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Getting Started with Taleo Transitions

About Taleo Transitions

Taleo Transitions, a "new generation" onboarding product, provides a unified, automated and customizable system for transitioning candidates, new hires and employees.

Different types of users access Transitions processes differently:

- Recruiters, hiring managers, and onboarding coordinators access the Transitions Center where they can execute tasks and monitor the progress of the processes.
- Candidates and employees access the candidate portal to view and execute tasks, access documents and complete forms.
- External users access Transitions through a simplified portal to complete a task without having to access the Transitions Center.
- Transitions administrators configure processes and tasks through Transitions Administration.

The Transitions administrator can create task-based processes to: gather additional information from candidates your organization plans to hire; configure flexible electronic offer scenarios; ensure everything is in place so new hires become highly effective employees quickly; transition employees for "crossboarding" (internal mobility), promotion, relocation, offboarding and other purposes while they are employed at the organization.

Candidates and employees can quickly access the tasks they have to perform from a Tasks tab in the career section they visited as candidates or in any of your other career sections.

Recruiters, hiring managers, and onboarding coordinators have access to the Transitions Center. Provided they have the necessary permissions, they can:

- View, reassign and execute tasks.
- View task properties and edit some of them.
- Select the assignment message sent to assignees of a task; select the message sent to a task owner on completion of the task.
- Configure a reminder message to the task owner or to assignees.
- Monitor a process as it progresses toward completion.
- Attach files to a process and print any or all of the files that have been attached to each candidate's/employee's process.
- Preview a graphical picture of all the steps included in a process.
- Suspend a process which consists of putting a process on hold. As soon as you click Suspend for a given running process, you will see the Resume button. When clicking the Resume button, the same steps are reactivated.
- Restart a process which consists of restarting a process that was terminated. The process will be restarted from the first step. All active steps/tasks get canceled/terminated, and the initial emails and tasks get reassigned.

Processes in Taleo Transitions

A process is a series of steps typically performed by multiple stakeholders. All necessary steps must be completed before the process acquires the "Complete" status.

An organization can use any number of 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. Only the "right" processes are displayed to recruiters and hiring managers in the Recruiting Center at the right time. For example,
if five different processes are defined in your organization to respond to various business situations and specific OLF, only the right processes will be shown to recruiters and hiring managers.

**Components of a process**

Processes are created in Transitions Administration by the Transitions administrator.

- A process contains steps.
- A step contains a task. A task can be a form to complete, a message to be sent, or even a link to an external service.
- Steps are linked with transitions which define the order of steps.
- Transitions can contain conditions that govern whether or not the subsequent step will ever be appropriate to be assigned or not.

In the example depicted by the following image, the process contains three steps. The tasks within these steps are to send a message to welcome the new hire, to complete a form to request business cards, and to complete a form to request a computer.

![Process Diagram](image)

In the example depicted by the following image, the process contains three steps. The tasks within these steps are to send a message to welcome the new hire, to complete a form to request business cards, and to complete a form to request a computer.

![Process Diagram](image)

Four types of processes can be created in Transitions:

- **Pre-Hire**: A process that can be used when organizations require more information from new hires before the latter begin working or when organizations want to request external services (Passport services) in a configurable, logical flow. For a given candidate on a requisition, a Pre-Hire process can be launched from the Recruiting Center if all the right actions and permissions are configured. It can also be launched from Taleo Connect.
- **New Hire**: A process used for bringing new employees into an organization. For a given candidate on a requisition, a New Hire process can be launched from the Recruiting Center if all the right actions and permissions are configured. It can also be launched from Taleo Connect.

- **E-Offer**: Two E-Offer processes are available. The standard E-Offer process simply allows candidates to accept or refuse offers, while the advanced E-Offer process which requires Taleo Transitions allows candidates to accept or refuse offers and provides additional tasks, forms, electronic signatures, etc. For a given candidate’s offer, the E-Offer process can be launched from the Recruiting Center while extending an offer if all the right settings and permissions are configured. It can also be launched from Taleo Connect.

- **Offboarding**: A process designed for situations where employees leave an organization. An Offboarding process can only be launched from Taleo Connect, not from the Recruiting Center. The employee record must exist or be imported. The employee does not have to be matched to a requisition. Creation of a dedicated Transitions offboarding portal, one with a Tasks tab but without job searching capability, is an option to consider. The notification and reminder emails would have to be configured to include the URL leading to the dedicated portal.

### Simple Process Example

The following image depicts a simple Transitions process.

1. The new hire logs into a career section and completes the first task on the Tasks tab, which consists of completing new hire paperwork.
2. The hiring manager accesses the Transitions Center to view and execute a task which consists of completing HR forms.
3. The IT representative accesses the Transitions Center to view and execute a task which consists of ordering a computer for the new hire.
4. A message is sent to the Facilities person.
5. The new hire answers a few final questions at the end of the first week of employment.

### Complex Process Example

The following image depicts a more complex Transitions process.
Note that the above image is not a faithful graphical representation of a process created in Transitions. It is only given as an example.

The following list describes the process depicted in the image.

1. The new hire accepts the offer. (Not shown in the image: a system task which communicates the new hire's response to the Recruiting CSW for this candidate's 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. The HR department reviews the form.
6. While Payroll makes payroll adjustments, the office manager prepares office furniture and IT prepares the new hire's computer.
7. Payroll exports the necessary employee information.
8. The HR department updates the shared candidate file.
9. The employee arrives for work on the start date.
10. The hiring manager greets the new hire and gives an office tour.
11. The new hire gets assigned orientation and training and completes his Learning Plan.
12. After the first two weeks on the job, the new hire completes a new hire survey.
13. After two months, the manager is asked to fill in a form that monitors the quality of hire and ramp-up speed of the new employee.

A process can be complex and incorporate contributions from many different groups within (and even outside of) the organization. The following diagram illustrates how complex a process can be. Each box represents a task assigned to individuals or roles, such as hiring manager, new hire or IT department. Each task in the process is completed by performing an action such as filling out online forms, sending emails, reading PDF documents, etc. Conditions can be added to a step that serve to route the process a certain way (when the conditions are true). Conditions allow a single process to accommodate a variety of situations.
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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

Several methods are available to create a new password if the current one was forgotten.

The two main methods to recover a password are via an access code and security questions.

With the access code method, users are asked to enter their user name and email address. An email containing an access code is then sent to the users and the latter are prompted to enter a new password.

With the security questions method, users are asked to answer security questions (between 1 and 3) whose answers they provided beforehand. If the answers are correct, the users are prompted to enter a new password.

Other methods used to replace a forgotten password are: a combination of access code and security questions; contacting the organization’s system administrator.

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.
Getting Help

Online Help

Transitions offers comprehensive help on Transitions concepts and the various tasks you'll perform while using the product.

Online help is available in the Resources list in the auxiliary navigation bar located at the top right-hand side of all pages. When you click the Help link, a list of available help topics is displayed in the Help panel. You can also search the help database for specific subjects by clicking the Search link at the top of the Help panel.

Web Support

The Web Support link provides users with access to My Oracle Support.

The Web Support link is available in the Resources list in the auxiliary navigation bar located at the top right-hand side of all pages (provided the feature was enabled by the system administrator).

Tooltip

A tooltip is a short, explanatory text which appears when you pause your mouse pointer over a button, a link, a table cell heading or icon without clicking the item.

Toolips are available throughout the system and provide you with information about an action before you perform it.

Toolips are provided for buttons, links, icons, and table cell headings. These toolips are not configurable. The system administrator can, however, create toolips for some types of user-defined fields for screening services.

Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the system.

Once they are logged in, users can turn off the Release Notes message by selecting the Don’t display the message again option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

The same release notes message is displayed to users regardless of the product.

Deactivating the Release Notes Message

Prerequisite

The release notes message must have been enabled.

Steps

1. Log into a product.
2. On the Release Notes page, select the "Don’t display this message again" option.
Result

The release notes message will no longer be displayed until new release information or other important information is available. If you want to see the release note information again before new released information is available, delete your browser cookies.
Menus and Navigation Tools

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,</td>
</tr>
<tr>
<td></td>
<td>Employee Statuses, etc.</td>
</tr>
<tr>
<td>Roles</td>
<td>Role definitions of both hierarchical and functional roles. Both role types</td>
</tr>
<tr>
<td></td>
<td>are used for the Dynamic Approval Routing feature. In addition, functional</td>
</tr>
<tr>
<td></td>
<td>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</td>
</tr>
<tr>
<td></td>
<td>specified business rules.</td>
</tr>
<tr>
<td>Security</td>
<td>Security policies, message templates related to access and passwords, and</td>
</tr>
<tr>
<td></td>
<td>legal agreements presented to users when signing in an application. Note</td>
</tr>
<tr>
<td></td>
<td>that agreements for career sections are managed under Career Section</td>
</tr>
<tr>
<td></td>
<td>Administration.</td>
</tr>
<tr>
<td>Competencies</td>
<td>Competency tools used in Taleo Performance for Rating Models, Competencies,</td>
</tr>
<tr>
<td></td>
<td>Guidance Plans, etc.</td>
</tr>
<tr>
<td>Synchronization Tool</td>
<td>A tool to export configuration elements, such as career sections, application</td>
</tr>
<tr>
<td></td>
<td>flows, etc., from a source database to a target database.</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Specific Configuration</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>• SmartOrg</td>
<td></td>
</tr>
<tr>
<td>• Recruiting</td>
<td></td>
</tr>
<tr>
<td>• Career Section</td>
<td></td>
</tr>
</tbody>
</table>
Specific Configuration

- Onboarding
- Transitions
- 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>

Transitions Administration Menu

The Transitions Administration menu allows system administrators to fully configure the Transitions product.

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

<table>
<thead>
<tr>
<th>Item</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Settings</td>
<td>Configuration of Transitions settings.</td>
</tr>
<tr>
<td>Documents</td>
<td>Configuration of text documents and file-based documents that can be added to content pages and message templates.</td>
</tr>
<tr>
<td>Processes and Task Definitions</td>
<td>Configuration of processes and task requests to be sent to any person involved in a Transitions process.</td>
</tr>
<tr>
<td>Content Pages</td>
<td>Configuration of content pages including adding HTML and PDF documents and assigning Organizations, Locations and Job Fields (OLF). You can also upload images to include in HTML documents.</td>
</tr>
<tr>
<td>Correspondence</td>
<td>Configuration of message templates.</td>
</tr>
<tr>
<td>User-defined Forms</td>
<td>Configuration of user-defined forms to be filled by various persons involved in a 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. Only &quot;Support&quot; users can access this feature.</td>
</tr>
</tbody>
</table>
### Item | Description
--- | ---
Synchronization Tool | Copies administrative objects such as user-defined fields, user-defined forms, message templates, tasks, conditions, and processes from Taleo Onboarding to Taleo Transitions.

### 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; User Types &gt; Recruiting &gt; Administration</td>
</tr>
</tbody>
</table>

There is no specific permission to access the Transitions Administration menu. If a user is granted a permission in the Transitions Administration category such as Manage user-defined forms to display and collect data, the user will be able to access the Transitions Administration menu (*Configuration > [SmartOrg] Administration > User Types > Recruiting > Transitions > Administration*). Note that there are two ways to access the Transitions Administration menu: from the Configuration menu and from within the Transitions Center, via the Quick Access panel.

### Auxiliary Navigation Bar

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

If enabled, the auxiliary navigation bar is available at all times.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
</table>
| Home | • If you have access to multiple Oracle Taleo products and you click Home, the Welcome Center is displayed.  
• If you have access to one product only and you click Home, that product front page is displayed. |
| Resources | May include:
• My Setup: Access to personal preferences.  
• Help: Access to comprehensive help on concepts and tasks.  
• About: Information about the application such as the version number and the build number you need to provide to Oracle Support when you need to contact them.  
• Training: Access to online training materials.  
• e-Learning: Access to eLearning materials. |
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sign Out</td>
<td>Terminates the session and you are automatically signed out of all Oracle Taleo products.</td>
</tr>
</tbody>
</table>

**Quick Access**

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

```
Quick Access
Message Template List
Document List
Paragraph List
```

**Recently Viewed Items**

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

```
Recently Viewed Items
Learn Integration URL
Contact Information
```

**Breadcrumb Trail**

The breadcrumb trail located at the top of each page allows users to see where they are located within the application and to jump to previously viewed pages. The breadcrumb trail is only available in navigation mode; it disappears in edit mode.

**Pagination Icons**

Pagination icons allow users to navigate quickly through large lists of information.

Pagination icons appear at the top and bottom of lists in Transitions. They are used for navigation when lists are displayed across multiple pages. The maximum number of list items per page is fifteen.

```
<table>
<thead>
<tr>
<th>Pagination Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Goes to the first page.</td>
</tr>
</tbody>
</table>
```
<table>
<thead>
<tr>
<th>Pagination Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>❯</td>
<td>Displays the previous page</td>
</tr>
<tr>
<td>➡</td>
<td>Displays the next page.</td>
</tr>
<tr>
<td>▶</td>
<td>Goes to the last page.</td>
</tr>
</tbody>
</table>
Other Tools

History Tracking

The History feature presents useful tracking details on an element.

Actions that are performed on a page are recorded as events in History. The three most recent events are displayed in the History section. To view a more complete listing of events, click More Info.

<table>
<thead>
<tr>
<th>History Tracking 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>

Rich Text Editor

The Rich Text Editor enables the Transitions administrator to add formatting to text and to insert graphics, hyperlinks and more in forms, message templates and content pages.

The Rich Text Editor contains standard word processing tools such as:

- cut, copy, and paste functions
- font types and sizes
- bold, italics, and underline
- text and background color
- left, right, and center alignment
- numbered and bulleted lists
- spell checker

The Rich Text Editor is available when creating custom content in a message template, when creating a paragraph to be used in message templates. It is also available in the user-defined form builder, via the Enlarged View icon.

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 Languages field. When creating or editing an element, the user can choose 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 a company, there is no special indicator.

For a list of the languages supported by Taleo, refer to the document entitled Taleo Enterprise - Supported Languages.

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.
Central Configuration

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- User Types and Permissions.................................................................................... 27
- Organizations, Locations, Job Fields........................................................................ 32
- Operation Modes....................................................................................................... 34
- Release Notes Messages.......................................................................................... 36
- SmartOrg User Accounts and Transitions................................................................. 39
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*. 
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.

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

<table>
<thead>
<tr>
<th>Transitions Setting</th>
<th>Description</th>
<th>Security Level</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<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>
</tr>
<tr>
<td>Transitions Setting</td>
<td>Description</td>
<td>Security Level</td>
<td>Default Value</td>
</tr>
<tr>
<td>---------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>----------------</td>
<td>---------------</td>
</tr>
<tr>
<td>Antivirus Zone URL</td>
<td>URL address of the virus checker.</td>
<td>Private</td>
<td></td>
</tr>
<tr>
<td>Automatically Delete Old Transitions Processes</td>
<td>Automatically executes a permanent deletion of Transitions processes completed or canceled at least X days ago. All tasks within these processes will also be deleted. Value of 0 days means no automatic deletion will occur. Ongoing processes will be ignored and not included in permanent, automatic deletions. See <em>Automatically Deleting Old Processes</em>. After the initial setting is made, the automatic delete process will run twice per month.</td>
<td>Public</td>
<td>0</td>
</tr>
<tr>
<td>Contact Information</td>
<td>Indicates which contact to display in Transitions. The “contact” for a process is the person who is available for candidates/new hires to ask questions. The contact's phone number and email address can be configured to display in content pages, message templates, user-defined forms, and PDFs. There are 5 choices of whose information can be displayed: Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant, and Process Owner. Remember that the Process Owner could be configured to be a specific user or a functional role with context-sensitive assignees depending on the OLF of each requisition. Therefore, this contact information can be specifically tailored for new hires.</td>
<td>Public</td>
<td>Process Owner</td>
</tr>
<tr>
<td>Details Link for Processes</td>
<td>Activates the Details link in the General Information section of the Process page (which is available in the Transitions Center). Enter the code of the desired form in the Value field.</td>
<td>Public</td>
<td></td>
</tr>
<tr>
<td>Email Address for Transitions Process</td>
<td>To run a Transitions process, the email address of the candidate/employee is a prerequisite even if the process is configured such that no notifications or reminders are sent to the individual. For candidates for whom there is no email address, leaving this email address field with no value means that no Transitions process can be run for them. If a value is provided for this setting, for every candidate who lacks an email address, the value is reproduced in the “Personal Email Address” and “Correspondence Email” fields in the candidate's SmartOrg user account (unless the candidate already has an email address).</td>
<td>Public</td>
<td></td>
</tr>
<tr>
<td>Transitions Setting</td>
<td>Description</td>
<td>Security Level</td>
<td>Default Value</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
<td>----------------</td>
<td>---------------</td>
</tr>
<tr>
<td>associated SmartOrg user account with an email address). See: Launching a Transitions Process for Candidates/ Employees with no Email Address for a complete explanation.</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
| eSignature Timestamp Display Property | Controls whether all e-signature dates should be displayed with or without the exact time that the signature was captured. The date will always be formatted using a default short date style. The time will be displayed using Greenwich Mean Time (GMT) timezone format. 
If your organization is spread across time zones, it is better to have an absolute time shown on the e-signatures when displayed back on read-only forms or PDFs. If your organization is localized or consolidated in one time zone, then it might be more acceptable to omit the time entirely when displaying e-signature dates. | Public | Date |
| From Address | Email address used in the “From” field, when an email reminder or notification is sent out to any assignee or recipient. | Public | |
| From Address Alias Level | Alias associated with the email address used in the “From” field, when an email reminder or notification is sent out to any assignee or recipient. | Public | |
| Learn Integration URL | This is the URL the new hires/ employees will use to reach their learning page. When the new hires/ employees click the E-Learning variable on their assigned user-defined form, they will be sent to the destination in this setting to access their learning program. For details, see Transitions and Learn. | Private | |
| Mail Server | Mail server name. | Private | |
| Maximum Batch Print Size | The maximum size (in megabytes) allowed for a PDF generated for printing based on the attached files selected in the new hire page (the maximum size suggested is 15 megabytes). | Private | 0 |
| Transitions Single Image Maximum Size | Determine an image's maximum size in kilobyte in Transitions. Graphics can be uploaded to be hosted in the Taleo zone, including .jpg, .gif, and .png types. 
Images must have been first uploaded by the Transitions administrator. These small hosted images can be used in | Protected | 20 |
<table>
<thead>
<tr>
<th>Transitions Setting</th>
<th>Description</th>
<th>Security Level</th>
<th>Default Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>content pages, user-defined forms, and message templates.</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Transitions Total Image Size</td>
<td>Determine total images' maximum size in megabyte in Transitions. There is no limit on the number of images hosted in a zone, but the total of their size is governed by this setting.</td>
<td>Protected</td>
<td>25</td>
</tr>
<tr>
<td>Working Days</td>
<td>List of working days. Working Days configures which days of the week are counted when calculating task due dates and notification trigger times. Select all 7 days of the week if the organization prefers not to omit weekends in these calculations. This setting is shared by both Transitions and Taleo Performance. Updates to the setting in one product will also update the other. See Creating a Task Reminder.</td>
<td>Public</td>
<td>Monday, Tuesday, Wednesday, Thursday, Friday.</td>
</tr>
</tbody>
</table>
## Transitions Permissions

Permissions can be granted to the Transitions administrator and Transitions Center users.

There are Transitions permissions located under Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Transitions.

<table>
<thead>
<tr>
<th>Category</th>
<th>Transitions Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Administration</td>
<td>View public product settings</td>
<td>Allows users to view all Protected and Public settings in Transitions Administration.</td>
</tr>
<tr>
<td>Administration</td>
<td>Edit public product settings</td>
<td>Allows users to update all Public settings in Transitions Administration.</td>
</tr>
<tr>
<td>Administration</td>
<td>View protected product settings</td>
<td>Allows users to view the Maximum PDF File Size protected setting in the Transitions Administration settings.</td>
</tr>
<tr>
<td>Administration</td>
<td>Edit protected product settings</td>
<td>Allows users to view the Maximum PDF File Size protected setting in the Transitions Administration settings.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage user-defined forms to display and collect data</td>
<td>Enables the User-defined Forms feature in Transitions Administration. Users can create, edit and deactivate user-defined forms.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage message templates for email correspondence and reminders</td>
<td>Enables the Message Templates feature in Transitions Administration. Users can create, edit and deactivate message templates sent out to recipients.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage text documents and paragraphs for use in content pages and message templates</td>
<td>Enables the Documents feature in Transitions Administration. Users can create, edit and deactivate text documents and PDF documents.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage user-defined fields, e-signatures, and user-defined reporting</td>
<td>Enables the User-defined Fields and User-defined Selections features in Transitions Administration. Users can create, edit and deactivate user-defined fields and selections. Most user-defined fields and selections used in Transitions are managed in Recruiting Administration. Separate permissions control the creation of these fields. In a future release, users will have the ability to configure user-defined fields that appear in reports.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage task definitions, related sources, content pages, and images</td>
<td>Enables the Task Definitions feature in Transitions Administration. Users can create, edit and deactivate transitions tasks. The</td>
</tr>
<tr>
<td>Category</td>
<td>Transitions Permission</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-----------------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage Transitions processes of all types</td>
<td>Enables the <strong>Processes</strong> feature in Transitions Administration. Users can create, edit and deactivate Transitions processes. This permission also allows users to create and update steps within processes.</td>
</tr>
<tr>
<td>Administration</td>
<td>Manage services that are provided by partners</td>
<td>Controls whether the Transitions administrator can view the section for controlling Passport services that have been activated on the zone.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Send email correspondence on demand</td>
<td>Allows Transitions Center users to send ad hoc correspondences at any time from the Process page.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View processes I own or supervise, or that have been shared with me</td>
<td>Allows Transitions Center users to view processes for which they are the <em>process owner</em> or one of the <em>supervisors</em>.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View, suspend, and restart processes that I own or supervise or share</td>
<td>Allows Transitions Center users to suspend and resume processes for which they are the process owner or one of the supervisors for the processes that they have shared in Transitions.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View, suspend, restart and share processes that I own or supervise or share</td>
<td>Allows Transitions Center 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 Transitions Center users to view processes for new hires.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View, suspend, and restart all processes</td>
<td>Allows Transitions Center 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 Transitions Center users to share and revoke the sharing of processes in Transitions.</td>
</tr>
<tr>
<td>New Hire</td>
<td>View, add, and print attached files (PDFs)</td>
<td>Allows users to display the Attached Files section in the Process page seen by Transitions Center users. Once this permission is enabled, a PDF document that gets associated with the new hire via the Open PDF task would appear. Also, with this permission, Transitions Center users can associate other PDF documents into this Attached Files section of the new hire's running process from the document library, if desired.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Delete processes that are completed or canceled</td>
<td>Allows Transitions Center users to delete information about the process status, completion, tasks, task completion dates, etc.</td>
</tr>
<tr>
<td>Category</td>
<td>Transitions Permission</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>Manage tasks assigned to me</td>
<td>Allows Transitions Center users to view tasks in the Transitions Center for which the logged-in user is an assignee, or tasks that were self-created. Note that there is no specific permission that says &quot;Execute tasks assigned to me&quot;. If Transitions Center users can see a task and the task is assigned to them, they will be able to execute it.</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>View and execute tasks assigned to me</td>
<td>When this permission is granted, Transitions Center users cannot change facts about the task such as its due date, but they are able to execute the task. Note that this is analogous to the &quot;View and execute all tasks assigned to anyone&quot; permission except that one is the same actions for all tasks not only those assigned to the user.</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>View, edit, and execute tasks assigned to me</td>
<td>Allows Transitions Center users to edit tasks in the Transitions Center for which the logged-in user is an assignee, or tasks that were self-created. Allows changing the due date and priority of tasks that users can access.</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>Create tasks assigned to me, and view, edit, and execute tasks assigned to me</td>
<td>Allows Transitions Center users to change the due date and priority of assigned tasks, in addition to always being able to execute their own tasks if they can see them. Also allows Transitions Center users to create self-assigned tasks.</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>Reassign tasks assigned to me</td>
<td>Allows Transitions Center users to reassign tasks in Transitions that they have created for themselves.</td>
</tr>
<tr>
<td><strong>Tasks</strong></td>
<td>View related sources of tasks assigned to me, to see their forms and documents</td>
<td>Allows Transitions Center 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. 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</td>
</tr>
<tr>
<td>Category</td>
<td>Transitions Permission</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>------------------------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>Details hyperlink to the partner Web site, for tasks that are the External Service Request type.</td>
<td></td>
</tr>
<tr>
<td>Tasks</td>
<td>View and execute all tasks assigned to anyone</td>
<td>Allows Transitions Center users to view all tasks in the Transitions Center, that is all statuses and assigned to all users.</td>
</tr>
<tr>
<td>Tasks</td>
<td>View, edit, and execute all tasks assigned to anyone</td>
<td>Allows Transitions Center users to edit all tasks in the Transitions Center, 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>View, edit, execute, and reassign all tasks assigned to anyone</td>
<td>Allows Transitions Center users to reassign all tasks in the Transitions Center to other users who will complete them. A user could choose to reassign a task to himself to execute a task for which the user was not the original assignee.</td>
</tr>
<tr>
<td>Tasks</td>
<td>View related sources of all tasks, to see their forms and documents</td>
<td>Allows Transitions Center 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>View and execute my tasks in the Response Center (do not combine with other permissions)</td>
<td>Allows Transitions Center users to access their assigned tasks in a simplified view, rather than the Transitions Center which provides access to 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. There is a specific variable that can be placed into emails that will bring users directly to the Response Center for executing tasks. See <em>Message Template Key Concepts</em>.</td>
</tr>
</tbody>
</table>

Transitions-related permissions related to the Recruiting Center are located under *Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other.*

<table>
<thead>
<tr>
<th>Category</th>
<th>Transitions Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Transitions</td>
<td>Initiate a prehire process for a candidate</td>
<td>Enables Recruiting Center users to start a prehire process for candidates when the latter reach a step configured for such an action (in a candidate selection workflow).</td>
</tr>
<tr>
<td>Transitions</td>
<td>Cancel a prehire process in progress</td>
<td>Enables Recruiting Center users to cancel a prehire process that was started and whose status is In Progress.</td>
</tr>
<tr>
<td>Transitions</td>
<td>Initiate a new hire process for a new resource</td>
<td>Enables Recruiting Center users to start a new hire process for candidates when the latter</td>
</tr>
<tr>
<td>Category</td>
<td>Transitions Permission</td>
<td>Description</td>
</tr>
<tr>
<td>-------------------</td>
<td>-----------------------------------------------------</td>
<td>---------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td></td>
<td></td>
<td>reach a step configured for such an action (in a candidate selection workflow).</td>
</tr>
<tr>
<td>Transitions</td>
<td>Cancel a new hire process in progress</td>
<td>Enables Recruiting Center users to cancel a new hire process that was started and whose status is In Progress.</td>
</tr>
</tbody>
</table>

Transitions-related permissions related to the Recruiting Center are located under *Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers.*

<table>
<thead>
<tr>
<th>Category</th>
<th>Transitions Permission</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td>Extend offers electronically</td>
<td>Enables Recruiting Center users to extend offers electronically to candidates when the latter reach a step configured for such an action (in a candidate selection workflow). E-Offer processes can be started and canceled from the Recruiting Center or using Taleo Connect.</td>
</tr>
</tbody>
</table>
Organizations, Locations, Job Fields

Fundamental Data Structure: Organization-Location-Job Field (OLF)

Taleo designed a data structure so that each company would be able to personalize the system to reflect how it does business. Taleo defines each company as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred as contextualization.

**Organization** describes the hierarchical structure of an organization. Up to 20 organization levels can be created. The system proposes the following organization structure, but other terms may be chosen to better reflect the hierarchical structure of a company:

- Company
- Sector
- Department
- Division

**Location** represents a geographical area, such as a country or state. Locations are listed in a hierarchical order, from the broadest geographical area (often a country) to increasingly specific areas (work location). Up to 5 location levels can be created. Locations must be associated to Taleo network locations used for various purposes, mainly integration with external systems, using a common and standard universal structure. Taleo strongly recommends defining a zip code for the location. A common location structure is:

- Country
- State/Province
- Region
- City
- Work Location

**Job Field** represents the employment sectors or domains. Up to 4 job field levels can be created. Job fields must also be mapped to the network job fields, again to have a common language with the external world, be for posting or integrations. This mapping also serves to inherit existing classification for competencies. The system proposes the following job field structure, but other terms may be chosen to better reflect the structure of a company:

- Category
- Function
- Specialty

Contextualization, that is the Organization-Location-Job Field structure associated to an element, represents the framework the application uses to organize, classify, link, match or search for information in the application. Although Organization-Location-Job Field structures are configured with the help of an Oracle representative during the implementation phase, modifications to structure elements can be done in maintenance mode at any time. It is possible to customize the system to reflect a company's unique structure and make modifications to Organization-Location-Job field elements in real time so that the data accounts for any changes in the structure.

There are several key elements of the Taleo Enterprise products that are tied to the Organization-Location-Job field structure such as candidate selection workflows, requisitions and requisition templates, message templates, user management, prescreening, approvals, etc.

The purpose of contextualizing an element is to make the element relevant according to a specific context. Below is an example of contextualization with candidate selection workflows. The CSW1 would not be available to the user for this requisition, because the last level of its Location does not match that of the requisition. The CSW2
could be available to the user for this requisition. The parent element of the lowest level of the requisition for each dimension (Organization, Location or Field) must be the same as the lowest level of the workflow for each dimension.

<table>
<thead>
<tr>
<th></th>
<th>Organization</th>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Requisition</td>
<td>Urban transportation</td>
<td>United States/California/Los Angeles</td>
<td>Bus driver</td>
</tr>
<tr>
<td>CSW1</td>
<td>Urban transportation</td>
<td>United States/California/San Jose</td>
<td>Bus driver</td>
</tr>
<tr>
<td>CSW2</td>
<td>Urban transportation</td>
<td>United States</td>
<td>Bus driver</td>
</tr>
</tbody>
</table>

When using contextualization, the system applies the AND operator between Organizations, Locations and Job Fields entities. However, the OR operator is applied between elements of the same entity.

In the following example, a field would be displayed if Canada (or any of its children) AND Architecture were selected.

<table>
<thead>
<tr>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Architecture</td>
</tr>
</tbody>
</table>

In the following example, a field would be displayed if Canada AND Architecture were selected, or if United States AND Architecture were selected.

<table>
<thead>
<tr>
<th>Location</th>
<th>Job Field</th>
</tr>
</thead>
<tbody>
<tr>
<td>Canada</td>
<td>Architecture</td>
</tr>
<tr>
<td>Location</td>
<td>United States</td>
</tr>
</tbody>
</table>

**Configuration**

To manage organizations, locations and job fields in SmartOrg, the `Manage foundation data` permission is required.

<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 &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>
Operation Modes

Operation Mode

The operation mode of the Taleo system can be changed for service, configuration, or implementation purposes.

Three operation modes are available:

- implementation
- maintenance
- production

System administrators have the ability to switch to maintenance mode or production mode for each product individually or for all. Products supported by the operation mode feature are:

- Recruiting (which also includes the Remote Manager Experience)
- Performance
- Career Section
- Onboarding
- New Hire Portal
- Transitions

For the above products, except the New Hire Portal, system administrators will know the number of users using both the product AND the administrative area related to the product. Note that candidates/new hires who are doing their Transitions processes are logged into the Career Sections, not into the New Hire Portal.

**Implementation Mode**: The implementation mode is usually only for new customers or new zones (databases). It is used during the initial configuration and implementation stages of the system. Once the implementation is completed, the implementation mode is no longer available to system administrators and a request must be made through Oracle Support. When the implementation process is completed and the system has been moved out of implementation mode, it is no longer possible to add or remove structure levels in maintenance or production mode. In implementation mode, system administrators can:

- Create, delete and modify the Organization-Location-Job Field structure.
- Create, delete and modify levels in the Organization-Location-Job Field structure.
- Create, delete and modify elements in the Organization-Location-Job Field structure.

If the Taleo Recruiting is in implementation mode, users cannot connect to the Remote Manager Experience.

If changes need to be made to the structure of the database after implementation, system administrators must contact Oracle Support and request that the system be put back into implementation mode.

**Maintenance Mode**: The maintenance mode is a special administrative feature used to protect the integrity of the database when editing Organizations, Locations, or Job Fields.

In maintenance mode, the application is inactive. All users, except system administrators, are logged out automatically. The application displays a message to users as well as to candidates in Career Sections, indicating that the application is in maintenance mode. If users are logged in and have not saved data they were entering, this data will be lost.

The system must be in maintenance mode for the following:

- Delete departments, both via Integration and SmartOrg.
- Delete positions, both via Integration and SmartOrg.
- Import job positions via Integration.
• Edit Organization, Location, and Job Field elements (Element Management), both via Integration and SmartOrg.

There are no transactions in Taleo Transitions, Taleo Onboarding or Taleo Performance that require the maintenance mode. If Taleo Transitions is in maintenance mode and a user is performing a Start Transitions Process or a Cancel Transitions Process action from Taleo Recruiting, the transaction will still be scheduled to process.

If Taleo Recruiting is in maintenance mode, users can connect to the Remote Manager Experience.

Oracle Taleo customers and Oracle Taleo Support can place Taleo Recruiting in Maintenance mode (Configuration > Operation Modes) and then modify Organization, Location and Job Field (OLF) elements and the hierarchical structure. Prior to 12C, they were able to perform that action while Career Section was in Production mode. This would create situations where OLF were inconsistent between the two products. The issue was resolved in 12C and later releases such that both products must be placed in Maintenance mode before changes can be made to OLF elements and structure.

Production Mode: In production mode, all users as well as guests, agents, and system administrators have access to the application. In production mode, system administrators can:

• View structure elements for Organizations, Locations, and Job Fields.
• Save agencies, both via Integration and SmartOrg.
• Create and edit job templates.
• Select and view positions.
• Create and edit departments.

All tasks listed above can also be performed in maintenance mode and in implementation mode.

To import/export candidates (by Integration) and move candidates in the candidate selection workflow (by Integration), the system must be in production mode.

Configuration
To have access to the Operation Mode feature, the Manage Application Mode permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage Application Mode</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt;</td>
</tr>
<tr>
<td></td>
<td>Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

Modifying the Operation Mode

Prerequisite
The Manage Application Mode user type permission is required.

Configuration > Operation Modes

Steps
1. In the Operation Modes page, click Edit.
2. In the Operation Mode Editor page, select the desired mode for each product, that is production or maintenance mode.
3. Click Save.

Result
The selected operation mode appears beside each product. If the system is put in Maintenance mode, users currently logged will receive a message and will be logged out.
Release Notes Messages

Release Notes Message

A pop-up message containing new release information, system improvements, important messages and other information can be displayed when users log into the system.

Once they are logged in, users can turn off the Release Notes message by selecting the Don’t display the message again option. The message will then reappear only when new release information or other important information is available or if the users clear their browser cookies.

The same release notes message is displayed to users regardless of the product.

Configuring the Release Notes Message Feature

The configuration of the release notes feature consists of the following steps.

1. Creating the release notes message content.
2. Enabling the release notes setting in configuration profiles.

No default release notes message is provided by Taleo. A blank page is displayed unless the system administrator decides to customize the page to present important information to users.

Creating the Release Notes Message Content

Prerequisite

The Edit release notes user type permission is required.

Configuration > Release Notes

Steps

1. In the Release Notes page, click Edit.
2. In the Release Notes Editor page, write the message.
3. Clear the Do not display release note information check box.
4. Specify the validity period of the message by indicating the period of time when the message will be displayed.
5. Click Save.

Release Notes - Other Configuration Tasks

Editing the Release Notes Message

Prerequisite

The Edit release notes user type permission is required.

Configuration > Release Notes

Steps

1. Click Edit.
2. Modify the fields as required.
3. Click Save.

**Setting the Release Notes Message Validity Period**

**Prerequisite**
The *Edit release notes* user type permission is required.

**Configuration > Release Notes**

**Steps**
1. Click Edit.
2. Set the validity period with the calendar icon.
3. Click Save.

**Next Step**
The release notes message is displayed to users when they sign in the application only for the determined period provided the *Do not display release note information* is not selected and the *Release Notes* setting has been activated in the user’s configuration profile.

**Displaying the Release Notes Message**

**Prerequisite**
The *Edit release notes* user type permission is required.

**Configuration > Release Notes**

**Steps**
1. Click Edit.
2. Clear the *Do not display release note information* check box.
3. Click Save.

**Hiding the Release Notes Message**

**Prerequisite**
The *Edit release notes* user type permission is required.

**Configuration > Release Notes**

**Steps**
1. Click Edit.
2. Select the *Do not display release note information* check box.
3. Click Save.

**Release Notes - Permissions and Settings**
The following permissions and settings are used to configure the release notes feature.
## User Type Permission

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Edit release notes</td>
<td>Allows users to edit the release notes message content.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Configuration &gt; Foundation Data</td>
</tr>
</tbody>
</table>

## Setting

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Release Notes</td>
<td>Displays the release note information when accessing the application. Once the system administrator has created the content of the release notes message, the Release Notes setting must set to Yes in the user’s configuration profile.</td>
<td>No</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] Configuration Profiles</td>
</tr>
</tbody>
</table>

---

### Enabling the Release Notes Setting in a Configuration Profile

#### Prerequisite

The Release Notes message must be created.

#### Configuration > [SmartOrg] Administration > Configuration Profiles

#### Steps

1. Click a configuration profile.
2. Click the Release Notes setting.
3. Click Edit.
4. Select Yes.
5. Click Save.
SmartOrg User Accounts and Transitions

SmartOrg User Account Creation When Process Started

Starting a Transitions process for the first time for a candidate creates an associated user account in SmartOrg. Oracle Taleo customers should note that the first time a Transitions process is started for a candidate, a linked SmartOrg user account is created automatically, unless the candidate already has an associated employee and/or user account. This means that SmartOrg administrators can now access information about this person, as well as Recruiting Center users continuing to access the associated candidate information. Although they now also have a SmartOrg record, that individual is not automatically granted any permissions to use Taleo products and is not automatically considered an employee of the organization. The candidate continues to log into the Career Section using their candidate credentials as before, and executes their Transitions tasks on the “Tasks” tab.

The information used to create the SmartOrg account comes from the candidate profile. The User Name value is created as a concatenation of "tr", the Taleo candidate number and 4 system-generated characters, linked by underscores. In the following example, the SmartOrg user name is tr_1705185584_2m4X. The candidate profile is unchanged, and it is linked to this SmartOrg user account (i.e. some fields are shared).

If additional Transitions processes get launched for this same candidate in the future, no additional SmartOrg account will be created. Instead, this previously-associated SmartOrg account will continue to be used with this candidate. This SmartOrg account may get transformed into an employee of the organization, if an administrator or an integration makes this change; this SmartOrg account may get transformed into a user of the Taleo system if an administrator or an integration grant it any user types with permissions. Regardless, these changes do not affect the individual’s ability to view and complete their Transitions tasks on the career section “Tasks” tab, as long as there is a Transitions process that is “In Progress” for them.

Because starting a Transitions process for the first time for a candidate also results in the creation of this account in SmartOrg, customers should not be surprised if the number of accounts in SmartOrg (Configuration > [SmartOrg] Administration > User Accounts) surpasses the number of employees in SmartOrg.

Starting Transition Process and Impact on SmartOrg User Accounts
Before starting a Transitions process for a candidate, it is important that Recruiting Center users ensure there is only one candidate file for the person. Performing a check for duplicates (More Actions list > Check for Duplicates) enables Recruiting Center users to determine if a candidate created multiple candidate profiles. If more than one candidate file is found for the person, Recruiting Center users are strongly encouraged to perform the Merge Candidate Files action before starting a Transitions process.

Starting a Transitions process for a candidate results in the creation of a user account in SmartOrg (assuming the candidate file is not already linked to a user account). Each person should have a single candidate file and it should be linked to a single SmartOrg user account.

Suppose a candidate is hired using candidate file "A" and a Transitions process is started. This action results in the creation of a linked user account "A" in SmartOrg. Suppose the person later creates a second candidate file “B” at the external career site and applies for a different job in the organization. If a Recruiting Center user does not perform the Check for Duplicates action and starts a Transitions process, an unnecessary user account "B" is created in SmartOrg. These two conflicting user accounts can easily become problematic for integrations, Learn accounts and single-sign-on configurations.

In addition, the two user accounts cannot be merged and even the two candidate files cannot be merged because each is associated with a distinct Transitions process. (Please see Automatically Deleting Old Transitions Processes). Such problematic situations can be avoided if Recruiting Center users perform the Check for Duplicates action and merge candidate files that refer to the same person before starting a Transitions process.

**Transitions User Management Enhancements**

Transitions User category created in SmartOrg. When a Transitions process is started for a candidate, this action can create a new user in the Transitions category.

**SmartOrg Administration UI**

An administrator User can access the Transitions User category on SmartOrg’s User Account page. Transitions-type users can be searched for, identified, and managed like any other users.

---

**Transitions Process**

Every Transitions process is launched on a Candidate and must have a SmartOrg User associated to that Candidate.
• A Candidate may already be linked to a SmartOrg User. A Taleo Connect HRMS feed can automatically create this association between Candidates and Operators or Employees. An Employee-type user of Performance Management, when they log in, can be asked to identify their existing Candidate account.

• A Candidate may not yet be linked with any SmartOrg User. Then the Transitions process creates a new User in the Transitions category that is associated to the Candidate. No registration email is sent when a Transitions User is created.

**Transitions Users**

Transitions Users are created in SmartOrg only when Transitions launches for a Candidate without any previously associated User. They cannot be created manually via the SmartOrg UI, or be imported into SmartOrg via Taleo Connect. Existing Employees and Operators can't be transformed into Transitions Users.

Transitions Users can become Operators by granting User Types with permissions to use Taleo. They can become Employees by assigning OLF:Organization, and OLF:Location. When they become Operators/ Employees, notification email can be sent to them, depending on the registration email sending policy. They automatically stop being Transitions Users, and are no longer retrieved when filtering SmartOrg for Transitions Users.
Transitions and Career Sections

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• Transitions-only Career Sections................................................................. 46
Transitions Tasks in Career Sections

If Taleo Transitions is enabled in your organization and a Recruiting Center user starts a process for someone, the candidate or employee can view on the career section Tasks tab the tasks he or she has to perform. The tab is displayed in every career section to which the person has access.

The Tasks tab is divided into two sections. The left panel displays the list of tasks assigned to a person. When clicking a task in the left panel, the information associated with the selected task is displayed in the right panel. The "information" might be forms to be completed, links to PDF documents, electronic offers, email correspondence, rich content tasks that can include images and links and provide information about almost anything (a welcome message, documents about policies within the organization, the specific job and work the new hire will perform, volunteer opportunities, the campus where the person will be working, etc.).

Display of the Tasks tab in the career section

All career sections that a person can access display the Tasks tab. This includes internal and external career sections. There is no way for a Career Section administrator to turn off the Tasks tab: it appears if it is relevant for the logged-in user. The Tasks tab for a given candidate appears on every single career section to which the candidate has access. A career section can be configured so that a single URL directs candidates to an external career section before they are hired, and directs candidates to an internal career section once they are hired and become employees.

As soon as the first task in a process gets assigned to the candidate/new hire, the Tasks tab appears on the person's career sections. Processes that are running but have not yet assigned any tasks to the candidate/new hire are not accessible on the career sections. As soon as the last task in a process gets completed and the process reaches 100% Complete, then all of these tasks cease to be accessible on the career sections. If there are no other Transitions processes running at this time, the Tasks tab disappears. Note that several Transitions processes can be running for the same person, for example for different requisitions, or for one Pre-Hire process and one New Hire process for the same requisition.
Note that the label "Tasks" can be changed, like any text in any career section. This is helpful for instance if only Offboarding tasks are being handled on a given career section.

In addition, a separate career section can be configured which only contains the Tasks tab. See Transitions-Only Career Section.

**Accessing tasks in the career section**

Candidates/employees can click the Tasks tab while in the career section.

- If one process is running with at least one In Progress task, they land on that task. If the process has more than one In Progress task, they land on the first In Progress task.
- If one process is running but all the tasks currently assigned to the candidate are Complete, they land on the first Complete task.
- If more than one process is running, they land on a page that lists each running process. The name of the process is displayed, there is a graphic of how many tasks are complete out of the total tasks, and candidates can click the tasks of each process.

Candidates/employees can also receive an email message containing a link to the specific task or to their Tasks tab (and hence to all their tasks).

**Display of completed tasks**

If candidates, new hires or employees arrived at the task after clicking the Tasks tab or after clicking the URL in the email they received, the system will automatically show them the next In Progress task after they complete/submit a task. If there is no In Progress task after this one, and if the process is still not 100% complete, the system will bring them back to the first Completed task.

If candidates/employees arrived at the task by clicking on its name in the left-hand side of the Tasks tab, then the system will remain on the current task after they click to complete it. They can now choose to click another task name in the list at the left-hand side of the page.

If this was the last task and its completion caused the overall process to reach 100% Complete, with no additional tasks waiting for any other assignees, then this process will disappear from the career section. The candidates, new hires or employees can no longer access any completed tasks nor PDF documents or reference hyperlinks within that process. If there are no other Transitions processes running for this candidate, then the Tasks tab will disappear. Each task gets completed in its own way:

- **User-defined form task:** The person reads the instructions or other text; clicks any hyperlinks to visit any resources or sites; reviews or updates the data in any fields, especially the mandatory required fields; provides any e-signature that is required; visits the Learn page from the URL if any is configured in the form; clicks the Submit button when done. Note that there is no option to save a partially-completed form; any changes that are made in the form are lost if they are not submitted.
- **Document task:** The only information shown on the right panel of the Tasks tab is the name of the PDF document. When the person clicks the name of the document, the browser opens the PDF in a new tab, depending on the browser version and settings. This PDF can contain personalized information due to any variables that it contains. By clicking to open the PDF, the person has automatically changed this task's status to Completed; there is no additional button to click.
- **Correspondence task:** The person can open and view the email message sent to him/her. The Send Correspondence type of task is automatically in status Completed from the moment it appears; there is no way for the candidate to mark it complete. The email message is a copy of what was emailed by the Send Correspondence type of task. Any additional reminders or notifications for any other tasks are not displayed here; those emails only go to the selected email address of the candidate. Also, this is not related to the Secure Message Center where Recruiting's messages can be displayed, for zones that have configured this feature.
- **Content Page task:** The person can read the content and can also access any hyperlinks or resources that are embedded within the content. Some organizations may find that the history tracking for task completion provides a sufficient audit mechanism, so that using separate forms to gather e-signatures is not necessary.
• External Service task: This is a correspondence task configured to provide partner-related information. It may contain a URL to visit the partner so that the candidate can perform any necessary actions, or it may simply contain partner data and updates. This task appears in the status "In Progress", and there is no button/way to mark this task as complete. When the overall partner communication is completed and the final results have been sent from the partner back to the system, this task is automatically completed.

Configuration of the Tasks tab

For the Tasks tab to be displayed in career sections, the Transitions administrator must configure a Transitions process and assign tasks to the New Hire role. When the process starts and a task is assigned to the new hire, the new hire sees the Tasks tab in the career section. There is no configuration to be done in the Career Section Administration menu to make the Tasks tab appear.

The Tasks tab must share the same theme, branding and colors as the rest of the career section. This provides a look and feel that is familiar to people who visited the career section as a candidate and return to perform other tasks while employed at your organization.

Just like any other career section, it is always possible for the Career Section administrator to select one place in each career section that will be the default landing page for candidates after they log in.
Transitions-only Career Sections

Transitions-only Career Section

A Transitions career section type was developed for organizations who want to create task-oriented career sections for candidates/employees.

This career section type contains a single tab called "Tasks" where candidates, new hires or employees can complete their tasks. No job-related information such as the Job Search tab, the My Jobpage tab, job lists or application flows is available.

Dedicated Transitions-only career sections are ideal if you want to create distinct portals for specific purposes and audiences. You can create dedicated Transitions portals for onboarding, "cross-boarding" (internal mobility), promotion, relocation, offboarding or other purposes. Each one can have theme, branding and colors that are different from your other career sections and you can rename labels if desired. A dedicated Transitions portal for offboarding processes, for example, could have a unique theme, branding and colors and you could change the default tab name "Tasks" to "Offboarding".

Email messages which bring employees to these dedicated Transitions-only career sections must be configured to include the specific URL for that destination, rather than any variable. This is because only invited employees should find out about this career section; other more standard internal and external career sections should be configured to have earlier sequence numbers, so that these will receive all of the standard candidate traffic.

To create this type of career section, the Transitions Portal career section type must be selected by in the career section properties. By default, the Tasks tab appears. The My Account and Access Management career portal pages are enabled by default; the other career portal pages cannot be turned on. For details, see Building a Transitions-only Career Section.

Building a Transitions-only Career Section

The building of a Transitions-only career section consists of the following steps. The step-by-step process on how to configure each of these step is available in the Career Section Configuration Guide.

1. Creating a branding file (optional): It is recommended only to put custom information at the top and bottom of the browser page. It is not recommended to constrain the width of the page by adding a navigation or margin at the left or right around the career section. This is because it makes the usable area within the career section very narrow. Job searching may not suffer much from a narrow page, however the Tasks tab contains its own tasks list on the left which consumes some space, leaving a tightly-constrained area for displaying forms, content, and other Transitions tasks.

2. Creating a privacy agreement: Note that the other types of statement (e-Signature, Background Check Consent, Diversity) are not relevant for the Transitions-only career section. The privacy agreement must be associated to the Transitions Portal career section type.

3. Creating a theme (optional).

4. Configuring security options for career sections: Security options can be configured specifically for the Transitions-only career section.

5. Defining the properties of the career section.

6. Configuring career portal pages: The My Account and Access Management career portal pages are enabled by default; configure the properties as desired. The other career portal pages cannot be turned on.

7. Changing the label of the Tasks tab (optional): For example, if the Transitions-only career section is used for offboarding, you could rename the tab Offboarding.

8. Enabling the Activate SSL encryption setting to ensure data sent from the candidate to the server is encrypted. (Career Sections > select the Transitions Portal career section > Security Settings).
9. Activating the career section.
10. Creating a Transitions message template (in the Transitions Administration menu) and put the Transitions portal URL in the message to send candidates, new hires or employees to the Transitions portal. This URL is available under Career Sections > select the Transitions Portal career section > Career Section URL > Show). Do not use the standard variable {TransitionsURLs_Para.TaskAccessURL}.

### Transitions-only Career Section Properties

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>General</td>
<td></td>
</tr>
<tr>
<td>Code</td>
<td>The code must be unique.</td>
</tr>
<tr>
<td>Name</td>
<td>The name must be unique.</td>
</tr>
<tr>
<td>Description</td>
<td>A brief description of the Career Section.</td>
</tr>
<tr>
<td>Type</td>
<td>Select Transitions Portal.</td>
</tr>
<tr>
<td>Sequence</td>
<td>The sequence is the order in which the Career Sections are used by the system to evaluate on which Career Section to redirect a candidate coming from a job specific URL. For Transitions-only career section, make sure to put the Transitions-only career section last in the sequence to avoid people landing on this career section by mistake.</td>
</tr>
</tbody>
</table>

Display the link allowing to deactivate the account in the My account page |
| Displays the Deactivate link in the My Account page to allow the candidate to deactivate his or her account. This can be useful if the My Account career portal page is enabled in the Transitions-only career section. |

### Authentication Privacy Agreement

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>In the Name list, select the privacy agreement you created for the Transitions-only career section.</td>
</tr>
</tbody>
</table>

Display the authentication privacy agreement before |
| Specify where the privacy agreement will appear in the career section. Possible options are before the Login page or the Registration page. |

### Corporate Brand

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Corporate brand that will appear in the Transitions-only career section.</td>
</tr>
</tbody>
</table>

### Theme

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Theme that will appear in the Transitions-only career section.</td>
</tr>
</tbody>
</table>
Fields and Selections

- Data Sharing Between Taleo Recruiting and Taleo Transitions.............................. 49
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Data Sharing Between Taleo Recruiting and Taleo Transitions

A common set of candidate fields is used by Taleo Recruiting and Taleo Transitions. Consequently, candidate data is not copied from one product to the other; a change to candidate information in the Taleo Recruiting side or in the Taleo Transitions side is immediately reflected in the other product.

Fields which are not shared and are specific to Taleo Transitions are:

- Information about Transitions processes and tasks, their statuses and completions.
- Transitions Process user-defined fields which are created in Transitions Administration. They can be displayed and updated on any assigned Transitions form for any Transitions assignee, but cannot be used in Recruiting at all, not by candidates nor Recruiting Center users. See [Standard Fields and User-defined Fields](#).
- Submission, Offer, Requisition, Department fields that are only editable in Recruiting but visible in Transitions. See [Standard Fields and User-defined Fields](#).
- External service result fields created from Passport partners in Taleo Transitions.
- Fields captured for e-signatures on Transitions forms.
- I-9 fields for storing locally-captured I-9 information (not via an external service provider) such as citizenship, names and dates for document from lists.
- Direct deposit information.
Standard Fields and User-defined Fields

Transitions uses both standard fields supplied by the system as well as user-defined fields (UDFs) created by your organization to capture any additional information that is needed about a new hire, candidate or employee. Standard fields and user-defined fields display any current information and, if editable, allow overwriting the field's value with more current information.

There are two general categories of fields available for input on forms or for display on message templates, PDF documents and content pages:

- **Standard fields** supplied with the system which include standardized information on a candidate, an offer, or the current task such as candidate's name, the offer's proposed salary, or the current task's due date. Standard fields may be editable on forms, but they are always read-only on PDFs, content pages, and message templates.

- **User-defined fields** created by the Transitions administrator. Administrators often choose to create UDFs when there is not an appropriate standard field to capture the information that their business requires. UDFs may be editable on forms, but they are always read-only on PDFs, content pages, and message templates.

**Editable vs Read-only Fields**

All of the following Recruiting standard fields and user-defined fields are available in Transitions automatically. The Transitions administrator can add them to forms, message templates, documents and content pages. Recruiting fields are available under Configuration > [Recruiting] Administration > Fields.

- **Candidate standard fields and user-defined fields**: These fields are created in Recruiting Administration. They can be displayed and updated in the Recruiting Center and the Transitions Center. They can also be updated by candidates/new hires in the Career Section. The value of a candidate UDF is specific to the candidate and is consistent for every job for which the candidate submits an application. For example, U.S state driving license would be a good choice for a candidate UDF, a value that is specific to the candidate and independent of job submissions and processes. The Transitions administrator can add candidate standard fields and UDFs to forms and configure the fields so they can be updated in the Transitions Center as well as by candidates/new hires in the Career Section.

- **Submission standard fields and user-defined fields**: These fields are created in Recruiting Administration. They can be displayed and updated in the Transitions Center but not in the Recruiting Center. The value of this type of UDF is specific to each of the candidate's job submissions. For example, equipment preferences would be a good choice for a job submission UDF because candidates/managers can provide a different value depending on the requisition.

- **Offer standard fields and user-defined fields**: These fields can only be read-only when displayed on Transitions forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to a Transitions form that bypassed any Recruiting approval procedures that have been put in place for these types of information.

- **Requisition standard fields and user-defined fields**: These fields can only be read-only when displayed on Transitions forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to a Transitions form that bypassed any Recruiting approval procedures that have been put in place for these types of information.

- **Department standard fields and user-defined fields**: These fields can only be read-only when displayed on Transitions forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to a Transitions form that bypassed any Recruiting approval procedures that have been put in place for these types of information.

Taleo Recruiting standard and user-defined fields often have properties (such as Availability, Content Required and Security Level) and Organization, Job Field and Location (OLF) criteria that can be configured. Be aware that the effect of a field's properties and OLF does not extend to Taleo Transitions. Suppose, for example, you created a user-defined field in Recruiting Administration. The field would be available automatically to the
Transitions administrator. If you later selected or deselected the property that makes the field available in Taleo Recruiting, these actions have no effect on the field’s availability in Taleo Transitions. The Taleo Transitions administrator would still be able to add the field to forms and the field would be displayed to the assignees of the forms. To summarize, a standard or user-defined field in Recruiting Administration is available and can be used in Taleo Transitions independent of the field’s property and OLF configuration.

The limit of Recruiting UDFs that you can create is set to 100. To increase this limit for a given zone at no additional price, contact Oracle Support.

Transitions user-defined fields are created under Configuration > [Transitions] Administration > User-defined Fields. Two types of user-defined fields are managed in Transitions:

- **Transitions Process user-defined fields**: Transitions Process user-defined fields are specific to the process. These fields are created in Transitions Administration. They can be displayed and updated on any assigned Transitions form for any Transitions assignee, but cannot be used in Recruiting at all, not by candidates nor Recruiting Center users. Here is an example of a user-defined field defined by a Transitions administrator in order to drive their process. Take the case of a "Do we have signatures yet?" user-defined field. A "Yes" value would trigger one series of Transitions steps while a "No" value would trigger a different series of steps. Each time a process is started or re-started, the user-type field would need to be completed regardless of the candidate or the job submission.

- **Personal Information user-defined fields**: These fields are created in Transitions Administration. They can be displayed and updated in the Transitions Center but not in the Recruiting Center. These fields are persistent for the person in all processes. Each time a new Transitions process of any type gets launched for the person, the values in these fields will be displayed again and can be updated. This is very similar to the UDFs created by the Recruiting administrator in the Candidate Personal Information category. Additional UDFs can be created in Transitions Administration to augment the list of Recruiting Candidate UDFs.

When a Passport service is installed, this usually brings some vendor-specific UDFs into a zone. These UDFs are defined by the Passport vendor for use with its service, and they appear in the Transitions Personal Information UDF category. These fields will usually get filled for each candidate/new hire when the service gets invoked during a Transitions process. These fields can be used in all the same places as all other UDFs in order to display the results of the Passport service.

There is no limit in the number of Transitions UDFs that you can create. However, a best practice is to limit that number to 100.

**Types of User-defined Fields**

When creating user-defined fields in Transitions Administration, the following types can be created:

<table>
<thead>
<tr>
<th>User-defined Field 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. With regard to reporting, this type of user-defined field will not be supported. Instead, customers can create user-defined fields with two selections: &quot;True&quot; and &quot;False&quot;.</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. With regard to reporting, this type of user-defined field will not be supported.</td>
</tr>
<tr>
<td>Multilingual Text</td>
<td>User-defined field containing more than one value in different languages.</td>
</tr>
<tr>
<td>Numerical</td>
<td>User-defined field containing whole numbers. Numerical fields can only accept digits, not commas, decimal points nor leading zeros. If a field is intended to capture numbers that will contain this type of punctuation, then the Transitions...</td>
</tr>
</tbody>
</table>
## Multi-row Fields

Some UDFs are multi-row fields. They are used within a form to gather or display information that requires several different rows. (Whether this type of field will be supported for reporting purposes has not been determined.) For details, see *Multi-row Fields* in the "User-defined Form" section.

## Creating a Transitions User-defined Field

**Prerequisite**

The *Manage user-defined fields, e-signatures, and user-defined reporting* permission is required.

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

**Steps**

1. Click the Transitions Process or Personal Information category.
2. Click Create.
3. Enter a code.
4. Enter 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.
5. Specify a type (domain) for the user-defined field.
6. 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 Taleo Connect exports.
User-defined Selections

A user-defined selection is a list of possible choices with which a user-defined field can be filled.

When the business need requires a predefined list of choices (instead of free-form text answers to be entered by an assignee), the Transitions administrator can create these choices with user-defined selections. These user-defined selections are then used by a user-defined field that the Transitions administrator creates. User-defined selections created in Recruiting Administration can be used in the Recruiting Center and Transitions Center. However, user-defined selections created in Transitions Administration can only be used in the Transitions Center.

When creating a user-defined selection, you can specify the type of selection users will be able to make:

- **No Selection**: No selection is provided. For example, a text field where the user must type in a value.
- **Single Selection**: A selection of answers is provided, but the user can only select one answer.
- **Multiple Selection**: A selection of answers is provided and the user can select multiple answers.

User-defined selection elements (choices) 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.

System administrators can create and edit user-defined selections (UDS) in SmartOrg through integration. These selections are displayed in Taleo Transitions, in Taleo Onboarding and in Taleo Performance. User-defined selections created in a product are available in that product only.

Creating a Transitions User-defined Selection

**Prerequisite**

The *Manage user-defined fields, e-signatures, and user-defined reporting* permission is required.

**Configuration** > [Transitions] Administration > User-defined Selections and User-defined Fields

**Steps**

1. You first need to create the selection:
   a) In the Transitions Administration menu, click User-defined Selections.
   b) Click Create.
   c) Enter a code and a name.
   d) Specify the order of appearance of the selection.
If selecting Sequential order, the list of choices in the selection will appear in the order they were created. If selecting Alphabetical order, the list of choices in the selection will appear in alphabetical order.

e) Click Save.

2. You then create the elements (choices) provided for the selection:
   a) Click Create next to Elements.
   b) Enter a code and a name.
   c) Click Save.
   d) Create as many elements as required for the selection.
   e) Activate the elements.

3. Activate the selection.

4. You then add the user-defined selection to a user-defined field.
   a) In the Transitions Administration menu, click User-defined Fields.
   b) Click the Transitions Process or Personal Information category.
   c) Click Create.
   d) Enter a code.
   e) Enter 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.
   f) In the Domain field, select the selection you just created.
   g) Specify a type of selection: Single or Multiple.
   h) 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 Taleo Connect exports.
User-defined Fields and Selections - Other Configuration Tasks

Deleting a User-defined Field

Prerequisite
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.

Configuration > [Transitions] Administration > User-defined Fields

Steps
1. Click Transitions Process or Personal Information.
2. Next to the user-defined field, click Delete.
3. In the message box, click Yes.

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

Deleting a User-defined Selection

Prerequisite
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.

Configuration > [Transitions] Administration > User-defined Selections

Steps
1. Click Delete next to the user-defined selection.
2. Click Yes in the message box.

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

Deleting an Element in a User-defined Selection

Prerequisite
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.

Configuration > [Transitions] Administration > User-defined Selections

Steps
1. Click a user-defined selection.
2. Click Delete next to an element.
3. Click Yes in the message box.
Deactivating an Element in a User-defined Selection

Prerequisite
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.
The element must be Active.

Configuration > [Transitions] Administration > User-defined Selections

Steps
1. Click a user-defined selection.
2. Click Deactivate next to an element.
3. Click Yes in the message box.

Result
Once a user-defined selection is deactivated, it is no longer able to be chosen by future views. However, for prior choices that have been made for this field, in which candidates or assignees chose this value on a user-defined form, this information is preserved. Future views of the filled-out form for these candidates or assignees will continue to display the chosen element, even though it has been deactivated.

Deactivating a User-defined Selection

Prerequisite
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.
The user-defined selection must be activated.

Configuration > [Transitions] 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 available to be selected by the Transitions administrator when defining new user-defined fields. However, forms that include user-defined fields based on this user-defined selection that had been assigned and completed in the past for prior candidates/new hires will still preserve the selection that was chosen when the form got submitted by the assignee.

Selecting User-defined Fields for Reports

Prerequisite
The Reporting solution is not yet available but you can get ready by indicating which UDFs should be reportable when the solution becomes available.
The Manage user-defined fields, e-signatures, and user-defined reporting permission is required.

Configuration > [Transitions] Administration > User-defined Reporting

Steps
1. Click Transitions Process.
2. In the list of available items, select the desired fields and click Add.
3. Use the up and down arrows to indicate which UDF will be reportable in which slot in the reporting tool.
4. Click Save.
5. Click Yes to confirm.

**Result**

That data is available for reporting.
Electronic Signatures

Electronic Signature

Electronic signatures allow an organization to validate the identity of a new hire, manager, or other task assignee when they are submitting a specific set of information on a form.

The Transitions administrator can configure and use an electronic signature in forms, message templates, documents, content pages. For example, a person may have to read and complete specified forms and may be asked to give specific information confirming their identity. The information provided by the person is checked by the system before allowing the form to be submitted. For instance, the system can validate if the data entered matches the last name, initials, or their Taleo password.

The Electronic Signature feature is flexible and extensive. Transitions provides 50 e-signature fields that can be used by the Transitions administrator to meet the organization's business needs. There are also three e-signature fields intended for use with the I-9 form, and one e-signature field intended for use with electronic offers. The Transitions 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-signatures.

There are several methods of validation that can be used for an e-signature. When determining which validation method to use, the Transitions administrator must consider their business process. If data in any of these fields has not been previously captured in the system for the assignee, it will then be impossible for the assignee to successfully submit the form (the system cannot compare the information that is typed in the e-signature). For example, if the Taleo password is a mandatory field for all users in an organization, this validation method would be a good choice. On the other hand, if an organization does not collect the date of birth for all candidates, this would be a poor choice to use for an e-signature.

<table>
<thead>
<tr>
<th>Use this e-signature validation method</th>
<th>If the assignees are in this group of people</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>Email</td>
<td>All</td>
<td>Can match any one of three possible email addresses that can potentially exist in Transitions:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Personal email address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Correspondence email address</td>
</tr>
<tr>
<td></td>
<td></td>
<td>• Corporate email address</td>
</tr>
<tr>
<td>First name</td>
<td>All</td>
<td></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>Last name</td>
<td>All</td>
<td></td>
</tr>
</tbody>
</table>
Use this e-signature validation method | If the assignees are in this group of people | Notes
--- | --- | ---
SSN last 4 digits | New hires only | Before choosing this validation method, the Transitions administrator needs to be confident that the Social Security Number/Social Insurance Number value was properly entered in the system. The Transitions administrator should make sure that the SSN/SIN field is filled with digits only, no extraneous dashes nor spaces. If gathering the SSN/SIN in a Transitions form, this can be done on a form that uses an input mask to ensure that they only save 9 digits.

Taleo password | All | Before choosing this validation method, the Transitions administrator must ensure that there is data saved for this field in the database. The secret identifier entered by the assignee must match the data saved in the database. If the system administrator forgot to capture the data in the first place, then this e-signature method will always fail.

User secret identifier | New hires only | Before choosing this validation method, the Transitions administrator must ensure that there is data saved for this field in the database. The secret identifier entered by the assignee must match the data saved in the database.

Zip/postal code | New hires only | Before choosing this validation method, the Transitions administrator must ensure that there is data saved for this field in the database. The zip/postal code entered by the assignee must match the data saved in the database.

The value entered by the assignee into the e-signature field can only be compared with existing data. This data can originate from different sources:

- From Recruiting and the Career Section.
- It can be filled in manually on a prior Transitions form by the new hire or other user on their behalf.
- It can be imported using Taleo Connect after it has been generated for new hires in an external system.

In any 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.

**Configuring an Electronic Signature**

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

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

**Result**
The electronic signature can be successfully used in a form.
Electronic Signature on a Form

The Transitions administrator can configure and insert electronic signature fields into a form.

Each of the 50 available electronic signatures should only be used on one form in a single process. It is important not to reuse an electronic signature. Instead, the Transitions administrator must define a specific electronic signature which is intended to be used on a specific form. If one single electronic signature field is placed in two forms, then it can appear to the users as if the second form has already been signed or the second form's electronic signature can overwrite the information about who signed the first form and when. For example, if using Signature1 in a I-9 form, it cannot be used in the Sexual Harassment form in the same process. Signature2 would need to be selected and configured for use on the Sexual Harassment form.

The e-signature is a set of four fields. There is one main field (Esignature[Number]) that must be configured onto forms for capturing the signer's electronic signature data, and the other three fields (Esignature[Number]Date, Esignature[Number]IPAddress, Esignature[Number]FullName) are intended to display back information about the successful capture of that signature. The main field must be used as editable and is only meaningful when configured onto the form where the signature will be validated and submitted. The other three fields for viewing the information about the signature can only be read-only and these are useful on PDFs, reports or exports, and when viewing past-submitted forms in read-only as well. These fields help legal departments consider how to best meet their regulatory and compliance needs. They can be inserted as a variable into PDFs, message templates, content pages.

The following table describes the four 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 e-signature value. Configure this field to appear on only one form and consider making this field mandatory. Do not configure this field onto other forms, PDFs, or message templates. It is not possible to display back the data that was provided by the assignee for validation.</td>
</tr>
<tr>
<td>Esignature[Number]Date</td>
<td>Automatically by Transitions</td>
<td>Timestamp indicating when the form containing the e-signature was submitted. When the corresponding field has been captured and submitted, this field becomes read-only.</td>
</tr>
<tr>
<td>Esignature[Number]IPAddress</td>
<td>Automatically by Transitions</td>
<td>The IP Address captured is from either the submitting computer or that computer network's firewall. When the corresponding field has been captured and submitted, this field becomes read-only.</td>
</tr>
<tr>
<td>Esignature[Number]FullName</td>
<td>Automatically by Transitions</td>
<td>This field is filled automatically once the Esignature[Number] field is captured. It will contain the first and last name of the assignee. The purpose of this field is to display the assignee's full name because the Esignature[Number] field is not visible once it has been submitted. In other words, if the Transitions administrator designs a form that only contains the Esignature[Number] field, once the form is submitted and has been viewed as a read-only completed form, the name of the assignee will not be displayed. On the other hand, if the form was designed to include the Esignature[Number] field for capturing the</td>
</tr>
</tbody>
</table>
Electronic Signature on a PDF

The Transitions administrator can configure and insert electronic signature fields into a PDF document in order to display information about signatures that were successfully captured on Transitions forms.

PDF documents can be created by the Transitions administrator to display any type of information that has been gathered in the Taleo system, including displaying specific information about electronic signatures that have been successfully captured on forms that precede the PDF in each candidate/new hire's Transitions process. The \texttt{Esignature[Number]FullName}, \texttt{Esignature[Number]Date} and \texttt{Esignature[Number]IPAddress} fields are available for inclusion in the PDF. Once entered on the PDF, custom formatting can be applied to these fields using Adobe Professional. For example, the \texttt{Esignature[Number]FullName} field can be displayed in dark blue italics to simulate an ink signature while the rest of the PDF's text can be black.

A PDF with an e-signature can be displayed in the Transitions Center and in the career section within any Transitions Task. If the user's e-signature was valid when submitted, then the \texttt{Esignature[Number]FullName} 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[Number]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 will see both fields as empty. An assignee can make several unsuccessful attempts to submit a form with invalid data in the Esignature field. These unsuccessful attempts are recorded and the form does not get completed. If after one or more unsuccessful attempts the PDF (or any other form or message template that uses these fields) is viewed, the fields will be null.

Adding an Electronic Signature in a PDF

Prerequisite
Adobe Acrobat Professional is required to insert electronic signature fields 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 "ESignature01" and its corresponding Date will be "Esignature01Date".
5. Enter any other information to appear on the PDF.
   For example, the Esignature[Number]FullName field can be displayed in dark blue italics to simulate an ink signature while the rest of the PDF's text can be black.

Result
Electronic signature fields will appear on the PDF after they have been associated with any candidate/new hire as long as a successful electronic signature has been captured for that set of fields during the current process. The PDF document containing an electronic signature can be used in the Transitions Center and in the Candidate Portal within any Transitions Task.

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 when displaying the Date field after capturing a signature, either on forms or PDFs.

The Esignature[Number]Date field is a timestamp of when a document was signed by a new hire or assignee using an electronic signature field. It is available as a variable that can be included on message templates, forms, and PDF documents. 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 the Greenwich Mean Time (GMT) time zone. If your organization operates in a single or a few time zones, then the date of an e-signature would probably be sufficient by your organization's legal department or other compliance considerations. But if your organization operates globally, then it may be more important to know exactly when each e-signature was captured, according to one centralized system. 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 e-Signature[Number]Date fields.

Example:
When the date is chosen to be displayed without the time, it will be displayed according to the 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.
Images

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Working with Images

Graphical images can be uploaded to the Oracle Taleo system for use in message templates, forms, and the paragraphs within content pages.

The Transitions administrator can upload small images to their zone, and can view the resulting URL where these images get hosted. This URL in turn can be used in the Rich Text Editor when creating text in various places in the Transitions system: message templates, forms, and paragraphs for use in content pages. This hosting capability is limited but handy for teams which do not have other access to web hosting capabilities.

Supported image formats include: .jpg, .gif, and .png. The .tiff format is not supported by the Chrome and Firefox browsers when it is used in a src attribute in an img tag.

The size limit for each individual image is configurable by a protected setting, with a default of 20 kilobytes. The size limit for all images collectively is configured by a protected setting, with a default of 25 megabytes (see Transitions Settings).
Adding an Image to the Images Library

**Prerequisite**

*Configuration > [Transitions] Administration > Images*

**Steps**

1. Click Create.
2. Enter a code (mandatory) and a description (optional) in the corresponding fields.
3. Click Browse, locate the image file you want to add to the library and click it.
4. Click Save.
5. To use the URL in rich text areas, find it in the Properties area and cut it for later pasting.
6. To display the image after uploading is complete, click Show in the area named Preview.

**Result**

The image is available to be displayed within various rich text areas wherever the Transitions administrator specifies the corresponding URL.
Deleting an Image from the Images Library

Prerequisite

Configuration > [Transitions] Administration > Images

Steps

Locate the image and click the corresponding Delete.

Result

The image will no longer be displayed in any rich text areas regardless of where the Transitions administrator specified the corresponding URL.
Forms

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User-defined Form

Forms in Transitions allow new hires or other participants to provide specific information to the system by entering values into fields in an online form and then submitting it. A user-defined form is one or more pages of information containing standard and/or custom fields that can be used in specific tasks during the Transitions process.

Transitions uses a form builder to assist in the formatting and personalization of a user-defined form. You can add text, graphics, hyperlinks and make fields required among many other formatting options. User-defined forms can be created from scratch, duplicated, and edited.

When creating a form, you provide a name, a code, and a page name to facilitate future references. Then, rows, columns, and sections can be added to the form using the different tools of the Toolbox. Fields and text are then inserted in the form. A list of available fields appears in the Field Chooser. To insert fields, you select the field, then drag and drop it into the desired area. 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, assignees cannot edit Esignature[number]Date because it is captured automatically by the system when an e-signature is successfully provided.

Once a user-defined form is created, it 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 within an organization. Forms can be translated as required, but if no translation is provided, the form is displayed in the base language.

While people are completing forms opened in the Transitions Center or on the Transitions tab in career sections, there is no Save as Draft feature. For this reason, when you are designing a form, consider creating multiple, shorter forms rather than a long form. Multiple, short forms enable assignees to complete and submit information more easily. In addition, if you make some fields mandatory on a form, this will ensure that assignees provide more information before they submit the form.

**Multi-row Fields**

When a form will be used for gathering or displaying information that requires several different rows, multi-row fields can be used. For example, this is useful for a candidate to provide several different prior addresses, several emergency contacts, or several destinations for a percentage of their paycheck to be direct-deposited. The form builder contains these multi-row fields:

- Addresses / AddressBookHistory
- StructuredResume / EducationList
- StructuredResume / ReferenceList
- StructuredResume / WorkExperienceList
- PersonalInfo / DirectDeposit

When these fields are placed onto a form, a table is created in the form to allow the inclusion of child fields into the table as columns. Add and Delete buttons need to be added to allow users to enter new rows of information or delete rows of information.

- A column in a multi-row field must contain at most one field.
- Multi-row fields are only supported in user-defined forms. They are not available for inclusion in PDFs, message templates, and content pages.
Creating User-defined Forms

The creation of a user-defined form consists of the following steps.

1. Creating the user-defined form.
2. Previewing the user-defined form.
3. Translating the user-defined form in the languages activated within your organization.
4. Activating the user-defined form.

Creating a User-defined Form

Prerequisite

The Manage user-defined forms to display and collect data permission is required.

Configuration > [Transitions] Administration > User-defined Forms

Steps

1. Click Create.
2. Provide a code, a name, and a page name.
3. To add a section, position your cursor in an existing section, then click . A section entitled Default section title is inserted in the form, just below where your cursor was positioned.
4. To modify a section title, click your mouse on Default section title and make required changes in the Selected Element Properties section.
5. To add a table, position your cursor in the desired section of the form, then click . A table containing two columns and five rows is inserted in the form.
6. To add rows and columns, use the tools in the Toolbox.
7. To add text, position your cursor in a cell then click to place a text area onto the form. Then, in the Selected Element Properties section, in the Value field, use the rich text editor to add formatting, graphics, hyperlinks, etc.
8. To add fields, select a field in the Field Chooser list, then drag and drop it in the desired section.
9. To edit the properties of a field, select the field then scroll to the Selected Element Properties section at the bottom of the form.
10. To add a page, click Add Page.
11. Click Save.

Result

The form appears in the User-defined Forms list and its status is Draft.

Previewing a User-defined Form

Prerequisite

The Manage user-defined forms to display and collect data permission is required.

Configuration > [Transitions] Administration > User-defined Forms

Steps

1. Locate the user-defined form in the User-defined Forms list.
2. Click Preview.

**Translating a User-defined Form**

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**
1. Click the user-defined form.
2. Click Configure next to Language.
3. Select *In Use* for the desired language and click Save.
4. In the Language selector, select the language you just activated.
5. Translate the form.
6. Click Save.

**Activating a User-defined Form**

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**
1. Locate the user-defined form in the User-defined Forms list.
2. Click Activate.

**Result**
The status of the user-defined form is changed to Active. The user-defined form can be used in a Transitions process.

**Field Selected Element Properties**
The Selected Element Properties section is used to configure fields added to a user-defined form.

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<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>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 Offer/AnnualBonus. The value in the Binding field is not editable.</td>
</tr>
<tr>
<td>CSS Style</td>
<td>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</td>
</tr>
<tr>
<td>Field Label</td>
<td>The Field Label is the name used to identify a field, according to the CSS formatting above. Tools allow the formatting of the text for example, bold, italic, underline, bullets, alignment.</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
</tr>
<tr>
<td>---------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</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>Field Type</td>
<td>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:</td>
</tr>
<tr>
<td></td>
<td>• Date Drop-down list.</td>
</tr>
<tr>
<td></td>
<td>• Date input-utilizes a calendar picker with keyboard short-cut keys available.</td>
</tr>
<tr>
<td></td>
<td>• Control-Forward and Ctrl-Back changes the calendar by month</td>
</tr>
<tr>
<td></td>
<td>• Ctrl-Up and Ctrl-Down changes the calendar by year, in the current month</td>
</tr>
<tr>
<td></td>
<td>• Escape key does the Cancel action</td>
</tr>
<tr>
<td></td>
<td>• Enter key does the Done action</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. 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>
<tr>
<td>Help Callout</td>
<td>Similar to instructions, but this is displayed as a help bubble on the form and can provide information about a field to the user. The help callout is used to provide tips on the field. Tools allow the formatting of the text for example, bold, italic, underline, bullets, alignment. You can click the enlarged view icon to access the Rich Text Editor which provides more formatting tools.</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></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>| = the</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: 99999</td>
</tr>
<tr>
<td></td>
<td>Postal Code Canada: a9a9a9</td>
</tr>
<tr>
<td></td>
<td>Note: Make sure not to add a space before and after the</td>
</tr>
<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</td>
</tr>
</tbody>
</table>

You can click the enlarged view icon to access the rich text editor, which provides more formatting tools.
<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>The field. Tools allow the formatting of the text for example, bold, italic, underline, bullets, alignment. You can click the enlarged view icon <img src="image" alt="icon" /> to access the Rich Text Editor which provides more formatting tools.</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>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>Tooltip</td>
<td>Tooltips are small pop-up windows containing a descriptive text of the field label. Tooltips display when the user hovers over a title.</td>
</tr>
</tbody>
</table>
User-defined Forms - Other Configuration Tasks

Duplicating a User-defined Form

Prerequisite
The Manage user-defined forms to display and collect data permission is required.

Configuration > [Transitions] Administration > User-defined Forms

Steps
1. Locate the user-defined form in the User-defined Forms list.
2. 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.

Deactivating a User-defined Form

Prerequisite
The Manage user-defined forms to display and collect data permission is required.

The status of the user-defined form must be Active.

The user-defined form must not be in use.

Configuration > [Transitions] Administration > User-defined Forms

Steps
1. Locate the user-defined form in the User-defined Forms list.
2. In the User-defined Forms page, click Deactivate.

Result
The status of the user-defined form is changed to Inactive. The Transitions administrator cannot incorporate the form into additional tasks for defining future Transitions processes. Processes for candidates/new hires who have already completed this form can continue to view this completed form. Processes for candidates/new hires who will be assigned this form in their current process will still be able to view and complete this form.

Deleting a User-defined Form

Prerequisite
The Manage user-defined forms to display and collect data permission is required.

The status of the user-defined form must be Draft.

Configuration > [Transitions] Administration > User-defined Forms

Steps
1. Locate the user-defined form in the User-defined Forms list.
2. Click Delete.
3. 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 Transitions process.

Adding a Page in a User-defined Form
Prerequisite
The Manage user-defined forms to display and collect data permission is required.

Configuration > [Transitions] 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. The Transitions administrator can navigate among the pages using the page indicator. The assignee in the career section portal will see multiple pages and navigate between them using the Next/Previous buttons.

Reordering Pages in a User-defined Form
Prerequisite
The Manage user-defined forms to display and collect data permission is required.
The user-defined form must contain more than one page.

Configuration > [Transitions] Administration > User-defined Forms

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
Within any form, an existing page can be deleted. This includes forms that are active and have been assigned to participants in Transitions processes. This is something that should be done after careful consideration because the result is that any completed history for new hire processes which had completed that form will now display only the updated version of the form that is, without the deleted page included any longer. For this reason, deleting a page in a form is less risky when done on forms which are still in Draft status.
The Manage user-defined forms to display and collect data 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.

---

### Adding a Field to a User-defined Form

**Prerequisite**

The Manage user-defined forms to display and collect data permission is required.

**Steps**

1. Click a user-defined 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.

---

### Deleting a Field in a User-defined Form

**Prerequisite**

Within any form, an existing field can be deleted. This includes forms that are active and have been assigned to participants in Transitions processes. This is something that should be done after careful consideration because the result is that any completed history for new hire processes which had completed that form will now display only the updated version of the form that is, without the deleted field included any longer. For this reason, deleting a field in a form is less risky when done on forms which are still in Draft status.

The Manage user-defined forms to display and collect data permission is required.

**Steps**

1. Click a user-defined form.
2. Select the field in the form.
3. Click in the Toolbox.
4. Click Save.

---

### Adding Multi-Row Fields in a User-defined Form

**Prerequisite**

The Manage user-defined forms to display and collect data permission is required.
Multi-row fields are:

- Addresses / AddressBookHistory
- StructuredResume / EducationList
- StructuredResume / ReferenceList
- StructuredResume / WorkExperienceList
- PersonalInfo / DirectDeposit

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

**Steps**

1. Click a user-defined form.
2. In the Field Chooser, select a subcategory field from a main category and drag and drop it in the form. This will add the table onto the form.
   For example, under Addresses, select AddressBookHistory and drag and drop it into the form.
3. In the Field Chooser, select a child field from the list and drag and drop it into a column. This will get the child field into a column of the table.
   For example, under Addresses/AddressBookHistory, select StreetAddressLine1 and drag and drop it into a column of the table.
4. In the Field Chooser, select add and drag and drop it to the gray title area of the table.
   For example, under Addresses/AddressBookHistory, select add.
5. In the Field Chooser, select delete and drag and drop it to the gray title area of the table.

**Adding an Image to a User-defined Form**

**Prerequisite**

The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Click a user-defined form.
2. Add a text field to the form by positioning your cursor in a cell and clicking to place a text area onto the form.
3. Select the field you just added and scroll to the Selected Element Properties section at the bottom.
4. Place the cursor in the Value text field and click the Enlarged View icon .
5. In the Enlarged View page, click the Insert or edit image icon.
6. Enter the URL of the image location.
   Enter image property information, if desired.
7. Click OK.
8. Click Save.

**Printing a Non-Filled User-defined Form**

**Prerequisite**

The Manage user-defined forms to display and collect data permission is required.
Steps

1. Locate the user-defined form in the User-defined Forms list.
2. Click Preview.
3. Click Print Preview.
4. Click Print.
5. Select a printer and click Print.

Result

An empty form is printed, it does not contain any values in the field and is not assigned to any specific person.

Modifying User-defined Forms - Best Practices

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 are:

- 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, follow these steps:
  1. Create a duplicate of the form, make changes in the new form, and activate the new form.
  2. Deactivate the old form if it should not be pulled into new tasks and processes.
  3. For the existing Transitions tasks and processes which are using the old form, create duplicates, make sure they are using the newly-created form, and activate the new tasks and processes.
  4. Result: Candidates/new hires can be started on the newly-updated process.

The old process can be deactivated, either before or after the new process got activated. Existing candidates/new hires who already completed the old form with the old process will continue to see that old form in their history. This is desirable because it does not change history. Existing candidates/new hires who have already started moving through the old process will continue to do so, and the assignee will be presented with the old form when the time comes. If this is undesirable, in other words if they must get the new form instead, then the Transitions Center or Recruiting Center user must cancel their running process and start them from the beginning of the newly-activated process.
Hyperlinks in User-defined Forms

Hyperlinks can be added to user-defined forms. Those three methods are available:

- A hard-coded hyperlink can be added to a text field to direct candidates/new hires to resources, training, videos, websites, or anything that the Transitions administrator can plan in advance to help the assignee.
- A dynamic hyperlink can be added to a user-defined field. For example, if an organization requires that candidates/new hires be directed to different web destinations, then it may be appropriate to design a process that gathers the right URL from one assignee and then displays it back to the new hire assignee. To achieve that, the Transitions administrator would define a UDF and then use it in a form that will be assigned for example to each recruiter or other participant. When adding the UDF to a form, the Transitions administrator would display the field as a URL in a read-only format. Later, at runtime for each process, the assignee will type in the right value. Then, each new hire assignee will see this as a hyperlink in their form and each new hire could potentially see a different link than each other new hire.
- A dynamic hyperlink can be added in a standard field. This is done when an organization wants to use the ELearningURL field to link a Transitions process to a learning program in Taleo Learn.

Adding a Hard-Coded Hyperlink in a Text Field

**Prerequisite**

The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Click a user-defined form.
2. Add a text field to the form by positioning your cursor in a cell and clicking to place a text area onto the form.
3. Select the text field you just added and scroll down to the Selected Element Properties section at the bottom.
4. Place your cursor in the Value field and click the icon .
5. Enter text or an image. To insert the image:
   a) Click Insert or edit image.
   b) Enter URL of image location.
      Enter image property information, if desired.
6. Select the text or image for the hyperlink.
7. Click Insert or Edit Link.
8. In the Link Info tab, select URL, then the http:// protocol, and enter the destination URL.
9. In the Target tab, select the Open in New Window option if the destination page is to open in a new browser window.
   This is recommended because the form assignee will lose the form in their browser window.
10. Click OK.
11. Click OK.
12. Click Save.

**Adding a Dynamic Hyperlink in a User-defined Field**

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Create a user-defined field.
2. Click a user-defined form.
3. In the Field Chooser, select the user-defined field you created. The field will be available under the TransitionsProcess or PersonalInfo category.
4. In the Selected Element Properties section, under Field Type, select URL.
5. 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.
6. Click Save.

**Adding a Dynamic Hyperlink in a Standard Field**

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Click a user-defined form.
2. In the Field Chooser, select the TransitionsURLs category.
3. Click the ELearningURL field then drag and drop it into the form.
4. In the Selected Element Properties section, under Field Type, select URL.
5. 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.
6. Click Save.
Passport Partner Fields in User-defined Forms

Passport Partner fields can be added into user-defined forms to show a candidate/new hire's results for every external service request, past or current, for that Partner.

Services, provided by certified third parties, that engage users outside of the Oracle Taleo system, can be integrated into Taleo Transitions processes. If a Passport service is enabled, a Transitions administrator can create tasks to interact with it. Completion values returned after the external service provides its results can be displayed in forms.

A Passport request is one single entire conversation for one candidate/new hire between the Taleo system and the given Partner, from beginning to end, including as many back-and-forth exchanges as are required to complete the transaction and get a final result for the candidate/new hire. On the other hand, a Passport result is a single field, either standard or user-defined by the Partner, storing a single value like a status, an ID number, a total, or any information that the Partner manages.

So for instance, one new hire process can be configured to kick off three different requests for three different Partners, and each request may take a varied amount of time and different participants to reach successful completion and deliver its various results to Transitions for this person. Then, if the same new hire gets rehired later on, perhaps a differently-configured process will be appropriate, a shorter rehire process which is configured to only kick off one new request to one of those prior Partners and new results will be imported back to Transitions.

In the form builder Field Chooser, there are two different types of results fields:

- **ServiceLastRequestResult**: This category shows each user-defined field that has been created by each Passport Partner that is activated on the zone. When placed onto a form, the assignee will see the single most recent value in that field from that Partner, if any exists. These fields each yield a single value. Therefore they are useful for many things in a new hire's process for example to display the current information on a form, a PDF, a message template, a content page.

- **ServiceAllRequestResults**: This category shows each activated Partner as a subcategory, and the user-defined fields of each partner can be configured to appear as children columns in a multi-row table on a form. When placed onto a form, the assignee will see all the data from ALL the prior requests for this candidate/new hire for this partner, showing the most recent one at the top. These fields can each yield several values, if more than one request has ever been made to this Partner for this candidate/new hire within Transitions. Therefore they are useful to track historical information or to view improvements or changes in results over time. These multi-row fields can only be displayed in forms (not in PDFs, message templates, content pages, conditions).

Note that these fields are read-only and can only be modified by the Partner while each request is happening.
History Tracking in User-defined Forms

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

The History feature shows modifications to the form definition itself. Updates or additions within text fields are not explicitly described. The History feature does not show history of assignees who are completing this form within processes.

When clicking the View History link of a user-defined form, the History list 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>
Candidate/Employee Details Form in the Transitions Center

A form can be created to display extended details on the Transitions Center.

In the Transitions Center, when clicking the name of a candidate/employee in the Processes section, the Process page is displayed and provides standard information about the candidate/employee and his/her process. To present a larger set of information, the Transitions administrator can configure a Details Form providing read-only access to any fields that the organization considers to be important. When enabled, this Details Form is available in the Transitions Center when clicking the Details link located in the General Information section of a candidate/employee Process Page.

Only one Details Form can be used and will apply to all candidates/employees in all processes and all Organizations, Locations, and Job Fields. All information in the form is shown read-only. Regardless of the form name, the name of the link will always be Details.

In the Transitions Center, the Details form is displayed when clicking the Details link located in the General Information section of the Process Page.

Configuring the Details Form

The configuration of the Details form consists of the following steps.

1. **Creating the user-defined form** that will be used for the Details form.
2. Configuring the Details Link for Processes setting (Configuration > [Transitions] Settings). In the Value field, enter the code of the user-defined form you just created. This setting activates the Details link on the Process page.
Message Templates

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Message Templates

A message template is an e-mail that is sent to one or more recipients in a process.

Message templates are available via the Configuration menu:

- Message templates under Configuration > Security are messages relating to the security of Taleo Enterprise products. They are system-generated messages provided by Taleo. For details, see Security Message Templates.
- Message templates under Transitions Administration > Message Templates are messages specific to the Transitions product. In Transitions, almost all emails sent to recipients are based on predefined message templates. In the Transitions Center, there is one mechanism for sending a free-text email to the candidate/new hire whose process is running. Other than this, all communication emails, task reminders, or completion notifications sent to any task assignee are based on the message templates. They can be personalized to each situation by the use of variables placed within the paragraphs. When sent at runtime, the variables within these message templates get replaced with the most up-to-date values from the Taleo database. In this way, the same message template can be used several times, to invite several different participants to complete several different tasks with different due dates, throughout the course of a single process. Message templates can be associated with tasks within a Transitions 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.

The Message Templates list displays information in the following columns:

- Code
- Name
- Status: Active, Inactive, Draft.
- Creation Date
- Last Modification Date
- Actions

All columns (except the Actions column) can be sorted by clicking on the column header. The list can also be filtered using the Refine by tool.
Transitions Message Template - Key Concepts

Several elements are configured when creating a message template.

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

• Code
• Name
• Description
• Status
• Message Format: 1) HTML: Select this format if you want the custom content to be seen directly in the email. 2) Read only attach: Select this format if you want the custom content to be delivered as a PDF attachment. 3) Text: Select this format if you want to send an email which contains the custom content in an HTML attachment.
• To, Reply To, Cc, Bcc: Variables can be dragged and dropped in these fields. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any variables placed in these fields 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 assignees receive it. Also note that you can enter an explicit email address in these fields.
• Subject: Variables can be dragged and dropped in the Subject field.

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 variables or fields from the Transitions database, unlike the PDF documents which the Transitions administrator uploads into the Documents feature.

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 text-based messages. Variables are most often used in the body of a text-based 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 the new hire, 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 you entered.

This table presents useful information regarding specific variables:
<table>
<thead>
<tr>
<th>Variable</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td><code>{TransitionsURLs_Para.TaskAccessURL}</code></td>
<td>Can be used for any assignee. The variable gets resolved as follows:</td>
</tr>
<tr>
<td></td>
<td>• Candidates and new hires are driven to the Career Section.</td>
</tr>
<tr>
<td></td>
<td>• Managers and recruiters (and other SmartOrg users) are driven to the Transitions Center.</td>
</tr>
<tr>
<td></td>
<td>• Users who only have “External User” permissions are driven to the Response Center.</td>
</tr>
<tr>
<td><code>{TransitionsURLs_Para.ResponseCenterURL}</code></td>
<td>The assignee is driven to the Response Center.</td>
</tr>
<tr>
<td><code>{TransitionsURLs_Para.TransitionsCenterURL}</code></td>
<td>The assignee is driven to the Transitions Center.</td>
</tr>
<tr>
<td><code>{Requisition_Para.ExpectedStartDate}</code></td>
<td>Used to display a new hire’s start date in a message template. The date is to be displayed with the time.</td>
</tr>
<tr>
<td><code>{Requisition_Para.ExpectedStartDateNoTime}</code></td>
<td>Used to display a new hire’s start date in a message template. The date is to be displayed without the time.</td>
</tr>
<tr>
<td><code>{TaskParticipant.FirstName}</code></td>
<td>This variable is useful if you want to say “Dear [Fred]” in a correspondence. It is also useful if there are multiple assignees and you want to say “Dear [Mary]” to the other recipient who isn’t Fred.</td>
</tr>
<tr>
<td><code>{Task.AssigeneesNames}</code></td>
<td>This variable is useful if you want to tell the recipient who are ALL the assignees of the step: they all are listed.</td>
</tr>
<tr>
<td><code>{Task.OwnerFullName}</code></td>
<td>This variable is useful to tell candidates/new hires who to contact should they have any questions. This works if the process owner is the manager, recruiter, or a specific person like <a href="mailto:Bob@company.com">Bob@company.com</a>. It also works when the process owner is a functional role – as long as the role resolves to a single person. If the functional role for this requisition's OLF is assigned to more than one person, then only one person's contact information will be shown.</td>
</tr>
</tbody>
</table>
Creating Message Templates for Transitions

The creation of a message template consists of the following steps.
1. **Defining the properties of the message template.**
2. **Creating the content of the message template.**
3. **Adding attachments to the message template (optional).**
4. **Previewing the message template to see how it will look (optional).**
5. **Activating the message template.**

Defining the Properties of the Message Template

**Prerequisite**

The *Manage message templates for email correspondence and reminders* permission is required.

**Configuration** > [Transitions] Administration > Message Templates

**Steps**

1. Click Create.
2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.
   
   Variables can be dragged and dropped in these fields. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any variables placed in these fields 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 assignees receives it. Also note that you can enter an explicit email address in these fields.
5. Complete the Subject field. Variables can be dragged and dropped in the field.
6. Click Save.

Creating the Content of the Message Template

**Prerequisite**

The *Manage message templates for email correspondence and reminders* permission is required.

**Configuration** > [Transitions] Administration > Message Templates

**Steps**

1. Open the message template.
2. Click Custom Content.
3. Type the content of the message in the text box. You can format the text using the Rich Text Editor options. You can also use variables. Simply select a variable, then drag and drop it in the desired area.
4. Click Save.

Adding an Attachment to the Message Template

**Prerequisite**

The *Manage message templates for email correspondence and reminders* permission is required.
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 5.

**Configuration > [Transitions] Administration > Message Templates**

**Steps**
1. Open the message template.
2. Click Add next to Attachments.
3. Enter a code.
4. Click Browse to select a file.
5. 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.

**Previewing the Content of the Message Template**

**Prerequisite**
The `Manage message templates for email correspondence and reminders` permission is required.
You must be in the active language of the message template.

**Configuration > [Transitions] Administration > Message Templates**

**Steps**
1. Click a message template.
2. Click Preview.

**Activating the Message Template**

**Prerequisite**
The `Manage message templates for email correspondence and reminders` permission is required.
The message template must have an Inactive or Draft status.

**Configuration > [Transitions] Administration > Message Templates**

**Steps**
1. Open the message template.
2. Click Activate.

**Result**
The message template status is Active. 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 Transitions.
Message Templates for Transitions - Other Configuration Tasks

Duplicating a Message Template

Prerequisite
The Manage message templates for email correspondence and reminders 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.

Configuration  >  [Transitions] Administration  >  Message Templates

Steps
1. Click a message template.
2. Click Duplicate.
3. Make changes.
4. Click Save.

Result
The message template is in Draft status and appears in the Message Templates page.

Deactivating a Message Template

Prerequisite
The Manage message templates for email correspondence and reminders permission is required.
The message template must have the Active status.

Configuration  >  [Transitions] Administration  >  Message Templates

Steps
1. Click a message template.
2. 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 for email correspondence and reminders permission is required.
The message template must have the Draft status.

Configuration  >  [Transitions] Administration  >  Message Templates
Steps

1. Click Delete next to the message template to delete.
2. Click Yes in the message.

Result
The message template is permanently deleted from the database.

Removing an Attachment from a Message Template

Prerequisite
The Manage message templates for email correspondence and reminders permission is required.

Configuration > [Transitions] Administration > Message Templates

Steps

1. Click a message template.
2. Click Remove.

Result
The attachment no longer appears in the Attachments section of the message template.
Security Message Templates

Security message templates are messages relating to the security of Taleo Enterprise products. They are provided by Taleo.

Security message templates are located in the Configuration menu, under Security. For a list of message templates, see Message Templates Related to Security. System administrators can change the languages available and the wording of messages. They cannot create new message templates.

Configuration

To create and edit security message templates in the Configuration menu, the Manage Message Templates for email correspondence and reminders permission is required.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
</table>

Message Templates Related to Security

Message templates related to security are located in the Configuration menu, under Security.

<table>
<thead>
<tr>
<th>Message Template</th>
<th>Description</th>
<th>Recipient</th>
<th>To Field Content</th>
</tr>
</thead>
<tbody>
<tr>
<td>Forgot Password</td>
<td>Indicates that the password change request was received and provides the user the access code needed to change his/her password.</td>
<td>User account email address (user trying to do a forgot password).</td>
<td>{Other.UserEmail}</td>
</tr>
<tr>
<td>Password Change</td>
<td>Indicates that the password change request was received and provides a step-by-step procedure on how to change the password.</td>
<td>User account email address (user trying to do a forgot password).</td>
<td>{Other.UserEmail}</td>
</tr>
<tr>
<td>Instructions</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Password Change</td>
<td>Indicates to send a new password to a user that was unable to answer his/her password change questions, or did not remember his/her password and had not yet specified questions.</td>
<td>Not define by default. Define by the client. (Email probably sent to an administrator).</td>
<td>PLEASE ENTER A VALID EMAIL ADDRESS</td>
</tr>
<tr>
<td>Request</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Message Template</td>
<td>Description</td>
<td>Recipient</td>
<td>To Field Content</td>
</tr>
<tr>
<td>-------------------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
<td>---------------------------------------------------------------------------</td>
<td>--------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Standard Notification for a Successful Network Data Synchronization</td>
<td>Indicates that the synchronization of a specific element with the network database was successfully completed.</td>
<td>Logged user email address (user who requested the synchronization task).</td>
<td>[NdaSynchronizationInfoFields.emailAddress]</td>
</tr>
<tr>
<td>Standard Notification for an Unsuccessful Network Data Synchronization</td>
<td>Indicates that the communication with the network database could not be established and that the synchronization of a specific element could not be executed.</td>
<td>Logged user email address (user who requested the synchronization task).</td>
<td>[NdaSynchronizationInfoFields.emailAddress]</td>
</tr>
<tr>
<td>Standard notification - User Account Information</td>
<td>Provides information on how to log into the application (user name, access code, URL address).</td>
<td>User account email address (user on which the action is done).</td>
<td>[AccountCreationFields.EmailAddress]</td>
</tr>
<tr>
<td>Standard notification for a candidate account confirmation</td>
<td>Indicates that a candidate account was created and how to log into the application (user name, access code, URL address).</td>
<td>User account email address (user on which the action is done).</td>
<td>[AccountCreationFields.EmailAddress]</td>
</tr>
<tr>
<td>Standard notification for a Password Reset</td>
<td>Indicates that the user password was reset and how to specify a new password.</td>
<td>User account email address (user on which the action is done).</td>
<td>[PasswordResetInfoFields.EmailAddress]</td>
</tr>
<tr>
<td>Standard notification for a registration</td>
<td>Indicates that an account was created and how to access it using a user name and access code.</td>
<td>User account email address (user on which the action is done).</td>
<td>[AccountCreationFields.EmailAddress]</td>
</tr>
</tbody>
</table>
Forgot Password Message Template

The Forgot Password message template is a system message template that uses a specific set of variables. It is available for creating correspondence to send to new hires that may have forgotten their password.

This message template is available under Configuration > [Security] Message Templates and is called WebTop Forgot Password.

There is a specific set of variables for use with this template that are able to be resolved before new hire information is contextualized. These variables are:

- ForgotPasswordFields.FullName
- ForgotPasswordFields.EmailAddress
- ForgotPasswordFields.ForgotPasswordURL
- ForgotPasswordFields.ForgotPasswordURLLink
- ForgotPasswordFields.SecurityCode
- ForgotPasswordFields.UserName
- ForgotPasswordFields.FirstName
- ForgotPasswordFields.LastName
- ForgotPasswordFields.MiddleName
Text documents and file-based documents can be added to content pages and message templates.

You can create two types of documents:

- File-based documents which are PDFs created with Adobe and which can contain variables.
- Text documents which are created by the Transitions administrator by assembling paragraphs. Variables can also be added to the text documents.

File-based documents can be used as follows:

- As reference documents linked from a content page.
- As information to be viewed in a task of type "Open PDF".
- As attached files viewed in the Transitions Center for a given candidate's/new hire's process.
- Within any message template that can be emailed by the system.

Text documents can be used as follows:

- As the body of a content page.
- As the body of any message template that can be emailed by the system.

The Documents list displays information in the following columns:

- Code
- Name
- Status: Active, Inactive, Draft.
- Format: HTML, PDF.
- Creation Date
- Last Modification Date
- Actions

All columns (except the Actions column) can be sorted by clicking on the column header. The list can also be filtered using the Refine by tool.
Paragraph

A paragraph is a block of text added to a document.

Paragraphs can be accessed from three places:

- Transitions Administration menu, in the Documents section.
- Quick Access panel, within the Documents list page.
- Quick Access panel, within the Message Templates list page.

Paragraphs can be created from either the Paragraph List or from within a document. When creating a paragraph from the Paragraph List, the paragraph is available for new and existing documents. When creating a paragraph from within a document, the paragraph is only available for that document and will not be available in the Paragraphs list.

Content in a paragraph is created by typing text and/or by adding variables. Standard variables are provided with the system and represent a specific value in the database. For example, a paragraph contains the standard variable {NewHirePersonalInfo.LastName}. When opening the document, the system will replace the variable by the new hire's last name.

Edits made to a paragraph in the Paragraphs list will affect all documents using the paragraph, regardless of whether the edits are made directly from within a document or from within the Paragraphs list.

The Paragraphs list displays information in the following columns:

- Code
- Name
- Status: Active or Inactive.
- Creation Date
- Last Modification Date
- Actions

All columns (except the Actions column) can be sorted by clicking on the column header. The list can also be filtered using the Refine by tool. If you select the Text option in the Refine by tool, the system will display only the paragraphs that contain the text. Note that the text field is not case sensitive. Also, the search is performed for the selected language only.
Creating a Text Document

The creation of a text document consists of the following steps.

1. **Defining the properties of the text document.**
2. **Adding existing paragraphs to the text document** or creating new paragraphs.
3. **Reordering the paragraphs** (optional).
4. **Previewing the text document to see how it will look** (optional).
5. **Activating the text document.**

Defining the Properties of a Text Document

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

*Configuration* > *[Transitions] Administration* > *Documents*

**Steps**

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

Adding a Paragraph to a Text Document

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

*Configuration* > *[Transitions] Administration* > *Documents*

**Steps**

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

**Result**

The paragraph appears in the Paragraphs section of the document.

Creating a New Paragraph for a Text Document

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

*Configuration* > *[Transitions] 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 the Rich Text Editor options.
5. To include variables in the paragraph, select the variable with your cursor, copy the variable, then paste it in the Text field.
6. Click Save.
7. Activate the paragraph.

Result

The paragraph appears in the Paragraphs section of the document.

Reordering Paragraphs in a Text Document

Prerequisite

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

The text document must have the Draft status.

Configuration > [Transitions] Administration > Documents

Steps

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

Previewing a Text Document

Prerequisite

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

Configuration > [Transitions] Administration > Documents

Steps

1. Open a text document.
2. Click Preview.

Activating a Document

Prerequisite

The Manage text documents and paragraphs for use in content pages and message templates permission is required.
The document must have the Draft status.

**Configuration > [Transitions] Administration > Documents**

**Steps**

1. Select a document.
2. Click Activate.

**Result**

The status of the document is now Active. Once the status of a document is Active, the document cannot be deleted; it can only be deactivated if no longer needed.
Documents - Other Configuration Tasks

Removing a Paragraph Included in a Text Document

**Prerequisite**
The Manage text documents and paragraphs for use in content pages and message templates permission is required.
The text document must have the Draft status.

*Configuration > [Transitions] Administration > Documents*

**Steps**
1. Click a text document.
2. Click Remove next to the paragraph.
3. Click Yes in the message box.

**Result**
The next time the text document gets accessed, changes will be available. Note that messages that were already sent will not change.

Editing a Paragraph Included in a Text Document

**Prerequisite**
The Manage text documents and paragraphs for use in content pages and message templates permission is required.
The text document must have the Draft status.

*Configuration > [Transitions] Administration > Documents*

**Steps**
1. Click a text document.
2. Click Edit next to the paragraph.
3. Make changes.
4. Click Save.

**Result**
The next time the text document gets accessed, changes will be available. However, messages that were already sent will not change.

Duplicating a Text Document

**Prerequisite**
The Manage text documents and paragraphs for use in content pages and message templates permission is required.

*Configuration > [Transitions] Administration > Documents*

**Steps**
1. Click a text document.
2. Click Duplicate next to the document name.
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.

### Activating a Document

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

The document must have the Draft status.

**Configuration** > [Transitions] Administration > Documents

**Steps**

1. Select a document.
2. Click Activate.

**Result**

The status of the document is now Active. Once the status of a document is Active, the document cannot be deleted; it can only be deactivated if no longer needed.

### Deactivating a Document

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

The document must have the Active status.

**Configuration** > [Transitions] Administration > Documents

**Steps**

1. Click 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.

### Deactivating a Paragraph

**Prerequisite**

The Manage text documents and paragraphs for use in content pages and message templates permission is required.
Steps
1. Click a paragraph.
2. Click Deactivate.

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

Deleting a Document
Prerequisite
The Manage text documents and paragraphs for use in content pages and message templates permission is required.

The document must have the Draft status.

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

Result
The document is permanently deleted from the database. There is no effect of deleting a draft document since it was not incorporated in message templates or content pages.
PDF Documents

Candidates/new hires cannot type information directly into PDFs because they do not act like forms for data entry. Instead, the system must have captured the information through some other method, like a user-defined form or Taleo Connect. Once the desired information has been stored, it can then be viewed in a PDF. This is very handy for preserving it and exporting it, to prevent it from getting further updated if that is not desirable.

For some business needs, capturing candidate/new hire information on a dynamic form 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 Transitions 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.

A PDF is a "canvas" or generic paper, and the values for each new hire/candidate get merged with the PDF to display information on the PDF in the desired places. Each new hire/candidate gets its own version of the PDF with the most current data. This data is visible for each candidate/new hire and can be viewed, printed, or saved locally. But because the Taleo system is dynamic, these PDFs will always show the most up-to-date information. The Taleo system is not intended to be the long-term system of record for an entire organization. So if the business requires keeping a permanent record of the data as of a certain point in time, then each candidate/new hire's PDFs can be saved or exported from the system.

Creating a File-based Document

Prerequisite

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

Configuration > [Transitions] Administration > Documents

Steps

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

Viewing of PDF Files Attached to Documents

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

The Transitions 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 Transitions Administration and Adobe Acrobat will display the content of the file.
Variables in PDF Documents

PDF documents can be prepopulated with variables retained in the system.

A PDF document containing variables will automatically display information from Transitions. 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 Transitions 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 Transitions system.

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, display the Forms toolbar: Tools > Forms > Show Forms Toolbar.
Create a document in Word and save it 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 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 variable in the Name field and replace the forward slash “/” with a dot “.”.
   
   The name of variables can be found in the Transitions User-defined Forms feature, in the Field Chooser area.
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 Transitions User-defined Forms feature.
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 variables that will automatically extract information from each 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 PDF into the Transitions Document Library.

---

**Updating PDF Documents in an Existing Process**

Normally, a process definition and all of its elements become unchangeable after they have been activated. However, business requirements sometimes require a change to the PDF documents within an active process.

One of the method changes the PDF for new assignees who will get the PDF in the future. For example, after many new employees have reviewed an annual PDF policy document, any needed changes for next year should be updated using a new PDF for new assignees only, not affecting the prior completed PDF by new hires. To do so:

- **Create a new file-based document and upload the new PDF file.**
- **Update the Related Source for the new PDF in the task definition.**

The other method changes the PDF for all viewers of the PDF, regardless of whether it is assigned in the past, present, or future. For example, a simple spelling mistake or formatting error in the PDF could be safely substituted and would affect all viewers, including past-completed tasks in case they get viewed again later. To do so:

- **Open the document and replace the PDF file in the 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.
Capturing Form Information for PDFs Workflow

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

In Adobe Acrobat Professional or Adobe Acrobat 3D, the Transitions administrator creates the PDF that will display all those fields which are desired for long-term static use. This PDF contains variables, created with fields analogous to the items on a user-defined form. Almost all the variables available in the Transitions system that can be placed onto a form can also be placed into a PDF document. The only exception is mult-row fields. When using a variable, it must be slightly modified by replacing the forward slash “/” with a dot “.”. For example, PersonalInfo/LastName must be modified to become PersonalInfo.LastName.

- The Transitions administrator puts standard and user-defined fields onto a form: Creating User-defined Forms.
- The Transitions administrator puts standard and user-defined fields (variables) onto a PDF (using Adobe Acrobat Pro usually): Creating a File-based Document.
- The Transitions administrator puts the user-defined form on a task: Creating a Task.
- The Transitions administrator puts the form task into a process: Creating a Step.
- The Transitions administrator uploads the PDF into a document with different possible configurations: Creating a File-based Document.

- As a PDF task into a process, to have its completion tracked for any assignee and will be available for export at runtime.
- On a content page task that includes the variables {ContentPage.GeneralDocuments} and {ContentPage.PersonalizedDocuments} which will not be available for export, but which can be viewed, saved, and/or printed by the new hire/candidate.
- Transitions Center users who have the right permissions can view the Process page for any candidate/new hire process, and from there they can associate a PDF from the zone's library to that person in the Attached Files section. In this way, the PDF will display all the specific values in the fields for that person, and the personalized PDF is available for export.
Runtime Use

Each new hire process is composed of a series of steps. Assignees of a form task can view the associated PDFs when the task becomes active in the step sequence. Whenever a PDF is viewed within a form task by assignees, field values originating from any variables in the PDF reflect the most current information available.

At some moment in time, a specific PDF (including variables) is viewed by an assignee about a specific candidate/new hire. Then, some data in the system gets updated for that specific candidate/new hire, either via a form, Taleo Connect, the Career Section, the Recruiting Center. That same specific PDF (including variables) can be viewed again for that same candidate/new hire, and the updated values now appear. In short, these PDFs are dynamic and do not retain their original values; they always show the most current values for their variables. This PDF variable behavior is true in all places where PDFs are viewed at runtime:

- When an Open PDF task is viewed later in the process by any assignee, it will display the current values for these variables. 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 variables.
- When candidates/new hires view their documents within their content pages on the Career Section’s Tasks tab, this PDF will contain the current values for its variables.
- Transitions Center users can manually associate any PDF document from the Transitions list into the Attached Files section of the candidates/new hires' process pages and then this too will display this new hire's current values in any variables. This page is only visible to Transitions users with the permission to view processes.

Exporting PDFs

This is a service engagement to use Taleo Connect to pull out snapshots of filled-in PDFs for a specific subset of new hires at regular intervals. PDFs that appear in the Attached Files section of each candidate/new hire’s process page are available for export. Files can arrive on this list in two ways:

- A task of type Open PDF has reached the In Progress status within the process, though it is not necessary that the task is in Completed status.
- A Transitions Center user has manually associated the PDF with the person's process.

PDFs associated with a content page in the new hire's process are not available for export.
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 Transitions 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.
- Try to ensure that no unwanted changes are made to the data before the export is completed: do not configure any additional Transitions forms to capture information into the fields that also appear on the PDF; prevent Recruiting Center users from making updates to these fields; do not configure any way for the candidates themselves to make updates to their information for example in other job submissions; do not run any Taleo Connect imports to these fields.
- 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 Transitions Field Types and Corresponding Adobe Acrobat Fields

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

<table>
<thead>
<tr>
<th>Transitions Field Type</th>
<th>Corresponding Adobe Acrobat 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 database and will display in the PDF document.</td>
<td>![Text Icon]</td>
</tr>
<tr>
<td>Text Area</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Rich Text Format</td>
<td></td>
<td></td>
<td></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>
<tr>
<td>Check Box</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 Icon]</td>
</tr>
<tr>
<td>Radio Button</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 Icon]</td>
</tr>
</tbody>
</table>

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...
Content Pages

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Content Page

A content page contains rich media and text information, and it can be displayed to targeted groups of candidates or employees at appropriate times throughout a Transitions process.

Content pages can serve many different purposes within a single Transitions process. For instance, the main welcome page can explain the Transitions process to each audience, including links to engaging video content and helpful resources, then a content page can list personalized PDF documents to be viewed and/or printed, another content page can present the right maps of the company’s campus for the appropriate location. An unlimited number of content page tasks can be designed and easily targeted to different audiences at many points within a single Transitions process. Candidates or employees who get these tasks assigned within their Career Section's Tasks tab must acknowledge each of these pages with a click, before their process will continue to the next task.

The basic building blocks of content pages are paragraphs, which are assembled into documents. These paragraphs are configured using the standard Rich Text Editor, so they can use HTML-based formatting. This means they can display images hosted in the zone or elsewhere, can give hyperlinks to useful resources in the intra- or internet, and can include all of the variables provided in the system. These variables can display all kinds of information about the candidate or employee and their standard and user-defined fields, their requisition and offer if any. Unlike forms tasks, these variables can appear directly within sentences on content page tasks.
Personalized and General PDF Documents in Content Pages

Content pages can display two lists of PDF documents if desired: a list of Personalized Documents, and a list of General Documents.

Personalized Documents can contain variables that display information about the candidate or employee, and General Documents are generic without any variables. Both types of PDFs can be viewed, printed, and/or saved to the candidate's or employee's computer if needed.

The system does not track whether the candidate or employee actually clicked on any or all of these PDF documents. The assignee is simply required to click one “Complete” button for the overall content page, to acknowledge that they have seen it. This overall step completion is recorded in the history of the process, visible to the Transitions Center user.

To display these lists of PDF documents, the Transitions administrator must insert the appropriate variable into the paragraphs:

- Use the variable {ContentPage.GeneralDocuments} to make the paragraph display the content page's list of PDFs that are generic.
- Use the variable {ContentPage.PersonalizedDocuments} to make the paragraph display the content page's list of PDFs that contain variables.

Then, on the content page which uses these paragraphs in its text document, the Transitions administrator must add PDF documents into the tables named General and Personalized. In this way, the PDFs that ultimately get displayed in the content page for candidates or employees are context-sensitive, not hard-coded. This means that the Transitions administrator can use the same paragraph in different content pages, and the resulting PDF lists will be different depending on which content page is being viewed.
Targeting a Content Page to a Candidate or Employee

There are two configuration methods to ensure that the right content page gets viewed by the right audience. Both of these methods can be used within a single process, so the process can contain one or several content pages at the desired time(s) for any groups of candidates or employees.

The first method is to create a task that contains a specific content page. The Transitions administrator must designate the type of task, that is “Display a Content Page”. Then, the Transitions administrator must choose a predefined and activated content page. This acts as the related source for the task, just like a form task must indicate one active form as its related source. In this case, every assignee of this task will view this specific content page. No information about Organization, Location, nor Job Field is relevant on a content page that will be used in this way.

The second method is to create a task that does not contain a specific content page. The Transitions administrator still creates a task of type “Display a Content Page”, but does not select any content page to be its related source. In this case, it will be the responsibility of the Transitions system to determine the most appropriate content page to display for each candidate or employee going through each process. The most appropriate choice is automatically determined by matching the Organization, Location, and/or Job Field of the content page with that of the candidate or employee's requisition.

The following examples describe when it is best to use each of these two methods.

**Example 1: Creating a task that contains a specific content page**

Often, business requirements are such that different groups of people need to receive different content, based on any information that the Transitions system can track. For instance, user-defined fields may be used to track distinctions such as hourly vs. salaried workers or campus hires vs. experienced hires. All of the task types in Transitions can be targeted to different groups based on conditions on transitions that are configured within a process, and this includes the content page tasks. The Transitions administrator can create conditions based on UDFs or standard fields which cause a given task to be displayed to a given subset of candidates or employees. They can also potentially create additional conditions based on the “opposite” values in these fields, in order to show an alternate task to all the remaining candidates or employees.

When using this configuration for targeting content tasks, it is best to use the first method of specifically defining a content page within the content task. In this way, the Transitions administrator ensures that the specific content page gets assigned to the candidates or employees only when the desired conditions are met. Because these conditions can be configured based on any field in the Transitions system, these conditions are extremely powerful. If there is a large number of different distinctions which need their own content tasks, then the Transitions administrator must configure many different conditions, transitions, and tasks in order to specify each content page.

**Example 2: Creating a task that does not contain a specific content page**

However, in other business situations, the differences in appropriate content are based on the Organization, Location, and/or Job Field. Maps to a given location, policies for a given organization, and success stories for a given job family are some examples of these business requirements.

In this situation, the Transitions administrator may use the second method of working with content tasks: a content task which does not specify any content page. This second method of configuration relies upon the system to select the most appropriate content page for each assignee. The Organization, Location, and Job Field are matched between all of the active content pages and that of the requisition in the current process, or that of the candidate or employee when no requisition is present (for example, the process was launched by Taleo Connect). Many fewer conditions, transitions, and tasks are needed; the Transitions administrator has a much simpler job; and the process preview diagram is simpler to view.
Do not select the check box next to Default Content Page.

If no specific content page is designated, the system will always select the content page that is the best match based on the OLF of the requisition. Therefore, if two tasks were part of the same process and both were designed to display the content page that was the "best match", the same content page would be displayed twice (because a requisition's OLF does not change during the process is in progress).

Content pages can only be viewed by candidates or employees using the Tasks tab of the career section. Transitions Center users cannot view these tasks, even if they have permissions to view the related sources of tasks.

The above diagram illustrates both methods of targeting content pages. Each candidate or employee will see three content pages on their Career Section's Tasks tab. First, they will see one content page as a welcome message, due to Step/Task A. Next, everyone will see the same content page about charitable opportunities, due to Step/Task B which specifically calls the fourth content page as its related source. And then the process's conditions and transitions ensure that only the salaried people will get assigned Step/Task C1, which specifically calls the salaried content page, whereas only the hourly people will get assigned Step/Task C2, which specifically calls the hourly content page.

In the diagram, there is no specific content page associated with Step/Task A. This means that the system must calculate the best-matching content page to display for each candidate or employee who gets this task assigned to them. There are currently six content pages active in the system. Three of them have no Organization, Location, nor Job Field: content pages 4, 5, and 6. Content page 1 has the location Canada, content page 2 has the city-level location New York City within the United States, and content page 3 has the location of United States. (This example assumes that the company does not hire for requisitions with any locations outside these two countries.)

So in this example:

- When a candidate or employee process begins for a requisition in any city in Canada, the first task in the career section's tasks tab will display content page 1.
- When a process begins for a requisition in New York City, the first task in the career section will display content page 2.
- When a process begins for a requisition in any other location within the United States, that first task will display content page 3.

The appropriate one among these three different content pages will display, without requiring the Transitions administrator to have configured three specific content tasks, three conditions and transitions leading into them, and three more conditions and transitions leading out of them.
The "Default" check box on the content page is reserved for future use.

If a content page is specifically associated with a content task (the first method above), any OLF information associated with the content page is irrelevant. The specific content page is displayed to the task assignee regardless of which OLF is associated with the requisition or the candidate or employee. Only if the content task is not associated with any specific content page (the second method above), the system seeks the content page with the best-matching OLF; this is when the content page's OLF becomes relevant.
Creating and Configuring a Content Page

Creating a Content Page

Prerequisite
The Manage task definitions, related sources, content pages, and images permission is required.

Configuration > [Transitions] Administration > Content Pages

Steps
1. Click Create.
2. Enter a code and a name.
3. Do not click the check box next to “Default Content Page” because this is reserved for future use.
4. Click Save.
5. Click Select next to the TextDocument field.
6. On the HTML Document Selector page, click the radio button next to the text you want add to the content page.
7. Click Select.
8. Click Activate.

Result
The content page can be specifically associated with a task by the Transitions administrator and it will be selected automatically by the system in a task with no associated content page if it is the best match for a candidate's or employee's requisition.

Next Step
Associate any personalized or general PDF documents with this content page, if desired.
Associate OLF information with this content page, if it will not be specifically included in any content task.

Associating Personalized and General Documents with a Content Page

Prerequisite
The Manage task definitions, related sources, content pages, and images permission is required.
The Manage text documents and paragraphs for use in content pages and message templates permission is required.

Configuration > [Transitions] Administration > Content Pages

Steps
1. Create or select a paragraph. (See Creating a New Paragraph for a Text Document.)
2. Add the variables {ContentPage.GeneralDocuments} and/or {ContentPage.PersonalizedDocuments} into the paragraph, to indicate where the appropriate lists of PDF file names will be displayed.
3. Optionaly, add some text above this variable, stating “Please review the following PDF documents”. Bear in mind that this text will appear on the content page whether or not any PDF documents ultimately do get associated with the content page that uses this paragraph.
4. Save the paragraph, and activate it.
5. Use this paragraph in a text document, and activate it.
6. Create or select a content page. (See Creating a Content Page.)
7. To add documents to the table named “General Documents”, click Add.
8. Click the check box next to each general document you want to add to the content page. The File-based Document Selector page lists both general and personalized documents. Typically, a document naming convention has been adopted that enables you to easily identify which files are "general" and which files are "personalized" (contain variables).
9. Click Select.
10. To rearrange the display order of documents, click Reorder next to General Documents. Click the name of a document whose position you want to change and click the "up" arrow or "down" arrow. Repeat as necessary, then click Save.
11. To add personalized documents (which contain variables), perform the previous steps in the “Personalized Documents” section.

**Result**

When this content page is displayed to a candidate or employee in the Tasks tab of a career section, the {ContentPage.PersonalizedDocuments} and {ContentPage.GeneralDocuments} will be replaced by a list of PDF documents that are taken from the content page being shown.

### Associating Organizations, Locations, and Job Fields with a Content Page

**Prerequisite**

The Manage task definitions, related sources, content pages, and images permission is required.

The Manage text documents and paragraphs for use in content pages and message templates permission is required.

**Configuration > [Transitions] Administration > Content Pages**

**Steps**

1. Create or select a content page. (See Creating a Content Page.)
2. Perform one of the following steps:
   - Click Add next to Organizations if you want to associate organizations with the content page.
   - Click Add next to Locations if you want to associate locations with the content page.
   - Click Add next to Job Fields if you want to associate job fields with the content page.
3. On the selector page, click the check box next to each item you want to associate with the content page. If the list spans multiple pages, you can use the Refine by field and accompanying field to filter list and find an item more quickly. Your selections are displayed in the corresponding section (Organizations, Locations, Job Fields) of the content page.
4. You can add items to the two other OLF sections if desired.
   Your selections are displayed in the corresponding sections (Organizations, Locations or Job Fields) of the content page.

**Result**

If the Transitions administrator specifically associates this content page with a content task, then these OLF fields have no effect.
If the Transitions administrator configures a task that has no content page associated with it, then this content page will be displayed to any candidates/employees whose requisition's OLF fields match these OLF fields best.
Content Page - Other Configuration Tasks

Editing a Content Page

Prerequisite
The Manage text documents and paragraphs for use in content pages and message templates permission is required.
The Manage task definitions, related sources, content pages, and images permission is required.

Configuration > [Transitions] Administration > Content Pages

Steps
1. In the content page list, click the name of the content page you want to edit.
2. To edit the content page properties:
   a) Click Edit next to Properties.
   b) Make your changes.
   c) Click Save.
3. To edit the HTML-based document:
   a) Click Edit next to the TextDocument field.
   b) In the Paragraphs section, you can create new paragraphs, edit paragraphs, add and remove paragraphs, modify the order of paragraphs and preview paragraphs.
   c) On the content page, you can add and remove general and personalized documents as well as Organizations, Locations and Job Fields.

Deactivating a Content Page

Prerequisite
The Manage task definitions, related sources, content pages, and images permission is required.

Configuration > [Transitions] Administration > Images

Steps
1. Select a content page.
2. Click Deactivate.
   
   If you click Content Page Configuration in the breadcrumb trail near the top of the page, the content page list is displayed and the content page you disabled is no longer displayed in the list.
3. If you want to view the content page whose status is now Inactive or enable the page again, perform the following steps:
   a) On the content page list page, click the Refine by field and select Inactive from the list.
   b) Click Refresh.
   c) Click the name of the content page.
   d) To enable the content page, click Activate.

Result
If Transitions administrators create or edit a task (Task Definition Editor page) and select the "Display Content Page" action, the content page is no longer displayed in the "Display Content Page" list. The content
Deleting a Content Page

Prerequisite

The Manage task definitions, related sources, content pages, and images permission is required.

A content page can only be deleted as long as it has Draft status.

Configuration > [Transitions] Administration > Content Pages

Steps

1. In the content page list, find the name of the content page you want to delete and click the corresponding Delete in the Actions list.

2. Click Yes.
Transitions and Learn

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Transitions and Learn

Taleo Transitions processes can include Taleo Learn tasks for new hires and employees who are in SmartOrg. Taleo Learn tasks can therefore be part of onboarding processes for new hires as well as part of other processes (cross-boarding, promotion, relocation, transfer and reorganization processes) when the latter require learning.
Pairing Up Learn with SmartOrg

Each Taleo Learn zone is paired with one Taleo Transitions zone.

1. The Transitions administrator arranges user synchronization between SmartOrg and Taleo Learn such that employees in SmartOrg are immediately synchronized with the Learn system to receive assigned learning titles and to use single sign-on from the career section (if the latter was implemented in the organization).
Preparing Learn to Be Visited

The Learn administrator performs certain tasks to prepare Learn to be visited.

1. The Learn administrator configures a single landing page for all visitors including those who come from the Taleo Table of Contents/Welcome Center and those who come from Taleo Transitions tasks.

2. The Taleo Learn landing page should include the Learning Plan dynamic object so that when employees go to the page, all the learning titles (from the catalog) they are supposed to see are displayed. In other words, although the landing page is the same for all visitors, the selection of Taleo Learn courses and classes displayed in the learning plan is specific to each person.

3. The Learn administrator should set up some dynamic rules to ensure that the appropriate selection of Taleo Learn courses and classes is assigned to specific groups (of new hires or employees) automatically. For example, rules could be configured to automatically populate each employee's learning plan with titles (compliance information, etc.) based on the individual's location or department. Later, the manager could decide which skills would need to be improved through learning over the coming year and could manually assign the most appropriate Taleo Learn courses and classes.

4. The only information available in Taleo Transitions regarding an employee's progress through a Learn task is when the person submits the form that indicates they have completed all of the required learning. No record of completion of individual learning titles is available in Transitions; the system of record for this information is Taleo Learn. For this reason, any reporting of task completion of Learn tasks in Transitions processes is the domain of the Learn administrator.
Configuring the Transitions Form to Visit Learn

The Transitions administrator then performs the following tasks.

1. The Transitions administrator configures a product setting for the Learn URL. See Specifying the Learn URL.
2. The Transitions administrator creates a Transitions form that must include the Taleo Learn variable ElearningUrl. The system will populate the variable later with the link to the appropriate landing page in Taleo Learn. See Creating User-defined Forms.
3. The Transitions administrator adds the form (as a task) to a process.
4. Before the Learn form is assigned to a person, the process must ensure that the individual is an employee in the Taleo system. If the person is a candidate, not an employee, the link will not work and will display an error message instead of the Learn landing page. To ensure that the individuals are indeed employees before a process including a Learn form is assigned to them, an organization can use the following methods:
   • Companies often use a Taleo Connect import at a certain point around start date, to import in batch all the relevant information for new hires, such as OLF and manager.
   • An HR participant can be assigned a task in the process to go into SmartOrg and add some of this information manually to each candidate before the form task is assigned to the candidates.
5. The form can only be assigned to the new employee; the link will not work if clicked by a manager, recruiter or any other participant. This is to ensure that the learning is in fact completed by the employee (and not someone else).
6. The variable cannot be used on a message template to invite the employee to click from the email directly to the Learn landing page. Instead, the Transitions form, which includes the Learn variable, can be configured to send a specific notification to its assignee, which brings them to this Transitions task after they log in.

It is recommended that the Transitions administrator indicates on the form when new hires or employees should submit completion confirmation. This can avoid situations where people submit confirmation before completing all the titles in the Learn plan and other situations where people completed all titles but forgot to submit confirmation.

Reporting of completed Taleo Learn tasks is based on information in the Taleo Learn product. No information about completion is available in Taleo Transitions, neither about the Learn titles taken by the new hire or the employee, nor about overall progress or completion.

Specifying the Learn URL

Prerequisite

Configuration > [Transitions] Administration > Settings

Steps

1. Click Learn Integration URL.
2. Click Edit.
3. Enter the URL in the Value field.
   The URL typically resembles the following one but <customerzone> must be replaced by the Sub-Learn zone name: https://<customerzone>/LCNet/Integrations/SSO/TEE/TargetHandler.aspx).
4. Click Save.
Completing the Learn Task

Finally, the employee completes the Learn task.

The form containing the Taleo Learn variable is displayed at the appropriate moment on the Tasks tab of the new hire or employee. When the new hire or employee visits a career section and clicks the link on the form task, a new browser window opens and displays the Taleo Learn landing page configured by the Taleo Learn administrator. The learning plan can vary from one individual to another. The person takes the training.

Only new hires and employees can access learning plan form tasks. They must be employees in SmartOrg. Though Transitions Center users can view employees’ forms, they cannot access the Taleo Learn link.

The person submits confirmation manually on the Taleo Transitions form that he or she completed all the titles in the Learn plan.
External Services

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External Services

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

Organizations can choose to have services executed by external partners. Partners can provide services such as collecting information for tax withholding purposes, handling governmental forms including U.S. I-9 and WOTC credits, and performing background checks.

External services must be certified and deployed by Oracle Taleo before they can be included in a Transitions process. Once the service is available, users with the Manage services that are provided by partners permission can activate and deactivate services in Transitions Administration and modify them as needed.

Once a service is enabled, the Transitions administrator can create tasks to interact with it. Completion values returned after the service provides its results can be displayed in forms, emails and reports. They can be exported, and/or used as conditions to drive or direct subsequent tasks. Like other tasks, external service tasks are added to form the Transitions process.

Correspondence versus Invitations

When configuring an external service, the service details page may display a Correspondence section or an Invitations section. The Correspondence section is displayed if the partner needs to only communicate with the candidate/new hire and only requires a single message. The Invitations section is displayed if the partner needs to communicate with several participants and requires several messages. This is the case with all the I-9 partners who will be certified for Transitions.

In the case where a single message is required, the Transitions administrator can create a specific message template that includes a link that the candidate/new hire clicks to go to an external service Web site to complete a task. The message is also displayed in the list of tasks on the career section Tasks tab. The message task contains the same link and the task keeps its In Progress status until the overall service results have been returned. When all the results have been received, the status changes to Complete. Note that if the external service needs to communicate with the candidate/new hire and no specific message template is provided, or the selected message template is not active, then the Transitions built-in message template named General Validation Message is sent to the candidate/new hire instead. The candidate/new hire might be requested to provide the standard Oracle Taleo user name and password, which the system validates before granting access to external service Web sites.

When the Invitations section is displayed, one line is displayed for every activity the partner can trigger within the Transitions system as its request proceeds. For each line, the participant who would receive the communication about that activity is displayed. It is the responsibility of the Transitions administrator to configure all message templates that will be used when each of these activities happens.
For instance, the U.S. Form I-9 process for a given partner might be designed to consist of four activities:

1. Invitation for the new hire to visit the partner Web site to fill in Part 1 of the I-9 form.
2. Invitation for the Hiring Manager to visit the partner Web site to fill in Part 2 of the I-9 form.
3. Update for the Hiring Manager if the results show a negative response.
4. Update for the Hiring Manager if the results show a positive response.

Each of these message templates must be created by the Transitions administrator and associated with each of these events. If any line does not have a message template, the service cannot be activated to be used in a task.

**Standard and Customized Settings**

External services accept standard and customized settings. The standard settings include result validity period, sender identifier, expected reply time constraint and request time-out time constraint. Oracle Taleo consultants or Transitions administrators add custom settings to a service, enabling Transitions administrators to use them in processes. For instance, a service might want to include a company identifier to be used in each new hire interaction. An Oracle Taleo consultant or a Transitions administrator would add that setting to the service.

**Viewing Partner Results**

Once a candidate or employee (and possibly other participants) have completed the external service-related tasks, the results can be viewed in user-defined forms, message templates, exports and reports, and can also be used to drive conditional workflows. While setting up forms, templates, and so forth, if the Transitions administrator selects the ServiceLastRequestResults category, he/she will have access to all fields related to the service providers. If the Transitions administrator places fields in forms, templates, and so forth, along with displaying certain fields as a URL field type, the results can be viewed by assignees and task owners. The Transitions administrator can use ServiceLastRequestResults fields in the condition editor as well. The more complete ServiceAllRequestResults tables can be used to show all conversations/interactions between the person and the service provider. See *Passport Partner Fields in User-defined Forms.*
Configuring External Services

The configuration of external services in Transitions consists of the following steps.
1. Deploying the external service in the zone. This task is performed by Oracle Support. An external service must be certified and integrated by Oracle before it can be used in a Transitions process. Once the service is deployed, it is displayed on the Transitions Administration Services page.
2. Granting permissions to configure external services.
3. Editing the properties and settings of the external service.
4. Configuring input fields. An input field is a specified area of the application where an administrator must enter or choose information that will be sent to request an external service.
5. Creating a message template (optional). Some partners require only one email to be sent out to invite the candidate/new hire to visit their Web site to complete a task. When this is the case, the Transitions administrator can create a message template that includes a link or, use a built-in message template named General Validation Message which is available for that purpose.
6. Selecting the message template in the Correspondence section of the partner's details page.
7. Activating the external service.

Granting Permissions to Configure External Services

These permissions are required to use external services.

<table>
<thead>
<tr>
<th>User Type Permissions</th>
<th>Description</th>
<th>Path</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage services that are provided by partners</td>
<td>Displays the Services section in the Transitions Administration menu where</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Transitions</td>
</tr>
<tr>
<td>Allow this user type to perform integration tasks</td>
<td>users can configure partners services.</td>
<td></td>
</tr>
<tr>
<td></td>
<td>This permission is required to see Transitions specific information in Taleo</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Integration &gt; Transitions</td>
</tr>
<tr>
<td></td>
<td>Connect relating to export/import and also to perform actions such as</td>
<td></td>
</tr>
<tr>
<td></td>
<td>executing an import service (for example, Start Process) and executing an</td>
<td></td>
</tr>
<tr>
<td></td>
<td>export service (for example, Export of Attachments).</td>
<td></td>
</tr>
</tbody>
</table>

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

Editing the External Service Properties and Settings

**Prerequisite**
The Manage services that are provided by partners permission is required.

*Configuration > [Transitions] Administration > Services*

**Steps**
1. Click the name of a service.
2. Click Edit next to Properties.
3. Modify the properties and settings as required. For details, see *External Partner Properties, Settings, and Fields*.
4. Click Save.

**Configuring Input Fields**

**Prerequisite**

The Manage services that are provided by partners permission is required.

*Configuration > [Transitions] Administration > Services*

**Steps**

1. Click the name of the service.
2. Click the code of an Input field.
3. Click Edit next to Properties.
4. Under Default Value, select a value.
5. Click Save.

**Creating a Message Template**

**Prerequisite**

The Manage message templates for email correspondence and reminders permission is required.

*Configuration > [Transitions] Administration > Message Templates*

**Steps**

1. Click Create.
2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.
   
   Variables can be dragged and dropped in these fields. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any variables placed in these fields 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 assignees receives it. Also note that you can enter an explicit email address in these fields.
5. Complete the Subject field. Variables can be dragged and dropped in the field.
6. Click Save.
7. Click Custom Content.
8. Type the content of the message in the text box. You can format the text using the *Rich Text Editor* options. You can also use variables. Simply select a variable, then drag and drop it in the desired area.
9. Create a hyperlink within the body of the message that the recipient can use to visit the partner's Web site.
   a) Write some text for the hyperlink. For example, visit our partner ABC.
   b) Select the text then click the Insert or edit link icon.
   c) On the Link Info tab, select URL, select the http:// protocol and enter the `{ServiceURL.ExternalServiceUrl}` variable.
   d) On the Target tab, select the Open in New Window option if the destination page is to open in a new browser window.
   e) Click OK.
10. Click *Save*.
11. To add an attachment, click *Add* next to *Attachments*.
12. Enter a code.
13. Click *Browse* to select a file.
14. Click *Save*.
15. Click *Activate*.

**Selecting Correspondence for an External Service**

**Prerequisite**

This procedure applies to partners who have the Correspondence section in the Service page.

The message template to be selected must be activated to be used within a process.

The Manage services that are provided by partners permission is required.

*Configuration > [Transitions] Administration > Services*

**Steps**

1. Click the name of an external service.
2. Click Edit next to Correspondence.
3. Click Select.
4. Select the message template.
5. Click Select.
6. Click Save.

**Result**

The message template added to the Correspondence section will be sent by the system. If this newly-added message template is not activated, the generic default message template named General Validation Message will be sent to the candidate/new hire. If the General Validation Message is deactivated, it will still be sent to the candidate/new hire.

**Activating the External Service**

**Prerequisite**

The Manage services that are provided by partners permission is required.

The external service must be inactive.

*Configuration > [Transitions] 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.

**Result**

The Transitions administrator can now create tasks that use this external service.

**External Service Properties and Settings**

<table>
<thead>
<tr>
<th>Location</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Properties</td>
<td>Name</td>
<td>Name of the specific external service.</td>
</tr>
<tr>
<td>Location</td>
<td>Field</td>
<td>Description</td>
</tr>
<tr>
<td>----------</td>
<td>-------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Properties</td>
<td>Description</td>
<td>Description of the specific external service.</td>
</tr>
<tr>
<td>Properties</td>
<td>Provider Name</td>
<td>Name of the external service.</td>
</tr>
<tr>
<td>Properties</td>
<td>Provider Description</td>
<td>Description of the external service.</td>
</tr>
<tr>
<td>Properties</td>
<td>Type</td>
<td>This relates to the screening user type permission designation of Taleo partners and is reserved for internal use.</td>
</tr>
<tr>
<td>Properties</td>
<td>Status</td>
<td>Once deployed to a zone by Oracle Support, this indicates whether the external service is active and available.</td>
</tr>
<tr>
<td>Properties</td>
<td>Code</td>
<td>Unique identifier of the external service.</td>
</tr>
</tbody>
</table>
| Settings  | Validity Period             | The length of time that any prior results are valid, before a new request gets initiated to the service partner. 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 Transitions 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 as starting either at the beginning of the prior transaction (when the first contact was made for the request) or at the end (when the final results were returned to Transitions from the partner). |
<p>| Settings  | 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 does not respond within the allocated time, the hyperlink in the email is disabled for security reasons. If the external service does not require interaction with new hires, the setting is not displayed. |
| Settings  | Company Identifier         | It is issued by the partner to each customer, and must be entered here by the Transitions administrator. This information gets sent to the partner in each request and in each communication that comes from this zone to the partner. It allows the partner to know which of the many Oracle-Taleo customers is asking for this information. |</p>
<table>
<thead>
<tr>
<th>Location</th>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Settings</td>
<td>senderId</td>
<td>Alphanumeric value used to identify the email sender for the external service.</td>
</tr>
<tr>
<td>Settings</td>
<td>Delay to wait before timing out a request (in hours)</td>
<td>This setting indicates how long the Transitions task will wait to receive a response from the partner. If no response is received, the overall external service task may become unable to complete successfully.</td>
</tr>
</tbody>
</table>
Variables to Display External Service Results

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

External service partners return various field results for each new hire while their service is running. This information can be displayed in a message template or on a form by using variables 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 variables may be named ServiceLastRequestResults/UDFResult_TaxpartnerABC:TaxResult1 and ServiceLastRequestResults/UDFResult_TaxpartnerABC:TaxResult2. Placing these variables 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 Transitions, however; hyperlinks can be added to any form, which will bring the form assignees directly to the service provider website to access this information. Typically this variable is given the name 'More Details' by the service provider. For information on using hyperlinks, see *Hyperlinks in a User-defined Forms*.

The number and type of variables available is wholly dependent on which services are used in your Transitions implementation.
Troubleshooting External Services

System administrators can troubleshoot issues dealing with the interaction between the external partner and the Transitions process. All other external partner problems are handled by Oracle Support.

If an error is due to the Transitions process as it applies to the partner, you can attempt to fix the problem. You should first go to the process and check the history section for external partner 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 Canceled 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.

Ten tries are supported, which means nine clicks on the Retry button.

If the error is due to issues around the external service you must contact Oracle Support for assistance. Oracle 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.
Deactivating an External Service

When an external service that was activated gets deactivated, the following will occur:

- The Transitions administrator can no longer create tasks using this external service.
- At runtime, if the process has not yet reached the external service task, the process will be interrupted because the task will not initiate a new request to the partner since the service is inactive.
- At runtime, if the process has reached the external service task, the task will remain in Progress but as soon as candidates/new hires try to access the partner site the task will appear as Canceled and the process will not be able to reach its completion status.
External Service Request Tasks and Results in the Transitions Center

The Transitions Center displays details of external service request tasks passed to a partner using Taleo Passport. An external service request is the whole "conversation" between the Taleo Oracle process and the external service provider, on behalf of a given candidate or employee. Each time either side contacts the other during this whole task, it is part of the overall request. Even after the final results have been passed to the Taleo Oracle system from the service provider, the Transitions Center user can still view the details of this request, and can choose to visit the partner to view every available detail. All of this is associated with the single request.

Provided users have the corresponding user type permissions, the Transitions Center provides information about external service tasks involved in Transitions processes. Such tasks are displayed along with the other tasks in the Tasks section. An External Service Request section appears on the task details page of a task associated with an external service provider. That section shows details of the data exchange between Transitions and the provider, including message parameters and the current status of the task as defined by the partner (who can have any number of statuses in any sequence).

Each partner is certified based on the unique capabilities and strengths they bring with your services. Contact your Taleo Transitions administrator and/or partners for more information.

**Request Fields**

Information on the task details page includes request fields and result fields. Details vary by request. Input information is also displayed and varies by task.

<table>
<thead>
<tr>
<th>Request Field Name</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Name of the external service provider.</td>
</tr>
<tr>
<td>Service</td>
<td>Name of the service.</td>
</tr>
<tr>
<td>Status</td>
<td>Any of the predefined statuses for Passport requests used by Oracle Taleo for its partners. These values originate from the Provider status sent to Oracle Taleo in the Passport exchange.</td>
</tr>
<tr>
<td>Provider Status</td>
<td>Value passed to Oracle Taleo from the external service involved in the Passport exchange. This value is mapped to the appropriate Oracle Taleo status.</td>
</tr>
<tr>
<td>Request Date</td>
<td>Date when the request to the service provider was initiated for this candidate/new hire for this process. Additional processes for the candidate/new hire will have different Request dates.</td>
</tr>
<tr>
<td>Last Activity Date</td>
<td>Date of the most recent communication.</td>
</tr>
<tr>
<td>Results Expiration Date</td>
<td>Date after which the results should not be relied upon according to the service provider. This date is calculated by the service provider if a validity period was configured for the service. The date is the date the results are received by Oracle Taleo plus the validity period. For example, if the results were received on September 15th and the validity period was 30 days, the Results Expiration Date would be October 15th. This date is important for any future attempts to connect to the provider on behalf of the candidate or employee to request the service. If an external service request task obtained In Progress status before the expiration date, the Oracle Taleo system would not contact the partner to resubmit the request. Instead, the existing</td>
</tr>
<tr>
<td>Request Field Name</td>
<td>Description</td>
</tr>
<tr>
<td>------------------------------------</td>
<td>-------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>results would used, thereby saving money for the client. If the external service request task obtained In Progress status after the expiration date of the previous request's results, a new request would be sent.</td>
<td></td>
</tr>
<tr>
<td>Reference Number (Internal)</td>
<td>A unique identification number used by Oracle Taleo to identify a particular Passport request. Oracle Support typically uses this number in the Passport Console.</td>
</tr>
<tr>
<td>Reference Number (External)</td>
<td>A unique identification number used by the service providers to identify a particular Passport request.</td>
</tr>
</tbody>
</table>

**Parameters Used**

The Parameters Used section displays parameters configured by the Transitions administrator when building the process.

**Results**

The Results section displays all the results received by Oracle Taleo from the external service provider for the request. Result fields usually include a More Details link, which opens a new browser window. Transitions Center users can then visit the external service provider's Web site to view documents and additional information (such as error messages and detailed sub-statuses) about the request.

**Request Statuses**

Every external service task displays its current status. The following Oracle Taleo request statuses can be selected from the Status field:

- Service scheduled
- Candidate didn't answer email within set time
- Partner didn't respond within set time
- Declined by candidate
- Acknowledged by provider
- Waiting for provider response
- Unable to process
- Completed
- Canceled
- In progress
Tasks

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Tasks

A task is a unit of work that is usually assigned to some participant in a step, and is part of a larger process. Tasks are assigned to various participants involved in a process. When tasks are getting completed by participants, the process moves forward automatically. Tasks have to be created and stored in the library in order for the Transitions administrator to configure them into steps which then get assigned to participants in the right sequence to form a coherent process for each new hire.

Task Action

Each task must contain a task action and a related source (except manual tasks and content tasks). Related sources tell the system what source material, such as a form or message, to access to complete the task. When you create a task, you specify the action to be performed and the related source for the action.

<table>
<thead>
<tr>
<th>Type of Action</th>
<th>Description</th>
<th>Related Source</th>
</tr>
</thead>
<tbody>
<tr>
<td>Fill user-defined form</td>
<td>Assignees are asked to read and complete a user-defined form.</td>
<td>The Transitions administrator is presented with a list of existing user-defined forms and can only select one.</td>
</tr>
<tr>
<td>Send Correspondence</td>
<td>An email message is sent to the task assignee(s) and also to any additional recipients that the Transitions administrator added at the task level or in the message template.</td>
<td>The Transitions administrator is presented with a list of message templates and can only select one.</td>
</tr>
<tr>
<td>Execute the task manually</td>
<td>A manual task does not require any support i.e. no form, PDF, correspondence, etc. This is a task with only the cancel or completion option. With manual tasks, the Transitions administrator can simply ask an assignee to perform a task and the Transitions Center user will receive an acknowledgment of completion (tracking). Details regarding the task are contained in the task description field. An example of a manual task could be to instruct the assignee to do an action outside the system, such as make a welcoming phone call to the candidate.</td>
<td>Not applicable.</td>
</tr>
<tr>
<td>Open PDF</td>
<td>A PDF file, that can contain specific variables, gets assigned here by the Transitions administrator to the assignee as a task. The assignee can complete the task simply by opening the PDF. After it gets assigned to any participant, then Transitions Center users can access it in the Transitions Center, on the Process Page for that candidate/new hire. It can also be exported via Taleo Connect.</td>
<td>The Transitions administrator is presented with a list of PDF documents and can only select one.</td>
</tr>
<tr>
<td>System Task</td>
<td>The system is executing something by itself. This is used in the E-Offer process to communicate the candidate response back into the Recruiting Center candidate selection workflow.</td>
<td>The Transitions administrator is presented with a list of system tasks and can only select one.</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>Request External Service</td>
<td>A third party is the approved vendor for a specific service or product, such as the U.S. I-9 form completion or help with tax form completion. When this type of task is part of the process, it makes a request to a third-party provider to perform the type of service configured here.</td>
<td>The Transitions administrator is presented with new fields relevant to the service. The Transitions administrator chooses among any activated external service providers and then he/she can configure any of the Input Fields that are requested or required by that selected partner.</td>
</tr>
<tr>
<td>Display Content Page</td>
<td>A content page is text, graphics, links, lists of PDFs or other rich media and formatting, whose purpose is to communicate information to the candidate/employee assignee.</td>
<td>The Transitions administrator is presented with a list of content pages and can only select one.</td>
</tr>
</tbody>
</table>

**Task Type**

When creating a task, the Type drop-down list allows you to classify the nature of the task you are creating. This classification will help others identify and review your specific task in Transitions.

**Task Priority**

Priority is a useful indicator of how urgently a task should be executed: Low, Normal or High. Note that Priority is simply a helpful indicator but has no automatic effect on the system's behavior. It does not control any due dates (driven by the Duration field) nor any timing of task assignment (driven by the links and conditions) nor any sequence on the candidate Tasks tab (driven by sequence).

**Notifications**

You may designate that special correspondence, called notifications, be sent to the assignee or owner of the task. There are two notifications:

- **Task Assignment Correspondence:** A message is sent to the assignee informing him/her that a task has been assigned. Often, the Transitions administrator can choose the same standard message each time a task gets assigned. However, sometimes a process is configured to assign several tasks at the same time to the same assignee(s). In this case, it is likely overwhelming to send the same email for each. Instead, the Transitions administrator can choose to remove these notifications from every parallel task. The Transitions administrator can use a modified message template which describes all of the simultaneous tasks that the assignee will find when clicking the link to visit their task list. Another best practice is to use the notification for the first assigned task as the overall kick-off for the process, introducing the candidate/new hire to the whole concept of the Career Section as the home for their newly-launched process. Sometimes the Transitions administrator might choose to communicate this information in a correspondence task before any actionable tasks get assigned to the candidate/new hire. But this is not always necessary, if the first task's notification can deliver the same introductory information, thus the process configuration might be simplified in this way.

- **Task Completion Correspondence:** Once the task is completed, a message is sent to the process owner or supervisor.

**Reminders**

You may also designate that reminders be sent to the task assignee or the task owner a specified number of days before or after the task due date.
Creating a Task

Prerequisite

*Configuration > [Transitions] Administration > Task Definitions*

Steps

1. Click Create.
2. Enter a code, name and description for the task.
   The description is visible only to the Transitions administrator who can determine what is the intention/behavior of the task when viewing, for example, the process that it has been used in, or to decide whether to incorporate it into future processes.
3. Enter guidelines as required.
   Guidelines are displayed to assignees when the task is assigned to them. Guidelines appear as a tooltip when hovering the mouse over the task name in the career section Tasks tab.
4. Select a *type of task*.
   The type of task is a list of values that can be used for any purpose relevant to your business needs, although there is no significance in the Transitions product that results form choosing any value selected in this field.
5. Select a *priority for the task*.
   The priority is an of how urgently a task should be executed, although there is no significance in the Transitions product that results form choosing any value selected in this field.
6. Select the action the task will perform and the related source, from among the active sources.
7. Click Save.

Next Step

After completion, if required you can configure a notification and/or a reminder.
Key Concepts

Process

A process is a series of steps typically performed by multiple stakeholders for a single person. All necessary steps must be completed before the process gets completed.

An organization can use any number of processes to serve a variety of business units and locations. Processes can be tied to organizations, locations and job fields (OLF) so that the right process is available for candidates/new hires in the intended group. For example, the onboarding process at a corporate office might be very different from one at a field office. An organization might also have processes for electronic offer, prehire, promotion, relocation, cross-boarding or offboarding processes to name a few other examples. A single process can involve numerous stakeholders such as a human resources manager and a hiring manager in addition to the candidate or employee.

A process includes steps, usually dozens of steps, and each step is built upon only one single task. Once tasks are created and you have a suitable task library, a process can be created. In a single process, multiple tasks 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.

You can target different processes to specific audiences according to Organizations, Locations and Job Fields.

Process Status

Processes can be in Draft, Active, or Inactive. The status of a process affects the availability of a process for a new hire when the process is first launched, if changes can be made to a process, or if it can be deleted.

- **Draft**: When processes are created initially they are in Draft status. A process that is in Draft status cannot be seen nor selected in the Recruiting Center nor by Taleo Connect. Processes in Draft status may be modified. When a process leaves the Draft status and changes to Active, it cannot return to the Draft status. Only processes in Draft status can be deleted.

- **Active**: This is the status where people can be launched into a process, either using the Recruiting Center or Taleo Connect. An Active process cannot be modified. Steps within it cannot be changed nor 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 nor selected in the Recruiting Center nor can it be launched from Taleo Connect. Any new hires/candidates/employees currently going through a process will not be affected if the process status changes to Inactive. Inactive processes cannot be modified in any substantial way.

Process Types

Four types of processes can be created in Transitions. You must associate only one process type to a process.

- **Pre-Hire Validation**: A process that can be used when organizations require more information from new hires before the latter begin working or, when organizations want to request paid external third-party services in a configurable, logical flow. For a given candidate on a requisition, a Pre-Hire process can be launched
from the Recruiting Center if all the right actions and permissions are configured. It can also be launched from Taleo Connect. This type of process is also tied to user type permissions. Recruiting Center users require the "Initiate a new hire process for a new resource" permission, for example, to start processes you created of type Pre-Hire Validation.

- **New Hire:** A process used for bringing new employees into an organization. For a given candidate on a requisition, a New Hire process can be launched from the Recruiting Center if all the right actions and permissions are configured. It can also be launched from Taleo Connect. This type of process is also tied to user type permissions. Recruiting Center users require the "Initiate a prehire process for a candidate" permission, for example, to start processes you created of type New Hire.

- **E-Offer:** A process allowing candidates to accept or refuse offers on line via an organization Career Section portal. For a given candidate's offer, the E-Offer process can be launched from the Recruiting Center while extending an offer if all the right settings and permissions are configured. It can also be launched from Taleo Connect. See Electronic Offers.

- **Offboarding:** A process used for when employees are leaving an organization. The Offboarding process can only be launched from Taleo Connect Taleo. It cannot be launched from the Recruiting Center. This requires that an employee/candidate file exists or be imported. No requisition is required.

A candidate's or employee's running and completed prehire, new hire, e-offer, offboarding processes are consistent regardless of which career sections, internal or external, the person visits in the customer's zone.

Some organizations may choose to use Taleo Connect to launch their processes because they trigger them automatically from an HRMS system or some other system rather than relying upon recruiters to do it manually from the Recruiting Center. If you know that the process will only be launched with Taleo Connect, it is OK to not specify the process type. However, a best practice is to always specify the process type.

Associating a process to a process type is useful for Transitions Center users so they can filter their list of processes by process type.

### Process Owner

The process owner is responsible for ensuring the completion of a process.

The purpose of having a process owner is to ensure that an individual is responsible for viewing, managing, and sharing processes. With the appropriate permissions, the process owner can view and execute all the tasks in a process regardless of who is assigned to each task. The process owner can reassign any task in a process to a different person to avoid or resolve bottlenecks while the process is in progress. A process can be configured such that the process owner's name and contact information are displayed to candidates/employees who might have questions.

#### Functional Role as Process Owner

Transitions processes can be configured by the Transitions administrator such that the process owner is a functional role. Functional roles are groups of people assigned to perform similar tasks but for their specific Organization, Location or Job Field (OLF). Every functional role also has one default assignee. When a Transitions process is started for a specific candidate/employee, the person in the functional role group who is the best match for the candidate/employee and the requisition based on OLF is chosen as the process owner. Where a person in the functional role has no assigned OLF, the person is still considered a better match than the default assignee of the role overall.

If functional roles are used to designate process owners, it is a best practice to ensure that only one person is assigned to each Organization, Location and Job Field within each functional role. If more than one person is equally appropriate for a given OLF, only one of them will be designated the process owner when processes are started.

#### Functional Role Assignment Resolution
When a functional role is assigned to a Transitions task, the actual assignees are resolved at runtime according to the assignment’s position OLF information, which is populated from the requisition’s OLF if initiated from Recruiting.

For each functional role, the tasks are assigned to the user(s) who have the top score when their role OLF data is compared with the target values. If no user is found who matches the target data, the functional role’s default assignee is selected.

The system assigns each user a partial score for each criterion (O, L or F) and then adds them to calculate a final score. The partial scores are calculated from the offset between the structure levels of the target and the matching element in the user's OLF. If the match is partial (the user's information is applicable but less specific than the required value), a point is deducted for every level that differs from the target.

For example, suppose the requisition information is:
- Org1>Org11>Org112
- Job3>job32>job325
- United States>Pennsylvania>Philadelphia

If a user matches all three criteria exactly, the person obtains a score of 300 (100 + 100 + 100). Anybody else who matches all three criteria exactly obtains 300 points and is also assigned.

Suppose there are no perfect matches. User A has Org1>Org11>Org112, Job3>job32>job325, and United States>Pennsylvania and user B has Org1>Org11, Job3>job32, and United States>Pennsylvania>Philadelphia. User A obtains 100 + 100 + 99 = 299 because his/her location is 1 level higher than the target value. User B obtains 99 + 99 + 100 = 298. Only user A is assigned to the task.

If user C happens to have Org1>Org11>Org112, Job3>job32>job325, but no location information at all, he/she obtains 100 + 100 + 97 = 297. 3 points are deducted for location because they are all levels away from the third level that is required.

Suppose the target values are Org1>Org12>Org123>Org1234>Org12345>Org123456>Org1234567, Job1>Job12>Job123 and US>NY>New York>Manhattan.

User A has Org123456, New York and no Job info, so 99+99+97=295. User B has the required values Job123 and Manhattan but no Organization info. The score will be 100+100+93=293 because not having organization places the person 7 levels away from the requirement. This means that user A will be assigned even though user B is a better match on 2 out of 3 requirements.

Note that if the task is to be assigned to more than one role, the computations will be made independently for each role and combined in one consolidated list.

Role A -> Users A and B + Role B -> Users C and D: task gets assigned to users A, B, C, and D.

If the same user happens to be assigned to both roles, and obtains top score for both, the person would only appear once as the task assignee:

Role A -> Users A and B + Role B -> Users A and D: task is assigned to users A, B, and D.

So if user A was the only match in one of the two roles but was chosen in both, it might appear as if one of the roles hadn't been resolved.

The results can be even more counterintuitive if users appear in several roles with different OLF info for each.
**Supervisor**

Supervisors are people who can be assigned to do any of the things that the process owner can do.

Whereas a process has only one owner, it can have multiple supervisors. This means that a large team of coordinators or HR specialists can share the responsibility for monitoring a process involving a group of candidates, for sending reminders and for reassigning or executing tasks when delays occur. Supervisors can be assigned to a process as part of the process's configuration. As well, if a process with In Progress status is shared with others, these individuals also become supervisors.

To execute all tasks they can view, supervisors require the Manage tasks in processes for which I am the supervisor, same capabilities as the owner permission. This is different from process owners who can execute all tasks in a process regardless of whether they have the permission.

If supervisors of a process are not the owner of the process and the process has not been shared with them, they cannot reassign a task in the process unless they have the Reassign all tasks permission. On the other hand, if they are the owner of the process or the process has been shared with them, they can reassign a task regardless of whether they have the View, edit, execute, and reassign all tasks assigned to anyone permission.

A person can be the supervisor of a process because of two types of actions in the system:

- Because the Transitions administrator defined them as a Supervisor, either by name or they were in a functional role at the moment when the process was launched. This type of responsibility cannot be removed.
- Because someone chose to "share" with them the specific process while it was already running. The "share" and consequently, the supervisor role, can be ended with the "Stop Sharing" action.

**Step**

A step is the "envelope" in which a task gets assigned to participants.

A process contains steps. Steps are created for each process and they are the "container" for tasks (a task can be reused in the same process or across different processes). A step provides information about the assignee and sequence of tasks. Business logic ensures that the work to be done is routed correctly between steps.

**Type of Step**

When creating a step, the Transitions administrator needs to select a type of step.

<table>
<thead>
<tr>
<th>Step Type</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Task</td>
<td>The step will consist of a task selected from a defined list of tasks which are available in the Tasks library in the Transitions Administration.</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 for the welcome messages and paperwork for the new hire, you could create a sub-process and reuse it in various processes to simplify management. Like regular processes, a sub-process cannot be substantively changed after being activated. However, when a sub-process gets incorporated into a larger &quot;parent&quot; process, then any later adjustments to the definition of the &quot;child&quot; sub-process do not have an effect on this larger &quot;parent&quot; process.</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</td>
</tr>
<tr>
<td>Step Type</td>
<td>Description</td>
</tr>
<tr>
<td>-----------</td>
<td>-------------</td>
</tr>
<tr>
<td></td>
<td>can also be used to handle branching and reconnecting, if their transitions are built to do so. See <em>Understanding Routing Steps</em>.</td>
</tr>
</tbody>
</table>

**Step Execution**

For each step defined in a process, the Transitions administrator must specify the *Execute Step* and the *After Step Execution* properties.

The **Execute Step** is used to indicate if:

- The step will wait for all previous steps before becoming active.
- The step will wait for one of the step before becoming active.

The **After Step Execution** is used to indicate if the step will execute:

- All subsequent steps.
- One subsequent step.

For details, see *Understanding Step Execution*.

**Duration**

When configuring a step, the Duration field is used for calculating the due date of each task for its assignee(s). At the moment the task gets assigned, its due date is determined to be a certain number of days in the future, depending on the task's expected duration. This due date only takes into account the *working days* and not the weekends that are configured in the zone. Also, the duration of a task contributes to calculating percentage complete of the overall process. The duration acts as a weighting factor because tasks which take longer are considered to be worth a larger percentage of the total work needed to complete the process. For example, a given person's Transitions process might have 9 out of 10 tasks complete. If every task including that one remaining task was configured to have a duration of 1 day, the process would be at 90% completion, with only one small task left to go. However, if that one remaining task had a duration of 10 days, the process would be more like at 50% completion, because 9 days' worth of work have been completed but another 10 days' worth of work still remains to go.

**Specific versus Fallback Assignees**

In Transitions, the work in a step's task can be assigned to one or more person.

- If one person is assigned, then this person must complete the task. If the person fails to do so (even after configurable reminders are emailed to him/her) then the process owner and/or supervisor may be able to execute the task themselves and/or reassign the task to another user(s).
- If more than one person is assigned, then just one of these person must complete the task. It appears on each person's open task list. As soon as any one person completes it, then it disappears from all open task lists and becomes visible only in the Completed lists.

There are several ways that more than one person can become assigned to a given step:

- The Transitions administrator explicitly selects two or more individual users of the system.
- The Transitions administrator explicitly selects one or more individual users and/or one or more roles defined in the system, either Taleo-defined system roles or user-defined functional roles. Please note that a system role can be a Hiring Manager, a Hiring Manager Assistant, a Recruiter, a Recruiter Assistant. If no user is found in the context for that role, the system falls back on the Recruiter role. If there is no Recruiter, the system then falls back to the Process Owner. In some rare cases, the Process Owner can also be empty for instance if the Process Owner is also defined to be a System Role which happens to be empty for a given candidate/new hire. This situation should be avoided, because the Transitions process will be unable to start for this person. The action in the Recruiting Center will appear to proceed smoothly, but the candidate/new hire will not appear on the Transitions Center's list of In Progress processes.
Understanding Step Execution

The options available for executing steps should enable the Transitions administrator to account for their organization's specific process requirements, depending on whether certain steps are mandatory or optional and if subsequent steps should be repeated.

The following scenarios should be considered and used as best practice models when implementing a process.

**Scenario 1: All steps are required**: Select the option *When all previous steps have been completed* when there are multiple prior parallel steps that each have a transition into a specific step and this specific step should execute only after all prior steps are completed. This means that the specific step cannot begin until each prior individual step is complete. Also note that a step having this option will not start if one of the incoming transitions has a condition preventing its execution.

**Scenario 2: One mutually exclusive step is required**: Select the option *When one, and only one, of the previous steps has been completed* when there are multiple prior parallel steps that each have a transition into a specific step, but these prior steps are mutually exclusive based on conditions and only one of these prior steps will ever be completed.

**Scenario 3: One or more dependent steps may be completed**: Select the option *When one of the previous steps has been completed* when there are multiple prior parallel steps that each have a transition into the same specific step, and one or more of these prior steps may eventually be completed, and the specific step must be executed each time one of the prior steps gets completed. This can be useful in an instance where someone wanted to receive an email each time one of a group of prior tasks assignees completed their work. Or when a loop is introduced (a set of steps and transition that forms a cycle) and would make a step to be executed more than once.

**Scenario 4: One or more steps may be completed**: Select the option *When one, and only one, of the previous steps has been completed* when there are multiple prior parallel steps that each have a transition into the same specific step and one or more of these prior steps may eventually be completed, but you only want the specific step to be executed once and then allow the process to progress further. This means that as soon as the first of the preceding parallel steps get completed, the specific step will execute. Subsequently, if another prior step is completed it does not initiate a repeat execution of the specific step.

Be sure 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.
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 new job. The manager must determine if the new hires will need to fill out forms for a company car and/or relocation expenses. The above example will require the Transitions administrator to define a process that includes routing steps. Note that the above illustration is not a faithful graphical representation of a process created in Transitions. It is only given as an example.

1. Create one form that gets assigned to the manager and which contains these two user-defined fields that both have yes/no answers: Does the new hire need a car? Does the new hire need relocation reimbursement?
2. Create a routing step to act as the conclusion of all the variations that will arise from every combination of responses to these two user-defined fields from each new hire. This step is named Concluding routing step.
3. Create the required steps.
4. Create transitions with conditions that proceed from the form and cover each possible answer combination. These transitions need to have specific conditions that handle yes-no, no-yes, yes-yes, and no-no situations.

<table>
<thead>
<tr>
<th>Does the new hire need a car?</th>
<th>Yes</th>
<th>No</th>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does the new hire need relocation reimbursement?</td>
<td>No</td>
<td>Yes</td>
<td>Yes</td>
<td>No</td>
</tr>
</tbody>
</table>

5. For yes-no, the transition should lead to one task "New Hire Form Car Preferences" and then that form-step should connect to the Concluding routing step.
6. For no-yes, the transition should lead to the task "New Hire Form Relocation Preferences" and then that form-step should connect to the Concluding routing step.
7. For yes-yes, there should be two transitions from the 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 routing
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step. Only these two tasks feed into this routing step. The setting on this routing step must be to execute when all of the previous steps are completed, as we know that both are appropriate and required for the type of new hire who requires a company car and relocation expenses. The small Yes-Yes routing step must have a transition into the Concluding routing step.

8. For no-no, it is necessary to configure one more routing step, called Do Nothing. This step contains no task and takes no action. This is appropriate because nothing is necessary for new hires who need no car and no relocation. However, this routing step is still necessary. A transition needs to proceed from the Do Nothing routing to the Concluding routing step.

9. The Concluding routing step must be configured to be satisfied when one and only one of its prior tasks is completed. If no car and no relocation is needed, then the Do Nothing routing step will be immediately completed by the system. This in turn will trigger the completion of the Concluding routing step.

When configuring a Transitions process, it is possible to have more than one end-point, although this is not recommended. Anytime a step is configured to have no subsequent step after it, this automatically becomes an end-point where the process stops and achieves a percentage completion of 100% and a status of Complete.

For instance, a new hire process might receive results from an external partner indicating whether or not the candidate is qualified to work in the United States. If this result is positive, then the process should continue on and assign various tasks to multiple assignees until the new hire is considered as being ready to work. But if this partner’s response is negative, then the process might only need to assign a handful of concluding steps.

However, it is preferable to configure all processes to have only one end-point, even in this situation. Configurations with only a single end-point yield much better results for calculating completion percentage. The described situation can still be achieved with a single end-point, by configuring the process to have a routing step as the final step. Each of the paths above, the long one for qualified employees and the short one for candidates who prove to be unable to employ, can both lead into a single routing step. This routing step must be configured to be triggered "when one and only one of the prior steps are complete". This works because a given candidate can only follow one of the two main paths, never both. The routing step must be satisfied as soon as one of the two main paths is finished, and because the routing step has no subsequent steps, it is followed only by "End". As soon as this routing step is complete, the overall process reaches 100% completion status and its status becomes Complete.

**Transition**

Transitions are created to connect steps together.

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.

**Viewing Details on Transitions Added to a Process**

When looking at the transitions created for steps in a process, it is possible to display a spreadsheet-like view of the entire process including information about each step and transition to assist the Transitions administrator who is configuring and reviewing processes.

The Process page displays two tabs.

- The Steps tab lists each step, its description, perhaps its position (relative to the other steps) on the Tasks tab in the career section, and a Delete button.
- The Transitions tab lists the process by transition. Each row in the Transitions list can be collapsed or expanded, controlling the level of detail given for each transition.

These tabs are very useful because it is possible to click the From step and the To step columns in order to sort the list based on these items. This enables the Transitions administrator to view all the steps together which feed into a given step, or to view all the steps that flow out of a given step. This is extremely valuable for ensuring
completeness while defining a process, and/or iterating or troubleshooting after a version of a process has been defined.

<table>
<thead>
<tr>
<th>Name</th>
<th>From Step</th>
<th>To Step</th>
<th>Conditions</th>
<th>Required</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>From SignatureForm To SignatureMT</td>
<td>SignatureForm</td>
<td>SignatureMT</td>
<td>No</td>
<td>—</td>
<td>Delete</td>
</tr>
<tr>
<td>From SignatureMT To SignaturePDF</td>
<td>SignatureMT</td>
<td>SignaturePDF</td>
<td>No</td>
<td>—</td>
<td>Delete</td>
</tr>
<tr>
<td>From SignaturePDF To manual</td>
<td>SignaturePDF</td>
<td>manual</td>
<td>No</td>
<td>—</td>
<td>Delete</td>
</tr>
</tbody>
</table>

- **Assignees**: Patrice Lemay
- **Task**: SignaturePDF
- **Execute Step**: When all previous steps have been completed
- **After step execution**: Execute all subsequent steps

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 transition to the Connection 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: It means that conditions do exist on this transition, which govern whether and when the downstream task will get assigned. No means that there are no conditions on the transition, so every downstream task will be triggered for every assignee as soon as the prior task is complete.</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(s).</td>
</tr>
<tr>
<td>Row</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Task</td>
<td>The name of the task as a transition to the Task Definition page, if any (no tasks are associated to Routing Steps).</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 the process.

**Condition**

A transition can contain conditions, that is a set of circumstances that must be met in order to complete a transition from one step to another.

Once a transition is created, it is possible to add a condition. This means that the transition will be executed only if and when 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 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.

A transition can have multiple conditions. To ensure that a given task only gets assigned if two or more elements are true, the Transitions administrator can use the Condition Requirements field when configuring the transition. This field provides two options:

- All conditions must be valid
- At least one of the conditions must be valid

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.

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. However, the *Transitions tab in the Process page* has a column that provides a useful view of whether or not a given transitions has any conditions. Another column in the Transitions tab also shows whether one or all of the conditions must be met in order for the transition’s To task to get assigned.

**Operators used in Conditions**

<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: Field: TransitionsProcess/ProcessName Operator: Contains Value: Computer Setup</td>
</tr>
<tr>
<td>Operator</td>
<td>Description</td>
</tr>
<tr>
<td>--------------</td>
<td>--------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Is</td>
<td>The name of the Transitions 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 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 equal to</td>
<td>The resulting information must be less than or equal to the value entered in the Value field.</td>
</tr>
<tr>
<td>Is greater than or equal to</td>
<td>The resulting information must be greater than or equal to the value entered in the Value field.</td>
</tr>
<tr>
<td>Below examples are conditions used for the following fields:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• NewHireDemographicDescriptorForCondition / LicenceLocation</td>
</tr>
<tr>
<td></td>
<td>• NewHireLegalIdentifierForCondition / Residency</td>
</tr>
<tr>
<td></td>
<td>• PositionForCondition / JobField</td>
</tr>
<tr>
<td></td>
<td>• PositionForCondition / Location</td>
</tr>
<tr>
<td></td>
<td>• PositionForCondition / Organization</td>
</tr>
<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.</td>
</tr>
<tr>
<td></td>
<td>Note that the IS_IN operator does not behave like the IS operator when the operand is one of the Collection member.</td>
</tr>
<tr>
<td></td>
<td>For example: Salesman.region IS_IN {Ontario, Alberta} would return false if Salesman.region was Ontario.</td>
</tr>
<tr>
<td></td>
<td>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.</td>
</tr>
</tbody>
</table>
### Operator Descriptions

<table>
<thead>
<tr>
<th>Operator</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>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 is 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>

### 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>
<tr>
<td>Value</td>
<td>-4</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 process was started will not be transferred into Transitions. However, Start Date changes are immediately transferred from Recruiting into Transitions.

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 Transitions accepts null values for transition conditions for processes.

When creating a condition for a transition between steps in a process, an 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 Transitions can then move forward through the process according to whether or not there is a value in the condition field.

Example:

If a 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.

**Preview Process**

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 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.

It is a best practice to preview your developing process often to ensure that any errors can be caught and corrected.

Setting Hold Until Prior Task Completion

You can make a task wait until a prior task completes by using the variable LastPreviousStepEndDate.

By using the variable 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.

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.

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 rules.

**Launching a Transitions Process for Candidates/Employees with no Email Address**

To launch a Transitions process via the Recruiting Center or Taleo Connect, whether it is a Pre-Hire, a New Hire, an E-Offer or an Offboarding process, candidates/employees need to have an email address. In version 13B, customers can now configure Taleo Transitions such that Transitions processes can be launched for candidates or employees even if they do not have an email address.

System administrators have the possibility to set a fallback email address for candidates/employees with no email address. This email address will be used for every candidate/employee who lacks an email address so that Transitions processes can be launched. To support this new feature, a setting has been created. The value of this setting is empty by default for all customers (new customers and those migrating to 13B).

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Email Address for Transitions Process</td>
<td>To run a Transitions process, the email address of the candidate/employee is a prerequisite even if the process is configured such that no notifications or reminders are sent to the individual. For candidates for whom there is no email address entered.</td>
<td>Blank value, no email address entered.</td>
<td>Configuration &gt; [Transitions] Settings</td>
</tr>
</tbody>
</table>
no email address, leaving this email address field with no value means that no Transitions process can be run for them. If a value is provided for this setting, for every candidate who lacks an email address, the value is reproduced in the “Personal Email Address” and “Correspondence Email” fields in the candidate’s SmartOrg user account (unless the candidate already has an associated SmartOrg user account with an email address).

Some actions in the system send an email message and show a copy of the message on the career section Tasks tab. Other actions simply send an email message. If a fallback email address has been saved in a candidate profile, the candidate/employee will not receive any communication by email. The only information that they will receive would be the one appearing on the career section Tasks tab (for example, correspondence tasks, Passport-triggered invitations/messages). If a task has "auxiliary" emails such as notifications and reminders, this information will not be displayed in the Tasks tab.

The table presents the type of communication a candidate/employee will get if a fallback email address has been saved in their candidate profile and how they will get the communication (via the career section Tasks tab or via email).

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Default Value</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>no email address, leaving this email address field with no value means that no Transitions process can be run for them. If a value is provided for this setting, for every candidate who lacks an email address, the value is reproduced in the “Personal Email Address” and “Correspondence Email” fields in the candidate’s SmartOrg user account (unless the candidate already has an associated SmartOrg user account with an email address).</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The table presents the type of communication a candidate/employee will get if a fallback email address has been saved in their candidate profile and how they will get the communication (via the career section Tasks tab or via email).

<table>
<thead>
<tr>
<th>Correspondence tasks</th>
<th>Passport-triggered invitations/messages</th>
<th>Notifications of assigned tasks</th>
<th>Reminders of upcoming/overdue tasks</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candidates/employees with a fallback email address</td>
<td>Tasks tab</td>
<td>Tasks tab</td>
<td>None</td>
</tr>
<tr>
<td>Candidates/employees with an email address</td>
<td>Tasks tab Email</td>
<td>Tasks tab Email</td>
<td>Email</td>
</tr>
</tbody>
</table>

When launching a Transitions process for a candidate/employee, the candidate/employee must be linked to a user account in SmartOrg.

- If the candidate/employee is already linked to a SmartOrg user account, this user account is used.
- If the candidate is not linked to a SmartOrg user account, a new SmartOrg user account of type "Transitions" gets created automatically by the system when a Transitions process gets launched for a candidate with no preexisting SmartOrg user account.

The system automatically configures the email address of the newly-created Transitions SmartOrg user account using the email address provided by the candidate or the fallback email address entered in the Email Address for Transitions Process setting. If the system cannot any of these addresses, then the Transitions process cannot be launched because the new Transitions user cannot be created at all by the system.
Building a Process

Several steps are involved when building a process.

1. **Analyzing your process.**
2. **Creating the process by only defining its properties that is name, code, description, type of process, owner, etc.**
3. **Creating any forms needed for the tasks.**
4. **Creating any messages needed for the tasks.**
5. **Creating tasks using forms and messages as well as manual tasks.**
6. **Creating steps by associating the tasks.**
7. **Adding transitions to link the steps together.**
8. **Adding conditions to transitions (optional).**
9. **Adding OLF associations to steps (optional).**
10. **Previewing the process to validate the process you just created.**
11. **Activating the process.**

Analyzing Your Process

Before creating a process in Transitions, it is important to analyze your business requirements and the activities and participants that you will need.

During the analysis, you need to identify the steps involved in building the process, define what is required to perform the task in each step, decide who will complete each step, determine the order of the steps and any dependencies, identify the transitions from one step to another.

Take the example of a task you wanted to ensure was assigned at a precise time, for example, five days after the employees' start date. You wouldn't want the assignment of the task to be delayed just because some earlier tasks in the process were taking longer to complete than planned.

A good solution would be to construct your process such that the "time-critical" task was independent on other tasks that might encounter a delay. You could create a transition from a task placed early in the process and certain not to encounter a delay to the "time-critical" task. You could assign a condition to the transition such as Start Date less-or-equal to five days. If other tasks in the process encountered a delay and took longer to complete than planned, the "time-critical" task would still be assigned no later than five days after the employees' start date.

You may want to create a flowchart to assist with the above analysis or you can simply use a pen and paper.

Once your process is well defined, you can built it in Transitions Administration.

Defining the Properties of a Process

**Prerequisite**

*Configuration > [Transitions] Administration > Processes*

**Steps**

1. Click Create.
2. Enter a code, name, and description.
3. Select the type of process: Process or Sub-process.
4. Specify the *process owner*, by searching for a role or specific user.
5. (Optional) Select one or more *supervisors*.
6. In the Guidelines field, enter instructions as needed.
7. Click Save.

**Creating User-defined Forms**

The creation of a user-defined form consists of the following steps.

1. *Creating the user-defined form.*
2. *Previewing the user-defined form.*
3. *Translating the user-defined form in the languages activated within your organization.*
4. *Activating the user-defined form.*

**Creating Message Templates for Transitions**

The creation of a message template consists of the following steps.

1. *Defining the properties of the message template.*
2. *Creating the content of the message template.*
3. *Adding attachments to the message template (optional).*
4. *Previewing the message template to see how it will look (optional).*
5. *Activating the message template.*

**Creating a Task**

**Prerequisite**

*Configuration* > [Transitions] Administration > Task Definitions

**Steps**

1. Click Create.
2. Enter a code, name and description for the task.
   The description is visible only to the Transitions administrator who can determine what is the intention/behavior of the task when viewing, for example, the process that it has been used in, or to decide whether to incorporate it into future processes.
3. Enter guidelines as required.
   Guidelines are displayed to assignees when the task is assigned to them. Guidelines appear as a tooltip when hovering the mouse over the task name in the career section Tasks tab.
4. Select a *type of task*.
   The type of task is a list of values that can be used for any purpose relevant to your business needs, although there is no significance in the Transitions product that results form choosing any value selected in this field.
5. Select a *priority for the task*.
   The priority is an of how urgently a task should be executed, although there is no significance in the Transitions product that results form choosing any value selected in this field.
6. Select the action the task will perform and the related source, from among the active sources.
7. Click Save.

**Next Step**

After completion, if required you can configure a notification and/or a reminder.

**Creating a Step**

**Prerequisite**

The process must be in Draft status.

**Configuration** > [Transitions] Administration > Processes

**Steps**

1. In the process you just created, click Create Step located in the Steps section.
2. Select the type of step you want to create then click Continue.
3. Click the Search button to select a predefined task and click Continue.
4. Provide a description for the task step.
5. In the Sequence field, specify the order by which the tasks display by entering a numerical value. This will only affect the display of the tasks. The true order in which the tasks are performed is determined by the transitions among the steps.
6. In the Duration field, enter the number of days expected for the step to take.
   This will help calculate the due date of the step. The duration is reflected in the process status bar in the Transitions Center.
7. Select one or multiple assignees who are to perform the step.
   You can select specific users or specific roles.
8. From the Execute Step list, select whether the current step should wait for one or all of the steps before it to reach completion. See Understanding Step Execution.
9. From the After step execution list, select Execute all subsequent steps.
10. Click Finish.

**Creating a Transition**

**Prerequisite**

**Configuration** > [Transitions] Administration > Processes

**Steps**

1. In the process you just created, click Create in the Transitions tab.
2. Indicate which two steps are to be connected: the starting step and the ending step.
3. Click Continue.
4. In the Name field, you can provide a meaningful name for the transition you just created. By default, the name of the transition consists of the word "From" and the name of the first step, plus the word "to" and the name of the second step.
5. In the Description field, you can enter a description that can help explain what is the intention of this transition between the steps, and/or the intention of any conditions that will be placed on it.
6. Select whether any or all *conditions* must be met in order for the "To" step to get assigned, if you intend to create any conditions in the next step.
7. 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 feature is very helpful to get a quick visual of whether all the steps are connected together as intended.

### Creating a Condition

**Prerequisite**

The process must have Draft status.

**Configuration > [Transitions] Administration > Processes**

**Steps**

1. In the process you just created, click a link.
2. Click Create next to Conditions.
3. In the Name field, provide the condition a meaningful name, which will be visible when reviewing and troubleshooting the process logic in the future.
4. In the Field area, select a category and a specific variable, which corresponds to the Field Chooser in the User-Defined Form Builder.
   
   This is the information about the candidate/new hire that will be checked by the system when evaluating whether this condition is true or not.
5. In the Operator field, select an operator to indicate how the candidate's/new hire's information should be checked.
6. In the Value field, choose or enter a value that is appropriate for the field and the operator selected above.
7. Click Save.

**Result**

On the Transition page of the process, the condition you created is displayed in the Conditions section.

**Next Step**

If necessary, continue to create additional condition(s) on the same transition. Whether all of them must be true, or whether only one of them must be true, is governed by the condition requirement that was configured onto the transition itself.

### Associating a Process to a Process Type

**Prerequisite**

**Configuration > [Transitions] Administration > Processes**

You can associate only one process type to a process.

**Steps**

1. Select the process.
2. To associate the process to a process type, click Add next to Process Types.
3. Select *one* process type.
Selecting the type Pre-Hire or New Hire allows this process to be launched by Recruiting Center users as an action in a candidate's CSW. Selecting the type E-Offer allows this process to be launched when extending an offer electronically. Selecting Offboarding allows the process to be launched by Taleo Connect, but not by any users in the system.

4. Click Select.

### Associating a Process with Organizations, Locations and Job Fields

**Prerequisite**

*Configuration > [Transitions] Administration > Processes*

**Steps**

1. Select the process.
2. To associate the process to an Organization, Location or Job Field, click Add where relevant.
3. Select an element.
4. Click Select.
5. Click Save.

**Result**

If no OLF is associated with the process, then it is appropriate for all candidates/new hires and can be launched for people in requisitions in any OLF. If a specific OLF is associated here with the process, then it will only appear to Recruiting Center users for requisitions in that same OLF.

### Previewing a Process

**Prerequisite**

*Configuration > [Transitions] Administration > Processes*

**Steps**

- Click the Preview Process link in the Quick Access box.

**Result**

A system generated flow chart can help you validate the process you just created. For details, see Preview Process.

### Activating a Process

**Prerequisite**

*Configuration > [Transitions] Administration > Processes*

**Steps**

- In the process you just created, click Activate.

**Result**

The process can be launched for any number of candidates/new hires who will each get assigned their own copy of all appropriate tasks. After a process has been activated, the Transitions administrator cannot
make any further substantive changes to the process, its steps, its links, nor its conditions. This is because Taleo Transitions is designed to ensure consistency among all candidates/new hires who travel through a given process. This can be achieved only if the process remains intact as originally defined, without later adjustments.
Processes - Other Configuration Tasks

Creating a Task Reminder

Prerequisite
A task must be created and must have a duration, because at runtime for each new hire, the due date gets calculated by adding the duration onto the date that the task gets assigned.

The due date takes into account only the working days that are used in the zone, for example not Sunday or any days configured. See Transitions Settings.

Configuration > [Transitions] Administration > Task Definitions

Steps
1. Click the name of the task for which you want to create a reminder.
2. Click Create next to Reminders.
3. In the Assignees field, click Owner or Assignees or individual assignees.
4. Select a triggering time.
   The triggering time is expresses in days (not time of day) before or after the task's due date.
5. Select a notification message.
6. Click Save.

Result
A reminder entry appears in the Reminders section. On the day specified, if the task remains In Progress, the reminder recipient will receive an email with the selected message template.

Deleting a Task Reminder

Prerequisite
Configuration > [Transitions] Administration > Task Definitions

Steps
1. Click the name of a task.
2. In the Reminders section, find the reminder and click the corresponding Delete button.
3. Click Yes in the message box to confirm the deletion.

Result
The reminder no longer appears in the Reminders section of the Task page. At runtime, from the perspective of the assignees, anyone who will reach this date for an unfinished task in the future will not receive this reminder.

Creating a Task Notification

Prerequisite
Configuration > [Transitions] Administration > Task Definitions

Steps
1. Click the name of a task.
2. Click Edit next to Notifications.
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.

Removing a Task Notification

**Prerequisite**

Configuration > [Transitions] Administration > Task Definitions

**Steps**
1. Click the name of a task.
2. Click Edit next to Notifications.
3. Click Clear buttons.
4. Click Save.

Deactivating a Process

**Prerequisite**

Configuration > [Transitions] Administration > Processes

**Steps**
1. Click a process.
2. Click Deactivate.

**Result**

The process status is now Inactive.

Deleting a Draft Process

**Prerequisite**

The process must be in Draft status.

Configuration > [Transitions] Administration > Processes

**Steps**

Click Delete.

**Result**

Because no candidate/new hire processes can be launched for a process that is in Draft status, deleting the process only removes it from the list that can be viewed by the Transitions administrator. There is no effect on any candidate/new hire processes nor on any personal data.

Automatically Deleting Old Processes

Completed and canceled processes associated with a specific new hire/candidate can be automatically deleted.

The *Automatically Delete Old Transitions Processes* is a setting that the Transitions administrator can configure to determine when to delete obsolete processes. These processes are associated with a specific candidate/new
hire and have been either completed or canceled. The Transitions 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 delete occurs 14 days later and a new delete 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 candidate/new hire completed or canceled process has reached the defined age value in days, the process is automatically deleted. All 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/candidate can no longer be generated. However, the candidate/new hire user account is not deleted. Candidate/new hire data is retained in the database and is available for reporting purposes.

<table>
<thead>
<tr>
<th>Setting</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatically Delete Old</td>
<td>Automatically executes a permanent deletion of new hires’ Transitions</td>
<td>Configuration &gt; [Transitions] Settings</td>
</tr>
<tr>
<td>Transitions Processes</td>
<td>processes completed or canceled at least X days ago. All tasks within these</td>
<td></td>
</tr>
<tr>
<td></td>
<td>processes will also be deleted. Value of 0 days means no automatic deletion</td>
<td></td>
</tr>
<tr>
<td></td>
<td>will occur. Ongoing processes will be ignored and not included in permanent,</td>
<td></td>
</tr>
<tr>
<td></td>
<td>automatic deletions</td>
<td></td>
</tr>
</tbody>
</table>

**Impact with the Automated Candidate Deletion Process in Recruiting**

The automatic deletion of candidates that is set through the Recruiting Administration Automated Task feature will no longer work if a candidate/new hire has any associated Transitions processes in any status whether In Progress, Canceled, Completed or even Suspended.

The Transitions automated process deletion mechanism is critical if organizations want to free up the candidates/new hires to be deleted from the Recruiting automated candidate deletion mechanism. The Transitions administrator can configure the *Automatically Delete Old Transitions Processes* setting to delete processes that are older than X days. Then, after this deletion has occurred, the next time candidates/new hires are matched to the Recruiting automated candidate deletion mechanism, they will get removed from the Taleo system entirely.

Removing the Transitions processes does not delete the data about candidates/new hires. Only the record of what processes and what tasks they completed, and what PDFs were completed, etc., gets deleted by the Transitions deletion mechanism. The Recruiting deletion mechanism is required to truly wipe out the data pertaining to the candidates/new hires themselves.

Any manual deletion of candidates in Recruiting will also be unsuccessful if the candidate has an associated Transitions process of any status.

**Deleting a Task**

**Prerequisite**

*Configuration > [Transitions] Administration > Task Definitions*

**Steps**

1. In the Task Definitions list, click Delete next to the task.
2. Click Yes to confirm the deletion.
Deleting a Step

Prerequisite

*Configuration > [Transitions] Administration > Processes*

Steps

1. Click a process.
2. Click the Steps tab.
3. Click Delete next to a step.

Deleting a Transition

Prerequisite

*Configuration > [Transitions] Administration > Processes*

Steps

1. Click a process.
2. Click the Transitions tab.
3. Click Delete next to a transition.

Getting a Graphical Preview of a Process

Prerequisite

This feature is only available if you are logged in as a Support user. Customers will never see this option.

*Configuration > [Transitions] Administration > Processes*

Steps

1. Click a process.
2. Click Export as XPDL10.
Processes in the Recruiting Center and Transitions Center

Launching and Canceling Transitions Processes in the Recruiting Center

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Transitions pre-hire and new hire processes from the Recruiting Center.

When candidates reach an appropriate step and status in a Candidate Selection Workflow, the following actions becomes available for selection:

- Start Transitions Pre-Hire Process
- Start Transitions New Hire Process
- Cancel Transitions Pre-Hire Process
- Cancel Transitions New Hire Process

Like any other actions, these actions are available via the Candidates list More Actions menu, the Candidates list contextual action menu, and the candidate file More Actions menu. Processes can also be launched when using the Bypass action and the Change Step/Status action.

As a system administrator, you can add the **Start Transitions Pre-Hire Process** and the **Start Transitions New Hire Process** actions to candidate selection workflow steps (Configuration > [Recruiting] Administration > Candidate Selection Workflow > Steps tab > Actions Usage tab).

You must also grant these permissions to users so they can access these actions:

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Initiate a pre-hire process for a candidate</td>
<td>Configuration &gt; SmartOrg Administration &gt; Users &gt; User Types &gt; select a user type &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Cancel a pre-hire process in progress</td>
<td>Configuration &gt; SmartOrg Administration &gt; Users &gt; User Types &gt; select a user type &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Initiate a new hire process for a new resource</td>
<td>Configuration &gt; SmartOrg Administration &gt; Users &gt; User Types &gt; select a user type &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td>Cancel a new hire process in progress</td>
<td>Configuration &gt; SmartOrg Administration &gt; Users &gt; User Types &gt; select a user type &gt; Recruiting &gt; Other</td>
</tr>
</tbody>
</table>

Viewing Transitions Processes via Channels and Links in the Recruiting Center

The Recruiting Center center stage provides channels and links to view Transitions processes.

These channels and links are:

- Pre-Hire channel
- New Hire channel
- Transitions link
If the Pre-Hire channel, New Hire channel, or Transitions link are displayed, users can click the title of any of those channels/link to go to the Transitions Center. Users can also click a status in the Pre-Hire or New Hire channel. That action opens the Transitions Center and, in the Processes section, “Pre-Hire Validation” or “New Hire” is displayed in the Process Type list.

Also, in the Tasks channel, a Transitions section displays the number of Transitions tasks owned by the user and that are due today, that are overdue, and those that are opened. The counts consider the New Hire and Pre-Hire processes. If the Transitions section is displayed, users can click any link in that section to go to the Transitions Center. That action opens the Transitions Center and, in the Tasks section, the status you selected is displayed in the Refine by list.

To display these channels and links, you must add them in the desired center stages (Configuration > [Recruiting] Administration > Center Stage).

You must also grant these permissions to users so they can view these channels:

<table>
<thead>
<tr>
<th>Channel</th>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pre-Hire and New Hire channels</td>
<td>One of the following permissions:</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Transitions Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</td>
</tr>
<tr>
<td></td>
<td>• View processes I own or supervise, or that have been shared with me</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• View all processes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>And one of the following permissions:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Initiate a pre-hire process for a candidate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Initiate a new hire process for a new resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cancel a pre-hire process in progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cancel a new hire process in progress</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Transitions channel</th>
<th>One of the following permissions:</th>
<th>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Transitions Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>• View, suspend, and restart all processes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• View, suspend, restart and share processes that I own or supervise or share</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• View, suspend, and restart processes that I own or supervise or share</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Share all processes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• View all processes</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• View processes I own or supervise, or that have been shared with me</td>
<td></td>
</tr>
<tr>
<td></td>
<td>And one of the following permissions:</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Initiate a prehire process for a candidate</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Initiate a new hire process for a new resource</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cancel a prehire process in progress</td>
<td></td>
</tr>
<tr>
<td></td>
<td>• Cancel a new hire process in progress</td>
<td></td>
</tr>
</tbody>
</table>
Restarting a Process from the Recruiting Center and Transitions Center

Sometimes an error is made during a Transitions process, and it is deemed necessary to restart the process to correct the error. This can be done by the Recruiting Center user in the same way that the process was initially started, or it can be done by the Transitions Center user as well. Note that there is no way to re-open a specific task or form after it has been submitted, if the process was not designed to allow corrections on a later form. This is why an important error in a submitted form might warrant restarting the whole process again from the beginning.

Anytime a process is started in Transitions, it uses the most up-to-date information. The process starts from the beginning, assigning every task to the right participants. Usually this means that the same forms will be assigned to the same people when the new process is running. Fortunately, the system has saved all of the information that they had entered into the system the first time they submitted the form. This means that almost all of the fields will appear prefilled when the assignees revisit the form in the restarted process. The only fields that are empty are those which store their data uniquely per process: these are expected to be filled every time the process runs. For example, an assignee's electronic signature must be re-entered each time the form is presented, regardless of whether the data on the form has been updated. By contrast, most fields do not store their information uniquely per process: the majority of information in Taleo is related to the candidates/employees themselves, or the requisition, or the offer. So these values do not disappear or change just because a process has been restarted for the same candidate, requisition, and offer.

Below are the methods to restart a process:

- From the Recruiting Center, users select the candidate submission and cancel the running process (if it was originally started there). Then, they start the process again by choosing the exact same process. This method works for New Hire and Pre-Hire processes only. For details, see Restarting a Process from the Recruiting Center.
- From the Transitions Center, users select the candidate's process, and from the Process page they click Restart. This launches the exact same process again for the same person, from the beginning. This method works for all running process types. For details, see Restarting a Process from the Transitions Center.
- From Taleo Connect, the Cancel Process action can be called for this running process. Then the Start Process action can be called for this same process definition and person and submission (if any). This method works for all running process types.

When the original process gets canceled, the in progress tasks become terminated/canceled.

For the newly started process, the first tasks get assigned as usual to the same appropriate assignees. All prior recent data is retained and displayed because Transitions always uses the most up-to-date information in every form, email, PDF, etc. Only the fields which are supposed to be captured fresh for every process, such as e-signatures, appear empty on forms that had already been submitted in the prior running process. Other fields retain the last updated information about the candidate, from any source that had updated it most recently. Remember that it is never possible to update information about the requisition or the offer inside a Transitions form anyway: these must be edited following the normal business logic within the Recruiting Center.

If the Transitions process has been inactivated by the Transitions administrator, users will not be able to restart the same process. This is logical by design because only active processes are available to be launched for new candidates/employees. For example, if a given New Hire process was active in early December when a specific person first began their onboarding, then the Recruiting Center user could have selected this process. Let's imagine that the new hire submitted a form with an important mistake in late December. However, it is possible that the company is no longer running the original process for new hires because they have now defined a revised process for the new year. In this case, the old running process can still be canceled, either from the Transitions Center or the Recruiting Center. However, the prior year's process will not be available to start for this person; instead the new
year's replacement process is the only active process available. This means that the Restart action is not displayed in the Transitions Center. The new year's process can be launched only from the Recruiting Center and Taleo Connect for this candidate for this same submission.

**Restarting a Process from the Recruiting Center**

**Prerequisite**
This method can be used for the New Hire and Pre-Hire processes only.

*Recruiting > Candidates*

**Steps**
1. Click the name of a new hire.
4. From the drop-down list, select the exact same process.
5. Click Done.

**Restarting a Process from the Transitions Center**

**Prerequisite**
This method works for all running process types.

*Transitions > Transitions Center*

**Steps**
1. In the Processes section, click a candidate/employee.
2. Click Restart.
Mentors for New Hires

A mentoring process can be automated to help welcome and assimilate new hires.

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

The Transitions administrator can use the following variables to create mentor forms on which the assignee can provide information to associate a specific mentor to each new hire. Taleo Connect can be used to import the desired mentor information that corresponds to each new hire’s running process.

- MentorEmail
- MentorFirstName
- MentorInitial
- MentorLastName
- MentorPrefix
- MentorSuffix
- MentorTitle

Assigning a Mentor to a New Hire

A form must be assigned to some HR person (or Taleo Connect) who knows the intentions of the organization. Only after the right mentor information has been entered into the system, then email or form(s) can be shown to the new hire about their mentor, and any email(s) can be sent to the mentor him/herself.

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 variables to assign a mentor to each new hire. These variables are found in the User-defined form editor category of “Requisition Owners.”

Using Mentor Variables 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.

Because mentors might not be in the system, the Transitions administrator cannot directly assign tasks to them.

Mentors Can Get Email but No Tasks

Because mentors do not need to be Taleo users in the system, it is not possible for the Transitions administrator to assign any tasks to them. Only users in SmartOrg and roles can be step/task assignees. However, email messages can be configured to be sent to mentors when appropriate. This is done by adding the Mentor email variable on message templates, on the To, CC, or BCC lines. 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 Transitions administrator 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.
Electronic Offers

Recruiting Center users can extend offers electronically enabling candidates to view and respond to these offers on line.

Two E-Offer options are available:

- The standard electronic offer.
- The advanced electronic offer that requires Taleo Transitions.

Customers who have more complex electronic offer requirements can configure Transitions-based advanced electronic offer processes for use in the Recruiting Center. Customers might require additional e-signatures, notifications extended to include additional people, calls to external service providers, different tasks for executives.

Several participants can be involved in an advanced E-Offer process: the recruiter, the candidate, the Transitions administrator as well as other participants.

The following table describes some of the ways in which advanced electronic offers differ from standard electronic offers.

<table>
<thead>
<tr>
<th>Question</th>
<th>Standard E-Offer</th>
<th>Advanced E-Offer</th>
</tr>
</thead>
<tbody>
<tr>
<td>Configuration required?</td>
<td>No, the two standard E-Offers and the workflow cannot be configured.</td>
<td>Yes, you configure related forms, email messages and the workflow.</td>
</tr>
<tr>
<td>E-Offer is displayed on which tab?</td>
<td>Offer tab (which includes other offers if any).</td>
<td>Tasks tab (which includes tasks from the E-Offer process and (typically) tasks from other processes).</td>
</tr>
<tr>
<td>When is offer sent electronically?</td>
<td>As soon as E-Offer is extended.</td>
<td>Wherever you have configured this action in the E-Offer process.</td>
</tr>
<tr>
<td>Can multiple e-signatures be captured?</td>
<td>Two on a single form (candidate)</td>
<td>Unlimited including e-signatures for the offer and any attachments required from candidate or others (e.g. manager).</td>
</tr>
<tr>
<td>Are e-signatures validated?</td>
<td>e-signatures are mandatory, not validated.</td>
<td>Yes, choose validation method e.g. DOB, last-4 digits of SSN, initials, etc. e-signature can be made mandatory for candidates and/or others.</td>
</tr>
<tr>
<td>Can OLF be used to send different notifications or tasks?</td>
<td>No.</td>
<td>Yes, using &quot;branching&quot; logic in E-Offer process.</td>
</tr>
<tr>
<td>Can reminders be sent?</td>
<td>No.</td>
<td>Yes, for candidate E-Offer forms or any overdue tasks.</td>
</tr>
<tr>
<td>When is the status updated in the candidate selection workflow?</td>
<td>When candidate submits an e-offer form on a career section.</td>
<td>Whenever it is configured to be updated, using the &quot;system task&quot;.</td>
</tr>
<tr>
<td>Question</td>
<td>Standard E-Offer</td>
<td>Advanced E-Offer</td>
</tr>
<tr>
<td>------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
<td>----------------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Can a recruiter still capture a response manually?</td>
<td>Yes, the candidate selection workflow is updated accordingly and candidate cannot respond on the E-Offer page.</td>
<td>Yes, the candidate selection workflow is updated accordingly and the process can continue. The system can also capture candidate response (which might be different from the manual response).</td>
</tr>
<tr>
<td>Is the offer still displayed after a candidate declines an E-Offer?</td>
<td>No.</td>
<td>Yes, in read-only format for duration of E-Offer process.</td>
</tr>
<tr>
<td>Is the offer still displayed after a candidate accepts an E-Offer?</td>
<td>Yes, displayed until candidate/offer info is archived or purged, or until offer is rescinded.</td>
<td>Yes, displayed in read-only format for duration of E-Offer process.</td>
</tr>
</tbody>
</table>

Advanced electronic offers using Transitions are explained in more detail in the following pages. For information on standard electronic offers, please refer to the *Recruiting Configuration Guide*. 
Launching the Advanced E-Offer Process

There are two ways to launch the advanced E-Offer process in the Recruiting Center:

- While changing the offer status to Extended, a screen appears in which recruiters can choose to extend an offer to a candidate. On that screen, recruiters can indicate how to communicate the offer. When selecting Extend in writing, the recruiters can then select E-Offer. This will trigger the Transitions E-Offer process.

- Anytime after the offer is extended, there is always the Send option in the More Actions menu that recruiters can select so that the same offer be communicated again to the candidate. This could be the case if, for example, the offer was extended in writing via email and the recruiter wants to also send it by E-Offer. On the screen, the Extend in writing option appears and if the recruiters choose E-Offer, this will trigger the Transitions E-Offer process.

When an electronic offer is extended, this creates two new lines in the candidate file History tab: one indicating that the offer was extended, and another one indicating that the offer was sent as an E-Offer. When using the Send option to resend the offer as an E-Offer, this creates only one new line in the History tab indicating that the offer was sent as an E-Offer. In both cases, the name of the Recruiting Center user who performed the action is indicated.

The advanced E-Offer process that is launched can be configured to have various emails, forms, tasks, and participants, just like any other Transitions process, and one of these tasks is to view and respond to the offer letter.
Responding to the Advanced Electronic Offer

Candidates will likely receive an email to notify them about the offer and how to respond. This email notification can contain a hyperlink that brings the candidates to the career section.

The candidates need to log into the career section in order to see the offer process, rather than viewing any sensitive details of the offer in the email.

The advanced electronic offer will appear on the career section Tasks tab, just like any other Transitions process. Note that this is different from electronic offers that are sent using the standard electronic offer method; these offers appear on the career section Offers tab. The Tasks tab appears in every career section to which a candidate have access, not only in the career section where the candidate applied for the job.

The advanced E-Offer tasks on the career section Tasks tab appear as soon as any tasks get assigned to the candidate, for example as soon as the offer form reaches the status "In Progress". In other words, if the process is configured to gather additional information or e-signatures from managers before displaying the offer to the candidate, the candidate will not be aware of this prior process.

The offer letter and any attached documents can be printed or saved by the candidate when viewing this task.

If the candidate refuses the offer, depending on the configuration of the process, any further tasks will be assigned and/or the offer letter and the Tasks tab will disappear from the candidate's career section(s).

After the candidates submit the response to the offer and successfully provides any e-signatures that are required on that offer form, their Transitions process is usually configured to move forward. Just like any Transitions form, the submitted offer form remains visible on their Tasks tab in a read-only view.

The process and all its forms remain visible on the Tasks tab for as long as any additional tasks remain in the process, assigned either to the candidate or to any other participant. As soon as the final task gets completed and the overall process reaches 100% completion, this process and the offer letter will disappear from the candidate's career section(s).
Receiving the Candidate's Response to the Offer

As soon as candidates respond to the offer, the system task that must be configured into the process changes the candidate's status to Offer – Accepted or Offer – Refused, depending on the candidate's response.

As a result of this action an entry is added to the History tab of the candidate's submission in the Recruiting Center, capturing the candidate's response. Recruiting Center users or any other assignees can then receive a configurable email notification (if the process is configured in this manner), and the notification can contain the candidate's response, e-signature information if desired and any other data fields. Recruiting Center users can then move the candidate to the next step in the candidate selection workflow while the rest of the Transitions process can continue automatically in parallel.

Even if an offer has been extended electronically, recruiters still can perform all the activities on the offer in the Recruiting Center that they could always do in past releases. If the candidate contacts the recruiter directly to provide a response to the offer, the recruiter can still capture that response manually in the Recruiting Center. If the candidate wishes to negotiate the offer, the recruiter can do this manually (there is no option for candidates themselves to give an online response that puts an offer into the status Offer - Negotiating). If the recruiter needs to rescind the offer, he can do so. Note however that rescinding the offer causes the Transitions E-Offer process to be immediately canceled.

It is not recommended to capture a candidate response manually. When capturing a candidate response manually, this will not have any effect on an already-running Transitions process. So when the Transitions process reaches the system task that updates the CSW with the candidate's response, if the candidate is no longer in Offer - Extended status, then the status cannot be updated with the value that the candidate provided on the form. But the Transitions process will continue on past this point, without stopping or having any errors. This is fine if the response on the form matches the response entered manually by the recruiter, which will likely be the case.

Just like any process, recruiters can track the progression of the E-Offer process in the Transitions Center. They can also view their current tasks regarding an E-Offer process in the Transitions Center.
Updating the Offer Once the Advanced E-Offer Process is Running

After recruiters have extended an advanced E-Offer, the Transitions process is underway. If the recruiters need to make changes to that offer, they can rescind the offer as usual in the Recruiting Center.

Rescinding an offer causes any running advanced E-Offer process to be canceled immediately. Any tasks that are currently in progress are terminated and all of the candidate's tasks for this process are no longer displayed in the career section. The recruiters can then update the offer fields and extend the offer, sending it as a new advanced E-Offer from the first step.
Monitoring the Advanced E-Offer Process in the Transitions Center

Other participants may be involved in the advanced E-Offer process, such as a hiring manager or an HR coordinator. These participants may have to perform the following tasks in the Transitions Center:

• They can execute any tasks that the process has assigned to them.
• They can open up and view the completed forms and/or PDFs within the process, if they have the permission to view the related source of their tasks.
• They can view the overall completion percentage and progress of the process, if they have the permission to view processes.
• They can filter processes for which they have the permission. Two filters are available to narrow down the list if desired, to show only processes in a certain status and/or to show only a certain type of process.

Any participants who have an External User type and who can see their assigned tasks in the Response Center. This user type does not have the permission to view related sources nor to track overall progress towards process completion. The Response Center’s simple Web pages only allow them to access their currently-assigned tasks and submit them.
Starting and Canceling the Advanced E-Offer Process with the Recruiting Center and Taleo Connect

The advanced E-Offer process can be started and cancel from the Recruiting Center or using Taleo Connect.

Recruiting Center users can start an advanced E-Offer process if the zone is configured for the advanced E-Offer method, if they have the permission to extend offers electronically, and if the candidate selection workflow contains the RSOffer step that is built into the Taleo Recruiting product.

In the Recruiting Center, the advanced E-Offer process is launched when extending an offer electronically. There is no action in the More Actions menu to start the advanced E-Offer process, unlike the New Hire and Pre-Hire Transitions processes. There is also no action in the More Actions menu to cancel a running advanced E-Offer process; the only way a Recruiting Center user can do this is by rescinding the offer for a candidate.

Transitions Center users who have the proper permissions can cancel an advanced E-Offer process, and any other running processes.

The advanced E-Offer process can be started using Taleo Connect, by providing a specific candidate with a specific offer in the status of Offer-Extended. The advanced E-Offer process can also be canceled using Taleo Connect.
Things to Consider when Configuring the Advanced Electronic Offer

To extend offers electronically using Taleo Transitions, the Electronic Offers setting must be set to Advanced Electronic Offer, users must be granted the permission to extend offers electronically, and the candidate selection workflow must contain the RSOffer step.

The advanced E-Offer process that is launched can be configured to have various emails, forms, tasks, and participants, just like any other Transitions process. Most customers will configure at least a few similar steps, as follows. Candidates may receive an email notification inviting them to access a secure career section portal to view the offer on line. Candidates click the URL link in their email notification, they are directed to the career section portal where they need to log in, they are then directly brought to the Tasks tab where they can view the offer details and attachments, if any. They can also print the offer and its attachments. Candidates then decide to accept or refuse the offer and they must complete any mandatory fields which may include an electronic signature.

The Advanced E-Offer Process Must Reach Completion

When configuring the advanced E-Offer process in Transitions, every candidate will go through this process, following any branching logic that has been configured. When designing the advanced E-Offer process, it is important to make the process reach the END and be 100% completed even if the candidate refuses the offer. After notifying the recruiter about the candidate response to the offer, the process should have a branch for when the candidate accepts the offer and another branch for when the candidate refuses the offer. When the offer is refused, the process should go directly to the final routing step. This is required if you want to be able to issue a new offer after a refusal.

Using the Offer Expiration Date

Some organizations use expiration dates on their offers in the Recruiting Center to indicate the latest date by which a candidate can respond to an offer. By default, the Transitions advanced E-Offer process does not take the expiration date into consideration when updating the candidate's status. Instead, the advanced E-Offer system task checks that the status is still Offer-Extended and then it updates it to Accepted or Refused. So, if the offer expiration date is important to your organization, the advanced E-Offer process must be configured to handle this specifically.

One suggestion is to create a condition immediately after the candidates submit the form containing their response to the offer. This condition checks to see whether the expiration date is in the past.

- If the expiration date is not in the past, the process should proceed as expected, triggering the system task next and then notifying the recruiter of the offer's new status.
- If the expiration date is in the past, the process should be configured to take a different action: perhaps to tell the candidates that they are too late, or to tell the recruiter that a late response has been received, or to do whatever the company's business requirements dictate.

Using the {Offer_Para.StatusDescription} Variable

When creating the message informing recruiters of the candidate response to the offer, the variable {Offer_Para.StatusDescription} displays the current status of the offer, which presumably is the same as the response that the candidate provided on the E-Offer form. In the case something in the process was not properly configured, or the recruiter manually provided a different response for the offer prior to the candidate submitting the form, then there is the possibility that the response from the form and the actual status are out of sync. The {Offer_Para.StatusDescription} variable displays the real current status of the offer, regardless of whether the candidate's recent response was successfully saved in the system.

Validating E-Signatures
Several methods are available to validate the e-signatures provided by candidates, and a subset of these methods are available for other participants’ e-signatures. For details, see Electronic Signature.

These signatures are validated, which means that the value entered by the assignee must match the information already known about that assignee. If these values do not match, then the form on which the e-signature field is placed cannot be successfully submitted and the task cannot be completed.

It is recommended to configure the e-signature field(s) as required fields on the Transitions form, to ensure that it cannot be submitted without confirming the assignee’s identity.

Understanding the System Task

The system task is used to communicate the candidate response back into the Recruiting Center candidate selection workflow. This task must be placed after the candidate response is captured, and preferably before the recruiters/participants are notified. The system task gets automatically executed by the system but requires an assignee. It is recommended to use a "dummy" assignee (it is best not to use the candidate/new hire). The task will quickly disappear because it gets completed as soon as it is triggered in the process.

Adjusting the Advanced E-Offer Process

Sometimes, changes in an organization business requirements cause the need to make adjustments to the advanced E-Offer process definition. A new process must be defined, tested, and then activated to replace the prior process that was in use. However, there can only be one advanced E-Offer process in use at a time for each zone.

You can create a new advanced E-Offer process (usually by duplicating the old active process) and make the necessary changes to it. Give this process a temporary name such as “Do Not Use – E-Offer Test Process”. Then, give this process a process type such as Pre-Hire (but not E-Offer), and then activate it. Now, test that candidates can be launched into this process to ensure that no configuration errors were made. These candidates can be started by any Recruiting Center user who has the permission to start Pre-Hire processes for a new resource. As soon as you are satisfied that this new process is working smoothly, you can change its process type to E-Offer and then deactivate the old advanced E-Offer process.
Configuring the Advanced Electronic Offer using Transitions

The configuration of advanced electronic offers for Transitions consists of these basic steps. Other steps may be added depending on your requirements and process. Only one advanced E-Offer type process can be active in the zone at one time. This means that this one process needs to be appropriate for every person in every location and every job. It must be designed with as many different possibilities as needed.

1. **Enabling the Electronic Offers setting.**
2. **Granting the permission to extend offers electronically.**
3. **Creating the message inviting the candidate to view the offer on line.**
4. **Creating the message informing the recruiter about the candidate response to the offer.**
5. **Configuring the e-Signature validation method used to capture the candidate response to the offer.**
6. **Creating the form where the candidate responds to the offer.**
7. **Creating a system task to update the candidate's offer status.**
8. **Creating a task to send the message to the candidate.**
9. **Creating a task to send the message to the recruiter.**
10. **Creating a task for the candidate to complete the form used to respond to the offer.**
11. **Creating the E-Offer process.**

### Enabling the Advanced Electronic Offer Setting

**Prerequisite**

Configuration > [Recruiting] Settings >

**Steps**

1. Refine the settings list using the Offer category.
2. Click the Electronic Offers setting.
3. Click Edit.
5. Click Save.

**Result**

When sending an offer to a candidate in a written format, Recruiting Center users with the right permissions will see a third option "E-Offer" in addition to the options for extending offers to candidate via email and via printed letter.

### Granting the Permission to Extend Offers Electronically

**Prerequisite**

Configuration > [SmartOrg] Administration > [Users] User Types

**Steps**

1. Select a user type.
2. Click Recruiting.
3. Click Edit next to Offers.
4. Select Extend Offers Electronically.
5. Click Save.

Result
Users who are granted this permission can select the E-Offer option when extending offers to candidates using a written method.

Creating the Message Inviting Candidates to View the Offer On Line

Prerequisite
The Manage message templates for email correspondence and reminders permission is required.

Configuration > [Transitions] Administration > Message Templates

Steps
1. Click Create.
2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.
   Variables can be dragged and dropped in these fields. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any variables placed in these fields will be in addition to that assignee.
5. Complete the Subject field. Variables can be dragged and dropped in the field.
6. Click Save.
7. In the Content section of the message, click Custom Content.
8. Type the content of the message in the text box. You can format the text using the Rich Text Editor options. You can also use variables. The message should contain the variable \{TransitionsURLs_Para.TaskAccessURL\} which brings candidates to a secure career section portal.
9. Click Save.
10. Click Activate.

Next Step
This message template must be incorporated into a task so that it can be used in the advanced E-Offer process.

Creating the Message Informing Recruiters of the Candidate Response to the Offer

Prerequisite
The Manage message templates for email correspondence and reminders permission is required.

Configuration > [Transitions] Administration > Message Templates

Steps
1. Click Create.
2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.
Variables can be dragged and dropped in these fields. As with any Send Correspondence task, the message will be sent to the assignee selected at the step level. Any variables placed in these fields will be in addition to that assignee.

5. Complete the Subject field. Variables can be dragged and dropped in the field. You may want to show the candidate's response in the subject line. To do so, use the \{OfferHeader_Para.StatusDescription\} variable.

6. Click Save.

7. In the Content section of the message, click Custom Content.

8. Type the content of the message in the text box. You can format the text using the Rich Text Editor options. You can also use variables. The message should contain the variable \{Offer_Para.StatusDescription\} which displays the current offer status, Accepted or Refused.

9. Click Save.

10. Click Activate.

Next Step

This message template must be incorporated into a task so that it can be used in the advanced E-Offer process.

### Configuring the E-Signature Validation Method for the Offer

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Click E-Offer signature.

2. Select the method of validation that will be used when the form assignee signs the Transitions form that includes this e-signature field.

3. (Optional) Rename the signature if required.

4. Click Save.

5. Configure as many other e-signatures that you will need. If your business needs require that more than one e-signature gets captured, for example from a different participant or from the candidate themselves for various different aspects of the offer, then additional e-signatures will have to be used.

Next Step

The electronic signature can be added to the form used by the candidate to respond to the offer.

### Creating a Form for the Candidate to Respond to the Offer

**Prerequisite**
The Manage user-defined forms to display and collect data permission is required.

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

**Steps**

1. Click Create.

2. Provide a code, a name, and a page name.
3. To add a section, position your cursor in an existing section, then click \[\text{section} \]. A section entitled Default section title is inserted in the form, just below where your cursor was positioned.

4. To modify a section title, click your mouse on Default section title and make required changes in the Selected Element Properties section.

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

6. To add rows and columns, use the tools in the Toolbox.

7. To add text, position your cursor in a cell then click \[\text{text} \] to place a text area onto the form. Then, in the Selected Element Properties section, in the Value field, use the rich text editor to add formatting, graphics, hyperlinks, etc.

8. To add fields, select a field in the Field Chooser list, then drag and drop it in the desired section.

9. To edit the properties of a field, select the field then scroll to the Selected Element Properties section at the bottom of the form.

10. Include these variables. To add variables, select a token in the Field Chooser list, then drag and drop it in the desired section.
    
    • {Offer / CandidateOfferResponse}: Provides the offer response options. Choices will be displayed as "Accept the offer" and "Refuse the offer". Make the field mandatory. A response must be captured otherwise it will be impossible to update the candidate selection workflow in the next step.
    
    • {Offer / OfferLetterBody}: This is the content of the offer letter.
    
    • {ESignature / EOfferSignature}: To capture the validated electronic signature of the candidate. Make the field mandatory.
    
    • {Offer / OfferLetterAttachments}: If this variable is placed onto a form, it will display the names of all files that got attached to the offer letter in the Recruiting Center. If there were no attachments made, then nothing will be displayed on the form. Please note that if a label is provided for this variable, it will be displayed on the form regardless of whether any attachments exist for this offer letter.

11. Click Save. The form appears in the User-defined Forms list and its status is Draft.

12. Activate the form by clicking Activate in the User-defined Forms list.

**Next Step**

This form must be incorporated into a task so that it can be used in the advanced E-Offer process.

**Creating a System Task to Update Candidate's Offer Status**

**Prerequisite**

*Configuration > [Transitions] Administration > Task Definitions*

**Steps**

1. Click Create.
2. Enter a code, name and description for the task.
5. Click Save.

**Next Step**

Incorporate this task into the advanced E-Offer process.
Creating a Task to Send the Message to Candidates

**Prerequisite**

*Configuration > [Transitions] Administration > Task Definitions*

**Steps**

1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines (optional).
4. Select a *type of task*.
   The type can be used to generate reports by type of tasks.
5. Select a *priority* for the task.
6. In the Action field, select Correspondence.
7. In the Related Source field, select the message you created to invite candidates to view the offer online.
8. Click Save.
9. Click Activate.

**Next Step**

Incorporate this task into the advanced E-Offer process.

Creating a Task to Send the Message to the Recruiter/Participants

**Prerequisite**

*Configuration > [Transitions] Administration > Task Definitions*

**Steps**

1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines (optional).
4. Select a *type of task*.
   The type can be used to generate reports by type of tasks.
5. Select a *priority* for the task.
6. In the Action field, select Correspondence.
7. In the Related Source field, select the message you created to notify the recruiter/participants of the offer status once the candidate responds to it.
8. Click Save.
9. Click Activate.

**Next Step**

Incorporate this task into the advanced E-Offer process.

Creating a Task to Provide a Form to Respond to the Offer

**Prerequisite**

*Configuration > [Transitions] Administration > Task Definitions*
Steps
1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines (optional).
4. Select a type of task.
   The type can be used to generate reports by type of tasks.
5. Select a priority for the task.
6. In the Action field, select Fill User-defined Form.
7. In the Related Source field, select the user-defined form you created so the candidate can respond to the offer.
8. Click Save.
9. Click Activate.

Next Step
Incorporate this task into the advanced E-Offer process.

Creating the E-Offer Process

Prerequisite
Configuration > [Transitions] Administration > Processes

Steps
1. Click Create.
2. Define the properties of the process:
   a) Enter a code, name, and description.
   b) In the Type field, select Process.
   c) Specify the process owner, by searching for a role or specific user.
   d) Select none, one or multiple supervisors.
   e) In the Guidelines field, enter instructions as needed, which will appear in the Candidate Portal.
   f) Click Save.
3. Create the steps of the process:
   a) Click Create Step in the Steps tab.
   b) Select Task as the type of step you want to create and click Continue.
   c) Click the Search button to select one of the tasks you created earlier and click Continue.
   d) Provide a description for the task step.
   e) In the Sequence field, specify the position you want the task to occupy in the step list on the Tasks tab in the career section. The true order in which the tasks are performed depends on what transitions are set.
   f) In the Duration field, enter the number of days required to perform the step. This field is used for calculating the due date of each task for its assignee(s).
   g) Select one or multiple assignees who are to perform the step. You can select specific users or specific roles. A best practice is to select a role.
   h) From the Execute Step list, select when the task is to be performed. See Understanding Step Execution.
   i) Click Finish.
j) Repeat the above steps for all the tasks you created (that is, task to send a message to candidates, task to send a message to the recruiter, task to complete the form to respond to the offer).

4. Create transitions:
   a) Click Create in the Transitions tab.
   b) Indicate where the transition starts and where it goes next.
   c) Click Continue.
   d) Verify From Step and To Step.
   e) Select a condition requirement.
   f) Click Finish.

5. Select the type of process:
   a) In the Transition Types section, click Add.
   b) Select E-Offer.
   c) Click Select.

6. Preview the process.

7. Activate the process.
Product Resources

- Resource Administration

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Resource Administration

The Resource Administration feature allows system administrators to display the ID associated to text appearing on pages of Taleo applications in order to modify the text.

Each element of text also called resource, such as fields, buttons, tooltips, links, page titles and sections, has a unique ID associated to it. These IDs can be displayed in the application, in front of each resource, so users can precisely locate and identify a resource they need to modify or override in the application. If an “X” appears at the right of the resource ID, this means that the text was already overridden.

The value of a resource can be composed of units, special characters, and letters. The resource value is not unique, therefore the same text can be used for different resources. Resource values can be modified and updated in the application by system administrators. To make a global change to the value of a resource for all zones, contact your Oracle representative.

Example: The Save button can be used on several pages of the application. Each Save button appearing in the application will have a specific ID, and the value of every Save button will be text Save.

Resource values can be refreshed. This enables system administrators to apply any changes made to the resource values for the customer's custom set of resources. System administrators can block the refresh of the resource value. This allows system administrators to use a testing environment where the actual value of a resource is either chosen or not. This is usually done while performing some temporary testing in a staging zone.

With the exception of the Onboarding New Hire Portal, each Taleo product has a specific Resource Administration feature allowing the display of the product's resource IDs. The New Hire Portal Resource Administration is accessed from this URL: http://yourzonename/newhireportal/ResourceConsole.jss.

<table>
<thead>
<tr>
<th>Product</th>
<th>Administration Menu</th>
</tr>
</thead>
<tbody>
<tr>
<td>Career Section Administration</td>
<td>Career Section Administration Menu</td>
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<tr>
<td>Career Section</td>
<td>Career Section Administration Menu</td>
</tr>
<tr>
<td>Central Configuration</td>
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<tr>
<td>Onboarding Administration</td>
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<td>Onboarding WebTop</td>
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<td>Transitions Administration</td>
<td>Transitions Administration Menu</td>
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<tr>
<td>Transitions Center</td>
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<tr>
<td>Performance Administration</td>
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<td>Performance</td>
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<td>Recruiting Administration</td>
<td>Recruiting Administration Menu</td>
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<tr>
<td>Recruiting Center</td>
<td>Recruiting Administration Menu</td>
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<tr>
<td>SmartOrg</td>
<td>SmartOrg Administration Menu</td>
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</tbody>
</table>
Configuration

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Description</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage resources</td>
<td>Provides users the ability to refresh resource values, to block resource value refresh, and to force the refresh of resource values.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Functional Domains &gt; Configuration &gt; Resource Management</td>
</tr>
<tr>
<td>Display resource identifiers</td>
<td>Provides users the ability to display resource IDs using the Show Identifier button in the Resource Administration page.</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; Functional Domains &gt; Configuration &gt; Resource Management</td>
</tr>
</tbody>
</table>

To modify resource values for a specific product, user type permissions specific to the product are also required in some cases. To modify Taleo Transitions resource values, for example, users require the permissions described in the previous table and at least one Transitions permission, for example, "Manage Transitions processes of all types".

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.

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.
Refreshing Resource Values

**Prerequisite**

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

*Configuration > [Product] Administration > Resource Administration*

**Steps**

1. Click Unblock Refresh.
2. Select the desired type of refresh.
3. Enter the name of the project if necessary.
   The project name is associated with revisions made to the customer's custom set of resource values, administered in Taleo's TexTool application.
4. Click Refresh Values.
5. Close the window.

**Result**

The latest value of the resources is displayed.

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.
Taleo Connect

- Taleo Connect and Taleo Transitions
- Templates for Exporting Transitions Data Via Taleo Connect
Taleo Connect and Taleo Transitions

It is possible to launch all four types of processes using Taleo Connect: Pre-Hire Validation, New Hire, Offboarding and (advanced) E-Offer.

**Traceable record of electronic offers**

Some organizations might want to retain a traceable record of electronic offers (for legal purposes, for example). The record could contain the text of the offer letter and details such as a candidate's name and e-signature datestamp.

Such information can be exported via Taleo Connect; an HTML version of the offer letter text for each candidate can be exported from Taleo Recruiting and each candidate's e-signature data fields can be exported from Taleo Transitions. These elements can be imported into a storage system by the customer or by consultants.

On the other hand, Taleo Connect cannot export a single PDF containing a candidate's offer letter text shown side-by-side with the individual's e-signature name and datestamp.
Templates for Exporting Transitions Data Via Taleo Connect

Five templates have been added to Taleo Connect in 13B to assist customers in exporting the data stored in Transitions about their candidates, their processes and related information.

These templates are associated with the Transitions Process object and can be modified by customers. For instance, data fields, including user-defined fields, can be added or removed from the templates. The export templates can be helpful for the purposes of custom reports or for other purposes depending on business requirements and intended recipients. The templates create output in either comma-separated (CSV) or XML formats, and can be further manipulated by each customer as needed.

**New Hire Data Export from Taleo Transitions (CSV)**

Template used to export a large number of fields about each candidate/new hire and the person's requisition. Template assists with tracking or classifying each candidate/new hire and process for various purposes.

The exported fields include: new hire's name, candidate number, employee numbers, email address(es), internal or external status, Social Security or SIN number, information about the requisition and its OLF, job start date, information about the recruiter and hiring manager and assistants, and information about the process such as its name, status, progress, start and end dates.

**Task and Assignee Export from Taleo Transitions (T-XML)**

Template used to export critical information about each candidate's/new hire's process and the participants involved. This template can be useful for identifying workflow efficiencies and/or bottlenecks in the process progression.

The exported fields include: new hire's name, candidate number, employee numbers, the requisition information, name, the status, progress, start and end dates for each process, and each task's name, description, assignee(s), start date, due date and end date.

**E-signature Export from Taleo Transitions (CSV)**

Template used to export all electronic signature information gathered during any process, to see which people provided a validated e-signature when and from where. Please note that there is no direct correlation between each e-signature field and the user-defined forms on which it was presented to the user during a process. Rather, it is the responsibility of the Transitions administrator to track carefully that an e-signature field was configured to appear on a specific form for a specific assignee. The CSV output file is a long list of rows, each one containing information that identifies the candidate/new hire's process and one of each e-signature field that was filled in during the process from among the fifty generic e-signature fields and the four e-signature fields earmarked for e-offer and U.S. form I-9.

The exported fields for each row include: new hire's name, candidate number, employee numbers, email address(es), information about the process such as its name, status, progress, start and end dates, and for each e-signature--its name, code, type, signer's first and last name, date on which it was successfully signed (with time stamp, in GMT time zone, in yyyy-MM-dd), and the IP address from which the successful signature was received.

**Advanced E-offer Export from Taleo Transitions (CSV)**

Template used to export the information pertaining to each candidate's offer and e-offer signature. This template can be useful for record-keeping or auditing activities. This is meaningful in zones that use the Advanced e-offer feature that relies on Taleo Transitions and Taleo Recruiting integration.

The exported fields include: new hire's name, candidate number, employee numbers, email address(es), information about the process such as its name, status, progress, start and end dates, and for the e-offer e-signature--its name, code, type, signer's first and last name, date on which it was successfully signed (with time stamp, in GMT time zone, in yyyy-MM-dd), and the IP address from which the successful signature was received.
received, and many fields about the offer (if they are used) including salary, pay frequency, bonus, vacation, stock, options, commission, and others.

**New Hire Direct Deposits Export from Taleo Transitions (CSV)**

Template used to export information pertaining to banking choices that might have been gathered from the new hire/employee on a user-defined form. This template can be useful for passing this information to another department or system. The CSV output file is a long list of rows, each one containing information that identifies the candidate/new hire's process and one single direct-deposit choice that has been filled in that process.

The exported fields for each row include: new hire's name, candidate number, employee numbers, email address(es), information about the process such as its name, status, progress, start and end dates, and for the specific direct-deposit choice--its institution name, folio, pay distribution and transit number.
Candidate File Locking
Candidate File Locking

The system "locks" a candidate file temporarily to prevent people from making changes to the file while someone else is editing it.

It is quite common to have situations where more than one person has the permissions required to edit a specific candidate file. These people might be candidates, Transitions Center users or Recruiting Center users. When someone (the candidate, a Transitions Center or a Recruiting Center user), "B", attempts to edit a candidate file while someone else, "A", is making changes, the system locks the file until "A" has finished making his/her changes. In this way, the system ensures that "A's" changes are recorded. After the changes are saved and "A" is no longer editing the candidate file, the file is unlocked automatically and "B" (or anyone else who has the required permissions) can edit it.

If a Recruiting Center or Transitions Center user is editing a candidate's file when the candidate attempts to edit his/her own file, the file is locked. A message is displayed in the career section, inviting the candidate to return later to make changes.

If a Recruiting Center or Transitions Center user attempts to edit a candidate's file while the candidate or a Recruiting Center or Transitions Center user is editing the file, the file is locked until the person currently editing the file completes his/her changes and the file then becomes unlocked. The message displayed to the user attempting to access the file includes the name of the person currently editing the candidate file.

While a candidate file is being edited (and consequently, is locked) by someone, other people who have the required permissions can still access read-only information related to the file.

If someone is editing a candidate file (thereby locking it), and the Booker Release Interval setting value is exceeded, the candidate file is unlocked automatically. In other words, if the individual ceases to actively edit the file while it is locked and the elapsed time exceeds the inactivity period allowed while editing, the lock is removed and someone else can then edit the candidate file (thereby locking it anew).

Configuration

<table>
<thead>
<tr>
<th>Setting</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Booker Release Interval</td>
<td>Configuration &gt; (General Configuration) Settings</td>
</tr>
</tbody>
</table>
Synchronization of Transitions With Onboarding

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Transitions Synchronization

The synchronization tool in Transitions Administration copies most administrative objects from Taleo Onboarding to Taleo Transitions in an automated manner.

For Taleo Onboarding customers who do not want to reproduce all of their data and processes in Taleo Transitions manually, the Transitions synchronization (referred to sometimes as "sync tool") available with 13B and later versions of Taleo Enterprise enables them to copy almost all existing Taleo Onboarding information into Taleo Transitions automatically: Taleo Onboarding processes, conditions, tasks, forms, message templates, documents, e-signature and some UDFs. UDFs that are also in Taleo Recruiting, are not duplicated (simply because copying them would be redundant). Passport tasks, reporting and Taleo Connect integrations saw more extensive development efforts in Taleo Transitions so these are created by you as needed. Though New Hire Portal does not exist in name in Taleo Transitions, you can create and configure Transitions content pages for this purpose if desired.

After reviewing (and modifying if you wish) the processes copied into Taleo Transitions, you can enable them in your zone. Processes can then be started or stopped for candidates and employees through Taleo Connect or the Recruiting Center.

Activation of Taleo Transitions and synchronization do not modify in any way new hire and candidate data in Taleo Onboarding. Running processes in Taleo Onboarding are not copied to Taleo Transitions at all; they continue to run in Taleo Onboarding following synchronization and remain separate from Taleo Transitions processes. Onboarding WebTop users can view only (running and completed) Onboarding processes and perform only Onboarding tasks. Similarly, Transitions Center users can view only (running and completed) Transitions processes and perform only Transitions tasks.

Processes, tasks, forms, templates, documents, e-signature and UDFs created in Taleo Onboarding remain "as is" in Taleo Onboarding if you run the sync tool and later make changes to the corresponding objects in Taleo Transitions.

The sync tool compares the code of administrative objects in Taleo Onboarding with the code of objects in Taleo Transitions (in the case for UDFs, the Onboarding code is compared with object names in Taleo Recruiting). Where a match is identified, the object is "skipped", not copied to Taleo Transitions. Where there is no match, the object is copied to Taleo Transitions. An object's status in Taleo Onboarding is also copied during synchronization with the exception of processes. Following synchronization, the default status of all processes in Taleo Transitions is Draft.

Every time you perform synchronization, a report is generated indicating whether each object in Taleo Onboarding examined by the sync tool was copied to Taleo Transitions (because it was new to Taleo Transitions) or "skipped" (because it was found in Taleo Transitions). In rare situations where an object was not reproduced perfectly, the Details - Changes and Placeholders column in the report indicates if placeholders or other substitutions were made automatically. For example, some types of Onboarding tasks are copied to Taleo Transitions as manual tasks and this information is duly noted in the report. Examining the report, the Transitions administrator can easily identify those tasks and will typically replace them in Taleo Transitions with redesigned ones. You can filter the object list by type of object (document, e-signature, form, image, message template, task, user-defined field and user-defined selection, process).

Though there is no "export to Microsoft Excel" feature, the rows and columns in a synchronization report can be selected using a mouse and then copied and pasted into an Excel spreadsheet. In Excel, filters can be applied or the data can be printed.

Each row in the report is numbered, which enables you to know the total number of rows in the report and to keep track of which rows you have examined. Each row includes the name of an object that was synchronized.
The Details – Changes and Placeholders column displays recommendations if any. If recommendations are lengthy, you can click "…(more)" to view all of the recommendations for that object. You then have the option of clicking "Next" to view all the recommendations of the following object that was synchronized or displaying the report list anew.

In most cases, performing synchronization once and making adjustments to some objects identified in the report will be sufficient. The customers will then enable their Transitions processes for use in the Recruiting Center or with Taleo Connect.

In some cases, the nature of the changes made to objects might warrant running the sync tool again. This is certainly possible. Be mindful, however, that: where a match is identified, the object is "skipped", not copied to Taleo Transitions; where there is no match, the object is copied to Taleo Transitions. If you decide to modify certain Taleo Transitions or Taleo Onboarding processes between synchronizations, this can produce undesirable results in some situations. Suppose, for example, that you used the sync tool, copying forms, tasks, processes and so forth from Taleo Onboarding to Taleo Transitions. Later, in Taleo Onboarding, you replaced the form associated with a task with a different form. If you performed synchronization again afterward, the sync tool would determine that a task with the same code was already in Taleo Transitions and would "skip" the task, not copy it. As a result, the task in Taleo Transitions would not be updated to reflect the new form associated with the corresponding task in Taleo Onboarding.

The Transitions sync tool operates within a single zone. For this reason, it cannot be used to copy data from a staging zone to a production zone, nor can it be used to copy data from different versions (Taleo Onboarding 12C to Taleo Transitions 13A).

Recall that Taleo Recruiting and the new Taleo Transitions product share almost all database information originating from fields common to both products. In addition, Taleo Transitions features a new type of career section that combines the features of traditional career sections with onboarding and other processes that involve candidates and employees.

**Configuration**

System administrators access the Transitions synchronization tool from Configuration > [Transitions] Administration > Synchronization Tool provided:

- Taleo Onboarding is enabled in the zone.
- System administrators have the user permissions listed in the following table.

<table>
<thead>
<tr>
<th>User Type Permission</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manage user-defined forms to display and collect data</td>
<td>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; (click user type) &gt; Recruiting &gt; Transitions</td>
</tr>
<tr>
<td>Manage text documents and paragraphs for use in content pages and message templates</td>
<td></td>
</tr>
<tr>
<td>Manage user-defined fields, e-signatures, and user-defined reporting</td>
<td></td>
</tr>
<tr>
<td>Manage task definitions, related sources, content pages, and images</td>
<td></td>
</tr>
<tr>
<td>Manage Transitions processes of all types</td>
<td></td>
</tr>
</tbody>
</table>
User-defined Fields - Synchronization

The synchronization process ensures that the appropriate user-defined fields (UDFs) exist, or creates them if necessary, to be used by Taleo Transitions, for every UDF that was used in Taleo Onboarding.

The goal of the sync tool is to ensure that all the needed UDFs are available as building blocks for the later parts of the synchronization process. For example, in order for forms and message templates to get recreated in Taleo Transitions, it will require all the UDF ingredients to be available for Taleo Transitions to access.

When the sync tool runs, there are three sources of UDFs that are accepted to ensure that all Onboarding UDFs have a counterpart that will be usable and appropriate in Taleo Transitions. The sync tool can either identify the right existing Recruiting UDFs, or can create new UDFs as needed within Taleo Recruiting, or can create new UDFs within Taleo Transitions as appropriate. Here are more details:

- If Onboarding UDFs match any existing Recruiting UDFs, then the sync tool does not need to create any new UDFs. Later, when synchronizing forms and other objects, the sync tool will use the Recruiting UDFs that were identified as matching, in place of the Onboarding UDFs from the original Onboarding forms.
- If Onboarding UDFs do not match any existing Recruiting UDFs, then the sync tool creates them in Taleo Recruiting except in a few cases (see next bullet). These new UDFs are created in Recruiting under Candidate - Personal Information or under Candidate - Submission. Again, these new UDFs will be used later in the synchronization process, to be incorporated into newly-synchronized Transitions forms.
- In certain cases, the synchronization will match an Onboarding UDF by creating a new UDF in the Transitions-specific UDF area. These Transitions UDFs are not accessible by Taleo Recruiting.

In Taleo Onboarding, the code of a UDF is unique. In Taleo Recruiting, the name of a UDF is unique. Synchronization uses this information, comparing each UDF's code in Taleo Onboarding with each UDF's name in Taleo Recruiting, to determine if there are UDFs common to both products. Where there are matches, synchronization does not create new UDFs in Taleo Recruiting; Taleo Transitions uses the Recruiting UDFs "as is" in forms, message templates, conditions and so forth. Where there is no match, synchronization creates new UDFs in Taleo Recruiting that Taleo Transitions will use.

During synchronization, certain categories of UDF are copied to Taleo Recruiting (Configuration > [Recruiting] Administration > Candidate > Show Fields).

<table>
<thead>
<tr>
<th>Onboarding UDFs available in these categories...</th>
<th>... become available in these Recruiting UDFs categories</th>
</tr>
</thead>
<tbody>
<tr>
<td>Assignment</td>
<td>Submission</td>
</tr>
<tr>
<td>Education</td>
<td>Education</td>
</tr>
<tr>
<td>Job Application</td>
<td>Submission</td>
</tr>
<tr>
<td>Offer</td>
<td>Submission</td>
</tr>
<tr>
<td>Talent Master File</td>
<td>Personal Information</td>
</tr>
<tr>
<td>Work Experience</td>
<td>Work Experience</td>
</tr>
</tbody>
</table>

If you have any Onboarding UDFs in the Evaluation category, these UDFs will not be synchronized. When the sync tool encounters Onboarding Evaluation UDFs, nothing will happen in the UDF area, neither in Taleo Recruiting nor in Taleo Transitions. These UDFs are simply ignored and no counterparts are identified nor created. If any larger objects are using these Onboarding Evaluation UDFs as ingredients, here is what will happen:
• Forms: Any Onboarding form page that included them will be synchronized to a blank page in Taleo Transitions.
• Conditions: Any Onboarding condition that included them will be synchronized to use the Text Placeholder UDF in Taleo Transitions.
• Message Templates: Any Onboarding message template that included them will be synchronized to not display anything where that variable remains.
• PDFs: Onboarding PDFs never supported these UDFs, and PDFs do not get automatically synchronized either.

Some types of Onboarding UDFs are not supported in Taleo Transitions or Taleo Recruiting. In such cases, the sync tool creates substitutes. The synchronization report reveals the substitutes that will be used in place of the unsupported Onboarding UDFs.

Boolean-type UDFs were supported in Taleo Onboarding and continue to be supported in Taleo Transitions; however they are not supported in Taleo Recruiting. Therefore, during the synchronization process when any Boolean Onboarding UDF needs to be matched with its counterpart Recruiting UDF, a placeholder Recruiting UDF will be created. This Recruiting UDF will have two possible values, just like a boolean field: "Yes" and "No". These values come from another new object that gets created in Recruiting by the synchronization process: a short User-Defined Selection (SUDS). Whenever any Onboarding object relied upon a Transitions boolean UDF, now the synchronized Transitions form or message template or other object will instead reply upon the newly-created Recruiting placeholder UDF with possible selection values Yes/No. This substitution will be listed in the synchronization report, so that proper UDFs can be created manually by the Recruiting or Transitions administrator instead, to replace these placeholders manually anywhere needed.

Date and Date-and-Timezone UDFs were supported in Taleo Onboarding and continue to be supported in Taleo Transitions; however Date-and-Timezone UDF is not supported in Taleo Recruiting. During synchronization, each Onboarding Date-and-Timezone UDF needs to be matched with a Recruiting UDF. The newly-created Recruiting UDF is only of type Date, not Date-and-Timezone. This slight change will be listed in the Synchronization Report.

Taleo Onboarding references fields that do not have counterparts in Taleo Recruiting will be renamed “Reference/Middle Name” in Taleo Transitions. However, the Onboarding references fields that have counterparts will be synched into appropriate Transitions fields. For example, these Onboarding fields have counterparts in Transitions: Organization, Location, Phone Number, First Name, Last Name, Email Address.

During UDFs synchronization, it will not be possible to see these two fields populated in the Base Language (which is English in most of the cases): Help Text and Short Label.

Some organizations might have activated more languages in Taleo Recruiting than in Taleo Onboarding. When UDFs are copied from Onboarding into Recruiting, the sync tool substitutes the string "Need-To-Translate" for each language which is lacking a translation in the original Onboarding.
User-defined Selections - Synchronization

The purpose of user-defined selections (UDSs) is to provide the possible answer values for a user-defined field (UDF), for instance when displayed in a form to an assignee. Because the synchronization will consider all the UDFs in Onboarding and will transform them into Recruiting UDFs where needed, it is also necessary for the synchronization process to consider all the UDS in Onboarding and to transform these into Recruiting UDS for use within those new Recruiting UDFs.

The Onboarding administrator could create UDSs containing any number of elements, without any distinction between short lists and long lists. Recruiting UDS are of two types: large user-defined selections (LUDS) and small user-defined selections (SUDS). For this reason, it is necessary to tell the sync tool what length of list should be transformed into a LUDS vs. how short a list can still be created as a SUDS. The sync tool includes a field in which you can specify a cutoff number. If the number of elements in a user-defined selection in Onboarding is equal to or less than the number, the sync tool creates a SUDS in Recruiting. If the number of elements in a user-defined selection in Onboarding exceeds the number, the sync tool creates a LUDS in Recruiting.

Onboarding UDSs could be defined to permit multiple selections for a UDF, by an Onboarding form assignee. The sync tool will preserve this capability in the newly-created Transitions forms which rely upon these newly-created UDFs and UDSs. So any Onboarding UDS that was configured to allow multiple selection will be created as SUDS. This is because LUDS cannot support multiple selections when their UDF is assigned in a form. Also, please note that the minimum number of elements for the sync tool's SUDS/LUDS cutoff point will be large enough to allow the synchronization to create the largest Onboarding UDS as a Recruiting SUDS.

Some organizations might have activated and provided corresponding values for more languages in Recruiting than in Onboarding. Consequently, when UDFs are copied from Onboarding to Transitions, UDFs in Recruiting will have the corresponding value for languages supported by Onboarding while the same fields will have no value for languages not supported by Onboarding. Take the case where Recruiting included a language not supported by Onboarding. Following synchronization, a Transitions process was run. The process included a form that included a LUDS. In Transitions, the LUDS and its elements would display correctly in languages supported by Onboarding. On the other hand, in the language not supported by Onboarding, the LUDS would not be displayed in Transitions.

A user-defined selection in Onboarding must have at least one element if it is to be synchronized from Onboarding into Recruiting so that they can be used in Transitions.

If synchronization identifies user-defined selections in Onboarding that are already in Recruiting, these are not copied to Recruiting.
E-Signatures - Synchronization

The Transitions sync tool copies all 50 generic e-signatures in Taleo Onboarding to Taleo Transitions.

If a name is changed in Taleo Onboarding, the change is reflected in Taleo Transitions following synchronization and recorded in the synchronization report. In the rare case where a Transitions administrator modified an e-signature configuration manually in Taleo Transitions for any reason and then ran the sync tool a second time, the e-signature configuration in Taleo Onboarding would overwrite the changes he/she made in Taleo Transitions.

Running the sync tool does not affect the four additional e-signatures available in Taleo Transitions: three intended for use with I-9 forms and the fourth intended for use with E-Offers.
Images - Synchronization

To display images copied from Taleo Onboarding in Transitions tasks, the corresponding image URLs must be added manually to the forms and message templates copied to Taleo Transitions.

Onboarding images are displayed to task assignees if the Onboarding administrator added the respective URLs to Onboarding forms and message templates. The synchronization process copies the Onboarding forms, message templates and images to Transitions but to display the images in Transitions tasks, the corresponding image URLs must be added manually to the forms and message templates copied to Taleo Transitions.

During synchronization, the code of each image in Taleo Onboarding is compared with the code of all the images in Taleo Onboarding. The sync tool copies only images whose code is not found in Taleo Transitions. The Onboarding administrator should avoid modifying an image file after it has been copied to Taleo Transitions. If they modify the file and later perform synchronization again, the new Onboarding content will not be reproduced in Taleo Transitions. The sync tool will determine that the image code is already in Taleo Transitions and will "skip" (not copy) the file.
Documents and Paragraphs - Synchronization

The Transitions sync tool copies documents in Taleo Onboarding to Taleo Transitions as well as paragraphs that are part of at least one document.

The comments in this section refer to HTML-based documents and paragraphs created in Taleo Onboarding, not to PDF files created with Acrobat or other products.

Paragraphs not included in any document are not copied to Taleo Transitions.

If documents in Taleo Onboarding contain variables, the documents copied to Taleo Transitions typically include the variables updated to the corresponding Taleo Recruiting variables that Taleo Transitions recognizes. If the sync tool does not recognize a variable, it replaces the variable with a placeholder in the document in Taleo Transitions. This makes it easy for Transitions administrators to identify locations in Taleo Transitions documents where they will want to replace the placeholders with the desired correct variables that are relevant in Transitions.

If the languages activated in Taleo Onboarding and Taleo Transitions are exactly the same, all the language versions of HTML-based documents and paragraphs created in Taleo Onboarding are copied to Taleo Transitions. On the other hand, if some languages are enabled ("activated") in Taleo Onboarding and not in Taleo Transitions, versions of documents and paragraphs in those languages are not available in Taleo Transitions.
PDF-type Documents - Synchronization

Transitions synchronization copies the properties of each PDF-type document from Taleo Onboarding to Taleo Transitions. The name, code, status and description are the same. However, no PDF files are actually copied and attached to the PDF-type documents copied to Taleo Transitions.

The Transitions administrator can download the PDF files from Taleo Onboarding, manually replace placeholders added by the sync tool with variables used by Taleo Transitions, and add the updated files to the appropriate Transitions documents. Replacing placeholders with Transitions variables can be done using the variable's name from the Transitions form builder, replacing the forward slash with a period. For more information, please refer to the "Inserting Variables in a PDF Document" section of the Transitions Configuration Guide.

Please note that for multilingual zones, several different PDF files might be associated with an Onboarding document to support different language variations. The synchronization process does create the proper document name and description for all of the languages that are enabled in Taleo Transitions. The Transitions administrator then needs to upload the associated PDF files for each language after manually inserting the same Transitions variables for all languages.
Forms - Synchronization

The Transitions synchronization tool copies forms from Taleo Onboarding to Taleo Transitions, largely preserving them but listing a few areas to be fixed by the system administrator.

All forms in Taleo Onboarding become forms in Taleo Transitions, and the same form name, code, status, page names, images, text, and formatting are all copied intact. Every Onboarding form with a code that does not already exist in Taleo Transitions gets created by the synchronization, and its name gets listed on the synchronization report as “Missing” and “Added”.

Almost every field within these Onboarding forms gets transformed into a counterpart field in Taleo Transitions. Most fields are easy to synchronize: most standard fields from Taleo Onboarding have an obvious equivalent field in Taleo Recruiting, and most of the UDFs from Taleo Onboarding have been matched to an equivalent UDFs in Taleo Recruiting.

There are several exceptions to this simple transformation, and these are handled in various ways (see Forms - Synchronization - Exceptions). Each time an exception arises, the synchronization report lists the situation and any specific details. It is the responsibility of the system administrator to remedy the problem by changing Transitions as needed, after the automated synchronizing is finished.

Each time the sync tool is run, it compares the code (not the name) of all Onboarding forms with the code of all Transitions forms. If no matching Transitions form code is found for a given Onboarding form code, the sync tool copies that form into Taleo Transitions as faithfully as possible. The synchronization report lists this form as “Missing” and “Added” to Taleo Transitions. If the tool does find a matching Transitions form code, it takes no action: the form does not get copied and the synchronization report lists this form as “Existing” and “Skipped”. This matching Transitions form could exist due to a prior run of the sync tool, which was intentionally created on the Transitions side.

Regardless of the cause, anytime an Onboarding form code matches a Transitions form code, the sync tool will never examine the forms themselves. This means that if two forms have the same code but their pages and/or fields differ, they will never get synchronized. In other words, after the initial sync if the sync is run again, any changes made directly in the Onboarding form will not get updated into the Transitions form, and any changes made directly in the Transitions form will not get overwritten by the Onboarding form.

It is possible to activate different languages in Taleo Onboarding than in Taleo Recruiting, and it is possible to activate different languages in Taleo Transitions as well. If Onboarding and Transitions have the same list of active languages, then everything gets synchronized: each form gets copied along with each of its language variations. But if Onboarding has more languages activated, then the form will not appear in that language variation in Transitions after synchronization.
Message Templates - Synchronization

The Transitions sync tool copies message templates and their file attachments in Taleo Onboarding to Taleo Transitions.

All the message templates originally created and configured in Taleo Onboarding are also in Taleo Transitions following synchronization. The formatting, graphics and text in any Taleo Onboarding template are identical to those in the corresponding template in Taleo Transitions. A template's status in Taleo Transitions following synchronization is the same as the status in the other product.

The synchronization process reproduces perfectly the majority of Taleo Onboarding variables in Taleo Transitions. This means that after Onboarding message templates that include variables are copied, the corresponding Taleo Transitions templates include variables for Recruiting's candidate, offer, requisition and user-defined fields. A few Onboarding variables are not supported in Transitions. The sync tool replaces these unsupported variables with placeholder variables.

All such replacements are listed on the synchronization report. The system administrator must replace these temporary placeholders with the correct variables or remove the placeholders from the templates when the synchronization process is finished. The entries in the report enable the Transitions administrator to determine which message templates include placeholders that need to be replaced by correct variables.

Another special case is variables whose default formatting was modified in Onboarding message templates. If Onboarding administrators changed the default color, font, size, etc. of text for variables, the equivalent Transitions variables are not produced in the corresponding Taleo Transitions message templates. Consequently, the variable values will not be displayed in Transitions messages that include such variables. If an organization had Onboarding message templates that included formatted variables, it is important that Transitions administrators examine the corresponding Transitions message templates following synchronization and manually replace any remaining Onboarding variables with the correct Transitions variables.

The following message templates are in Taleo Transitions by default so the corresponding templates in Taleo Onboarding are not copied to Taleo Transitions.

- General Validation Request
- Standard notification for a reminder
- Task has been assigned to you

Be aware, however, that if you edited these templates in Taleo Onboarding and wish to reproduce your changes in Taleo Transitions, you will have to edit the corresponding templates in Taleo Transitions.

The following message templates are copied to Taleo Transitions but because they contain the URL that leads to the New Hire Portal in Onboarding they have no useful purpose and you should assign them Inactive status in Taleo Transitions.

The following message templates in Onboarding were used to help new hires manage their Onboarding passwords. These message templates contained variables that are not supported in Taleo Transitions, which uses candidates' career section passwords instead. The Onboarding message templates are copied to Taleo Transitions only because certain tasks in processes might depend on them. It is the Transitions administrator's responsibility, however, to remove any references to the message templates following synchronization and they can then change the status of the message templates to Inactive.

- Standard notification for a First Login
- Standard notification for a Password Reset
- Standard notification for a Forgot Password
Tasks - Synchronization

The Transitions synchronization tool copies tasks in Taleo Onboarding to Taleo Transitions.

All tasks originally configured in Taleo Onboarding also exist in Taleo Transitions after synchronization. The code, guidelines, status, notifications, and reminders related to each Onboarding task are recreated in the corresponding Transitions task. Usually the name, action type, and related source of each Onboarding task are also preserved in Transitions, but two types of exceptions exist. Both external service tasks and E-Verify system tasks instead get converted into a placeholder task, and this conversion is listed on the report each time the synchronization runs. See Tasks - Synchronization - Exceptions.
Processes - Synchronization

The Taleo Transitions synchronization tool copies processes from Taleo Onboarding to Taleo Transitions. All processes that exist in Taleo Onboarding get automatically synchronized into Taleo Transitions including their name, code, guidelines, assignees, steps, transitions, conditions, and OLF restrictions if any.

The process owner, supervisors if any, and the step/task assignees are all synchronized from each process in Taleo Onboarding to Taleo Transitions. However, system administrators must take note of one caveat in the area of users and their Taleo permissions. Probably not all Taleo users with Onboarding user types today have been granted the analogous Transitions user types, especially if Transitions is not yet rolled out across the organization. Yet these same users are being copied from Onboarding task assignees to become Transitions task assignees. (The user interface of Transitions Administration does not permit selecting assignees who lack Transitions permissions; however this is allowed within the synchronization process only.)

Nothing is recorded in the synchronization report pertaining to permissions and process owners, supervisors, and step/task assignees. Still it is imperative that the system administrator grant the appropriate Transitions permissions to these users at the appropriate time before these new processes get launched for any new hires. Otherwise, the assignees may receive task notifications but will be unable to access the tasks they are required to execute, so the processes will stall and not move forward.

As with the synchronization of other objects, it is the process code (not the name) which is compared between Taleo Onboarding and Taleo Transitions. If the sync tool encounters a Transitions process with the same code as an Onboarding process, that process is considered “Existing” and it gets “Skipped” and not created in Taleo Transitions. If the sync tool identifies that no existing Transitions processes have the same code as an Onboarding process, that process is considered “Missing” and it gets “Added” in Taleo Transitions. Again, no analysis is done of the other fields or contents of the process: merely the codes are compared. This means that any manually-introduced differences between processes with the same code will never get automatically synchronized when the sync tool gets run or re-run.

The code of processes and sub-processes is considered all together, so the existence of a Transitions sub-process with a given code will prevent the synchronization of an Onboarding process with the same code, and vice versa. The system administrator must be aware of any overlaps in codes across the system.

All processes and sub-processes are synchronized into Taleo Transitions in the Draft status, regardless of their original status in Taleo Onboarding. This is convenient for two reasons:

• The system administrator can make any adjustments to steps/tasks and can configure new content pages to show as desired, before activating the processes.
• Any unneeded processes can be deleted from Taleo Transitions, for instance if the Onboarding process list contains several incorrect or obsolete prior versions of any processes.

The synchronization process adds the process type “New Hire” to each newly-created Transitions process. This field does not exist in Taleo Onboarding, but in Taleo Transitions it is required in order for any Recruiting Center user to launch the process for individual candidates. System administrators do not need to remember to add this information after the synchronization process, because it is done automatically.
Tasks Performed by Transitions administrators

Though the Transitions synchronization tool automates most tasks necessary to replicating Taleo Onboarding administrative objects in Taleo Transitions, Transitions administrators have to perform other tasks themselves.

- **New Hire Portal**
- **External Services (OVI/Passport)**
- **Custom Reports**
- **Integrations**

**New Hire Portal**

Transitions administrators create content pages—tasks that contain content that typically targets specific audiences and purposes.

The New Hire Portal, familiar to Taleo Onboarding customers, new hires and candidates, is not part of Taleo Transitions. Instead, the career sections familiar to candidates now include a Tasks tab that displays new tasks to be completed related to onboarding, pre-hire processes, and so forth.

The Onboarding New Hire Portal enabled candidates and new hires to perform tasks and receive information. Customers had the opportunity to configure branding, logos, colors, welcome messages, customized documents and links to useful resources for the New Hire Portal. Taleo Transitions offers all of these possibilities and more. They are managed differently in Taleo Transitions, however, so they are not handled automatically by the sync tool: the Transitions administrator recreates these elements.

**Branding**

Career Section administrators already know how to configure branding, logos and color schemes. Because the Transitions Tasks tab is an integral part of the career section, it is subject to the same branding, logos and color schemes (automatically). For this reason, "Display Properties" from Taleo Onboarding is not copied to Taleo Transitions.

**Welcome Information**

Paragraphs and images are presented in the form of Content Pages in Taleo Transitions. The content pages are configured in Taleo Transitions and can include rich content such as text, images, variables and links to externally-hosted video and Web pages. Content Pages are displayed as tasks on the Tasks tab in career sections. For this reason, the "welcome text" areas in Taleo Onboarding’s New Hire Portal are not copied to Taleo Transitions.

**General and Personalized Documents**

Each Onboarding New Hire Portal contained a single Documents section where PDFs could be displayed to candidates and new hires. The PDFs could include variables to "personalize" the information. In Taleo Transitions, each Content Page can include HTML-based text or PDFs, and a process can include as many Content Pages as is required. In addition, Content Pages (and their corresponding documents) can be placed at the most appropriate positions in the task sequence of a process. For this reason, "Documents" lists from New Hire Portals are not copied to Transitions Content Pages.

**Links to Other Resources**

Each Onboarding New Hire Portal contained a single "Links" section composed of URLs (links) that pointed to Web sites. In Taleo Transitions, Content Pages can include links in any paragraph or image, and of course a Content Page can include any number of paragraphs. For this reason, the sync tool does not copy New Hire Portal links lists to Taleo Transitions.
Single Sign-on (SSO)

Single Sign-on (SSO) is not supported by the Onboarding New Hire Portal but it is supported by Taleo Career Section. Because the Transitions Tasks tab is an integral part of career sections, internal candidates and employees can access their pre-hire, onboarding, offboarding tasks, etc. directly provided that SSO is enabled in the customer's zone.

External Services (OVI/Passport)

Oracle Validated Integrations (OVI) partners offer a variety of services, including background check services, for Taleo Transitions.

Taleo Passport is a mechanism by which third-party vendors integrated their specialized services into Taleo Onboarding. Taleo Passport enabled partners' Web pages and activities to exchange data fields related to tasks in each candidate's or new hire's Onboarding processes.

With regard to Taleo Onboarding and Taleo Transitions, many of these partners updated their communications to become Oracle Validated Integration (OVI) partners within the Oracle Partner Network. These OVI partners offer services in different categories; services that can be licensed, enabled and configured for Taleo Transitions processes. The service categories available for Taleo Transitions include three that were available for Taleo Onboarding: U.S. tax forms, U.S. I-9 and E-Verify, and U.S. WOTC and incentives management. A fourth category is available only for Taleo Transitions: background check. For up-to-date lists of OVI partners and the services they provide (by category), please refer to the Oracle OVI Web pages.

Onboarding zones might have partners in the area named "Services" and Onboarding processes might have been configured to include external service tasks which "call" the services of the partners. The synchronization process does recognize these services or any external service tasks originating from them.

For this reason, the Transitions administrator or Oracle Taleo consultant is responsible for considering the information and performing the actions described in this section before proceeding with synchronization.

Are the partner services currently enabled in Taleo Onboarding also desired for Taleo Transitions? If the answer is "Yes", is the vendor an OVI partner for Transitions? If the vendor is not an OVI partner for Transitions, is there an OVI partner who could perform the same service?

After selecting a vendor and concluding the contractual arrangements, the service must be enabled in Taleo Transitions. Even if the vendor was the Taleo Onboarding partner, a new, separate activation must be performed. This is accomplished by creating a ticket with Oracle Support who will then request the partner to enable the Transitions-specific service.

Once the service is available for Transitions in the zone, it can be configured using the account information provided by the partner. Please refer to the "Configuring External Services" section in the Transitions Configuration Guide. Such configurations are not copied by the sync tool (even if the Onboarding partner is also an OVI partner for Transitions).

When the sync tool is run, any external service tasks in Taleo Onboarding are represented in Taleo Transitions by placeholder tasks. These are "manual tasks", which are not related in any real sense with services from any OVI partner. The Transitions administrator removes these manual tasks and creates and configures new external system tasks for OVI partner services for use in Transitions processes. Please refer to the "Request External Service" section of the Transitions Configuration Guide.

Occasionally an Onboarding process is configured to rely on additional tasks surrounding a partner's external system task. These can be parallel tasks assigned to a candidate, new hire or an Onboarding WebTop user. The tasks act as invitations to visit the partner's site or as updates about status changes. Though these parallel tasks (in the form of forms, email messages or routing tasks) are not required by Transitions, they are copied during synchronization and must be removed manually from the Transitions processes that include them.
Afterward, invitations and updates can be created in Transitions using the new "Invitations" area. Please refer to the "Correspondence Versus Invitations" section of the Transitions Configuration Guide.

Custom Reports

Full support for Taleo Transitions in Oracle Business Intelligence is planned for a future release.

Reporting capabilities will be updated for the entire Oracle Taleo Cloud suite, from the current reporting solution, Business Objects, to Oracle Business Intelligence (OBI). OBI-based reporting for Taleo Recruiting will include reporting capabilities on candidate information for both Taleo Recruiting and Taleo Transitions. Full OBI reporting support for Transitions-specific tasks and processes is planned for a future release. At that time, the following information should be reportable in OBI: information about candidates/new hires, standard and user-defined fields, and Transitions task completions and process statuses.

Until OBI becomes available, most candidate information in the Transitions process will be available for reporting purposes using Business Objects. Candidate information, including both standard and user-defined fields, is now unified and shared between Taleo Recruiting and Taleo Transitions. Consequently, the Business Objects solution for Taleo Recruiting can now encompass this aspect of Transitions reporting as well.

Information about candidates’ task completions and process statuses are unavailable for reports in Business Objects, however. Reporting for these areas is planned for a future release in OBI.

During the phasing in of the OBI reporting environment, existing customers could choose to continue to run Recruiting reports in Business Objects while adopting full Transitions reports in Oracle Business Intelligence. This would require managing concurrent reporting environments for a finite time period.

Integrations

The following information should be considered before adapting any existing Onboarding integration scripts for use with Taleo Transitions.

Importing and exporting data from the Taleo Onboarding has always been highly configurable using the powerful features in Taleo Connect Client (TCC) and Taleo Connect Broker (TCB). With the new Taleo Transitions, the same integration features can be used for importing and exporting purposes. However, many underlying changes in data storage mean that the sync tool cannot simply transform any existing Onboarding integration scripts so that they work with Taleo Transitions.

The following information should be considered before adapting any existing Onboarding integration scripts for use with Taleo Transitions:

- Where Taleo Onboarding managed a separate copy of many candidate, requisition and offer fields, Taleo Transitions shares this information with Taleo Recruiting.
- Where Taleo Onboarding had no effect on the records in SmartOrg’s list of users, Taleo Transitions processes can in some circumstances create new user accounts in SmartOrg.

The unification of candidate-related data, might simplify matters for customers who want to adapt their existing exports from the system. Customers who used Taleo Recruiting and Taleo Onboarding might have configured an initial export of new hire data from Taleo Recruiting to their HR management system and a second export in a different format from Taleo Onboarding after gathering additional data from Onboarding forms. With Taleo Transitions, two exports in two different formats are unnecessary. Instead, a single format can be used for exporting the desired candidate data fields and importing them into an HRMS both before and after a Transitions process is running.

Due to the automatic creation of Transitions-type users in SmartOrg (see Transitions User Management Enhancements), it is recommended that customers consider synchronizing their employees from their HR system into SmartOrg proactively. This will help prevent the creation of duplicate candidate records in future situations,
thus ensuring the integrity of the candidate lists and SmartOrg. This complex area can differ for each client configuration, and it can be explored with a consulting engagement with Oracle Taleo services.