Onboarding User Guide

Part Number: E51647-01

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Preface

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## Revision History

<table>
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<tr>
<th>Date</th>
<th>Modification</th>
<th>Revised Topic</th>
</tr>
</thead>
<tbody>
<tr>
<td>February 10, 2014</td>
<td>Initial publication.</td>
<td></td>
</tr>
</tbody>
</table>
Technical Configuration and Software Performance

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

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Onboarding Overview

About Taleo Onboarding

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

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

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

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

Understanding the Onboarding Process

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

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

An onboarding process requires a number of different participants to complete the process as well as activities performed in parallel or in sequence and before and after the start date. Below is a visual representation of an onboarding process. Of course, the process is only portrayed as an example. The creation of a process offers a lot of flexibility and any number of different processes can be assembled as needed.
The following list describes the details of the onboarding process depicted in the visual image above.

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

**Components of a process:**

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

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

- The new hire is requested to complete the New Hire Personal Information Form with a task that will appear in the New Hire Portal. For this step, a user-defined form containing a user-defined field with a selection is created.
- The recruiter is requested to send a correspondence to the hiring manager containing a checklist of preparations for the new hire's first day. For this step, a correspondence is created.

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

- Create one user-defined field containing a selection. The user-defined field is entitled “Mode of Transportation” and provides the following answer choices: Car, Bus, Other. The user-defined field is included in the user-defined form.
- Create one user-defined form to capture new hire personal information.
- Create one correspondence containing a checklist of preparations for the new hire's first day.
- Create two tasks:
  - One task for the new hire entitled “Complete personal information”.
  - One task for the recruiter entitled “Send new hire checklist”.
- Create one process integrating the above two tasks.
- Create one transition between the “Complete personal information” task and the “Send new hire checklist” task.

Steps

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

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

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

Tasks

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

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

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

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

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

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

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

### Task Definitions and Actions

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

Transitions

Transitions link steps together.

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

Process Owner

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

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

Functional Roles as Process Owners

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

Supervisor

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

There are two ways for someone to be a supervisor:

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

Login and Product Access

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

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

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

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

Accessing a Taleo Application

**Prerequisite**

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

**Steps**

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

Using the Forgot Password Link

**Prerequisite**

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

**Steps**

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

**Result**

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

**Next Step**

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

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

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

Launching Onboarding from the Recruiting Center Onboarding Channel

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

**Steps**
- Click the desired link on the Onboarding Channel.

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

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

Launching Onboarding from the Recruiting Center Task Channel

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

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

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

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

Launching Onboarding from the Recruiting Center Home Icon

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

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

**Result**
The Onboarding WebTop is launched.
Next Step

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

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

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

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

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

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

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

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

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

Welcome Center

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

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

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

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

Auxiliary Navigation Bar

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

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

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

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

### Core Navigation Bar

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

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

![Navigation Bar](image)

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

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

### Quick Access in Onboarding

The Quick Access feature provides shortcuts within Taleo Onboarding.

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

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

Breadcrumb Trail

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

Navigation Icons

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

<table>
<thead>
<tr>
<th>Icon</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Displays the previous page.</td>
</tr>
<tr>
<td></td>
<td>Goes to the previous 10 pages.</td>
</tr>
<tr>
<td></td>
<td>Displays the next page.</td>
</tr>
<tr>
<td></td>
<td>Goes to the next 10 pages.</td>
</tr>
</tbody>
</table>
Other Tools

History

Onboarding events are displayed in History.

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

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

Displaying Additional History Events

Steps

Click More.

Result

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

Next Step

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

Viewing User Information from History

Steps

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

Result

The User Information page is displayed.

List Sorting

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

- Onboarding WebTop ................................................................. 19
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- Processes ............................................................................. 27
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Onboarding WebTop

The Onboarding WebTop is used by managers and recruiters and consists of two main sections, the Task List and Onboarding Processes.

The Onboarding WebTop page provides a list of tasks assigned to the user, tasks the user owns, and tasks the user has permission to see. For example, an HR director might have access to all tasks. A task is a request for action that can be assigned to an actor, a person or system involved in an onboarding process. An actor can also be the new hire. Tasks can consist of filling out information, supervising the new hire and providing all the assets necessary to the new hire such as an email address, phone, and computer. A user with proper permissions can self-assign tasks. Tasks ensure that the onboarding process goes smoothly both for the new employee and the employer.

The Onboarding WebTop page also provides supervisors with general information about the onboarding processes they launched or are involved in. They can see the name of the new employee the process is associated with, the name of the process, the job title related to the process, and the progression of the process.
## Tasks

### Task List

The Task List section displays the list of all Onboarding tasks to which a user has access based on user type and permissions.

Any tasks that are created from the Onboarding WebTop will only be assigned to the user who created them.

<table>
<thead>
<tr>
<th>Task List Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Name</td>
<td>Shows the name of the step in the process which assigns this task to the assignee. Clicking on the name will launch the Task Page. See <a href="#">Viewing a Task</a>.</td>
</tr>
<tr>
<td>Due Date</td>
<td>Date when the task must be completed.</td>
</tr>
</tbody>
</table>
| Reference        | Displays one of the following values:  
  - Process name when the task is created from an onboarding process.  
  - Dash (-) when the task is a self-assigned task. |
| Priority         | Displays one of following priority levels assigned to the task:  
  - Low  
  - Medium  
  - High |
| Status           | Displays the status of the task. Available statuses are:  
  - Completed: The task was completed with success.  
  - In Progress: The task is assigned and ready to be completed.  
  - Not Started: The task has not started yet. |
| Assigned to      | The Assignee are the individuals who will complete the task involved in a step in a process. Appropriate permission is required to view a task assignee regardless of whether the logged in user is on the assignee list. |
| Owned by         | Owner of the process, as defined by the Onboarding administrator, as the person ultimately responsible for the completion of the overall process. For self-created tasks that are not part of any process, the user who created this task is shown in this column. |
| Actions          | Possible actions that can be performed on a task. Available actions are:  
  - Execute  
  - Reassign |

The Task List can be filtered to view processes in specific progress statuses.
<table>
<thead>
<tr>
<th>Refine by Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All Tasks</td>
<td>Displays all tasks in Onboarding, regardless of status, to users with the user type that allows them to see All Tasks.</td>
</tr>
<tr>
<td>All Opened Tasks</td>
<td>Displays all tasks in Onboarding, that a user can see in the In Progress status. This selection only appears for users with the user type that allows them to see All Tasks.</td>
</tr>
<tr>
<td>My Tasks</td>
<td>Displays tasks assigned to the current Onboarding user.</td>
</tr>
<tr>
<td>All Tasks with Errors</td>
<td>Displays all tasks with a status of Error in Onboarding, to users with the user type that allows them to see All Tasks.</td>
</tr>
<tr>
<td>My Opened Tasks</td>
<td>Displays tasks with a status of In Progress that are assigned to the user logged into Onboarding.</td>
</tr>
<tr>
<td>My Tasks with Errors</td>
<td>Displays tasks with a status of Error that are assigned to the user logged into Onboarding.</td>
</tr>
<tr>
<td>Overdue</td>
<td>Displays the logged in user's tasks with a due date before the current date.</td>
</tr>
<tr>
<td>Due Today</td>
<td>Displays the logged in user's tasks due the current date.</td>
</tr>
<tr>
<td>Due in the Next Week</td>
<td>Displays the logged in user's tasks due next week.</td>
</tr>
<tr>
<td>Keyword</td>
<td>Searches through the columns Name, Reference, and Owned by for a task using a keyword and refreshing the task list.</td>
</tr>
</tbody>
</table>

### Viewing a Task

**Steps**
1. Filter the Task List if necessary, to display the task on the list.
2. Click on the name link of the task to be viewed.

**Result**
The user is brought to the task page in view mode.

### Filtering Tasks

**Steps**
1. Click Refine by.
2. Select a value.
   - If filtering by a Keyword, enter the appropriate word.
3. Click Refresh.

**Result**
The Task List displays only those tasks that match the filtered value.

### Creating a Task

**Prerequisite**
User has permission to create and edit tasks.
Steps
1. Click Create.
2. Complete the property fields for the new task.
   Required fields are noted with a red asterisk.
3. Click Save.

Result
A Manual Task is created with the user logged into Onboarding as the task owner and assignee.

Editing a Task

Prerequisite
User has permission to create and edit tasks.

Steps
1. Filter the Task List if necessary.
2. Click the task name.
3. Click Edit.
4. Make the appropriate change.
5. Click Save.

Result
The task is edited with the changed information.

Reassigning a Task

Steps
1. Filter the Task List if necessary, to display the task to be reassigned.
2. Click Reassign.
3. Enter the name of the assignee.
4. Click Search
5. Select the appropriate user.
6. Click Select.
7. Click Save.

Result
The task is reassigned to the selected user. The newly-assigned user receives any configured notifications associated to the task.

Task Page
Detailed information about a task is displayed on the Task Page.
This information includes the following:
• Properties
• Related Source
• Notifications
• Reminders
• History

Notifications can be edited and reminders can be created on the Task Page. See Notifications and Reminders.

Passport Requests and Results
Taleo Onboarding displays details of external service request tasks passed to a partner using Taleo Passport.

The Onboarding WebTop provides information about Passport tasks involved in an onboarding process. Passport tasks can be viewed on the Task List by a WebTop user with appropriate permissions. An External Service Request section appears on the Task Page when a task exists for an external service provider. This section shows all the details of the data exchange between Taleo Onboarding and the provider, including message parameters and the current status of the partner.

Every external services provider has an Activation Guide. The guide includes information about how to communicate with the partner and explain the specific results fields that they provide.

Request Fields
Information on the Task page includes request fields and result fields with specific displayed details varying by request. Input information is also displayed and is varied by task.

<table>
<thead>
<tr>
<th>Request Field</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 specific service.</td>
</tr>
<tr>
<td>Status</td>
<td>Any of the predefined statuses for Passport requests used by Taleo for all partners. These values originate from the Provider status sent to Taleo in the Passport exchange.</td>
</tr>
<tr>
<td>Provider Status</td>
<td>Value passed to Taleo from the vendor involved in the Passport exchange. This value is translated into the appropriate predefined Taleo Status.</td>
</tr>
<tr>
<td>Request Date</td>
<td>Date when the request to the vendor was initiated.</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 these results should not be relied upon, according to the partner. This date gets calculated by the partner if there is any validity period configured for the service by adding the validity period value to the date results are received back into Taleo.</td>
</tr>
<tr>
<td>Reference Number (Internal)</td>
<td>A unique identification number used by Taleo to identify a particular Passport request, typically utilized by Taleo Customer Support in the Passport Console.</td>
</tr>
<tr>
<td>Reference Number (External)</td>
<td>A unique identification number used by the partner to identify a particular Passport request.</td>
</tr>
</tbody>
</table>

Parameters Used
The Parameters Used section displays parameters that were configured in the Task Definition sent by Taleo to the external partner for the specific request listed.
**Results**

The Results section displays all the results the external service returned back to Taleo for the specifically listed request in the new hire's process. These are the specific user-defined fields that get created automatically by each vendor when they are activated to start providing service. Results fields usually include a More Details hyperlink, which opens a new browser window. The WebTop user can then visit the external service provider's website to see documents or additional information about this request, such as any error messages or any detailed sub-statuses.

**Request Statuses**

Passport request status fields are available for Onboarding administrators to use for transition conditions. The following values are standard Taleo request statuses from the Status field that can be selected:

- 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

Status field values provided by partners, and populated in the Provider Status field, are also available for inclusion in transition conditions. However, since each partner determines their own statuses for each individual situation, there is no drop-down list of predefined values for this field.

**Certified Passport Partners Can Support Multiple Assignees**

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

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

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

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

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

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

External Service Tasks can be Retried Ten Times in Onboarding
Users can retry external service tasks up to ten times when the task is in Error status.

External service request tasks using Taleo Passport occasionally are unable to be completed due to events outside of the control of Taleo Onboarding. When this happens, these incomplete tasks fall into Error status and the status of the step is Canceled. When a task is in Error, a Retry button appears on the Task page for that task. The user may make ten separate attempts to resolve the issue and retry the task. After the tenth attempt the Retry button will disappear from the Task page. A History entry will be created with each retry attempt.

Correspondence tasks in Error status can also be retried ten times.

Notifications and Reminders
Notifications and Reminders are email alerts to task assignees and process owners for task completion.

A reminder is an email sent to any one of the task assignees, all the task assignees, or the process owner of a task in a new hire process. Reminders can be set to be sent before or after the due date of a Task and configured with a specific Notification Message. An Immediate Reminder will send an email alert to all assignees. Notification messages for an immediate reminder can be configured, although the recipient of the message cannot.

Notification can be sent to task assignees and the task owner. There can be one message template chosen to send to the Assignee when the task gets assigned and another message can be configured to send to the process owner upon completion of this task. However, notifications are optional and processes may be configured by Onboarding administrators so that no messages are sent.

Sending a Notification

Steps
1. Click the task name.
2. Complete one or both of the following two choices.
   • Under Task Assignment Correspondence (sent to assignees), click Search.
   • Under Task Completion Correspondence (sent to owner), click Search.
   Either choice opens the Message Template Selector page.
3. Filter the Message Template List, if necessary.
4. Select the desired template.
5. Click Select.
6. Click Save.

Result
Notifications are sent to the task assignees and/or the task owner.
Adding a Reminder to a Task

**Prerequisite**

The user has selected the task for the reminder.

**Steps**

1. Click Create.
2. Select an assignee, if necessary.
3. Enter a triggering time, unit, and relationship to the due date of the task.
4. Select a Notification Message.
5. Click Save.

**Result**

A reminder is created for a specific task.

Sending an Immediate Reminder

**Prerequisite**

The user has selected the task for the reminder.

**Steps**

1. Click Search, if necessary.
   - If there is a prefilled value in the Notification Message field and it is appropriate for this reminder, click Send.
   - If there is no prefilled value in the Notification Message field or it is not appropriate for this reminder, click Search.

   Clicking Search opens the Message Template Selector page.
2. Filter the Message Template List, if necessary.
3. Select the desired template by clicking the radio button.
4. Click Select.
5. Click Send.

**Result**

A reminder is created and sent immediately to the task assignees.
Processes

Processes List

The Onboarding Processes section displays a list of all active onboarding processes to which you have access based on user type and permissions.

<table>
<thead>
<tr>
<th>Column</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>New Hire</td>
<td>Name of the new hire associated with the process. Clicking the New Hire name accesses the New Hire page. See Viewing a New Hire.</td>
</tr>
<tr>
<td>Process</td>
<td>Name of the process.</td>
</tr>
<tr>
<td>Job Title</td>
<td>Job associated with the process.</td>
</tr>
<tr>
<td>Job Start Date</td>
<td>Date when the new hire starts his or her job.</td>
</tr>
<tr>
<td>Status</td>
<td>Status of the process. Available statuses are:</td>
</tr>
<tr>
<td></td>
<td>• Completed: The process was completed with success.</td>
</tr>
<tr>
<td></td>
<td>• In Progress: The process is in the process of being completed.</td>
</tr>
<tr>
<td></td>
<td>• Canceled: The process was ended before normal completion.</td>
</tr>
<tr>
<td></td>
<td>• Suspended: The process was interrupted temporarily.</td>
</tr>
<tr>
<td>Progression</td>
<td>The Progression Bar gives a visual indication of how the process is progressing using colored blocks appearing within the bar.</td>
</tr>
</tbody>
</table>

The process list can be filtered to view processes in specific progress statuses.

<table>
<thead>
<tr>
<th>Refine by Selection</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>All</td>
<td>Displays all onboarding processes to which the logged in user has access according to permissions.</td>
</tr>
<tr>
<td>In Progress</td>
<td>Displays onboarding processes that are in progress and to which the logged in user has access according to permissions.</td>
</tr>
<tr>
<td>Suspended</td>
<td>Displays onboarding processes that were interrupted and to which the logged in user has access according to permissions.</td>
</tr>
<tr>
<td>Completed</td>
<td>Displays onboarding processes that were completed and to which the logged in user has access according to permissions.</td>
</tr>
<tr>
<td>Canceled</td>
<td>Displays onboarding processes that were canceled and to which the logged in user has access according to permissions.</td>
</tr>
<tr>
<td>Pre Start Date</td>
<td>Displays onboarding processes that have started but for which the Job Start Date has not been reached yet.</td>
</tr>
<tr>
<td>Post Start Date</td>
<td>Displays onboarding processes that have started but for which the Job Start Date in now in the past.</td>
</tr>
<tr>
<td>Refine by Selection</td>
<td>Description</td>
</tr>
<tr>
<td>---------------------</td>
<td>-------------</td>
</tr>
<tr>
<td>Delayed</td>
<td>Displays onboarding processes that were delayed. To be considered in Delayed status the current task was due before the current date and has not been completed.</td>
</tr>
<tr>
<td>Keyword</td>
<td>Searches for an onboarding process using a keyword using the columns New Hire, Process and Job Title.</td>
</tr>
<tr>
<td>New Hire</td>
<td>Searches for a New Hire by name.</td>
</tr>
</tbody>
</table>

## Progression Bar

Onboarding displays process progress using the progression bar.

The progression bar is an approximate representation of the completion of the process value. It gives a visual indication of how the process is progressing. The bar is divided into 10 blocks, each representing 10% of the process duration. The progression through a process is indicated by coloring the blocks according to the status of the tasks within the process. The block colors are green and red, as well as colorless.

<table>
<thead>
<tr>
<th>Color</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Colorless</td>
<td>• The process was not executed by the first task's due date.</td>
</tr>
<tr>
<td></td>
<td>• The process is less than 10% complete.</td>
</tr>
<tr>
<td></td>
<td>• The process has been canceled.</td>
</tr>
<tr>
<td>Green</td>
<td>The current tasks are still within their allowed duration</td>
</tr>
<tr>
<td>Red</td>
<td>The process is delayed because the currently In Progress task was due before the current date and has not been completed.</td>
</tr>
</tbody>
</table>

## Filtering Processes

**Steps**

1. Click Refine by arrow to open the menu.
2. Select a value from Refine by.
3. Click Refresh.

**Result**
The Process List is displaying only those processes that match the filtered value.

## Viewing a New Hire

**Steps**

Click on the name link of the new hire to be viewed.

**Result**
The user is brought to the New Hire page.
Using the New Hire Page

New Hire Page

The New Hire page displays information about the new hire and provides detailed access to the associated onboarding process and files.

The New Hire Page is divided into five possible sections accessible according to user permissions assigned by an Onboarding administrator. These sections are:

- General Information
- Process
- Steps
- Attached Files
- History

The General Information section contains detailed information about the new hire. This information includes phone number, correspondence email address if the new hire has one, job manager name, and job start date.

The Steps section shows closed steps, remaining onboarding steps to be completed, and the actor responsible for completing a step. If the step is in progress, it shows the date it is due, based on the duration configured by the Onboarding administrator for the task associated with the step.

The Process section displays the onboarding process to which the new hire is associated, the process supervisors, the start date of the processes, and the percentage of the processes completed.

With the appropriate user type and permissions, the user can view the Attached Files section. This section displays a list of PDF files that are associated with the new hire and his or her onboarding process. These documents can be printed individually, printed in a batch, or exported from Onboarding.

The History section is a log of actions taken on sections of the New Hire page, as well as the completions and errors from tasks contained in each step of the process. See History.

Accessing the New Hire Page

Steps

Click the new hire name listed on the Onboarding WebTop.

Send Correspondence

Onboarding users can send ad-hoc correspondence to a new hire that is tracked in History.

The Send Correspondence link on the New Hire page allows a user to send an email directly to a new hire using the Onboarding system. The message is tracked within the system and is associated with the new hire. The header is prefilled with the new hire's correspondence email address and additional recipients can be added.

Sending Correspondence

Steps

1. Click the new hire name.
2. Click Send Correspondence.
3. Complete fields To, Reply To, Cc, Bcc, Subject, and Content, as appropriate.
4. Click Continue.
5. Review the email.
   • If the email is satisfactory, click Send.
   • If the email requires editing, click Back.

**Result**
Message is sent to the new hire. Record of sent email is posted in History section of New Hire page.

---

**Working with Processes**

**Working with Processes**
The Process section on the New Hire page displays the onboarding process to which the new hire is associated.

General information about the onboarding process associated with the new hire is displayed for viewing in the Process section. This information includes the following fields:

- Code
- Name
- Owner
- Supervisors
- Status
- Progression
- Start Date

A number of actions can be taken on processes by users with the correct user type and permissions.

**Viewing New Hire Details**

**Steps**
1. Click the new hire name listed on the Onboarding WebTop.
2. Click Details.

**Printing New Hire Details**

**Steps**
1. Click the new hire name on the Onboarding WebTop.
2. Click Details.
3. Click Print.

**Process Preview**

Process Preview is a visual representation of the onboarding process.

Onboarding displays a flow chart like illustration of the process used to onboard the new hire. This feature gives the user an overall glimpse of the process and the relationship among the steps in the process.
**Process Flow Chart Elements**

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Circle with arrow to the right</td>
</tr>
<tr>
<td>End</td>
<td>Circle with arrow with dotted line coming from the left</td>
</tr>
<tr>
<td>Tasks</td>
<td>Rectangle</td>
</tr>
<tr>
<td>Sub Process</td>
<td>Rectangle with small rectangle inside</td>
</tr>
<tr>
<td>Steps that Split a Process, in which all steps must be executed before that step is executed</td>
<td>Rectangle with right side convex</td>
</tr>
<tr>
<td>Steps that Merge a Process, in which all steps must be executed after that step is executed</td>
<td>Rectangle with left side concave</td>
</tr>
<tr>
<td>Transition</td>
<td>Arrow. It is thin if no condition, thick if conditions applied.</td>
</tr>
</tbody>
</table>

**Previewing a Process**

**Steps**
1. Access the New Hire page by clicking on the new hire name.
2. Click Preview.

**Changing a User Associated with a Process**

**Prerequisite**
The user conducting the change has the appropriate user type and permissions to manage Onboarding processes.

The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

**Steps**
1. Click the new hire name.
2. Click Change User.
3. Search for the user by entering a name into the field of the user role to change.
4. Click Search.
5. Click the radio button of the appropriate user.
6. Click Select.
7. Click Save.

**Result**
The user has been changed for that process.

**Next Step**
The new user may now have the right to view the onboarding process and act upon it if permissions are granted. The new user may receive tasks assigned to them in the future. Any tasks that are already in progress and assigned to the prior person who held that role are not reassigned.
Sharing a Process

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.
The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

Steps
1. Access the New Hire page by clicking on the new hire name.
2. Click Search
3. Refine User Selector list, if necessary.
4. Check appropriate user.
5. Click Select.
6. Click Save.

Result
The process has been shared with the user selected. The newly assigned person may now have the right to view this process and perform actions on it and on all its tasks, depending on his or her permissions.

Revoking Sharing a Process

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.
The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

Steps
1. Access the New Hire page by clicking on the new hire name.
2. Click Revoke Sharing.
3. Search for the user by entering a name into the field of the user role to change.
4. Click Search
5. Check the appropriate user.
6. Click Select.
7. Click Save.

Result
The process is no longer shared with the selected user. The newly assigned person may no longer have the right to view this process and perform actions on it and on all its tasks. The specific details of what was being revoked depends on his or her permissions.

Suspending a Process

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.
**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Suspend.

**Result**

The process is suspended immediately. All the process tasks that were previously In Progress appear as On Hold for their assignees. They cannot be completed/executed until the process is resumed later.

---

**Resuming a Suspended Process**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Resume.

**Result**

The process is resumed immediately and all tasks that were previously On Hold while suspended appear as In Progress.

---

**Canceling a Process**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Cancel.
3. Click Yes.

**Result**

The process is canceled and all the associated steps and tasks display a Terminated status. The process displays on the WebTop page if the filter for Canceled tasks is selected. The percentage-complete is retained at the level that was completed before cancellation but the WebTop progression bar is displayed as colorless.

---

**Deleting a Process**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes. The process is in either Completed or Canceled status.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Delete.
Deleting a New Hire

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.
The process is in either Completed or Canceled status.
There are no other existing processes for the new hire.
The Onboarding Administrator has configured that new hires are deleted when the last process is deleted.

Steps
1. Access the New Hire page by clicking on the new hire name.
2. Click Delete.
3. Click Yes.

Result
The process and the new hire are deleted.

New Hire Information from Taleo Enterprise

Information is sent from Taleo Recruiting to Onboarding when an Onboarding process is launched.
The candidate's current data within the areas of Assignment, Position, and Application are sent to Onboarding the first time an onboarding process is launched from Recruiting. At this point, there are two sets of data for that new hire, one set in Recruiting and one set in Onboarding. If candidate information is then modified in Recruiting, the new hire information in Onboarding will not be affected.

Contact the Onboarding administrator for more information about the data that transfers from Recruiting to Onboarding.

Restarting an Onboarding Process

This feature, performed in Taleo Recruiting or Onboarding, enables a user to cancel a process and start it over. A whole new process is created, all tasks are assigned again, and the old process is given a status of Canceled.

Restarting a process gives the user with the correct user type and permissions, the opportunity to start an onboarding process over from the beginning. When the new process is created, all the tasks from the original process are copied to the new process. All Onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

There are three ways to restart an onboarding process, each with a slightly different effect on the data that is stored in Onboarding.

- Start the process again from Recruiting with Updated Data, to undo any changes that had been made in the prior Onboarding process up to this point.
- Start the process again from Recruiting without Updated Data, which updates only the information about Assignment, Position, and Application that are used in Onboarding.
- Restart the process from Onboarding WebTop, which leaves intact all the existing information in Onboarding that had been used in the prior Onboarding process up to this point.

Start the Process Again from Recruiting without Updated Data

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

**Start the Process Again from Recruiting with Updated Data**

Using the option Update onboarding data with current recruiting data, the system overwrites all of the Candidate, Experience and Education data fields, as well as the Assignment, Position, and Application areas. All data about the New Hire that may originate from Onboarding, such as forms, previous processes, or data that was imported via Taleo Connect Client, prior to performing the cancellation of the Onboarding process and starting again, is erased. It will be updated with the information available in Recruiting at this point, and any field with or without a counterpart in Recruiting will be overwritten with the value or with null. Also, even if a user-defined field in Onboarding has no corresponding user-defined field in Recruiting, it will be erased.

When canceling an Onboarding process and restarting it from Recruiting, to preserve all data entered previously on all Onboarding forms and keep it intact, enabling a review of each task to submit them as they are, do not select the option Update onboarding data with current recruiting data.

**Restart the Process from Onboarding WebTop**

Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting. All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

**Restarting a Process from the Onboarding WebTop**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click *Cancel*.

**Result**

Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting.

**Next Step**

All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

**Restarting a Process from Recruiting**

**Prerequisite**

You must cancel the process in Recruiting before restarting.

*Taleo Recruiting > Candidates*

**Steps**

1. Click the name of the appropriate New Hire.
2. From My Actions, select Cancel Onboarding Process.
4. Check Start Onboarding and optionally, check Update onboarding data with current recruiting data.
5. From the drop-down list, select an available Onboarding process and if required, add comments.
6. Click *Done*.

**Working with Steps**

**Working with Steps**

The Steps section on the New Hire page lists all the steps in the onboarding process for a new hire.

Detailed information regarding the task associated with a step can be obtained on the Task Page. When the task page is displayed for a completed step, any related source is shown with information filled in about the new hire. Additionally, notifications and reminders can be sent from the Task page. See *Notifications and Reminders*.

**Viewing a Task from a Step on the New Hire Page**

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Step Name.

**Terminating a Step**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Terminate.

**Working with Attached Files**

**Working with Attached Files**

The user with the appropriate user type and permissions can view, print, or locally save completed PDF documents associated with a new hire from the Attached Files section.

The Attached Files section is a list of PDF documents that are associated with a new hire. When a PDF task in the new hire's onboarding process has been completed, it becomes available automatically in the Attached Files section of the New Hire page. Alternatively, PDF files can be uploaded manually.

Once PDF files have been added to the Attached Files section, they can be printed or saved locally individually or in a batch.

Attached Files can also be exported from Onboarding using Taleo Connect Client. Contact your Onboarding administrator for more information.

**Attaching Files Manually**

**Prerequisite**

The user must have the permission to view and manage related documents.
Steps
1. Click Add. The File-based Document Selector window is displayed.
2. Refine list, if necessary.
3. Check desired document.
4. Click Select.

Result
The PDF document is added to the Attached Files section.

Next Step
The PDF document can be viewed, printed, saved locally, or exported using Taleo Connect Client. Any tokens in the PDF document now display the specific data for the new hire.

Viewing an Attached File

Prerequisite
The user must have the permission to view and manage related documents.

Steps
Click the name of the PDF file.

Result
Adobe is launched in a new browser window displaying the opened PDF file. Any tokens in the PDF will be displayed with the new hire's information.

Next Step
The user can print or save the PDF file using the Adobe application launched in the web browser.

Deleting an Attached File

Prerequisite
The user must have the permission to view and manage related documents.

Steps
Click Delete.

Result
The Attached File is deleted immediately with no confirmation opportunity.

PDF Batch Printing

Multiple documents for a new hire can be printed at one time.

PDF Batch Printing is a feature that allows an Onboarding WebTop user to select PDF files associated with a new hire process to be printed as a single document in an Adobe application. When PDF Batch Printing is enabled, a check box will appear on each line of the Attached Files list, when Attached Files are viewable for a New Hire Process. Each page will display up to 15 attached files. The number of PDF documents the user can
select for batch printing depends on the maximum file size setting for a batch. This setting is determined by the system administrator.

PDF Batch Printing is enabled when it is configured with a value greater than zero. This value is equivalent to the maximum size of a batch. The default maximum batch file size is 10MB. If the maximum size is exceeded by the PDF batch, an error message will be presented to the user. The error message will tell the user that the batch exceeds the limit and will display the size of the batch to be printed.

The selected PDF documents are combined into a single document and sent to an Adobe application, either Acrobat or Acrobat Reader, depending on what is installed and configured on the user's computer. The Onboarding system creates a generic name for each new combined file and opens the Adobe application so the user may print all documents at once. During the Adobe print session, Onboarding remains open for use. A History record is created with the codes of the document that were sent to Adobe for printing. However, the history record will not show if the printing from Adobe was successful, only that it was created.

Printing a PDF Batch

**Prerequisite**

Batch PDF Printing must be enabled by Taleo Support.

The user must have the permission to view and manage related documents.

**Steps**

1. Click the check box of all the PDF documents to print.
2. Click Batch Print.

**Result**

Adobe is launched and asks whether you would like to open the file, save the file, or cancel the request.

**Next Step**

The PDF batch file appears, ready for printing, when the file is opened.
Using the New Hire Page

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New Hire Page

The New Hire page displays information about the new hire and provides detailed access to the associated onboarding process and files.

The New Hire Page is divided into five possible sections accessible according to user permissions assigned by an Onboarding administrator. These sections are:

- General Information
- Process
- Steps
- Attached Files
- History

The General Information section contains detailed information about the new hire. This information includes phone number, correspondence email address if the new hire has one, job manager name, and job start date.

The Steps section shows closed steps, remaining onboarding steps to be completed, and the actor responsible for completing a step. If the step is in progress, it shows the date it is due, based on the duration configured by the Onboarding administrator for the task associated with the step.

The Process section displays the onboarding process to which the new hire is associated, the process supervisors, the start date of the processes, and the percentage of the processes completed.

With the appropriate user type and permissions, the user can view the Attached Files section. This section displays a list of PDF files that are associated with the new hire and his or her onboarding process. These documents can be printed individually, printed in a batch, or exported from Onboarding.

The History section is a log of actions taken on sections of the New Hire page, as well as the completions and errors from tasks contained in each step of the process. See History.

Accessing the New Hire Page

Steps

Click the new hire name listed on the Onboarding WebTop.

Send Correspondence

Onboarding users can send ad-hoc correspondence to a new hire that is tracked in History.

The Send Correspondence link on the New Hire page allows a user to send an email directly to a new hire using the Onboarding system. The message is tracked within the system and is associated with the new hire. The header is prefilled with the new hire's correspondence email address and additional recipients can be added.

Sending Correspondence

Steps

1. Click the new hire name.
2. Click Send Correspondence.
3. Complete fields To, Reply To, Cc, Bcc, Subject, and Content, as appropriate.
4. Click Continue.
5. Review the email.
   • If the email is satisfactory, click Send.
   • If the email requires editing, click Back.

Result
Message is sent to the new hire. Record of sent email is posted in History section of New Hire page.
Working with Processes

The Process section on the New Hire page displays the onboarding process to which the new hire is associated. General information about the onboarding process associated with the new hire is displayed for viewing in the Process section. This information includes the following fields:

- Code
- Name
- Owner
- Supervisors
- Status
- Progression
- Start Date

A number of actions can be taken on processes by users with the correct user type and permissions.

Viewing New Hire Details

Steps

1. Click the new hire name listed on the Onboarding WebTop.
2. Click Details.

Printing New Hire Details

Steps

1. Click the new hire name on the Onboarding WebTop.
2. Click Details.
3. Click Print.

Process Preview

Process Preview is a visual representation of the onboarding process.

Onboarding displays a flow chart like illustration of the process used to onboard the new hire. This feature gives the user an overall glimpse of the process and the relationship among the steps in the process.

Process Flow Chart Elements

<table>
<thead>
<tr>
<th>Element</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Start</td>
<td>Circle with arrow to the right</td>
</tr>
<tr>
<td>End</td>
<td>Circle with arrow with dotted line coming from the left</td>
</tr>
<tr>
<td>Element</td>
<td>Description</td>
</tr>
<tr>
<td>----------------------------------------------</td>
<td>-----------------------------------------------------------------------------</td>
</tr>
<tr>
<td>Tasks</td>
<td>Rectangle</td>
</tr>
<tr>
<td>Sub Process</td>
<td>Rectangle with small rectangle inside</td>
</tr>
<tr>
<td>Steps that Split a Process, in which all steps must be executed before that step is executed</td>
<td>Rectangle with right side convex</td>
</tr>
<tr>
<td>Steps that Merge a Process, in which all steps must be executed after that step is executed</td>
<td>Rectangle with left side concave</td>
</tr>
<tr>
<td>Transition</td>
<td>Arrow. It is thin if no condition, thick if conditions applied.</td>
</tr>
</tbody>
</table>

**Previewing a Process**

**Steps**
1. Access the New Hire page by clicking on the new hire name.
2. Click Preview.

**Changing a User Associated with a Process**

**Prerequisite**
The user conducting the change has the appropriate user type and permissions to manage Onboarding processes.

The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

**Steps**
1. Click the new hire name.
2. Click Change User.
3. Search for the user by entering a name into the field of the user role to change.
4. Click Search.
5. Click the radio button of the appropriate user.
6. Click Select.
7. Click Save.

**Result**
The user has been changed for that process.

**Next Step**
The new user may now have the right to view the onboarding process and act upon it if permissions are granted. The new user may receive tasks assigned to them in the future. Any tasks that are already in progress and assigned to the prior person who held that role are not reassigned.

**Sharing a Process**

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.
The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Search
3. Refine User Selector list, if necessary.
4. Check appropriate user.
5. Click Select.
6. Click Save.

**Result**

The process has been shared with the user selected. The newly assigned person may now have the right to view this process and perform actions on it and on all its tasks, depending on his or her permissions.

**Revoking Sharing a Process**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

The user selected for the change has the appropriate user type and permissions to be assigned to his or her new role in the process.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Revoke Sharing.
3. Search for the user by entering a name into the field of the user role to change.
4. Click Search
5. Check the appropriate user.
6. Click Select.
7. Click Save.

**Result**

The process is no longer shared with the selected user. The newly assigned person may no longer have the right to view this process and perform actions on it and on all its tasks. The specific details of what was being revoked depends on his or her permissions.

**Suspending a Process**

**Prerequisite**

The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click Suspend.

**Result**

The process is suspended immediately. All the process tasks that were previously In Progress appear as On Hold for their assignees. They cannot be completed/executed until the process is resumed later.
Resuming a Suspended Process

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**
1. Access the New Hire page by clicking on the new hire name.
2. Click Resume.

**Result**
The process is resumed immediately and all tasks that were previously On Hold while suspended appear as In Progress.

Canceling a Process

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**
1. Access the New Hire page by clicking on the new hire name.
2. Click Cancel.
3. Click Yes.

**Result**
The process is canceled and all the associated steps and tasks display a Terminated status. The process displays on the WebTop page if the filter for Canceled tasks is selected. The percentage-complete is retained at the level that was completed before cancellation but the WebTop progression bar is displayed as colorless.

Deleting a Process

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.
The process is in either Completed or Canceled status.

**Steps**
1. Access the New Hire page by clicking on the new hire name.
2. Click Delete.

Deleting a New Hire

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.
The process is in either Completed or Canceled status.
There are no other existing processes for the new hire.
The Onboarding Administrator has configured that new hires are deleted when the last process is deleted.

Steps
1. Access the New Hire page by clicking on the new hire name.
2. Click Delete.
3. Click Yes.

Result
The process and the new hire are deleted.

New Hire Information from Taleo Enterprise
Information is sent from Taleo Recruiting to Onboarding when an Onboarding process is launched.

The candidate's current data within the areas of Assignment, Position, and Application are sent to Onboarding the first time an onboarding process is launched from Recruiting. At this point, there are two sets of data for that new hire, one set in Recruiting and one set in Onboarding. If candidate information is then modified in Recruiting, the new hire information in Onboarding will not be affected.

Contact the Onboarding administrator for more information about the data that transfers from Recruiting to Onboarding.

Restarting an Onboarding Process
This feature, performed in Taleo Recruiting or Onboarding, enables a user to cancel a process and start it over. A whole new process is created, all tasks are assigned again, and the old process is given a status of Canceled.

Restarting a process gives the user with the correct user type and permissions, the opportunity to start an onboarding process over from the beginning. When the new process is created, all the tasks from the original process are copied to the new process. All Onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

There are three ways to restart an onboarding process, each with a slightly different effect on the data that is stored in Onboarding.

- Start the process again from Recruiting with Updated Data, to undo any changes that had been made in the prior Onboarding process up to this point.
- Start the process again from Recruiting without Updated Data, which updates only the information about Assignment, Position, and Application that are used in Onboarding.
- Restart the process from Onboarding WebTop, which leaves intact all the existing information in Onboarding that had been used in the prior Onboarding process up to this point.

Start the Process Again from Recruiting without Updated Data
Each time a process is started, including when it is started again after the original time, the candidate's current data within the areas of Assignment, Position, and Application are transferred into Onboarding. Any data which had been transferred in at the start of the old process remains associated to this process and the new set of data is associated to the newly restarted process.

Start the Process Again from Recruiting with Updated Data
Using the option Update onboarding data with current recruiting data, the system overwrites all of the Candidate, Experience and Education data fields, as well as the Assignment, Position, and Application areas. All data about the New Hire that may originate from Onboarding, such as forms, previous processes, or data that was imported
via Taleo Connect Client, prior to performing the cancellation of the Onboarding process and starting again, is erased. It will be updated with the information available in Recruiting at this point, and any field with or without a counterpart in Recruiting will be overwritten with the value or with null. Also, even if a user-defined field in Onboarding has no corresponding user-defined field in Recruiting, it will be erased.

When canceling an Onboarding process and restarting it from Recruiting, to preserve all data entered previously on all Onboarding forms and keep it intact, enabling a review of each task to submit them as they are, do not select the option Update onboarding data with current recruiting data.

**Restart the Process from Onboarding WebTop**

Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting. All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

**Restarting a Process from the Onboarding WebTop**

**Prerequisite**
The user has the appropriate user type and permissions to manage Onboarding processes.

**Steps**

1. Access the New Hire page by clicking on the new hire name.
2. Click *Cancel*.

**Result**
Cancels the running process and immediately restarts it again for the new hire from the first step. All information that was previously entered into Onboarding for this process is retained and no new information is taken from Recruiting.

**Next Step**
All onboarding forms that were previously completed before the restart can be reviewed, updated if necessary, and submitted.

**Restarting a Process from Recruiting**

**Prerequisite**
You must cancel the process in Recruiting before restarting.

*Taleo Recruiting > Candidates*

**Steps**

1. Click the name of the appropriate New Hire.
2. From My Actions, select Cancel Onboarding Process.
4. Check Start Onboarding and optionally, check Update onboarding data with current recruiting data.
5. From the drop-down list, select an available Onboarding process and if required, add comments.
6. Click *Done*.
Working with Steps

The Steps section on the New Hire page lists all the steps in the onboarding process for a new hire. Detailed information regarding the task associated with a step can be obtained on the Task Page. When the task page is displayed for a completed step, any related source is shown with information filled in about the new hire. Additionally, notifications and reminders can be sent from the Task page. See Notifications and Reminders.

Viewing a Task from a Step on the New Hire Page

Steps

1. Access the New Hire page by clicking on the new hire name.
2. Click Step Name.

Terminating a Step

Prerequisite
The user has the appropriate user type and permissions to manage Onboarding processes.

Steps

1. Access the New Hire page by clicking on the new hire name.
2. Click Terminate.
Working with Attached Files

Working with Attached Files

The user with the appropriate user type and permissions can view, print, or locally save completed PDF documents associated with a new hire from the Attached Files section.

The Attached Files section is a list of PDF documents that are associated with a new hire. When a PDF task in the new hire's onboarding process has been completed, it becomes available automatically in the Attached Files section of the New Hire page. Alternatively, PDF files can be uploaded manually.

Once PDF files have been added to the Attached Files section, they can be printed or saved locally individually or in a batch.

Attached Files can also be exported from Onboarding using Taleo Connect Client. Contact your Onboarding administrator for more information.

Attaching Files Manually

Prerequisite

The user must have the permission to view and manage related documents.

Steps

1. Click Add.
   The File-based Document Selector window is displayed.
2. Refine list, if necessary.
3. Check desired document.
4. Click Select.

Result

The PDF document is added to the Attached Files section.

Next Step

The PDF document can be viewed, printed, saved locally, or exported using Taleo Connect Client. Any tokens in the PDF document now display the specific data for the new hire.

Viewing an Attached File

Prerequisite

The user must have the permission to view and manage related documents.

Steps

   Click the name of the PDF file.

Result

Adobe is launched in a new browser window displaying the opened PDF file. Any tokens in the PDF will be displayed with the new hire's information.
Next Step
The user can print or save the PDF file using the Adobe application launched in the web browser.

Deleting an Attached File
Prerequisite
The user must have the permission to view and manage related documents.
Steps
Click Delete.
Result
The Attached File is deleted immediately with no confirmation opportunity.

PDF Batch Printing
Multiple documents for a new hire can be printed at one time.
PDF Batch Printing is a feature that allows an Onboarding WebTop user to select PDF files associated with a new hire process to be printed as a single document in an Adobe application. When PDF Batch Printing is enabled, a check box will appear on each line of the Attached Files list, when Attached Files are viewable for a New Hire Process. Each page will display up to 15 attached files. The number of PDF documents the user can select for batch printing depends on the maximum file size setting for a batch. This setting is determined by the system administrator.
PDF Batch Printing is enabled when it is configured with a value greater than zero. This value is equivalent to the maximum size of a batch. The default maximum batch file size is 10MB. If the maximum size is exceeded by the PDF batch, an error message will be presented to the user. The error message will tell the user that the batch exceeds the limit and will display the size of the batch to be printed.
The selected PDF documents are combined into a single document and sent to an Adobe application, either Acrobat or Acrobat Reader, depending on what is installed and configured on the user's computer. The Onboarding system creates a generic name for each new combined file and opens the Adobe application so the user may print all documents at once. During the Adobe print session, Onboarding remains open for use.
A History record is created with the codes of the document that were sent to Adobe for printing. However, the history record will not show if the printing from Adobe was successful, only that it was created.

Printing a PDF Batch
Prerequisite
Batch PDF Printing must be enabled by Taleo Support.
The user must have the permission to view and manage related documents.
Steps
1. Click the check box of all the PDF documents to print.
2. Click Batch Print.
Result
Adobe is launched and asks whether you would like to open the file, save the file, or cancel the request.
Next Step

The PDF batch file appears, ready for printing, when the file is opened.
New Hires and External Users

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New Hire Portal

A New Hire Portal is a site that allows a new hire to gain information about a company and complete basic Onboarding Tasks assigned to them.

The New Hire Portal is a company-branded website personalized for the new hire. It is used exclusively by a new hire who is going through an onboarding process. Most Taleo Onboarding processes include a welcome email message inviting the new hire to visit the portal. This message includes a link and login credentials to the place where the new hire will access tasks to be completed.

New hires are assigned tasks to complete in order to make their Onboarding process more efficient and effective. A task, such as completing a form may be assigned to gather or confirm information prior to the first day of employment. Additional tasks may be completed after the new hire has started. Onboarding processes can last well into employment, and tasks, such as onboarding evaluations can be assigned after several weeks of employment.

The New Hire Portal also contains any documents and links an organization wants to provide to the new hire.

Password Synchronization between Career Section and the New Hire Portal

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

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

If a new hire's password is reset in the New Hire Portal, it is also reset in Career Section. If a new hire decides to change his or her password in the New Hire Portal, that change will be updated in the Career section.

If a new hire has a password in Career Section and a different password for the New Hire Portal before a zone is upgraded to Feature Pack 11B or later, he or she will start out having the two different passwords. Once the new hire logs in to either the Career Section or the New Hire Portal after the zone is updated to Feature Pack 11B or greater and updates his or her password, the password will then be synchronized.

New Hire Can Receive Passport Invitations on New Hire Portal

New hires can see and open correspondence tasks in the New Hire Portal that contain a URL to partner website for external service request task completion.

When an Onboarding process contains a Passport task that requires the new hire to complete a task, the new hire receives an invitation to access the external service partner website through an email and as a correspondence task on the task list of the New Hire Portal. When the email is sent and the task appears on the new hire's task list, the task status is marked as In Progress.
When the new hire clicks on the correspondence task in the New Hire Portal, the body of the email invitation message is presented. This message will contain the URL needed for partner website access. User authentication can possibly be automatic on the partner when it is accessed through the New Hire Portal correspondence task. Automatic authentication is at the discretion of the partner.

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

External Users

External Users are limited access Taleo Onboarding users involved in completing tasks in a new hire's onboarding process.

External Users carry out specific functions in the Onboarding process. For example, an outside print shop may need to print business cards or an IT Manager may need to facilitate computer setup. These users can be internal or external to your organization and have limited involvement in the Onboarding process. Because of their limited involvement they do not need access to the full Onboarding WebTop. Users with this user type are given login credentials, receive task emails, and access to a streamlined portal displaying only their assigned task page.

When an email is sent to an external user to perform a task, Onboarding marks this task as In Progress. When the external user completes the task, they can login to their portal page, complete the form associated with the task, and confirm the task is complete by submitting the completed form.