer network data category contains a list of all the companies in the Taleo master data repository. These companies are network data elements. A system administrator can activate, deactivate, filter, and synchronize some or all of the companies.

Configuration

The user must have the following user type permission:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Foundation Data</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types</td>
</tr>
</tbody>
</table>
Filtering Network Data Elements

Prerequisite

You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

This task applies to filtering certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps

1. Select an item in the Refine by list.

   The Creation Date is the date the network data element was added to the NDA central database.

   If you filter by Creation Date, click the date and use the calendar to select a specific date. Network data elements created as of the specified date will be listed.

2. Click Refresh.

Result

The filtered items are listed.
Activating a Network Data Element

Prerequisite

You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

The status of the network data element must be Inactive.

This task applies to activating certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps

Click Activate in the Actions column of the network data element you want to activate.

Result

The status of the network data element changes to Active.

The activated network data element is added to the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.
Activating All Network Data Elements

Prerequisite

You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

This task applies to activating certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps

1. Filter list if necessary.
2. Click Activate All.
3. Click Yes.

Result

The status of all network data elements in the list changes to Active.

All network data elements are added to the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.
Deactivating a Network Data Element

Prerequisite
You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

The status of the network data element must be Active.

This task applies to deactivating certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps
Click Deactivate in the Actions column of the network data element you want to deactivate.

Result
The status of the network data element changes to Inactive.

The deactivated network data element is removed from the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.

Data elements in lists that were selected before the element was deactivated remain selected.
Deactivating All Network Data Elements

Prerequisite
You must have the Manage Foundation Data user type permission at Configuration [SmartOrg] Administration [Users] User Types.

This task applies to deactivating certification, employer, institution, and program network data elements.

Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs

Steps
1. Filter list if necessary.
2. Click Deactivate All.
3. Click Yes.

Result
The status of all network data elements in the list changes to Inactive.

All network data elements are removed from the respective list in Taleo Recruiting, Taleo Performance, and Taleo Onboarding.

Data elements in lists that were selected before the element was deactivated remain selected.
Synchronizing the Database with the NDA Central Database

**Prerequisite**

You must have the *Manage Foundation Data* user type permission at *Configuration [SmartOrg] Administration [Users] User Types*.

This task applies to synchronizing certification, employer, institution, and program network data elements.

*Configuration > [SmartOrg] Administration > [Network Data] Certifications/Employers/Institutions/Programs*

**Steps**

1. Click *Synchronize*.
2. Click *OK*.

**Result**

An email is sent to you when the synchronization is complete.

When synchronizing institutions, RSLocations are also synchronized because institutions are associated to RSLocations.