

# Oracle

## **Talent Acquisition Cloud Implementing Onboarding (Transitions)**

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**17 (update 17.6)**

## Implementing Onboarding (Transitions)

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# Preface

This preface introduces information sources that can help you use the application and this guide.

## Using Oracle Applications

To find guides for Oracle Applications, go to the Oracle Help Center at <http://docs.oracle.com/>.

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# 1 Onboarding (Transitions) Basic Concepts

## About Taleo Onboarding (Transitions)

Taleo Onboarding (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 Onboarding (Transitions) processes differently:

- Recruiters, hiring managers, and onboarding coordinators access the Onboarding (Transitions) Center where they can execute tasks and monitor the progress of processes.
- Candidates and new employees access the career section to view and execute tasks, access documents and complete forms. Because the Onboarding (Transitions) Tasks tab is an integral part of career sections, internal candidates and employees can access their pre-hire, onboarding, offboarding tasks, etc.
- Participants in processes who only need to view and complete the tasks assigned to them, such as hiring managers and external users, can accomplish both things through a simple portal called the Response Center.
- Onboarding (Transitions) administrators configure processes and tasks through Onboarding (Transitions) Administration.

The Onboarding (Transitions) administrator can create task-based processes to: gather additional information from candidates the 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 by 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 the organization's other career sections.

### Onboarding (Transitions) Center

Recruiters, hiring managers, and onboarding coordinators can be granted access to the Onboarding (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 upon completion of the task.
- Configure a reminder message sent 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 representation of all the steps included in a process.
- Suspend a process; put a process on hold. If a user clicks Suspend for a running process, the Resume button becomes available. If the user clicks Resume, the same steps are enabled again.

- Restart a process that was terminated. The process is restarted from the first step. All active steps/tasks are canceled/terminated and the initial emails and tasks are reassigned.

## Response Center

The Response Center is a simplified user experience suitable for participants such as hiring managers and external users who only need to view and complete the tasks assigned to them.

Participants in an Onboarding (Transitions) process can receive an email that contains a link to a specific task. The recipients click the link and log into the Oracle Taleo system (or is logged in automatically if the organization implemented single sign-on). If they have only the permission to view the Response Center (and not the permission to view the full Onboarding (Transitions) Center page), the page in the Response Center that contains their assigned task is displayed. The task might be a form, for instance. The participants complete the form ensuring that all mandatory fields contain a value, and click "Submit".

As soon as the participants complete the task, the Response Center displays a list of the remaining tasks assigned to them. This view shows the name, due date, candidate or employee name and guidelines of each task that currently has In Progress status. When completed, tasks are no longer displayed in the task list in the Response Center. There are no additional filters to view completed tasks, no section to track overall process progress, no links to revisit recent "destinations".

The SmartOrg administrator is responsible for configuring the user types that include access to the Response Center. Users require the "View and execute my tasks in the Response Center (do not combine with other permissions)" permission. The Response Center is suitable for participants such as hiring managers and external users who do not need to access the Onboarding (Transitions) Center and whose occasional participation in processes is best served by a simple interface.

# Processes in Taleo Onboarding (Transitions)

A process is a series of steps typically performed by multiple stakeholders. All required 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.

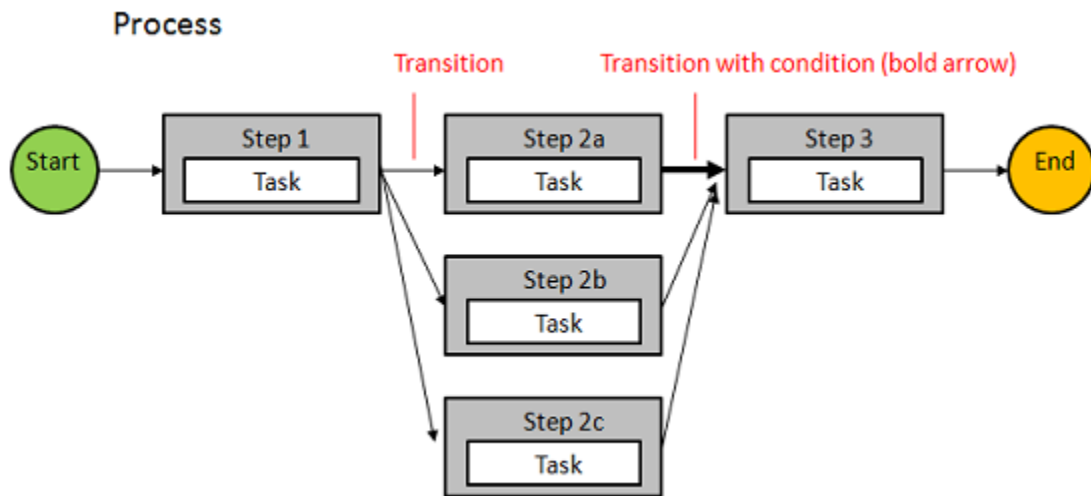
## Components of a process

Processes are created in Onboarding (Transitions) Administration by the Onboarding (Transitions) administrator.

A process contains several components:

- 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 by transitions which define the order of steps.
- A transition can include a condition that governs whether a subsequent step will ever be assigned or not.

The following illustration presents a process and its components.



In the following example, 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; to complete a form to request a computer.



Four types of processes can be created in Onboarding (Transitions):

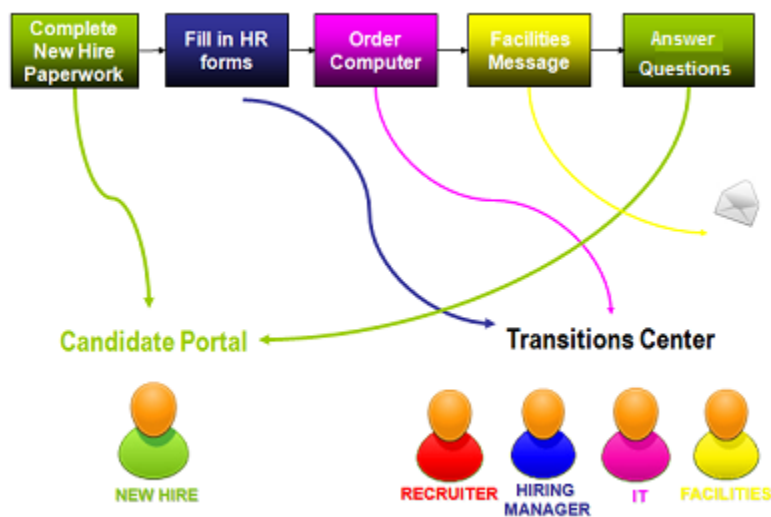
- Pre-Hire: A process used when the organization requires more information from new hires before the latter begin working , or when the organization wants to request paid external third-party services in a configurable, logical flow. A Pre-Hire process can be launched from the Recruiting Center for a candidate on a requisition provided all the right actions and permissions were configured. It can also be launched from Taleo Connect. This type of process is tied to user type permissions. Recruiting Center users require the "Initiate a prehire 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 the organization. A New Hire process can be launched from the Recruiting Center for a candidate on a requisition provided all the right actions and permissions were configured. It can also be launched from Taleo Connect. This type of process is tied to user type permissions. Recruiting Center users require the "Initiate a new hire process for a candidate" permission, for example, to start processes you created of type New Hire.
- E-Offer: Two E-Offer processes are available. The standard E-Offer process enables candidates to accept or refuse offers. The advanced E-Offer process, which requires Taleo Onboarding (Transitions), enables candidates to accept or refuse offers on line through the organization's career sections and provides additional tasks, forms, electronic signatures, etc. While an offer is being extended to a candidate, the advanced E-Offer process can be launched from

the Recruiting Center provided all the right settings and permissions were configured. It can also be launched from Taleo Connect.

- **Offboarding:** A process designed for situations where employees are leaving an organization. An Offboarding process can only be launched from Taleo Connect, not from the Recruiting Center. Before the offboarding process is run using Taleo Connect, the candidate record must exist in the database or it will have to be imported into Taleo Connect. The employee does not have to be matched to a requisition. Creation of a dedicated Onboarding (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 illustration depicts a simple Onboarding (Transitions) process.

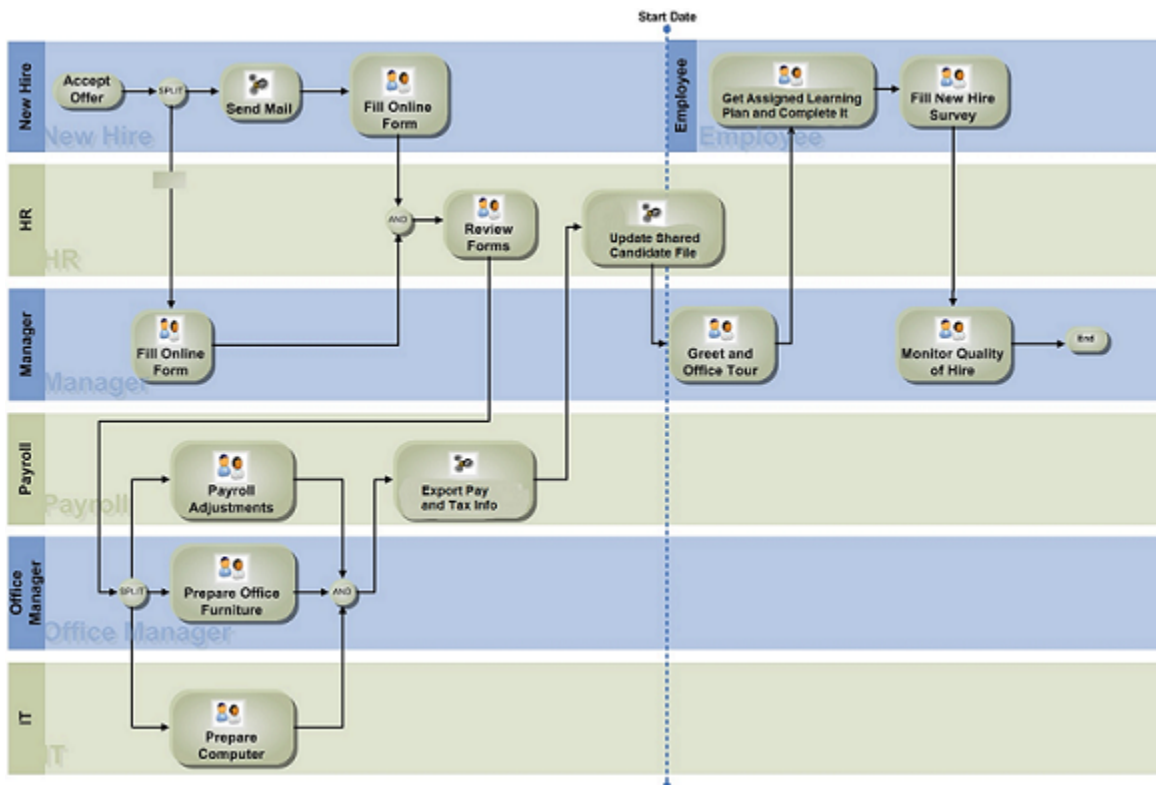


The process assigns tasks to the correct roles in the correct order. The tasks in this example are configured such that each one can only be performed after the previous one has been performed.

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 Onboarding (Transitions) Center to view and execute a task that consists of completing HR forms.
3. The IT representative accesses the Onboarding (Transitions) Center to view and execute a task that 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 illustration depicts a complex Onboarding (Transitions) process.

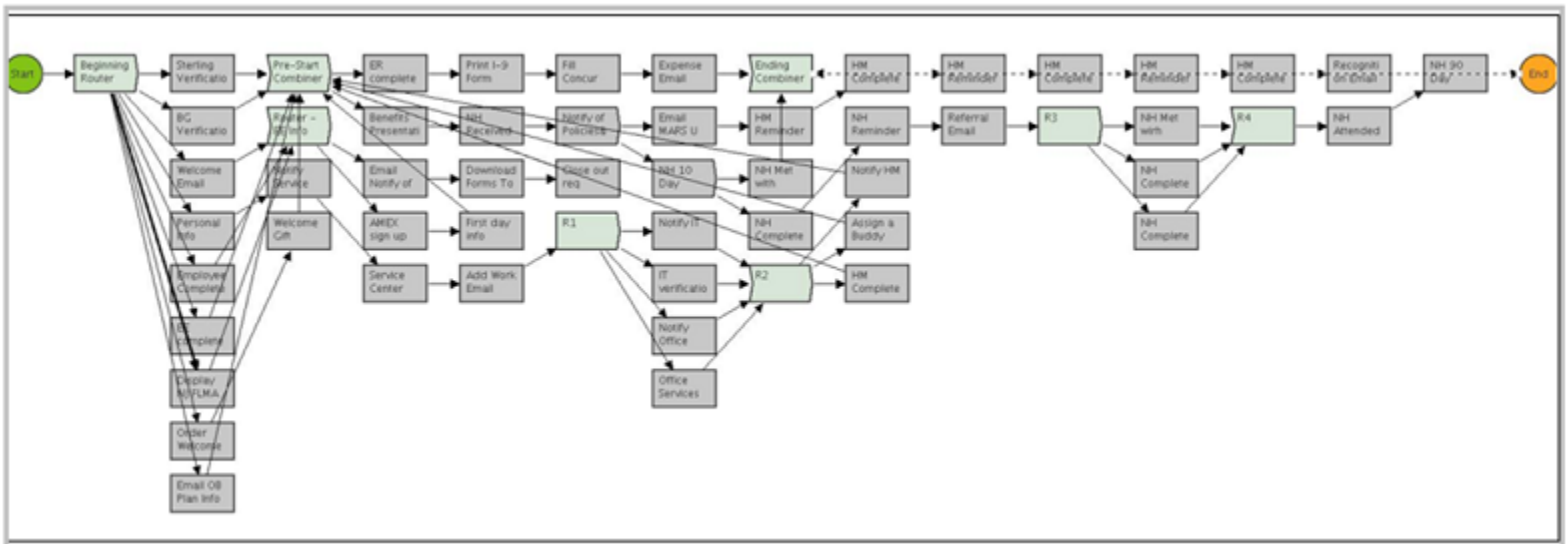


The following list describes the process depicted in the illustration.

1. The new hire accepts the offer. (Not shown in the illustration: the task that communicates the new hire's response to the Recruiting candidate selection workflow (CSW) for this 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 receives orientation and training and completes his/her 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 indicates the new employee's progress in becoming highly effective in the position.

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 an individual or to a role such as hiring manager, new hire or IT department. Each task in the process is completed by performing an action such as filling out an online form, sending an email, reading a PDF document, etc. A condition can be added to a step, which routes the process a certain way (when the condition is true). Conditions allow a single process to accommodate a variety of situations.



## 2 Getting Started

### Login and Product Access

#### Login Procedure

When users open the Oracle Talent Acquisition Cloud (OTAC) solution, the User Sign In page is typically displayed.

On the Sign In page, users can 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 OTAC 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. The user name and password are provided by system administrators. Users can modify their password. If SSO was configured through a consulting engagement (which requires a statement of work (SOW)), the Sign In page is not displayed and the default language that was configured is used.

Once a user's credentials are accepted, the [Welcome Center](#) or table of contents page is displayed. The OTAC products available for use are dependent on which products were purchased by the organization and on the user's user type and permissions. If a user has permission to see only one OTAC product and the Display Welcome Center setting is set to "Yes", the product is displayed directly.

#### Accessing an Oracle Talent Acquisition Cloud Application

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

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. It provides a "one-click" access to Oracle Talent Acquisition Cloud (OTAC) products.

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

- The auxiliary navigation bar contains links to additional resources such as the online help, setup, and the Sign Out link.
- The core navigation bar is a set of tabs that provide direct links to OTAC products. A user might have a tab for any or all of the following products: Performance, Recruiting, Compensation, Oracle Business Intelligence, Learn, and Configuration.
- The Quick Access panel provides an alternative "one-click" access to the same products available in the core navigation bar. It also provides access to modules within products for example, Onboarding (Transitions), Scheduling Center, and to specific content such as a requisitions and candidate files.
- In the central panel, customers can put information of interest to all product users. 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

Taleo Onboarding (Transitions) offers comprehensive help on Onboarding (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.



## Support

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

The 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.

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

Tooltips are provided for buttons, links, icons, and table cell headings. These tooltips are not configurable. The system administrator can, however, create tooltips 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 product.

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

Once users are logged in, they can turn off the Release Notes message by selecting the Don't display this 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.

## Deactivating the Release Notes Message

The release notes message must have been enabled.

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

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 enabled in your organization, the Configuration menu may include these elements.

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

Specific Configuration
SmartOrg
Recruiting
Career Section
Onboarding
Onboarding (Transitions)
Taleo Performance
Evaluation Management
Reporting and Analytics

## Configuration

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

User Type Permission	Location
Access Administration	Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Administration

## Onboarding (Transitions) Administration Menu

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

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

Item	Description
Settings	Configuration of Onboarding (Transitions) settings.
Documents	Configuration of text documents and file-based documents that can be added to content pages and message templates.
Processes and Task Definitions	Configuration of processes and task requests to be sent to any person involved in an Onboarding (Transitions) process.
Content Pages	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.
Correspondence	Configuration of message templates.
User-defined Forms	Configuration of user-defined forms to be filled by various persons involved in a process.
User-defined Fields	Configuration of fields and selections.

Item	Description
Services	Configuration of services provided by partners.
Product Resources	Display of resource ID. Only "Support" users can access this feature.
Synchronization Tool	Copies administrative objects such as user-defined fields, user-defined forms, message templates, tasks, conditions, and processes from Taleo Legacy Onboarding to Taleo Onboarding (Transitions).

## Configuration

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

User Type Permission	Location
Access Administration	Configuration > [SmartOrg] Administration > User Types > Recruiting > Administration

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

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

Element	Description
Home	<ul style="list-style-type: none"> <li>If you have access to multiple Oracle Taleo products and you click Home, the Welcome Center is displayed.</li> <li>If you have access to one product only and you click Home, that product front page is displayed.</li> </ul>
Resources	<p>May include:</p> <ul style="list-style-type: none"> <li>My Setup: Access to personal preferences.</li> <li>Web Support: Access to My Oracle Support.</li> <li>Help: Access to comprehensive help on concepts and tasks.</li> <li>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.</li> <li>Training: Access to online training materials.</li> <li>e-Learning: Access to eLearning materials.</li> </ul>

Element	Description
Talent Grid	Access to Solution Exchange, Knowledge Exchange.
Sign Out	Terminates the session and you are automatically signed out of all Oracle Taleo products.

## Quick Access

The Quick Access panel contains dynamically generated links to areas within Onboarding (Transitions). 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 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.

## 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 Onboarding (Transitions). They are used for navigation when lists are displayed across multiple pages. The maximum number of list items per page is fifteen.

Pagination Icon	Description
	Goes to the first page.

Pageination Icon	Description
	Displays the previous page
	Displays the next page.
	Goes to the last page.

## 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.

History Tracking Column	Description
Date and Time	Date and time when an event occurred.
Event	The event or action performed on an element.
Details	Information regarding the event.
By	The actor, person or system, who performed the event. Additional information about the actor is available for viewing.

## Rich Text Editor

The Rich Text Editor enables users to edit and format text contained in competency definitions, correspondence, requisitions, requisition templates and review forms (definitions, sections and section items). Text formatted with the editor is presented to users in the TE applications with the specific formatting defined in the editor.

The Rich Text Editor contains standard text 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

### Image or Link Insertion

Image or link insertion may only be available via the enlarged view of the editor, accessible when you first click the Enlarged View icon.

### Spell Checker

The spell checker uses the application language, not the content language. The spell checker is available in several languages.

### Internet Explorer 8

Users on Internet Explorer 8 may experience issues with the toolbar icons operating as expected. Users who experience this issue may either try viewing the page in Compatibility Mode, or use the Rich Text Editor in another browser such as another version of Internet Explorer or Firefox.

### Copying and Pasting Text

When copying content from MS Word and pasting it in the Rich Text Editor tool, some reformatting may be required due to the complexities of mapping MS Word formatting to the Rich Text Editor. Capabilities supported by the Rich Text Editor tool are presented in the following table.

Item	Description
Bold	Full support for the bold style.
Italic	Full support for the italic style.
Underline	Full support for the underline style.
Heading styles and fonts	Heading styles as well as fonts used in heading styles are preserved. Fonts not used in heading styles are treated as a default normal style.

Item	Description
Font name (font face)	Font names (font faces) are generally preserved, even those that are not part of the Rich Text Editor's natively supported fonts (Arial, Comic Sans MS, Courier New, Tahoma, Times New Roman, Verdana).
Font size	The Rich Text Editor supports seven sizes. A "best guess" font size conversion is done by the system. Conversion of font sizes may not be accurate in some unspecified cases (depending on browser, MS Word version, etc.).
Text color	Full support for text color.
Text background color	Full support for text background color.
Hyperlinks	Full support for hyperlinks.
Bulleted and numbered lists	<p>Lists should be created using the bullets, numbering and multilevel list features in MS Word. List types that do not conform to the recommended practice are not supported. The bullet type is preserved (bullet or number), but the symbol (circle, square, etc.) or notation (number, roman numerals, alphabetical) will be replaced by the browser's defaults.</p> <p>Numbering continuation between two distinct numbered lists is not supported.</p> <p>The color of the bullet is not preserved.</p> <p>Spacing around list blocks is browser-specific.</p> <p>Indentation level is preserved if made using the indent buttons. Custom indentations made using the MS Word ruler is not supported.</p>
Line spacing	<p>No line spacing information is preserved. All custom line spacing is converted to a single line. The only exceptions are:</p> <ul style="list-style-type: none"> <li>• Headings: the line spacing is browser-specific.</li> <li>• Lists: line spacing is browser-specific.</li> </ul>
Images	Images are not supported and will not be included.
Tables	<p>Table row and column dimensions are preserved.</p> <p>The presence or absence of borders is preserved.</p> <p>Colors are not preserved, default is black. Background and border colors are not preserved.</p> <p>Styles are not preserved, default is solid line.</p> <p>Custom widths are not preserved, default is 1px.</p> <p>Custom table and cell widths are converted to their pixel / percent equivalent. This conversion runs differently, based on the browser being used. This may result in discrepancies from the original table. Merged cells are preserved.</p>

### Recommended Practices for Constructing MS Word Documents to Minimize Reformatting Required When Pasting Content Into the Rich Text Editor

In general, the less complex the MS Word document is, the less reformatting a user will need to do when copying content from MS Word and pasting it in the Rich Text Editor. Below are some recommendations for creating MS Word templates.

Use the more common fonts that come with MS Word, such as:

- Arial



- Times New Roman
- Courier New
- Verdana
- Comic MS Sans

Avoid using images in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using the horizontal ruler to customize indent lines, as this type of formatting is not supported in the Rich Text Editor. Use the standard indent buttons.

Minimize the use of custom line spacing, as this is not supported in the Rich Text Editor.

Avoid using colored bullets in the MS Word template documents, as they are not supported in the Rich Text Editor.

Avoid using custom ruler indentation on bullets, as custom indentation on bullets is not supported in the Rich Text Editor. Use standard indent buttons.

Avoid mixing bullet types in the MS Word template documents, as mixed bullet types are not supported in the Rich Text Editor.

Create lists using the standard bullet types, numbering, multilevel list and indent features available in MS Word.

## 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 item is available are indicated in the Languages field. When creating or editing an item, the user can choose the base language as well as the languages in which an item will be available. The base language of an item 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 item. The base language of an item 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 item, the Earth icon is displayed. Hovering the mouse over the icon displays the languages activated for the item. When only one language is used for an item, the name of the language is displayed. When only one language is used in a company, there is no special indicator.

## Supported Languages

The languages supported for Oracle Talent Acquisition Cloud products as well as specific features are listed below. For details regarding language availability for Oracle Learn Cloud and Oracle Taleo Business Edition, see the documentation for those products.

- Scheduling Center: All listed languages are supported except Portuguese (Portugal).
- Assessment: All listed languages are supported except Indonesian (Bahasa).
- OBIEE: All listed languages are supported except Indonesian (Bahasa), Lithuanian, Malaysian (Malay), Serbian, Slovenian.

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing
Bulgarian	bg	Available	Available			
Chinese (China)	zh_CN	Available	Available	Available	Available	
Chinese (Taiwan)	zh_TW	Available	Available	Available	Available	
Croatian	hr	Available	Available			
Czech	cs	Available	Available		Available	
Danish	da	Available	Available			
Dutch	nl	Available	Available	Available	Available	Only Personal Details extraction, not full resume
English	en	Available	Available	Available	Available	Full resume extraction available
English (U.K.)	en_GB	Available	Available	Available	Available	Full resume extraction available
Finnish	fi	Available	Available		Available	
French (Canada)	fr	Available	Available	Available		Full resume extraction available
French (France)	fr_FR	Available	Available	Available	Available	Full resume extraction available
German	de	Available	Available	Available	Available	Full resume extraction available
Greek	el	Available	Available			
Hungarian	hu	Available	Available		Available	
Italian	it	Available	Available	Available	Available	Only Personal Details

Language	Locale	Recruiting and Onboarding	Performance	Mobile	Sourcing	Resume Parsing extraction, not full resume
Indonesian (Bahasa)*	in	Available	Available	Available		
Japanese	ja	Available	Available	Available	Available	
Korean	ko	Available	Available	Available	Available	
Lithuanian*	lt	Available	Available			
Malaysian (Malay)*	ms	Available	Available			
Norwegian	no	Available	Available		Available	
Polish	pl	Available	Available	Available	Available	
Portuguese (Brazil)	pt_BR	Available	Available	Available	Available	Only Personal Details extraction, not full resume
Portuguese (Portugal)*	pt	Available	Available		Available	
Romanian	ro	Available	Available		Available	
Russian	ru	Available	Available	Available	Available	
Serbian*	sr (sh)	Available	Available			
Slovak	sk	Available	Available		Available	
Slovenian*	sl	Available	Available			
Spanish (Worldwide)	es	Available	Available	Available	Available	Only Personal Details extraction, not full resume
Swedish	sv	Available	Available	Available	Available	
Thai	th	Available	Available		Available	
Turkish	tr	Available	Available		Available	

## 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.

# 3 Central Configuration

## Settings

### Settings

Settings are used to configure features in Oracle Talent Acquisition Cloud (OTAC) products.

There are two types of settings:

- Global settings: Settings that affect multiple OTAC products.
- Product settings: Settings specific to an OTAC product, for example, Recruiting, Career Section, Onboarding (Transitions), Performance, Reporting and Analytics.

Setting	Location
Global settings	Configuration > [Central Configuration] Settings
SmartOrg settings	Configuration > [SmartOrg] Settings
Recruiting settings	Configuration > [Recruiting] Settings
Career Section settings	Configuration > [Career Section] Settings
Onboarding (Transitions) settings	Configuration > [Onboarding (Transitions)] Settings
Performance settings	Configuration > [Performance] Settings
Reporting and Analytics settings	Configuration > [Reporting and Analytics] Settings

Settings are configured by system administrators. A default value is set prior to product delivery. System administrators can modify the value and the change will be applied throughout the product. Certain setting values can be changed by users. In that case, the value set by the user will override the value set by the system administrator.

A setting has one of the following security levels: Public, Protected, Private.

Security Level	Description
Public	System administrators can view and change the setting.
Protected	System administrators can view the setting, but changes can only be performed by Oracle.
Private	System administrators cannot view or change the setting. Only Oracle can view and change the setting.

## Candidate Information Integrity While Editing

The system prevents people from making changes to candidate information while someone else is editing it.

It is common to have situations where more than one person has the permissions required to edit candidate files. These people might be candidates, Onboarding (Transitions) Center users, Recruiting Center users. The system prevents someone (the candidate, an Onboarding (Transitions) Center or a Recruiting Center user) from editing a candidate file while someone else is making changes. After the changes are saved, the file becomes unavailable automatically and anyone who has the required permissions can edit the file.

If a candidate attempts to edit his/her own file while a Recruiting Center or Onboarding (Transitions) Center user is editing it, a message is displayed in the career section, inviting the candidate to return later to make changes.

If a Recruiting Center or Onboarding (Transitions) Center user attempts to edit a candidate file while the candidate or another Recruiting Center or Onboarding (Transitions) Center user is editing it, the message displayed to the user includes the name of the person currently editing the candidate file.

While a candidate file is being edited by someone, other people who have the required permissions can still access read-only information related to the file.

If someone is editing candidate information and the Booker Release Interval setting value is exceeded, the candidate file becomes available for editing automatically. In other words, if the individual ceases to actively edit candidate information and the elapsed time exceeds the Booker Release Interval setting value, the candidate file becomes available and someone else can then edit it.

### Configuration

Setting	Location
Booker Release Interval	Configuration > (General Configuration) Settings

## Onboarding (Transitions) Settings

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

Onboarding (Transitions) Setting	Description	Security Level	Default Value
Antivirus Timeout	Maximum time taken by the antivirus to perform a virus check.	Private	5000 Milliseconds
Antivirus Zone URL	URL address of the virus checker.	Private	

Onboarding (Transitions) Setting	Description	Security Level	Default Value
Automatically Delete Old Onboarding (Transitions) Processes	<p>Automatically executes a permanent deletion of Onboarding (Transitions) processes completed or canceled at least X days ago. All tasks in these processes will also be deleted. Ongoing processes will be ignored and excluded from permanent, automatic deletions. See <a href="#">Automatically Deleting Old Processes</a>.</p> <p>The automatic delete process will run twice per month (unless customers change the value to 0).</p> <p>Setting is enabled by default for new and existing customers. For new customers, the default value is set to 2 years (730 days). For existing customers, the default value is set to 5 years (1825 days). System administrators can modify the default value or disable the automatic deletion completely by changing the value to 0.</p>	Public	730
Contact Information	<p>Indicates which contact to display in Onboarding (Transitions). The "contact" for a process is the person who is available to answer questions for candidates/new hires. The contact's phone number and email address can be configured to display in content pages, message templates, user-defined forms and PDFs.</p> <p>There are 5 choices regarding whose information can be displayed: Recruiter, Recruiter Assistant, Hiring Manager, Hiring Manager Assistant, and Process Owner. Remember that the Process Owner might 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.</p>	Public	Process Owner
Details Link for Processes	<p>Enables the Details link in the General Information section of the Process page (which is available in the Onboarding (Transitions) Center). Enter the code of the desired form in the Value field.</p>	Public	
Email Address for Onboarding (Transitions) Process	<p>Before an Onboarding (Transitions) process can be started for a candidate/employee, an email address must be associated with the candidate/employee in the database. This is the case even if the process is configured such that no notifications or reminders are sent to the individual. If no value is provided for this setting, no Onboarding (Transitions) process can be started for candidates for whom there is no email address. If a value is provided for this setting, the value is reproduced in the "Personal Email Address" and "Correspondence Email" fields in the SmartOrg user account of every candidate who lacks an email address. The value is not</p>		

Onboarding (Transitions) Setting	Description	Security Level	Default Value
	reproduced where candidates already have an SmartOrg user account with an email address). See: <a href="#">Launching an Onboarding (Transitions) Process for Candidates/ Employees with no Email Address</a> for a complete explanation.		
eSignature Timestamp Display Property	Controls whether all E-Signature dates are displayed with the exact time that the signature was captured. The date is always formatted using a default short date style. The time is displayed using Greenwich Mean Time (GMT) timezone format. If the 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 the organization is localized or consolidated in one time zone, it might be more suitable 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 an 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 to an assignee or recipient.	Public	
Image in PIT Snapshot	Determine whether the image information need to be included in the PIT snapshot.	Public	No
Learn Integration URL	This is the URL the new hires/employees will use to access their learning page. When the new hires/employees click the E-Learning variable on their assigned user-defined form, they are sent to the destination specified in this setting to access their learning program. For details, see <a href="#">Onboarding (Transitions) and Learn</a> .	Private	
Mail Server	Mail server name.	Private	
Maximum Batch Print Size	Batch printing of PDF documents enables Taleo Onboarding (Transitions) users to select PDF files associated with a candidate or employee involved in a process and print them as a single document. This setting enables administrators to set the maximum size (in megabytes) of the combined document. The maximum size suggested is 15 megabytes.	Private	0
Maximum Size for File-based Documents	Onboarding (Transitions) administrators can set the maximum size of file-based documents that they can upload to the system. The default value is also the largest possible value: 10 Mb. The value can be set from 1 Kb up to 10 Mb. This setting is independent of the "Attached File Maximum Size" setting ([General Configuration] Settings) that applies to other Oracle Taleo products.	Protected	10 (Mb)



Onboarding (Transitions) Setting	Description	Security Level	Default Value
Onboarding (Transitions) Single Image Maximum Size	Determines the maximum size (in kilobytes) of any image in Onboarding (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 Onboarding (Transitions) administrator. These small hosted images can be used in content pages, user-defined forms, and message templates.	Protected	20
Onboarding (Transitions) Total Image Size	Determines the maximum size (in megabytes) of the sum of all images in Onboarding (Transitions). There is no limit on the number of images hosted in a zone; this setting governs the total size of all the images taken together.	Protected	25
Working Days	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 Onboarding (Transitions) and Taleo Performance. Updates to the setting in one product will also update the setting in the other product. See <a href="#">Creating a Task Reminder</a> .	Public	Monday, Tuesday, Wednesday, Thursday, Friday.

## General Configuration Settings

The following configuration settings apply to multiple Taleo Enterprise products including Taleo Onboarding (Transitions).

Other Settings			
Setting Name	Description	Security Level	Default Value
Attached File Maximum Number	The maximum number of file attachments per entity record allowed.	Protected	10
Attached File Maximum Size	The maximum size of a file attachment (in bytes) allowed.	Protected	1048576

## Configuring a Setting

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

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.

## Restoring the Default Value of a Setting

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

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.

The default value of the setting is restored and the change is reflected in the product.

## User Types and Permissions

### Onboarding (Transitions) Permissions

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

Many Onboarding (Transitions) permissions are located at Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Onboarding (Transitions).

Category	Onboarding (Transitions) Permission	Description
Administration	View public product settings	Enables users to view all Protected and Public settings in Onboarding (Transitions) Administration.
Administration	Update Human Resources Product Settings	Permits users to update all Public settings in Onboarding (Transitions) Administration.

Category	Onboarding (Transitions) Permission	Description
Administration	View protected product settings	Enables users to view protected product settings.
Administration	Update system product settings	Enables users to modify system product settings.
Administration	Manage user-defined forms to display and collect data	Enables the <i>User-defined Forms</i> feature in Onboarding (Transitions) Administration. Users can create, edit and disable user-defined forms.
Administration	Manage message templates for email correspondence and reminders	Enables the <i>Message Templates</i> feature in Onboarding (Transitions) Administration. Users can create, edit and disable message templates sent to recipients.
Administration	Manage text documents and paragraphs for use in content pages and message templates	Enables the <i>Documents</i> feature in Onboarding (Transitions) Administration. Users can create, edit and disable text documents and PDF documents.
Administration	Manage user-defined fields, e-signatures, and user-defined reporting	Enables the <i>User-defined Fields</i> and <i>User-defined Selections</i> features in Onboarding (Transitions) Administration. Users can create, edit and disable user-defined fields and selections. Most user-defined fields and selections used in Onboarding (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.
Administration	Manage task definitions, related sources, content pages, and images	Enables the <i>Task Definitions</i> feature in Onboarding (Transitions) Administration. Users can create, edit and disable Onboarding (Transitions) tasks. The Content Pages section (and corresponding links) are displayed in Onboarding (Transitions) Administration.
Administration	Manage Onboarding (Transitions) processes of all types	Enables the <i>Processes</i> feature in Onboarding (Transitions) Administration. Users can create, edit and disable Onboarding (Transitions) processes. This permission also enables users to create and update steps within processes.
Administration	Manage services that are provided by partners	Controls whether the Onboarding (Transitions) administrator can view the section for controlling OVI services that have been enabled for the zone.
New Hire	Send email correspondence on demand	Permits Onboarding (Transitions) Center users to send ad hoc correspondences at any time from the Process page.
New Hire	View processes I own or supervise, or that have been shared with me	Permits Onboarding (Transitions) Center users to view processes for which they are the <i>process owner</i> or one of the <i>supervisors</i> .
New Hire	View, suspend, and restart processes that I own or supervise or share	Enables Onboarding (Transitions) Center users to suspend and resume processes for which they are the process owner or that they shared in Onboarding (Transitions) and for which they are one of the supervisors.
New Hire	View, suspend, restart and share processes that I own or supervise or share	Permits Onboarding (Transitions) Center users to explicitly allow another user to view a new hire's process temporarily.
New Hire	View all processes	Permits Onboarding (Transitions) Center users to view processes for new hires.
New Hire	View, suspend, and restart all processes	Enables Onboarding (Transitions) Center users to suspend, restart or cancel processes for new hires,

Category	Onboarding (Transitions) Permission	Description
		and to change the assigned users, the hiring manager, recruiters or assistants while the process is running.
New Hire	View, suspend, restart, and share all processes	In addition to the previous permission, permits Onboarding (Transitions) Center users to share processes in Onboarding (Transitions) and to revoke sharing.
New Hire	View, add, and print attached files (PDFs)	Enables Onboarding (Transitions) Center users to view the System Documents section on the Process page. If this permission is enabled, PDF documents associated with the new hire via the Open PDF task are displayed. Also, with this permission, Onboarding (Transitions) Center users can add PDF documents, from the document library, to the System Documents section of the new hire's running process.
New Hire	Delete processes that are completed or canceled	Administrators can "purge" or delete candidates/new hires from the Taleo system manually or through an automated action provided the candidates/new hires are not involved in any process. This permission enables Onboarding (Transitions) Center users to delete information about the process status, completion, tasks, task completion dates, etc. All the personal information about the candidate/new hire is unaffected.
Tasks	Manage tasks assigned to me	Permits Onboarding (Transitions) Center users to view tasks in the Onboarding (Transitions) Center for which they are an assignee, and tasks they created for themselves. Note that there is no specific permission such as "Execute tasks assigned to me". If a task is displayed and assigned to an Onboarding (Transitions) Center user, the person can execute it.
Tasks	View and execute tasks assigned to me	When this permission is granted, Onboarding (Transitions) Center users cannot modify task details such as its due date but they can execute the task. Note that this permission is similar to the "View and execute all tasks assigned to anyone" permission except that it applies only to tasks assigned to the user.
Tasks	View, edit, and execute tasks assigned to me	Permits Onboarding (Transitions) Center users to edit tasks in the Onboarding (Transitions) Center for which they are an assignee, and tasks they created for themselves. Enables the users to change the due date and priority of tasks that they can access. Enables Onboarding (Transitions) Center users to "retry" a task that has Error or Canceled status.
Tasks	Create tasks assigned to me, and view, edit, and execute tasks assigned to me	Enables Onboarding (Transitions) Center users to change the due date and priority of assigned tasks, and to execute their own tasks if they can view them. Also enables Onboarding (Transitions) Center users to create tasks they want to assign to themselves.  Enables Onboarding (Transitions) Center users to "retry" a task that has Error or Canceled status.
Tasks	Reassign tasks assigned to me	Enables Onboarding (Transitions) Center users to reassign tasks in Onboarding (Transitions) that they have created for themselves.

Category	Onboarding (Transitions) Permission	Description
Tasks	View related sources of tasks assigned to me, to see their forms and documents	Permits Onboarding (Transitions) Center users viewing a new hire's steps and tasks to view the forms and PDFs that are part of the task assigned to them. This permission is useful for viewing the data that was entered in the fields by the task assignees. It also enables the viewer to see all the OVI request information and the More Details link to the partner's web site for tasks that are of External Service Request type.
Tasks	Manage tasks in processes for which I am the supervisor (same capabilities as the owner)	
Tasks	View all tasks assigned to anyone, and execute tasks assigned to me	Permits Onboarding (Transitions) Center users to view all tasks in the Onboarding (Transitions) Center regardless of a task's status and assignees.
Tasks	View and edit all tasks assigned to anyone, and execute tasks assigned to me	Enables Onboarding (Transitions) Center users to edit all tasks in the Onboarding (Transitions) Center, such as changing the title or due-date of the assigned task. This permission is unrelated to executing a task because a task's assignee(s) can always execute the task. Enables Onboarding (Transitions) Center users to "retry" a task that has Error or Canceled status.
Tasks	View, edit, and reassign all tasks assigned to anyone, and execute tasks assigned to me	Enables Onboarding (Transitions) Center users to reassign all tasks in the Onboarding (Transitions) Center to other users who will complete them. Users can also reassign tasks for which they were not the original assignees to themselves. Enables Onboarding (Transitions) Center users to "retry" a task that has Error or Canceled status.
Tasks	View related sources (forms, email correspondence, and documents) related to all tasks	Permits Onboarding (Transitions) Center users viewing the new hire's steps and tasks to view the forms and PDF documents that are part of the task. This permission is useful for viewing the data that was entered in the fields by the task assignees.
Tasks	View and execute my tasks in the Response Center (do not combine with other permissions)	Provides external users with a simplified view to access their assigned tasks (an alternative to the Onboarding (Transitions) Center). The Response Center displays only the users' open tasks. When completed, tasks are no longer displayed in the task list in the Response Center.  Email messages do not require a specific variable to direct users to the Response Center. The "{TransitionsURLs_Para.TaskAccessURL}" field brings each assignee to the appropriate place where he/she can complete the assigned task. This means that a single message template can be used for a task assigned to different people: a candidate or a new hire, a Response Center user and an Onboarding (Transitions) Center user. Clicking the link displays the right page and the right task to each type of user. Alternatively, a specific message template can contain the "{TransitionsURLs_Para.ResponseCenterURL}" field to ensure that people are directed to the Response Center only. The people must have

Category	Onboarding (Transitions) Permission	Description
		Response Center permissions. (See Message Template Key Concepts.)
		Because Response Center users have simple needs, other Onboarding (Transitions) permissions must not be selected in addition to the "View and execute my tasks in the Response Center (do not combine with other permissions)" permission. Likewise, the Response Center permission must not be selected for other Onboarding (Transitions) Center users who have other more substantial needs and consequently other Onboarding (Transitions) permissions. If the "View and execute my tasks in the Response Center (do not combine with other permissions)" permission is selected along with other Onboarding (Transitions) permissions, this can cause a variety of problems for those users.

Onboarding (Transitions)-related permissions for the Recruiting Center are located at Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Other.

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

An Onboarding (Transitions)-related permission for offers is located at Configuration > [SmartOrg] Administration > [Users] User Types > Recruiting > Offers.

Category	Onboarding (Transitions) Permission	Description
General	Extend offers electronically	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.

An Onboarding (Transitions)-related permission for integration is located at Configuration > [SmartOrg] Administration > [Users] User Types > Integration > Onboarding (Transitions).

Category	Onboarding (Transitions) Permission	Description
	Allow this user type to perform integration tasks	Enables users to perform integration tasks related to Onboarding (Transitions). This permission should only be granted to people who use Taleo Connect. It is a permission that can produce unexpected results when it is granted to other users. Take the case of users who have permissions required to view only their processes and tasks. If the users are also granted the "Allow this user type to perform integration tasks" permission, they will be able to view everyone's processes and tasks.

## Organizations, Locations, Job Fields

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

Taleo designed a data structure that enables each customer to customize Taleo products such that they reflect how the customer does business. Taleo defines each organization (customer) as a combination of three main elements: Organizations, Locations, Job Fields (OLF). OLF is also referred to 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.

## Configuration

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

User Type Permission	Location
Manage foundation data	Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Foundation Data

## Operation Modes

### Operation Mode

The operation mode 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 (includes Remote Manager Experience)
- Performance
- Career Section
- New Hire Portal



- Onboarding (Transitions)

For the above products, except the New Hire Portal, system administrators know the number of users using both the product as well as the administrative area related to the product. Note that candidates/new hires who are doing their Onboarding (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. 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 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.

In maintenance mode, system administrators can:

- Delete departments, both via Integration and SmartOrg.
- Delete positions, both via Integration and SmartOrg.
- Import job positions via Integration.
- Modify the Organization-Location-Job Field structure, both via Integration and SmartOrg.
- Modify levels in the Organization-Location-Job Field structure, both via Integration and SmartOrg.
- Edit Organization, Location, and Job Field elements (Element Management), both via Integration and SmartOrg.

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

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

**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.

## Modifying the Operation Mode

The Manage Application Mode user type permission is required.

### Configuration > Operation Modes

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.

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 product.

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

Once users are logged in, they can turn off the Release Notes message by selecting the Don't display this 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.

## 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. *Configuring configuration profiles to display release notes information when users access the application.*

No default release notes message is provided with the product. 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

The Edit release notes user type permission is required.

### Configuration > Release Notes

1. In the Release Notes page, click Edit.
2. In the Release Notes Editor page, write the message. Apply formatting to the text to organize information, facilitate readability and draw attention to particular passages.  
For details on the use of the formatting options, see [Rich Text Editor](#).
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 - Permissions and Settings

The following permissions and settings are used for the release notes functionality.

User Type Permission	Description	Location
Edit release notes	Allows users to edit the release notes message content in the Central Configuration menu.	Configuration > [SmartOrg] Administration > [Users] User Types > Configuration > Foundation Data

Setting	Description	Default Value	Location
Release Notes	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 be set to Yes in the user's configuration profile.	No	Configuration > [SmartOrg] Administration > [Users] Configuration Profiles

## Configuring Configuration Profiles to Display Release Notes Information

The Release Notes message must be created.

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

1. Click a configuration profile.

2. Click the Release Notes setting.
3. Click Edit.
4. Select Yes.
5. Click Save.

## Release Notes - Other Configuration Tasks

### Editing the Release Notes Message

The Edit release notes user type permission is required.

#### **Configuration > Release Notes**

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

### Setting the Release Notes Message Validity Period

The Edit release notes user type permission is required.

#### **Configuration > Release Notes**

1. Click Edit.
2. Set the validity period with the Calendar icon.
3. Click Save.

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

The Edit release notes user type permission is required.

#### **Configuration > Release Notes**

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

## Hiding the Release Notes Message

The Edit release notes user type permission is required.

### Configuration > Release Notes

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

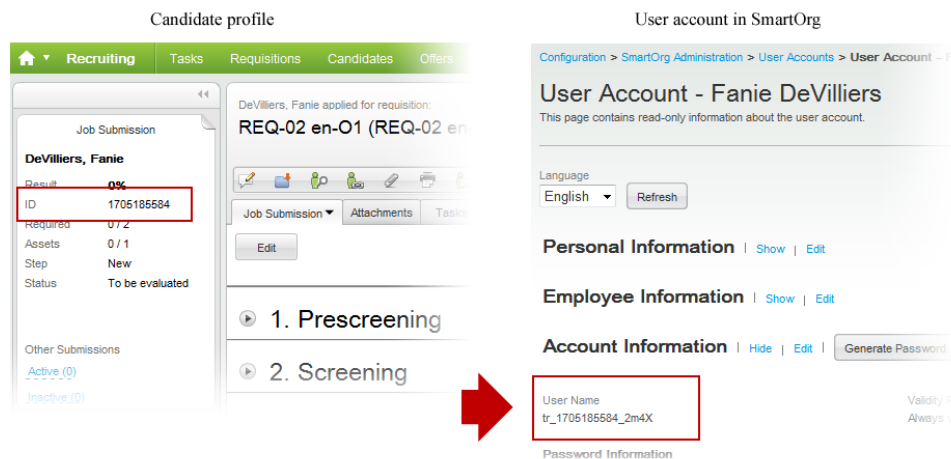
## SmartOrg User Accounts and Transitions

### SmartOrg User Account Creation When Process Started

Starting an Onboarding (Transitions) process for the first time for a candidate creates an associated user account in SmartOrg.

It is important to note that the first time an Onboarding (Transitions) process is started for a candidate, a SmartOrg user account of type Onboarding (Transitions) is created automatically unless the candidate already has an employee and/or user account. This means that SmartOrg administrators as well as Recruiting Center users can access the associated candidate information. A candidate who has an Onboarding (Transitions)-type SmartOrg account is not granted automatically 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 his/her candidate credentials as before and completes Onboarding (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 is linked to the SmartOrg user account (i.e. some fields are shared).



If additional Onboarding (Transitions) processes are started for the candidate in the future, the original SmartOrg account is used; no additional ones are created. An Onboarding (Transitions)-type SmartOrg user account can be transformed into an employee of the organization if the administrator assigns OLF Organization or Location. This can also be done through integration. An Onboarding (Transitions)-type SmartOrg user account can be transformed into a user of the Taleo system if the administrator grants user types with permissions required to use Taleo products. This can also be done through integration. When the user obtains an Employee or Operator user account, the individual receives notification by email (provided such notification was configured). Such users cease to be Onboarding (Transitions)-type users automatically and their user account is no longer displayed if the Onboarding (Transitions) filter is used in User Accounts (see the following image). These changes do not affect the individual's ability to view and complete their Onboarding (Transitions) tasks on the career section's Tasks tab.

An Onboarding (Transitions) user account is not created if a process is started for candidates who already have a SmartOrg user account (Onboarding (Transitions), Employee or Operator). Here are three examples:

- Former employees who therefore have an existing Employee or Operator user account in SmartOrg and who are candidates hoping to return to the organization.
- A Taleo Connect HRMS feed can automatically create an association between candidates and Operator or Employee user accounts.
- When Performance Management users of type Employee log in, they can be asked to confirm their existing candidate account.

Onboarding (Transitions) user accounts cannot be created manually via SmartOrg or be imported into SmartOrg via Taleo Connect. Existing Employee user accounts and Operator user accounts cannot be transformed into Onboarding (Transitions) user accounts.

Because starting an Onboarding (Transitions) process for the first time for a candidate results in the creation of an Onboarding (Transitions)-type user 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.

### SmartOrg Onboarding (Transitions) User Account Administration

SmartOrg administrators can select the Onboarding (Transitions) user type on the User Accounts page in SmartOrg. Onboarding (Transitions)-type users can be searched for, identified, and managed like other types of users (Operator and Employee).

## Impact in SmartOrg When There Are Duplicate Candidate Files and Onboarding (Transitions) Process is Started

Before starting an Onboarding (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 an Onboarding (Transitions) process.

Starting an Onboarding (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 an Onboarding (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 an Onboarding (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 Onboarding (Transitions) process. (Please see Automatically Deleting Old 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 an Onboarding (Transitions) process.

## Single Sign-On

### Single Sign-On

Single Sign-On (SSO) enables users to log into Oracle Talent Acquisition Cloud (OTAC) applications using their corporate credentials.

In an SSO environment, users are authenticated by an Identity Provider (e.g. OIF, ADFS) that is maintained by their corporate IT department. Both employees and candidates who have access to internal career sections can use SSO to access Oracle Talent Acquisition Cloud (OTAC) products. SSO cannot be used for external career sections.

Customers who want to use SSO can implement it themselves through the SSO configuration interface. Customers perform easy configuration steps to enable and support one or more identity providers. The feature supports two flows to authenticate users:

- Users are authenticated through their company portal, then they access OTAC products through the portal (Identity Provider initiated flow).
- Users access the OTAC product URL directly and are redirected to their identity provider for authentication (Service Provider initiated flow).

Customers can configure the authentication request flows, and exit and error URLs for seamless integration with their environment.

SSO setup requires:

- An Identity Provider with SAML 2.0 support.
- A user/candidate synchronization feed between the Identity Provider and OTAC. This can be developed using Taleo Connect Client (TCC).
- A corporate portal (optional).

Information technology professionals (system administrators, implementation consultants, etc.) who are planning on integrating Oracle Talent Acquisition Cloud (OTAC) with their corporate Single Sign-On (SSO) system should be familiar with:

- Oracle Talent Acquisition Cloud (OTAC)
- SAML 2.0 based SSO
- SSO Identity Provider (IdP) setup
- Taleo Connect Client (TCC)

SSO is only available for new customers or current customers who do not have an SSO setup in their zone. The SSO configuration screens are unavailable to customers who already have an SSO setup in place.

## Identity Provider (IdP) and Service Provider

Single Sign-On (SSO) in Oracle Talent Acquisition Cloud (OTAC) is accomplished through the use of SAML (version 2.0). SAML provides a mechanism to exchange authentication and authorization data between two trusting entities.

In a generic SAML context, the entities are:

- The Asserting party (or SAML authority)
- The Relying party (or SAML requester)

In an SSO context, the Asserting party is the Identity Provider (IdP) and the Relying party is the Service Provider (SP). The Identity Provider is the customer's SAML federation server (OIF, ADFS etc.) and the Service Provider is the Oracle Talent Acquisition Cloud (OTAC) application.

A trust relationship is established between the Identity Provider and the Service Provider. The Service Provider trusts the information received from the Identity Provider. The information sent is called the SAML assertion. It contains the identity of the user that has been authenticated by the IdP. Upon receiving the assertion, Oracle grants the appropriate level of access to resources, based on the identity of the user.

## Metadata File

SSO is set up by exchanging metadata files between the Identity Provider (IdP) and the Service Provider (SP).



The SAML 2.0 metadata file format is supported. This metadata file contains information about each SSO entity (URLs, protocols supported, certificates etc.). The IdP's metadata file can be imported into the SSO user interface. If any changes are made to the IdP, the metadata file must be re-imported.

Also, metadata files can be generated for the Taleo Service Providers (SmartOrg and Career Section). These files must be imported into the IdP. A separate metadata file will be generated for each SP-IdP combination. For example, if the customer has 2 IdPs, then up to 4 metadata files will be generated (2 for SmartOrg and 2 for Career section).

For an example of an Identity Provider metadata file, see [Identity Provider Metadata Example](#).

For an example of a SmartOrg metadata file, see [SmartOrg Metadata Example](#).

For an example of a career section Service Provider metadata file, see [Career Section Metadata Example](#).

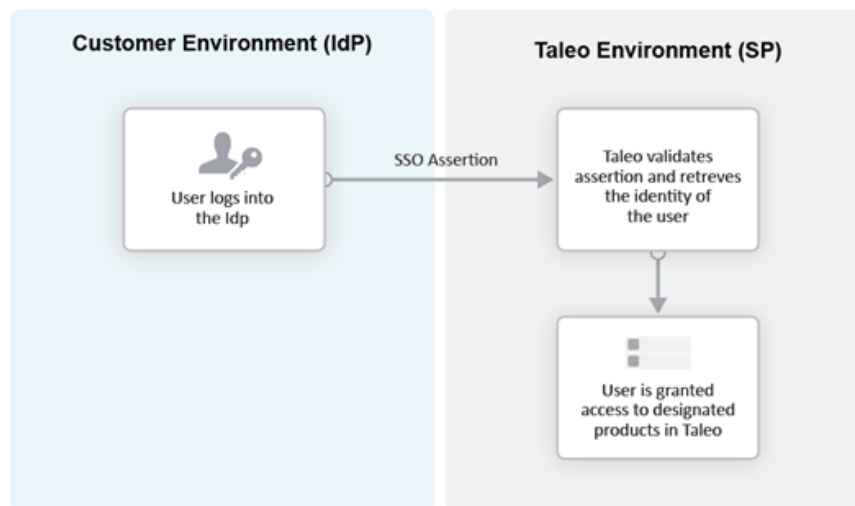
## Single Sign-On Flows

There are two types of Single Sign-On flows: Identity Provider (IdP)-initiated and Service Provider (SP)-initiated.

### Identity Provider (IdP)-initiated Flow

In the IdP-initiated flow, the user logs in first to the IdP. The person then requests access to the Service Provider (SmartOrg or career section) – often through an SSO Portal. The Identity Provider will initiate an SSO connection to the Oracle Talent Acquisition Cloud (OTAC) product and provide an assertion. The assertion contains the identity, attributes and entitlements of the requesting user. Oracle will grant access to the user based on the assertion information.

The image represents an Identity Provider (IdP)-initiated flow.



The IdP-initiated flow is the most commonly used configuration.

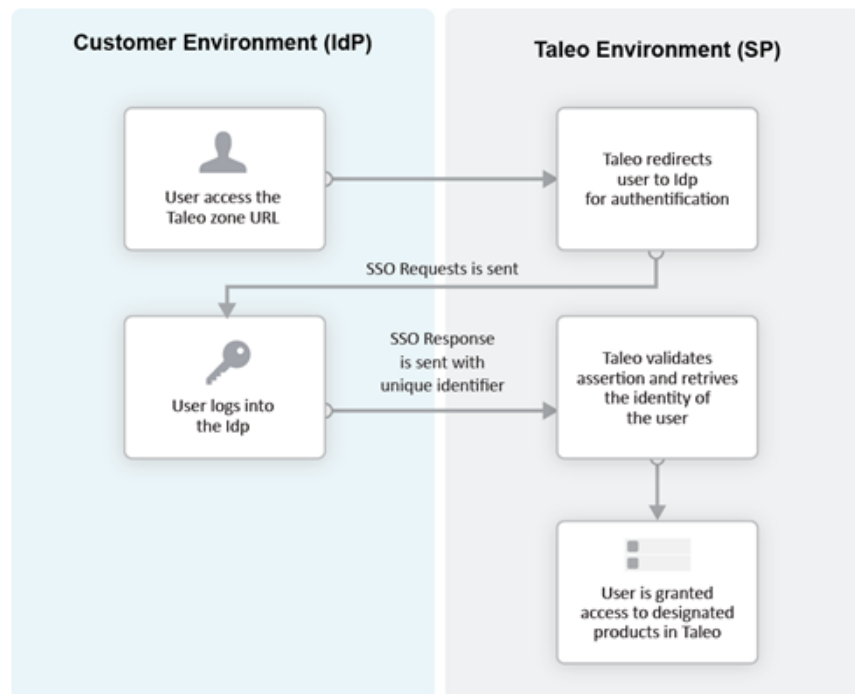
When SSO is configured, the IdP-initiated flow is activated by default.

Multiple IdPs are supported for IdP-initiated flows. Each IdP can redirect users to the Service Provider (SmartOrg and career section). The Service Provider accepts request from each IdP as long as the IdP is properly defined.

### Service Provider (SP)-initiated Flow

In the Service Provider-initiated flow, the user accesses the Oracle Talent Acquisition Cloud (OTAC) product (SP) directly. For example, this can be done by typing the URL of the zone in the browser. The Service Provider then redirects the user to the Identity Provider. After authenticating the user, the IdP generates and sends an assertion back to the SP. The assertion contains the identity, attributes and entitlements of the requesting user. Oracle grants access to the user based on the assertion information.

The Challenge URL setting, depicted in the following illustration, is used to set up a Service Provider-initiated flow.

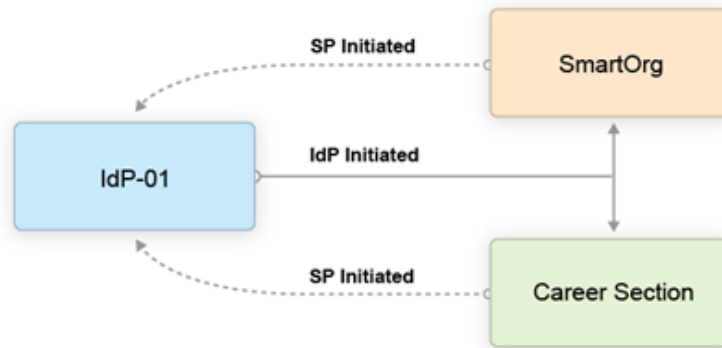


The customer can choose to optionally activate SP-initiated flow as well.

For SP-initiated flow from SmartOrg, only one IdP can be configured. All SP-initiated requests from SmartOrg are redirected to this IdP.

For SP-initiated flow from career sections, by default all requests are redirected to a single default IdP. However, individual career sections can be set up to redirect requests to a different IdP.

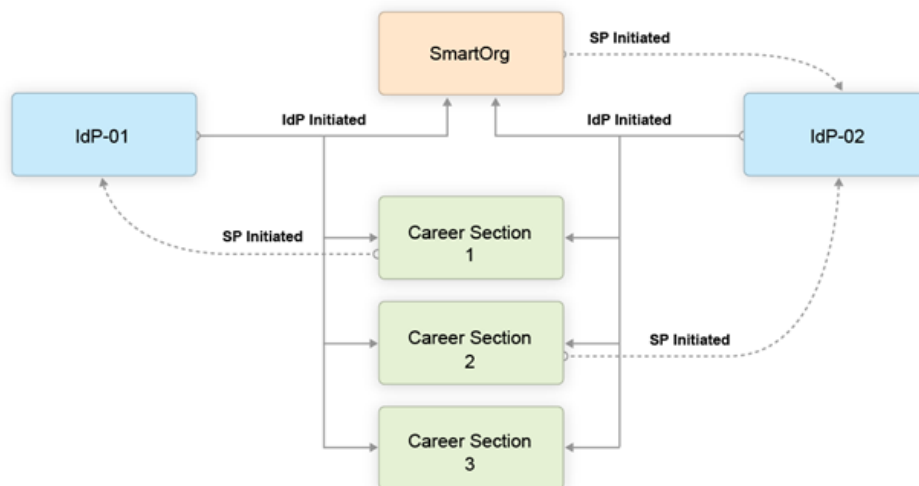
The following illustration depicts a single Identity Provider, SmartOrg and single career section:



- Users can access both SmartOrg and the career section from the Idp (IdP-initiated flows).
- When users access SmartOrg directly, they are redirected to the IdP for authentication (SP-initiated flows).
- When users access the career section directly, they are redirected to the IdP for authentication (SP-initiated flows).

 **Note:** This is the most commonly used configuration.

The following illustration depicts an SSO setup with two Identity Providers, SmartOrg and three career sections:



- Users can access both SmartOrg and each career section from the Idp-01 (IdP-initiated flows).
- Users can access both SmartOrg and each career section from the Idp-02 (IdP-initiated flows).
- When users access SmartOrg directly, they are redirected to the IdP-02 for authentication (SP-initiated flows).
- When users access career section 1 directly, they are redirected to the IdP-01 for authentication (SP-initiated flows).
- When users access career section 2 directly, they are redirected to the IdP-02 for authentication (SP-initiated flows).

- When users access career section 3 directly, they are not redirected to any IdPs. Instead, they are prompted for their credentials.

 **Note:** This configuration is very rare.

## Challenge, Error and Exit URLs

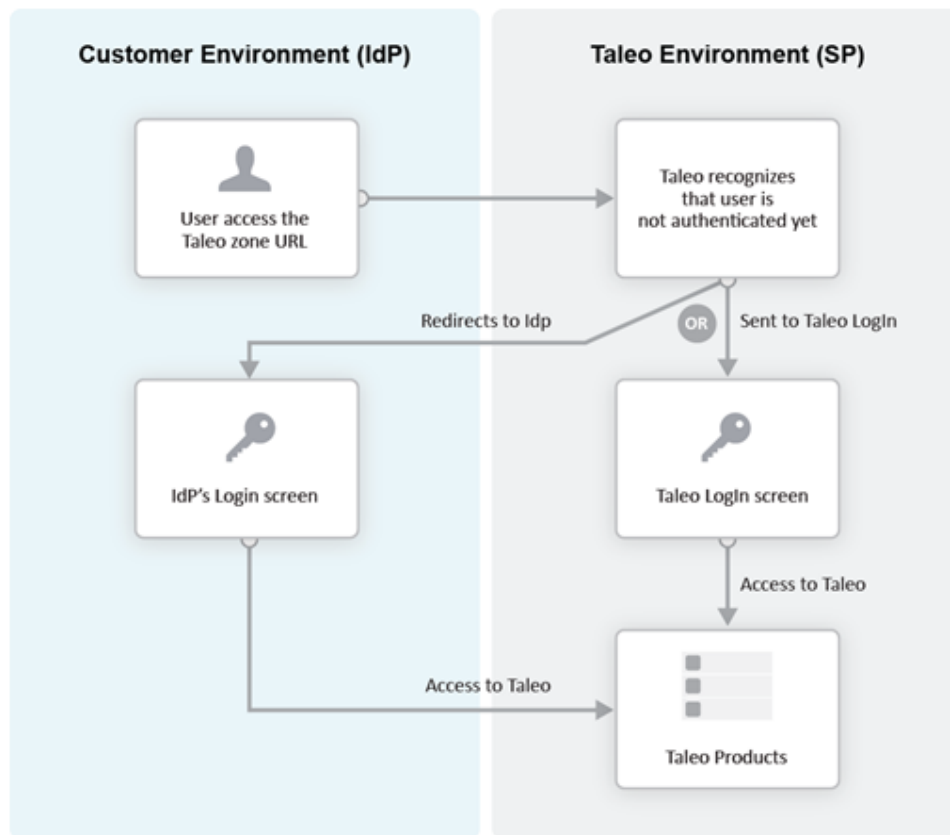
Challenge, Error and Exit URLs can be defined to configure the destination to which the user will be redirected under various conditions.

One set of URLs can be configured for each SP (SmartOrg and career section). In addition, individual career sections can have their own values for these URLs. These values will override the defaults for the career section SP.

### Challenge URL

The Challenge URL setting defines the page where the user will be directed to present his credentials. There are two options:

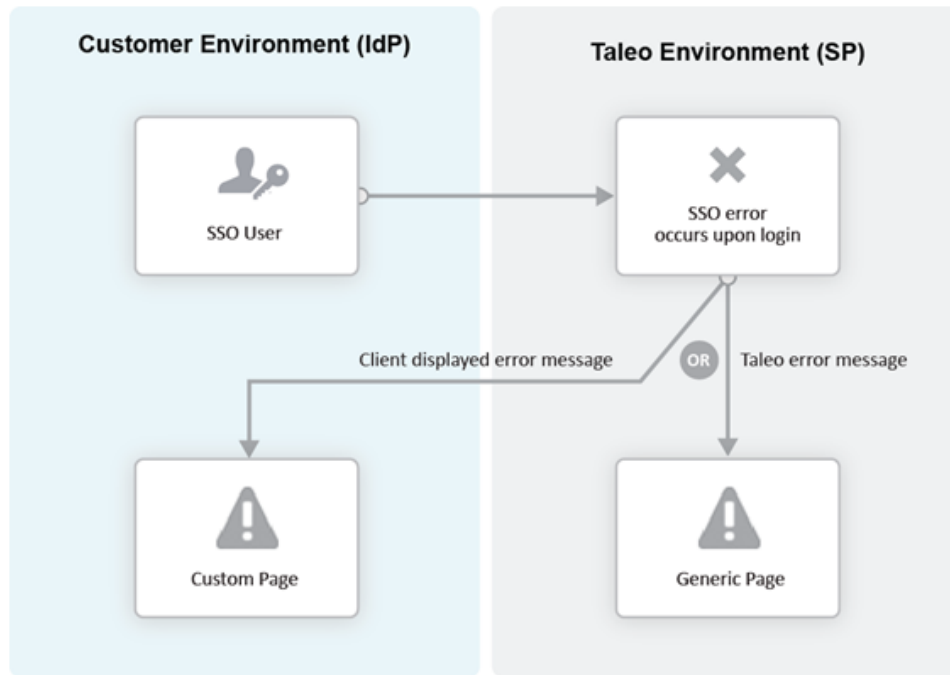
- Default login page: Standard OTAC page. No redirection to the IdP.
- SP Initiated Servlet redirect: The user is redirected to the IdP's login page. This option must be selected to enable SP initiated flows from SmartOrg and career section to the chosen IdP.



### Error URL

The Error URL setting defines the page where the user will be directed when an SSO error occurs. It can be the default Oracle Talent Acquisition Cloud (OTAC) error page or a custom page defined by the customer. Typical errors that would generate an SSO error are:

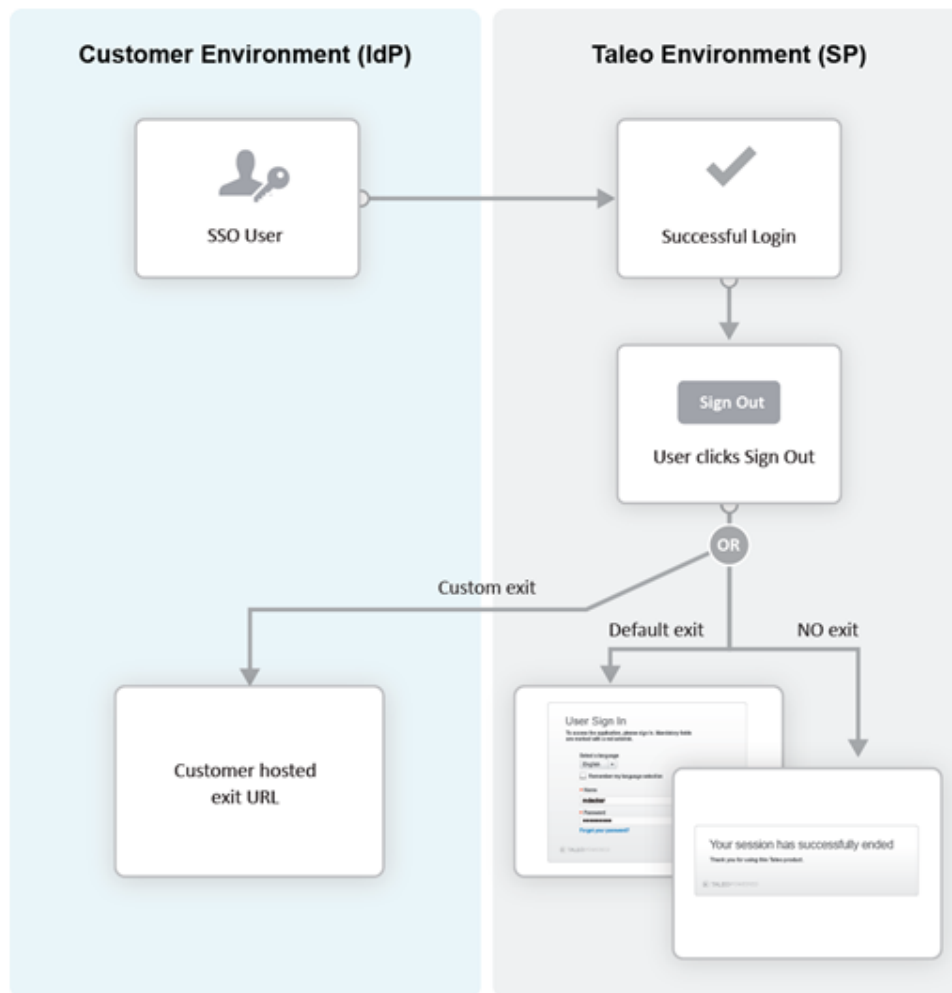
- Locked user account
- Invalid Assertion (generic SSO response issue)



## Exit URL

This Exit URL setting defines where the Service Provider sends the user upon exiting the application. Three options are available:

- Default exit page – Display the login screen
- Custom URL – Display a custom page defined by the customer
- No exit page – Display the exit screen



## Certificate and Validation

A trust relationship is established between the IdP and the SP when both exchange their respective certificates.

All communications (SAML Request and Response) will be signed by the issuing party. The receiving party will use the certificate to validate the received communication.

### IdP Certificates

The IdP's certificate is usually available in its metadata file. The certificate will be automatically imported when the metadata file is imported. After import, this certificate can be viewed and managed in the SSO interface. Certificates can also be manually imported. The certificate can be associated to one or both Service Providers (SmartOrg and career section). Each certificate will have a validity period defined by a start date and an end date.

Multiple certificates can be imported for an IdP. At least one has to be valid for SSO connections to be established.

### SP Certificates

The SP certificates are available through SP's metadata file. A separate certificate is generated for each SP-IdP combination.

### Validation

Upon receiving an assertion, each Service Provider performs the following validity checks.

- Signature – Validate that the assertion has been signed by the IdP.
- Timeout – Validate that the age of assertion has not exceeded a specified timeout period. The age is calculated as the time difference between the moment the assertion was received (by the SP) and the moment the assertion was issued (by the IdP). A timeout period of up to 30,000 milliseconds can be configured.

## User Synchronization

The customer must configure synchronization of users between the Identity Provider(s) and Oracle Talent Acquisition Cloud (OTAC).

The IdP will identify the user (subject) in the assertion. This user identifier must also be stored in the system. Upon receiving the assertion, Oracle extracts the user identifier from the assertion and then searches for the user in the system. Upon finding a match, the appropriate privileges are granted to this user.

Taleo Connect Client (TCC) can be used to import the user identifier into Oracle Talent Acquisition Cloud (OTAC). A TCC import file can be created and scheduled for automatic import into OTAC. Both user and candidate information must be updated. The following fields must be updated with the SSO user identifier:

- Employee/Username (for SmartOrg Service Provider)
- Candidate/Credentials/SSOID (for career section Service Provider)

For information about TCC, please refer to the Taleo Connect Client documentation.

Users can also be created manually:

- SmartOrg users: Create the users manually through the SmartOrg interface.
- Internal career sections: Use the career section SSO Configuration Wizard. See [Career Section SSO Configuration Wizard](#).

## Identity Provider Bindings

Identity provider bindings specify the IdP URLs that can be used to perform various SAML transactions.

These URLs will be used by the Taleo Service Providers. It is expected that some bindings will be identical. The metadata file provides values for these bindings automatically, however, you can edit the values as needed.



## Identity Provider Trusted Certificates

Trusted certificates are needed to confirm the identity of Identity Providers. Each assertion received will be validated against these certificates.

IdP certificates included in the metadata file are imported and displayed automatically. Certificates can also be imported manually in the Identity Provider Trusted Certificates section. Certificates can be chosen to confirm the identity of Identity Providers for SmartOrg, career sections or both. Afterward, each assertion received is validated against the certificates.

## Configuring Single Sign-On

### Recommended SSO Implementation

The Manage SSO configuration user type permission is required. (See: [Granting Permission to Manage Single Sign-On \(SSO\)](#)).

It is recommended that you enable and test IdP initiated flows before enabling SP initiated flows. If both IdP and SP initiated flows are enabled at the same time, you run the risk of completely locking out users due to incorrect SSO configuration.

1. Obtain the metadata file for the corporate Identity Provider from your IT department.
2. Register the Identity Provider in Oracle Talent Acquisition Cloud (OTAC).
  - a. Decide which Service Providers (SmartOrg, career section or both) must be activated for this IdP.
  - b. Initially activate just IdP initiated flows.
  - c. Set up the exit and error URLs if necessary.
3. Export the Service Provider metadata files from Oracle Talent Acquisition Cloud (OTAC).
4. Register the Service Providers in the IdP by importing the metadata files.
5. Synchronize SmartOrg SSO user identity (either using TCC or manually).
6. Test IdP initiated access to SmartOrg.
7. Activate SSO in one or more career sections.
8. Synchronize career section SSO identity (either using TCC or the career section SSO wizard).
9. Test IdP initiated access to these career sections.
10. Activate SP initiated flows for the IdP.
11. Test SP initiated access to SmartOrg.
12. Test SP initiated access to career section.

## Granting Permission to Manage Single Sign-On

**Configuration > [SmartOrg] Administration > User Types > (click user type) > Configuration > [Security Management] Edit**

1. Click the check box next to Manage SSO Configuration.
2. Click Save.

Users who have the user type will be able to configure SSO.

## Configuring an Identity Provider

The Manage SSO configuration user type permission is required.

**Configuration > SSO Configuration**

1. Next to Identity Provider Configuration, click Show.
2. Click Create.
3. SAML 2.0 is the only possible selection. Click Next.
4. In the Automated Identity Provider Information section, perform one of the following steps:
  - a. To upload an IdP metadata file, click Browse..., select the file and then click Upload.
  - b. Type a URL to the IdP metadata file in the corresponding field and click Retrieve.

The Display Name and Entity Id or issuer identity fields are filled automatically.

5. In the Manual Identity Provider Information section, complete the fields as needed.
  - o You can change the display name if you wish.
  - o In the Entity Id or issuer identity field, you can enter the identity of the user who was authenticated by the IdP.
  - o The UserID Type refers to the type of identifying information and currently "Loginname", the login name of the user in the system, is the only type supported so ensure that "Loginname" is the value displayed.
  - o The User ID Attribute Name (XPath value) does not require a value.
6. Click Next.
7. In the Bindings section , complete the fields as needed and click Next.
8. You can add certificates manually (in addition to the certificates imported automatically from the metadata file) by clicking Add.
  - a. To specify that a certificate be used to confirm the identity of Identity Providers for SmartOrg, career sections, or both, click the corresponding radio button.
  - b. Click Browse... and select a certificate file.
  - c. Click Save.
  - d. Click Next.
9. In the Authentication Settings section, you specify whether SAML requests issued by Oracle will be signed, whether the signature of SAML responses received from the IdP will be validated, and the time period (30,000 milliseconds is recommended) beyond which assertions will no longer be considered valid.

It is strongly recommended to have assertions validated (ensure that the Default SAML Signature check box is selected).

- a. If you want to change the default values, clear the Default SAML Signature check box and make your selections.
  - b. Click Next.
10. In the SmartOrg Configuration section, configure your SmartOrg Service Provider by making your selections. For details regarding these settings, see [SmartOrg Service Provider Settings](#) and [Challenge, Error and Exit URLs](#).  
Note: If Default for SP Initiated Flow is set to Yes, it is important to also select Custom Exit Page URL and type a Custom Exit Page URL in the corresponding field or leave the field empty.
  11. Click Next.
  12. In the Career Section Configuration section, configure your Career Service Provider by making your selections. For details regarding these settings, see [Career Section Service Provider Settings](#) and [Challenge, Error and Exit URLs](#).
  13. Click Next.  
The information headings are displayed. You can click Edit next to a heading to edit the corresponding information as needed.
  14. Click Finish to generate the metadata and certificates for the Service Providers (SmartOrg and Career Section).  
If the Service Provider-initiated flow was enabled and the challenge URL was configured, the users will be redirected to the IdP. SSO will fail, however, because the IdP is not yet configured. Because this can create a temporary lockout situation, a direct URL is available to bypass SSO as necessary. See [Bypassing Single Sign-On](#).

## SmartOrg Service Provider Settings

Setting	Description
Default for SP Initiated Flow	<ul style="list-style-type: none"> <li>• Set this value to Yes if you want to enable Service Provider-initiated flow for the SmartOrg Service Provider.</li> <li>• If the value Yes, this IdP will be the default for Service Provider-initiated flows to SmartOrg. All Service Provider-initiated requests to SmartOrg will be redirected to this IdP.</li> <li>• If the value Yes and a different IdP was configured at a prior time, the IdP will no longer be the default for Service Provider-initiated flows.</li> </ul>
Challenge URL	<ul style="list-style-type: none"> <li>• Select Taleo Default Login Page if you want the general login page to be displayed.</li> <li>• Select SP Initiated Servlet redirect if you want to enable Service Provider-initiated flow for the SmartOrg Service Provider. This selection will redirect SmartOrg login requests to the IdP for authentication.</li> </ul>
Error URL	<ul style="list-style-type: none"> <li>• Your selection will determine whether users are redirected to the default error page or a custom URL whenever an error occurs.</li> <li>• If Custom Error Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.</li> </ul>
Exit URL	<ul style="list-style-type: none"> <li>• You can redirect users who quit the application to the default exit page or to a custom URL.</li> <li>• If Custom Exit Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.</li> <li>• The Custom Exit Page URL field can also have an "empty value".</li> </ul>

Setting	Description
	<ul style="list-style-type: none"> <li>Important - If Server Provider-initiated flow is enabled, type a Custom Exit Page URL or leave the field empty. Do not use the default exit page option.</li> </ul>
Execute Global Logout	<ul style="list-style-type: none"> <li>Set this setting to Yes. When users log out, all open sessions with the Identity Provider will end. This is the safest way to log out because it closes the connection to the IdP.</li> </ul>

## Career Section Service Provider Settings

Setting	Description
Default for SP Initiated Flow	<ul style="list-style-type: none"> <li>Set this value to Yes if you want to enable Service Provider-initiated flow for the Career Section Service Provider.</li> <li>If the value is Yes, this IdP will be the default for Service Provider-initiated flows to Career Section. All Service Provider-initiated requests to Career Section will be redirected to this IdP. Note: This IdP can be overridden for individual career sections. See <a href="#">Configuring Career Sections Individually for Service Provider-Initiated Access</a>.</li> <li>If the value Yes and a different IdP was configured at a prior time, the IdP will no longer be the default for Service Provider-initiated flows.</li> </ul>
Challenge URL	<ul style="list-style-type: none"> <li>Select Taleo Default Login Page if you want the general Taleo login page to be displayed.</li> <li>Select SP Initiated Servlet redirect if you want to enable Service Provider-initiated flow for the Career Section Service Provider. This selection will redirect Career Section login requests to the IdP for authentication.</li> </ul>
Error URL	<ul style="list-style-type: none"> <li>Your selection will determine whether users are redirected to the default error page or a custom URL whenever an error occurs.</li> <li>If Custom Error Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.</li> </ul>
Exit URL	<ul style="list-style-type: none"> <li>You can redirect users who quit the application to the default exit page or to a custom URL.</li> <li>If Custom Exit Page URL is selected, you must specify a complete URL, e.g. http://exit.corporate.com.</li> <li>The Custom Exit Page URL field can also have an "empty value".</li> <li>Important - If Server Provider-initiated flow is enabled, type a Custom Exit Page URL or leave the field empty. Do not use the default exit page option.</li> </ul>

## Exporting SmartOrg Service Provider Metadata Files

- To download the metadata file associated with a SmartOrg Service Provider, go to: <https://ZoneName/smartorg/sp/metadata.jss?target=EntityID>, replacing ZoneName by your Taleo zone name, and replacing EntityID by the Entity ID value imported from the IdP metadata file.

The Entity ID value is displayed in the Identity Provider Information section for the Identity Provider.

## Registering Service Providers (SmartOrg and Career Section) in the IdP

1. The metadata files exported in previous steps can be imported into your IdP system (OIF, ADFS etc.). You should set up a single Service Provider for SmartOrg and a single, different Service Provider for Career Section.  
See [Configuring Oracle Identity Federation](#) for an example of how to set up Service Providers in Oracle Identity Federation (OIF).

## Deleting an Identity Provider

The Manage SSO configuration user type permission is required.

Ensure that all SSO flows are disabled before deleting an IdP. The IdP to be deleted should not be the default for any Service Provider-initiated flows.

### Configuration > SSO Configuration

1. Next to Identity Provider Configuration, click Show.
2. Click the Delete that corresponds to the Identity Provider you want to delete.
3. Click Yes.

## Adding an IdP Trusted Certificate to an Identity Provider

The Manage SSO configuration user type permission is required.

### Configuration > SSO Configuration

1. Next to Identity Provider Configuration, click Show.
2. Click the IdP to which you want to add a trusted certificate.
3. Next to Identity Provider Trusted Certificates, click Edit.
4. Click Add.
5. To indicate what the certificate will be used for, select the appropriate radio button.  
The certificate is typically used for both SmartOrg and career sections.
6. Click Browse... and select the certificate file.
7. Click Save.

## Deleting an IdP Trusted Certificate from an Identity Provider

The Manage SSO configuration user type permission is required.

### Configuration > SSO Configuration

1. Next to Identity Provider Configuration, click Show.
2. Click the IdP you want to remove a trusted certificate from.
3. Next to Identity Provider Trusted Certificates, click Edit.
4. Locate the trusted certificate you want to delete and click the corresponding Delete.
5. Click Yes.
6. Click Save.

## Configuring Career Sections Individually for Service Provider-Initiated Access

The Manage SSO configuration user type permission is required.

### Configuration > SSO Configuration

1. Next to SP Initiated Access for Career Sections, click Show.

The screen displays the internal career sections enabled for SSO. For each career section associated with a specific IdP, the latter is displayed. If no IdP is displayed, this indicates that the career section users will be redirected to the default service provider.

2. Locate the career section with which you want to associate an IdP and click the corresponding Configure.
3. Select the IdP to which the career section users will be redirected.

The Challenge, Error and Exit URL settings are selected automatically based on the IdP selected. For more information on these settings, see [Career Section Service Provider Settings](#). You can change these settings as needed.

## Displaying SSO-protected URLs

The Manage SSO configuration user type permission is required.

### Configuration > SSO Configuration

1. Next to SSO Protected URLs, click Show.

System administrators can embed these URLs within their corporate SSO portals.

## Bypassing Single Sign-On

1. Copy the following URL and replace the three occurrences of "ZoneURL" with your zone information (e.g. xyz.taleo.net):  
`https://ZoneURL/smartorg/iam/accessmanagement/login.jsf?redirectionURI=https%3A%2F%2FZoneURL%2Fsmartorg%2Fsmartorg%2Fcommon%2Ftoc.jsf%3Flang%3Den&TARGET=https%3A%2F%2FZoneURL%2Fsmartorg%2Fsmartorg%2Fcommon%2Ftoc.jsf%3Flang%3Den`
2. Paste the edited URL into your Internet browser.

Direct access to Oracle Talent Acquisition Cloud (OTAC) is typically used by system administrators to diagnose SSO configuration issues.

3. Enter your Oracle Talent Acquisition Cloud (OTAC) user name and password (not the IdP credentials).

You are logged into Oracle Talent Acquisition Cloud (OTAC) directly, bypassing Single Sign-On.

## Career Section SSO Configuration Wizard

The Single Sign-On wizard enables internal candidates to link a candidate account to their SSO user identifier.

This method can be used instead of running a Taleo Connect-based integration feed to populate the SSO user identifier in the candidate account.

If the wizard is enabled, the first time that internal candidates log into an internal career section through their Single Sign-On portal, they are prompted to associate their SSO user identifier (profile) with a candidate account. The users can either create a new candidate account or use an existing account. Upon successfully logging in using the candidate account credentials, the SSO user identifier is associated with this candidate account by the Single Sign-On wizard. This operation has to be performed only once. The user will be automatically authenticated in the internal career section for subsequent logins.

Welcome. You are signed in. Sign Out

---

Next Quit

### Welcome to the Candidate Profile Single Log-in Configuration

Please specify a user name and password below. You can use this username and password in the future to access any of the zone1 candidate portals. This username and password can also be used as a backup measure, in case your single log-in service provider is down. We suggest you use the same login information as for your single log-in.

**User Identification**  
*Mandatory fields are marked with an asterisk.*

**\*User Name**

**\*Password**

[Forgot your user name?](#)  
[Forgot your password?](#)

Do you already have a Candidate Profile?

Yes, I have a Candidate Profile and I would like to associate it to my single log-in

No, I don't have a Candidate Profile but I would like to create one now.

Next Quit

## Identity Provider Metadata Example

This is an example of an IdP metadata file.



```
<dsig:X509SubjectName>CN=adc-fap1067-idm.oracle demos .com OIF Encryption
  Certificate</dsig:X509SubjectName>
</dsig:X509Data>
</dsig:KeyInfo>
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#rsa-1_5" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes128-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes192-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#aes256-cbc" />
<md:EncryptionMethod Algorithm="http://www.w3.org/2001/04/xmlenc#tripledes-cbc" />
</md:KeyDescriptor>
<md:ArtifactResolutionService Binding="urn:oasis:names:tc:SAML:2.0:bindings:SOAP"
  Location="https://adc-fap1067-idm.oracle demos .com/fed/idp/soap" index="1" isDefault="true" />
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
  Location="https://adc-fap1067-idm.oracle demos .com/fed/idp/samlv20" ResponseLocation="https://adc-
fap1067-idm.oracle demos .com/fed/idp/samlv20" />
<md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
  Location="https://adc-fap1067-idm.oracle demos .com/fed/idp/samlv20" ResponseLocation="https://adc-
fap1067-idm.oracle demos .com/fed/idp/samlv20" />
<md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:emailAddress</md:NameIDFormat>
<md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
<md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
  Location="https://adc-fap1067-idm.oracle demos .com/fed/idp/samlv20" />
<md:SingleSignOnService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
  Location="https://adc-fap1067-idm.oracle demos .com/fed/idp/samlv20" />
</md:IDPSSODescriptor>
</md:EntityDescriptor>
```

## SmartOrg Metadata Example

This is an example of a metadata file for SmartOrg.

```

<md:EntityDescriptor entityID="http://z15awlrsv2.hcm.taleocloud.net/smartorg"
  validUntil="2016-05-26T14:54:16.285Z">
  <md:SPSSODescriptor AuthnRequestsSigned="true" WantAssertionsSigned="true"
    protocolSupportEnumeration="urn:oasis:names:tc:SAML:1.1:protocol
    urn:oasis:names:tc:SAML:2.0:protocol">
  <md:KeyDescriptor use="signing">
  <ds:KeyInfo>
    <ds:KeyName>SP SSO Key</ds:KeyName>
  <ds:X509Data>
    <ds:X509Certificate>MIICUzCCAbYgAwIBAgIIAyVm2cMLSc8wDQYJKoZIhvcNAQELBQAwPDEbMBkGA1UEChMST3
    JhY2xl IENvcnBvcnF0aW9uMQ0wCwYDVQQLEwRQcm9kMQ4wDAYDVQQDEwVUYWxlbzAeFw0xNTA1Mjc4NDU0
    MTZaFw0xNjYxNDU0MTZaMDwGZGZAZGZBbnVBAoTEk9yYWNsZSBDb3Jwb3JhdGlvbWJENMAsGA1UE
    CxMEUHVzZDE0ZawGA1UEAxMFVGFSZW8wZ8wDQYJKoZIhvcNAQEBBQADgYOAAMIGJAoGBANDPVxH5
    P4+4EiAmhAuaLAdSbdpjsxtBec1tc4zSI+KAEIBSww9aJC3s0AKyVLYJZENLC0qUPzQC+LXndYn
    s+U5TgUpQr3H0jf0GLCvLKfG5oEwshUPLwh/nLG6sd0k9kuMBiCuLUuLskGYKIjtg8N+c19hNQ5q
    cTU90su1NQU/AgMBAAGjXjBcMFoGCCsGAQUFBwEBBE4wTDBKBma2BgEgEwAYYY+aHR0cHM6Ly96
    MTVhd2xyc3YyLmhjbS50YWxlb2Nsb3Vklm51dC9zbWVydG9yZy9vY3NwL3N0YXR1cy5qc3MwDQYJ
    KoZIhvcNAQELBQADgYEAsoMI3SNkrfclmbs80qOe00M5P55v1WGUSUWsYoWLSKgzfieiJWvpPcfigj
    GnrESeI4wpxp/gf8z2xKuCOIhL+Enqz20a1bvZIHARnoXARbukdtVcV999YEBx6TVGLmLPOTegSX
    3PMFdYsfczCQ7bKxE/d2/0rG6JVA44xrcLsiPlw=</ds:X509Certificate>
  <ds:X509IssuerSerial>
    <ds:X509IssuerName>CN=Taleo, OU=Prod, O=Oracle Corporation</ds:X509IssuerName>
    <ds:X509SerialNumber>226700441718311375</ds:X509SerialNumber>
  </ds:X509IssuerSerial>
  </ds:X509Data>
  </ds:KeyInfo>
  </md:KeyDescriptor>
  <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss"
    ResponseLocation="https://z15awlrsv2.hcm.taleocloud.net/smartorg/iam/accessmanagement/
    globalLogout.jsf?lang=en"/>
  <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="0" isDefault="true"/>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:1.0:profiles:browser-post"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="1"/>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
    Location="https://z15awlrsv2.hcm.taleocloud.net/smartorg/SamlAssertionConsumerService.
    jss" index="2"/>
  </md:SPSSODescriptor>
</md:Organization>
  <md:OrganizationName xml:lang="en">Oracle</md:OrganizationName>
  <md:OrganizationDisplayName xml:lang="en">Oracle</md:OrganizationDisplayName>
  <md:OrganizationURL xml:lang="en">http://www.oracle.com</md:OrganizationURL>
  </md:Organization>
</md:EntityDescriptor>

```

## Career Section Metadata Example

This is an example of a metadata file for Career Section.

```

<md:EntityDescriptor entityID="http://z15awlrsv2.hcm.taleocloud.net/careersection"
  validUntil="2016-05-26T14:54:16.000Z">
  <md:SPSSODescriptor AuthnRequestsSigned="true" WantAssertionsSigned="true"
    protocolSupportEnumeration="urn:oasis:names:tc:SAML:1.1:protocol
    urn:oasis:names:tc:SAML:2.0:protocol">
  <md:KeyDescriptor use="signing">
  <ds:KeyInfo>
  <ds:KeyName>SP SSO Key</ds:KeyName>
  <ds:X509Data>
  <ds:X509Certificate>MIICUzCCAbYgAwIBAgII TbRCZ z28o2wwDQYJKoZIhvcNAQELBQAwPDEbMBkGA1UEChMST3
  JhY2xl IENvcnBvcnF0aW9uMQ0wCwYDVQQLEwRQcm9kMQ4wDAYDVQQDEwVUYWxlbnZ AeFw0xNTA1MjcxNDU0
  MTZaFw0xNjYxNDU0MTZaMDwxGzAZBgNVBAoTEkryYWNsZSBDb3Jwb3JhdG1vb2JENMAsGA1UE
  CxMEUHVzZDEOMAwGA1UEAxMFVGFsZW8wgZ8wDQYJKoZIhvcNAQEBBQADgYOAAMIGJAoGBAI 1YGiXn
  uEicY119Rfg4Sog2X1JjPzZ4zJq9UVnL4d9KYd+ThfZhnJOOXwafCuFqwo0TXKroe8Kwv41zPMA
  fuAbFDiKekQoWTy7RAGKUcaRp3nKA6Z3HHEX9ycLgogPzVsb4uwhjimYVYxUd9g6P9wEgt+N4gFv
  xR1VDzI J6RRvAgMBAAGjXjBcMFoGCCsGAQUFBwEBBE4wTDBKBggRBgEgFBQcwAyy+aHR0cHM6Ly96
  MTVhd2xyc3YyLmhjbS50YWxlbnZ5Y29vY3NwL3N0YXR1cy5qc3MwDQYJ
  KoZIhvcNAQELBQADgYEAB IijJj gorOW1gJ8jeCEBf1GY9UTbG8h+mpU/2A6qPvkf104bRvtounqn
  5Z9WzflUS9kQ4q2exMh5YaUg/eUTgZ2mVucASvx8pl/zBTC94F994wHUAtAlvRn+1AizA6YQNTyH
  q08+YGb1jdjqKsMt7xi/502urZefPk0d4VwvnyHY=</ds:X509Certificate>
  <ds:X509IssuerSerial>
  <ds:X509IssuerName>CN=Taleo, OU=Prod, O=Oracle Corporation</ds:X509IssuerName>
  <ds:X509SerialNumber>5599173247913206636</ds:X509SerialNumber>
  </ds:X509IssuerSerial>
  </ds:X509Data>
  </ds:KeyInfo>
  </md:KeyDescriptor>
  <md:SingleLogoutService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss"
    ResponseLocation="https://z15awlrsv2.hcm.taleocloud.net/careersection/iam/accessmanage
    ment/globalLogout.jsf?lang=en"/>
  <md:NameIDFormat>urn:oasis:names:tc:SAML:1.1:nameid-format:unspecified</md:NameIDFormat>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-POST"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="0" isDefault="true"/>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:1.0:profiles:browser-post"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="1"/>
  <md:AssertionConsumerService Binding="urn:oasis:names:tc:SAML:2.0:bindings:HTTP-Redirect"
    Location="https://z15awlrsv2.hcm.taleocloud.net/careersection/SamlAssertionConsumerSer
    vice.jss" index="2"/>
  </md:SPSSODescriptor>
  <md:Organization>
  <md:OrganizationName xml:lang="en">Oracle</md:OrganizationName>
  <md:OrganizationDisplayName xml:lang="en">Oracle</md:OrganizationDisplayName>
  <md:OrganizationURL xml:lang="en">http://www.oracle.com</md:OrganizationURL>
  </md:Organization>
  </md:EntityDescriptor>

```

## Configuring Oracle Identity Federation

1. To register SmartOrg and career sections, begin by logging into Fusion Middleware's Enterprise Manager.
2. Locate the OIF instance and click it.
3. Click Oracle Identity Federation.
4. Click Administration.
5. Click Federation.
6. Click Add.
  - a. Click Choose File.  
Do not change the displayed values.
  - b. Browse to the location where the user saved the SmartOrg metadata and upload the metadata to OIF.
  - c. Click OK.
7. Select the federation you created and click Edit.
8. Click the Oracle Identity Federation Settings tab.
9. Click the icon to the left of the Identity Provider/Authority Settings section to display the section.
10. In the Identity Provider/Authority Settings section:
  - a. Set the Default SSO Response Binding to: HTTP POST.
  - b. Select the check box next to Response with Assertion – SOAP.
  - c. Select the check box next to Response with Assertion – HTTP POST.
  - d. Click Apply.



# 4 Onboarding (Transitions) and Career Sections

## Onboarding (Transitions) Tasks in Career Sections

If Taleo Onboarding (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 while a process is in progress. This includes internal and external career sections, and Onboarding(Transitions)-only career sections. The Tasks tab cannot be "turned off". The standard email inviting the candidates to perform their assigned tasks is configured such that it directs them to an external career section before they are hired, and directs candidates to an internal career section once they are hired and become employees.

To log into a career section, candidates usually have to provide the user name and password they created while applying for a job for the first at any of the organization's career sections. Separate, different credentials are not required to access the Tasks tab and view the assigned Onboarding (Transitions) tasks. If Single Sign-On (SSO) was enabled for the organization (through a consulting engagement), the login page is not displayed and candidates can access the career section as usual.

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 Onboarding (Transitions) processes running at this time, the Tasks tab disappears. Note that several Onboarding (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 tab label "Tasks" can be changed, like any text in any career section. This can be useful for instance for career sections that have only Offboarding tasks.

In addition, a separate career section can be configured which only contains the Tasks tab. See [Onboarding \(Transitions\)-only Career Section](#).

 **Note:** Note that SSO is not supported with this type of 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).

### Completing 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 links within that process. If there are no other Onboarding (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 links 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 links 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 Onboarding (Transitions) administrator must configure an Onboarding (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.

## Onboarding (Transitions)-only Career Section

The Onboarding (Transitions) career section type is for career sections whose purpose is to display only tasks assigned to candidates or employees without job search capabilities.

Career sections of this type contain a single tab called "Tasks" where candidates 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 Onboarding (Transitions)-only career sections are ideal if you want to create distinct career sections for specific purposes and audiences. You can create dedicated Onboarding (Transitions) career sections for onboarding, "pre-boarding", promotion, relocation, offboarding or other purposes. Each one can have a theme, branding and colors that are different from your other career sections and you can rename labels if desired. A dedicated Onboarding (Transitions) career section for offboarding processes, for example, could have a unique theme, branding and colors and you could change the default tab name "Tasks" to "Offboarding".

To create this type of career section, the Onboarding Portal career section type must be selected in the career section properties. By default, the Tasks tab is displayed. 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 an Onboarding \(Transitions\)-only Career Section](#).

The email messages must be configured such that the link they include is not the {TransitionsURLs\_Para.TaskAccessURL} variable but instead, a specific URL of a dedicated Onboarding (Transitions)-only career section. This ensures that the candidates or employees who receive an invitation will be directed to the Onboarding (Transitions)-only career section with their assigned tasks. In addition, Career Section administrators should always assign a high sequence number to Onboarding (Transitions)-only career sections (see "Defining the Sequence of Career Sections" in the Oracle Taleo Career Section Configuration Guide). Why? The {TransitionsURLs\_Para.TaskAccessURL} variable for "standard" career sections directs candidates and employees to their tasks at the appropriate career section with the lowest sequence number. By assigning a high sequence number to each Onboarding (Transitions)-only career section, Career Section administrators ensure that candidates and employees who should be directed to a "standard" career section (to search for jobs, for example) will not be directed to an Onboarding (Transitions)-only career section.

## Building an Onboarding (Transitions)-only Career Section

The building of an Onboarding (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 to place custom information only at the top and bottom of the browser page. The Tasks tab contains a task list on the left, which means that less horizontal space is available for displaying forms, content, and other Onboarding (Transitions) tasks. Adding a navigation pane or margins to the left or right side of the career section is not recommended because such configurations would result in a narrow space for displaying forms, content and other tasks.
2. Creating a privacy agreement: Note that the other types of statement (E-Signature, Background Check Consent, Diversity) are not relevant to the Onboarding (Transitions)-only career section. The privacy agreement must be associated with the Onboarding portal career section type.
3. Creating a theme (optional).
4. Configuring security options for career sections: Security options can be configured specifically for the Onboarding (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 Onboarding (Transitions)-only career section was 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 > click the portal career section > Security Settings).
9. Enabling the career section.
10. Creating an Onboarding (Transitions) message template (in the Onboarding (Transitions) Administration menu) and including the Onboarding (Transitions) portal URL that will direct candidates, new hires or employees to the Onboarding portal. The URL is available under Career Sections > (click the portal career section) > Career Section URL > Show). Do not use the standard variable {TransitionsURLs\_Para.TaskAccessURL}.

## Onboarding (Transitions)-only Career Section Properties

Element	Description
General	
Code	The code must be unique
Name	The name must be unique.
Description	A brief description of the Career Section.
Type	Select Onboarding Portal.

Element	Description
Sequence	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 Onboarding (Transitions)-only career section, make sure to put the Onboarding (Transitions)-only career section last in the sequence to avoid people landing on this career section by mistake.
Display the link allowing to deactivate the account in the My account page	Displays the Deactivate link in the My Account page. Candidates can click the link to disable their account. This can be useful if the My Account career portal page is enabled in the Onboarding (Transitions)-only career section.
Authentication Privacy Agreement	
Name	In the Name list, select the privacy agreement you created for the Onboarding (Transitions)-only career section.
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	
Name	Corporate brand that will appear in the Onboarding (Transitions)-only career section.
Theme	
Name	Theme that will appear in the Onboarding (Transitions)-only career section.



# 5 Fields and Selections

## Data Sharing Between Taleo Recruiting and Taleo Onboarding (Transitions)

Most fields are shared by Taleo Recruiting and Taleo Onboarding (Transitions).

Candidate-related fields, whether standard or user-defined, are shared by Taleo Recruiting and Taleo Onboarding (Transitions). A change to candidate information on the Taleo Recruiting side or on the Taleo Onboarding (Transitions) side is immediately and automatically reflected in the other product. This includes cases where:

- Candidates update candidate-related fields in their job submissions in career sections.
- Candidates update candidate-related fields while performing tasks on the career section Tasks tab.
- Recruiting Center users make changes to candidate or job submission fields.
- Onboarding (Transitions) Center users such as hiring managers update candidate-related fields while executing form tasks.
- Taleo Connect updates candidate-related fields.

A second group consists of standard and user-defined fields of type Offer, Requisition and Department. If these fields are edited by candidates (e.g. during a job submission), by Taleo Recruiting users or via Taleo Connect, the new value is displayed immediately in Taleo Recruiting, on the candidate's Tasks tab in career sections, and in Taleo Onboarding (Transitions). Fields in this group cannot be edited in Taleo Onboarding (Transitions) however.

A third group of fields is specific to Taleo Onboarding (Transitions), therefore, not shared with Taleo Recruiting. If the fields are part of task, they can be updated by candidates on the Tasks tab. They can be updated by Onboarding (Transitions) Center users or via Taleo Connect. They are not displayed and cannot be updated through job submissions or through the Recruiting Center. Fields specific to Taleo Onboarding (Transitions) are:

- Information about Onboarding (Transitions) processes and tasks, their statuses and completions.
- Onboarding (Transitions) process standard fields. They can be displayed and updated on any assigned onboarding form for any Onboarding (Transitions) assignee but they cannot be used in Taleo Recruiting, either by candidates or by Recruiting Center users.
- Onboarding (Transitions) process user-defined fields, which are created in Onboarding (Transitions) Administration. These fields have no values when a process is first started. They can be displayed and updated on any assigned onboarding form for any Onboarding (Transitions) assignee but they cannot be used in Taleo Recruiting, neither by candidates nor by Recruiting Center users.
- Personal information standard and user-defined fields.
- Submission, Offer, Requisition and Department fields, which are displayed in Taleo Recruiting and Taleo Onboarding (Transitions) but are editable in Taleo Recruiting only.
- External service result fields created from Oracle Validated Integration (OVI) partners in Taleo Onboarding (Transitions).
- Fields captured for E-Signatures on onboarding forms.


- Direct deposit information.
- Address fields that have a "table" format and multiple rows, for previous or secondary addresses (AddressBookHistory is an example).
- I-9 fields for storing locally-captured I-9 information (not via an external service provider) such as citizenship, names and dates for documents from lists.


### Editable vs Read-only Fields

All of the following Recruiting standard fields and user-defined fields are available in Onboarding (Transitions) automatically. The Onboarding (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 Onboarding (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 Onboarding (Transitions) administrator can add candidate standard fields and UDFs to forms and configure the fields so they can be updated in the Onboarding (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 Onboarding (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 onboarding forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to an onboarding 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 onboarding forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to an onboarding 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 onboarding forms because there are proper ways to update these fields within the Recruiting product. It would not be desirable to make changes to an onboarding 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 Onboarding (Transitions). Suppose, for example, you created a user-defined field in Recruiting Administration. The field would be available automatically to the Onboarding (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 Onboarding (Transitions). The Taleo Onboarding (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 Onboarding (Transitions) independent of the field's property and OLF configuration.

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

 **Note:** The OBI reporting solution available can report on up to 100 UDFs, the same limit that applied to BI reporting.

Onboarding (Transitions) user-defined fields are created under Configuration > [Onboarding (Transitions)] Administration > User-defined Fields.

## Standard Fields and User-defined Fields

Onboarding (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.

There are two general categories of fields available for input on forms or for use in message templates, PDF documents, content pages, conditions, reports and Taleo Connect imports and exports:

- Standard fields Supplied with the system, these fields 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.
- User-defined fields Onboarding (Transitions) administrators often create UDFs when there are not appropriate standard fields to capture the information that their business requires.

Both standard fields and user-defined fields display current read-only information on PDF documents, content pages and message templates. If the Onboarding (Transitions) administrator configures the fields such that they are editable on forms, people can replace the current information via the forms with more recent data.

- Onboarding (Transitions) Process user-defined fields: Onboarding (Transitions) Process user-defined fields are specific to the process. These fields are created in Onboarding (Transitions) Administration. They can be displayed and updated on any assigned onboarding form for any Onboarding (Transitions) assignee but cannot be used in Recruiting at all, neither by candidates nor by Recruiting Center users. Take the case of a "Do we have signatures yet?" user-defined field. A "Yes" value would trigger one series of Onboarding (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 Onboarding (Transitions) Administration. They can be displayed and updated in the Onboarding (Transitions) Center but not in the Recruiting Center. These fields are persistent for the person in all processes. Each time a new Onboarding (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 Onboarding (Transitions) Administration to augment the list of Recruiting Candidate UDFs. When an OVI service is installed, this usually introduces some vendor-specific UDFs into a zone. These UDFs are defined by the OVI vendor for use with its service and they appear in the Onboarding (Transitions) Personal Information UDF category. These fields are usually filled for each candidate/new hire when the service is invoked during an Onboarding (Transitions) process. These fields can be used in all the same places as all other UDFs to display the results of the OVI service.

There is no limit in the number of Onboarding (Transitions) UDFs that you can create. Limiting the number to 250 is a best practice because you can assign a Reporting ID to up to 250 UDFs per entity type (Requisition, Candidate, Offer, Department, Work Experience, Education, Submission), making those UDFs available to be included in reports created with OBI Reporting.

In Recruiting Administration, in the Custom Report Universe configuration page, the limit of UDFs is 250. (Path: Recruiting Administration > Custom Report Universe)

In Onboarding (Transitions) Administration, in the User-defined Reporting configuration page, the limit of UDFs is 250. (Path: Onboarding (Transitions) Administration > User-defined Reporting)

## Important Information

The 250 UDF limit is available to existing and new customers but there is a private setting that controls the number of UDFs to report on.

To use more UDFs in reports, system administrators need to configure Recruiting and Onboarding (Transitions).

The 100 UDF limit remains in Legacy Onboarding.

In the Custom Report Universe configuration page, if one of the UDFs for an entity type (Requisition, Department, Offer, Candidate, Experience, Education, Submission) has its Reporting ID set to 250, the following error message will be displayed when trying to make another UDF available in reporting: "The maximum number of user-defined fields has been reached for the Custom Report Universe". This message will be displayed even if other Reporting IDs are still available to be assigned to a UDF. This is a known issue. As a workaround, we recommend not assigning the Reporting ID number 250 until all other Reporting IDs have been assigned to other UDFs.

### Types of User-defined Fields

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

User-defined Field Type	Description
Boolean	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: "True" and "False".
Date	User-defined field containing a date.
Date and Time Zone	User-defined field containing a date and a time. With regard to reporting, this type of user-defined field will not be supported.
Multilingual Text	User-defined field containing more than one value in different languages.
Numerical	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 Onboarding (Transitions) administrator who creates the form should create and use a UDF of type Text instead.
Text	User-defined field containing numbers and letters.

### 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 an Onboarding (Transitions) User-defined Field

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



## Configuration > [Onboarding (Transitions)] Administration > User-defined Fields

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.

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 a predefined list of choices (instead of free-form text answers to be entered by an assignee) is needed, the Onboarding (Transitions) administrator can create these choices with user-defined selections. These user-defined selections are then used by a user-defined field that the Onboarding (Transitions) administrator creates. User-defined selections created in Recruiting Administration can be used in the Recruiting Center and Onboarding (Transitions) Center. However, user-defined selections created in Onboarding (Transitions) Administration can only be used in the Onboarding (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 enabled and disabled after initial activation. After user-defined selection elements are in active use, they can be disabled for future use if necessary. This enables an organization to change its list of possible responses over time, as older responses become obsolete while responses on older completed forms are preserved.

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 is disabled and element D is enabled, 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.

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

## Creating an Onboarding (Transitions) User-defined Selection

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

### Configuration > [Onboarding (Transitions)] Administration > User-defined Selections

1. You first need to create the selection:
  - a. In the Onboarding (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. Assign Active status to the elements.
3. Enable the selection.
4. You then add the user-defined selection to a user-defined field.
  - a. In the Onboarding (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.

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

## Selecting User-defined Fields for Reports

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

**Configuration > [Onboarding (Transitions)] Administration > User-defined Reporting**

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.

That data is available for reporting.

## Deleting a User-defined Field

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

**Configuration > [Onboarding (Transitions)] Administration > User-defined Fields**

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

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

## Deleting a User-defined Selection

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

**Configuration > [Onboarding (Transitions)] Administration > User-defined Selections**

1. Click Delete next to the user-defined selection.

2. Click Yes in the message box.

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

## Deleting an Element in a User-defined Selection

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

**Configuration > [Onboarding (Transitions)] Administration > User-defined Selections**

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

## Disabling an Element in a User-defined Selection

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

The element must be Active.

**Configuration > [Onboarding (Transitions)] Administration > User-defined Selections**

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

Once a user-defined selection is disabled, it can no longer 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 disabled.

## Disabling a User-defined Selection

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

The user-defined selection must be enabled.

**Configuration > [Onboarding (Transitions)] Administration > User-defined Selections**

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

Once a user-defined selection is disabled, it is no longer available to be selected by the Onboarding (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 assignee submitted the form.

# Electronic Signatures

## Electronic Signature

Electronic signatures enable 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 Onboarding (Transitions) administrator can configure and use an electronic signature in forms, message templates, documents, content pages. For example, candidates and employees may have to read and complete specified forms and may be asked to provide specific information confirming their identity. The information they provide is checked by the system before the form can be submitted. For instance, the system can validate if the data entered matches the last name, initials and Taleo password.

The Electronic Signature feature is flexible and extensive. Onboarding (Transitions) provides 50 E-Signature fields that can be used by the Onboarding (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 Onboarding (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.

Any of the 53 "ESignature" variables in the Available Variables list can be used in multiple processes. A customer could configure a pre-hire process, a new hire process, an e-offer process and an offboarding process such that a candidate would provide the same E-Signature (e.g. {ESignature.ESignature45Fullname} ) on four separate occasions as he or she progressed from one process to the next and each e-signature would be treated and processed separately from the others.

There are several methods of validation that can be used for an E-Signature. When determining which validation method to use, the Onboarding (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.

Use this E-Signature validation method	If the assignees are in this group of people	Notes
Birth date	New hires only	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.
Email	All	Can match any one of three possible email addresses that can potentially exist in Onboarding (Transitions): <ul style="list-style-type: none"> <li>• Personal email address</li> <li>• Correspondence email address</li> <li>• Corporate email address</li> </ul>
First name	All	

Use this E-Signature validation method	If the assignees are in this group of people	Notes
Initials	All	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.
Last name	All	
SSN last 4 digits	New hires only	Before choosing this validation method, the Onboarding (Transitions) administrator needs to be confident that the Social Security Number/ Social Insurance Number value was properly entered in the system. The Onboarding (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 an onboarding form, this can be done on a form that uses an input mask to ensure that they only save 9 digits.
Taleo password	All	
User secret identifier	New hires only	Before choosing this validation method, the Onboarding (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.
Zip/postal code	New hires only	Before choosing this validation method, the Onboarding (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 onboarding 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

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

### Configuration > [Onboarding (Transitions)] Administration > User-defined Signatures

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.

The electronic signature can be successfully used in a form.

## Electronic Signature on a Form

The Onboarding (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 Onboarding (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.

Field	Completed by	Notes
Esignature[Number]	Assignee	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.
Esignature[Number]Date	Automatically by Onboarding (Transitions)	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.
Esignature[Number]IPAddress	Automatically by Onboarding (Transitions)	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.
Esignature[Number]FullName	Automatically by Onboarding (Transitions)	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 Onboarding (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 electronic signature AND the Esignature[Number]FullName, then after the form is successfully submitted, a person opening the completed read-only form will see the meaningful information about the assignee's first and last name.

Field	Completed by	Notes
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After submitting the form with a correct E-Signature filled in, a History event gets logged at the bottom of the step, showing who successfully provided the E-Signature and the timestamp of submission. Other events are also logged, such as failed E-Signature attempts due to wrong data provided and failed attempts due to missing the necessary E-Signature information from Onboarding (Transitions) to validate.

## Configuring an Electronic Signature Field to Capture Data on a Form

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

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

1. Click a user-defined form.
2. Create a space in the form to insert the electronic signature. For example, you may need to add a row.
3. In the Field Chooser menu, click ESignature and then find the desired set of four ESignature fields in this list.
4. Drag and drop the desired main ESignature field to be used for capturing the assignee's input.
5. Click the field to display the Selected Element Properties section at the bottom of the form.
6. In the Mandatory drop-down list, click Yes.

It is not mandatory to make the main ESignature field mandatory but it is a good practice. You will probably want to force the assignees to provide an electronic signature and have it validated when they complete the form.

7. Click Save.

The ESignature field can be used in a process.

## Electronic Signature on a PDF

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

PDF documents can be created by the Onboarding (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 Onboarding (Transitions) process. The Esignature[Number]FullName, Esignature[Number]Date and 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 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 Onboarding (Transitions) Center and in the career section within any Onboarding (Transitions) Task. If the user's E-Signature was valid when submitted, then the 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

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.

1. Using Adobe Acrobat Professional, open a PDF document.
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.

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 Onboarding (Transitions) Center and in the Candidate Portal within any Onboarding (Transitions) Task.

## Date and Time Setting for Electronic Signatures

The ESignature.ESignature[number]Date field captures the date and time when an E-Signature was successfully captured.

The ESignature.ESignature[number]Date field is a timestamp of when a document was signed by a new hire or assignee using an electronic signature field. The ESignature.ESignature[number]Date field is available as a variable that can be included on forms and message templates, in PDF documents, content pages, conditions, reports and Taleo Connect exports. 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, it might 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 ESignature.ESignature[number]Date fields.

If 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.

If the date and time are chosen to be displayed, the date will be displayed according to the date format for the locale, followed by the time always formatted as hh:mm:ss GMT.

## Configuration

Type Permission

Name

Location

eSignature Timestamp Display Property

**Configuration > [Onboarding (Transitions)] Administration > Settings**


# 6 Images

## 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 Onboarding (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 Onboarding (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.

-  **Note:** 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 [Onboarding \(Transitions\) Settings](#)).

## Adding an Image to the Images Library

**Configuration > [Onboarding (Transitions)] Administration > Images**

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.

The image is available to be displayed within various rich text areas wherever the Onboarding (Transitions) administrator specifies the corresponding URL.

## Deleting an Image from the Images Library

**Configuration > [Onboarding (Transitions)] Administration > Images**

1. Locate the image and click the corresponding Delete.

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

# 7 Forms

## User-defined Form

Forms in Onboarding (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 Onboarding (Transitions) process.

Onboarding (Transitions) uses a form builder to assist in the formatting and personalization of a user-defined form. You can add text, graphics, links 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 enabled in 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 Onboarding (Transitions) Center or on the Onboarding (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
- StructuredResume / Certification
- 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.

 **Note:** A column in a multi-row field must contain at most one field.

 **Note:** 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 enabled in your organization.*
4. *Enabling the user-defined form.*

## Creating a User-defined Form

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

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

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 the Insert a Section icon in the Toolbox. 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 the Insert a Table icon. 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 the Insert Text in the Selected cell icon 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, links, 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.

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

## Previewing a User-defined Form

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

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

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

## Translating a User-defined Form

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

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

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 enabled.
5. Translate the form.
6. Click Save.

## Enabling a User-defined Form

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

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

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

The status of the user-defined form is changed to Active. The user-defined form can be used in an Onboarding (Transitions) process.

## Field Selected Element Properties

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

Element	Description
Access	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.
Binding field	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.
CSS Style	Cascading Style Sheets or CSS provide formatting and style instructions which apply to the label of the field. It is important to enter valid instructions. For example, to put text in red, bold and with a yellow border, you must enter the following instructions: color: red; font-weight:bold; border:1px solid yellow
Field Label	The Field Label is the name used to identify a field, according to the CSS formatting above. 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.
Field Size	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.
Field Type	There are different field types to choose from: Text Input, Text Area, Rich Text Format, Read-only Text. When working with a date, the field can be text or: <ul style="list-style-type: none"> <li>• Date Drop-down list.</li> <li>• Date input-utilizes a calendar picker with keyboard short-cut keys available. <ul style="list-style-type: none"> <li>○ Control-Forward and Ctrl-Back changes the calendar by month</li> <li>○ Ctrl-Up and Ctrl-Down changes the calendar by year, in the current month</li> <li>○ Escape key does the Cancel action</li> <li>○ Enter key does the Done action</li> </ul> </li> </ul>
Header	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.
Help Callout	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.
Input Mask	Format of the input value. The following syntax must be used: <p>9=any number</p> <p>a=any letter</p> <p>n=any letter or number</p> <p> =logical or</p> <p>\9=the 9 character</p> <p>\a=the a character</p> <p>\n=the n character</p> <p>\ =the   character</p> <p>Any other symbol=the symbol (including a space)</p>



Element	Description
	<p>Possible formats for SSN and Zip/Postal codes:</p> <p>SSN: 999-99-9999</p> <p>ZIP Code United States: 99999 99999-9999</p> <p>Postal Code Canada: a9a9a9 a9a 9a9 a9a-9a9</p> <p>Note: Make sure not to add a space before and after the   operator. For example, do not enter 99999   99999-9999</p>
Instructions	<p>The instructions are messages or warnings regarding how a field performs or specifics on what the user should enter in the field. For example, for the Work Phone Number field, you could put the following instruction: Do not forget your extension number. Instructions appear below the field. 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. Note that the instructions are not displayed when the field type is "read-only text".</p>
Mandatory	<p>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.</p>
Status	<p>The status indicates if the field is enabled or disabled. The use of this field depends on the value selected in the Access field.</p> <ul style="list-style-type: none"> <li>• Editable access + Activated status=field can be modified</li> <li>• Read-only access + Activated status=field not editable</li> <li>• Read-only access + Deactivated status=field not editable</li> <li>• Editable access + Deactivated status=field not editable</li> </ul>
Tooltip	<p>Tooltips are small pop-up windows containing a descriptive text of the field label. Tooltips display when the user hovers over a title.</p>

## User-defined Forms - Other Configuration Tasks

### Duplicating a User-defined Form

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

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

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

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.

## Disabling a User-defined Form

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 > [Onboarding (Transitions)] Administration > User-defined Forms**

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

The status of the user-defined form is changed to Inactive. The Onboarding (Transitions) administrator cannot incorporate the form into additional tasks for defining future Onboarding (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

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

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

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

1. Locate the user-defined form in the User-defined Forms list.
2. Click Delete.
3. Confirm the deletion.

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

## Adding a Page in a User-defined Form

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

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

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.

A new page is added to the user-defined form. The Onboarding (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

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

The user-defined form must contain more than one page.

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

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

Within any form, an existing page can be deleted. This includes forms that are active and have been assigned to participants in Onboarding (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.

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

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

The page is deleted from the user-defined form.

## Adding a Field to a User-defined Form

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

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

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.  
Adding more than one field to a column is not supported.

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

Within any form, an existing field can be deleted. This includes forms that are active and have been assigned to participants in Onboarding (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.

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

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

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

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
- Structured Resume / Certification
- PersonalInfo / DirectDeposit

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

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

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

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

1. Click a user-defined form.
2. Add a text field to the form by positioning your cursor in a cell and clicking the Insert Text icon 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

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

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

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.

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 enable the new form.
  2. Disable the old form if it should not be pulled into new tasks and processes.
  3. For the existing Onboarding (Transitions) tasks and processes which are using the old form, create duplicates, make sure they are using the newly-created form, and enable the new tasks and processes.
  4. Result: Candidates/new hires can be started on the newly-updated process. The old process can be disabled, either before or after the new process was enabled. 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 Onboarding (Transitions) Center or Recruiting Center user must cancel their running process and start them from the beginning of the newly-enabled process.

## Links in User-defined Forms

Links can be added to user-defined forms.

Those three methods are available:

- A hard-coded link can be added to a text field to direct candidates/new hires to resources, training, videos, Web sites, or anything that the Onboarding (Transitions) administrator can plan in advance to help the assignee.
- A dynamic link 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 Onboarding (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 Onboarding (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 link in their form and each new hire could potentially see a different link than each other new hire.
- A dynamic link can be added in a standard field. This is done when an organization wants to use the ELearningURL field to link an Onboarding (Transitions) process to a learning program in [Taleo Learn](#). Other standard fields are not typically configured to include a dynamic link.

## Adding a Hard-Coded Link in a Text Field

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

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

1. Click a user-defined form.
2. Add a text field to the form by positioning your cursor in a cell and clicking the Insert Text icon 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 Enlarged View 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 link.
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 Link in a User-defined Field

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

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

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 Onboarding (Transitions)Process or Personal Info 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 Link in a Standard Field

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

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

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.

## OVI Partner Fields in User-defined Forms

Oracle Taleo partner fields can be added into user-defined forms to show a candidate's/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 Onboarding (Transitions) processes. If an Oracle Taleo service is enabled, an Onboarding (Transitions) administrator can create tasks to interact with it. Completion values returned after the external service provides its results can be displayed in forms.

An Oracle Taleo request is one entire conversation for one candidate/new hire between the Taleo system and a partner, from beginning to end, including as many back-and-forth exchanges as are required to complete the transaction and obtain a final result for the candidate/new hire. On the other hand, an Oracle Taleo 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 require different participants to reach successful completion and deliver its results to Onboarding (Transitions) for the person. Then, if the same new hire is 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 Onboarding (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 Oracle Taleo partner that is enabled 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 enabled 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 Onboarding (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:

Element	Description
Date and Time	Date and time when an event occurred.
Event	Event or action performed on an element.
Details	Information regarding the event.
By	The actor, person or system, who performed the event.

## Candidate/Employee Details Form in the Onboarding (Transitions) Center

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

In the Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (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 > [Onboarding (Transitions)] Settings). In the Value field, enter the code of the user-defined form you just created. This setting enables the Details link on the Process page.

## I-9 Form

### U.S. Form I-9

These forms look just like the official U.S. government form I-9 and are provided with Onboarding (Transitions) to capture U.S. employment information.


The following I-9 forms are available in the User-defined Forms section. You can modify the forms as necessary.

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

Use of the U.S. Form I-9 is governed by U.S. laws about employment, for details visit <http://www.uscis.gov/i-9>.

Customers can contact their client executive who can enlist the services of Oracle Taleo Support and Oracle Taleo partners to handle the full I-9 process if desired.

User-defined forms, even those provided with Onboarding (Transitions), cannot be exported and saved long term; PDFs can be used for this purpose instead. Onboarding (Transitions) administrators can examine the variables (if present) in I-9 PDFs and other PDFs provided they have Adobe Acrobat Pro.

-  **Note:** Onboarding (Transitions) administrators can examine the variables (if present) in I-9 PDFs and other PDFs provided they have Adobe Acrobat Pro. See [PDF Documents](#).

# 8 Message Templates

## 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 Onboarding (Transitions) Administration > Message Templates are messages specific to the Onboarding (Transitions) product. In Onboarding (Transitions), almost all emails sent to recipients are based on predefined message templates. In the Onboarding (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 an Onboarding (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.

## Onboarding (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: Email-type variables can be copied and then pasted into these fields. Afterward, whenever a message based on the template is sent to the task assignees, the message will also be sent to the individuals who correspond to the email-type variables. You can also enter specific email addresses in these fields.
- Subject: Variables can be copied and then pasted into 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 Onboarding (Transitions) database, unlike the PDF documents which the Onboarding (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 email-type variables 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 {PersonalInfo\_Para.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.

The following table presents useful information regarding specific variables:

Variable	Description
{TransitionsURLs_Para.TaskAccessURL}	<p>Can be used for any assignee. The variable is resolved as follows:</p> <ul style="list-style-type: none"> <li>• Candidates and new hires are directed to the Career Section.</li> <li>• Managers and recruiters (and other SmartOrg users) are directed to the Onboarding (Transitions) Center.</li> <li>• Users who only have “External User” permissions are directed to the Response Center.</li> </ul>

Variable	Description
	Email messages do not require a specific variable to direct users to the Response Center. The "{TransitionsURLs_Para.TaskAccessURL}" field brings each assignee to the appropriate place where he/she can complete the assigned task. This means that a single message template can be used for a task assigned to different people: a candidate or a new hire, a Response Center user and an Onboarding (Transitions) Center user. Clicking the link displays the right page and the right task to each type of user. Alternatively, a specific message template can contain the "{TransitionsURLs_Para.ResponseCenterURL}" field to ensure that people are directed to the Response Center only. The people must have Response Center permissions.
{TransitionsURLs_Para.ResponseCenterURL}	The assignee is directed to the Response Center.
{TransitionsURLs_Para.TransitionsCenterUR	The assignee is directed to the Onboarding (Transitions) Center.
{Requisition_Para.ExpectedStartDate}	Used to display a new hire's start date in a message template. The date is to be displayed with the time.
{Requisition_Para.ExpectedStartDateNoTim	Used to display a new hire's start date in a message template. The date is to be displayed without the time.
{TaskParticipant.FirstName}	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.
{Task.AssigneesNames}	This variable is useful if you want to tell the recipient who are ALL the assignees of the step: they all are listed.
{Task.OwnerFullName}	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 Bob@company.com. 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.

## Creating Message Templates for Onboarding (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. *Enabling the message template.*

### Defining the Properties of the Message Template

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

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

1. Click Create.

2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.

Email-type variables can be copied and then pasted into these fields. Afterward, whenever a message based on the template is sent to the task assignees, the message will also be sent to the individuals who correspond to the email-type variables. You can also enter specific email addresses 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

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

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

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

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 > [Onboarding (Transitions)] Administration > Message Templates**

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.

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

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

You must be in the active language of the message template.

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

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

## Enabling the Message Template

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

The message template must have an Inactive or Draft status.

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

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

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 Onboarding (Transitions).

## Message Templates for Onboarding (Transitions) - Other Configuration Tasks

### Duplicating a Message Template

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 > [Onboarding (Transitions)] Administration > Message Templates**

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

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

### Enabling a Message Template

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

The message template must have the Active status.

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

1. Click a message template.
2. Click Deactivate.

The status of the message template is Inactive. After the message template is disabled, it cannot be used. However, the message will continue to be displayed as configured to everyone whose process is already using the message template.

## Deleting a Message Template

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

The message template must have the Draft status.

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

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

The message template is permanently deleted from the database.

## Removing an Attachment from a Message Template

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

**Configuration > [Onboarding (Transitions)] Administration > Message Templates**

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

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 Oracle Talent Acquisition Cloud (OTAC) products. They are provided by Oracle.

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.



To edit security message templates, the **Manage Message Templates for email correspondence and reminders** permission is required (SmartOrg Administration > User Types > Configuration > Security Management).

## Message Templates Related to Security

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

Message Template	Description	Recipient	To Field Content
Forgot Password	Indicates that the password change request was received and provides the user the access code needed to change his/her password.	User account email address (user trying to do a forgot password).	{Other.UserEmail}
Password Change Instructions	Indicates that the password change request was received and provides a step-by-step procedure on how to change the password.	User account email address (user trying to do a forgot password).	{Other.UserEmail}
Password Change Request	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.	Not define by default. Define by the customer. (Email probably sent to an administrator).	PLEASE ENTER A VALID EMAIL ADDRESS
Standard Notification for a Successful Network Data Synchronization	Indicates that the synchronization of a specific element with the network database was successfully completed.	Logged user email address (user who requested the synchronization task).	{NdaSynchronizationInfoFields.emailAddress}
Standard Notification for an Unsuccessful Network Data Synchronization	Indicates that the communication with the network database could not be established and that the synchronization of a specific element could not be executed.	Logged user email address (user who requested the synchronization task).	{NdaSynchronizationInfoFields.emailAddress}
Standard notification - User Account Information	Provides information on how to log into the application (user name, access code, URL address).	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}
Standard notification for a candidate account confirmation	Indicates that a candidate account was created and how to log into the application (user name, access code, URL address).	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}

Message Template	Description	Recipient	To Field Content
Standard notification for a Password Reset	Indicates that the user password was reset and how to specify a new password.	User account email address (user on which the action is done).	{PasswordResetInfoFields.EmailAddress}
Standard notification for a registration	Indicates that an account was created and how to access it using a user name and access code.	User account email address (user on which the action is done).	{AccountCreationFields.EmailAddress}

## Email Addresses Used for Correspondence Tasks

### Email Addresses Used for Correspondence Tasks

When an email message to a candidate is part of a correspondence task, Taleo Onboarding (Transitions) chooses the "best" email address for the assignee and sends the email to that address.

The user account type is Onboarding (Transitions) rather than Operator or Employee. (See [SmartOrg User Account Creation When Process Started](#).)

This SmartOrg account includes three email address fields of which only one, Email Address, is a requirement. This differs from the candidate account, which has only one Email Address field and it can be configured to be mandatory or not for each zone.

User addresses in SmartOrg:

- Email address (displayed as "Correspondence Address" in Onboarding (Transitions) forms and message templates)
- Personal Email address
- Corporate Email address

	Name of User Field as Displayed in SmartOrg	Name of Candidate Field as Displayed in Recruiting Center	Name of New Hire Field as Displayed in Onboarding (Transitions)
1	Email Address	Email Address	Correspondence Address
2	Personal Email Address	not applicable	Personal Email Address
3	Corporate Email Address	not applicable	Corporate Email Address

Candidates make a job submission or are "captured" by a Recruiting Center user. A single email address can be provided for the candidate at that time. When Onboarding (Transitions)-type user account is created in SmartOrg for the candidate, the email address is copied to two SmartOrg fields:

- Email Address
- Personal Email Address

In cases where no email address was provided by candidates or the Recruiting Center users, see [Launching an Onboarding \(Transitions\) Process for Candidates/Employees with no Email Address](#).

The Onboarding (Transitions) email fields can be updated by way of Onboarding (Transitions) forms assigned to the manager, the new hire or any user. Updates can be imported using Taleo Connect, for instance, in a batch as new information from an HRIS is received.

Regardless of whether additional email addresses and variables are placed on the "TO" line of an Onboarding (Transitions) message template, the corresponding message is always sent to the assignee of a task that includes the template. Taleo Onboarding (Transitions) chooses the "best" email address for the assignee and sends the email to that address.

If the assignee is a candidate, the system selects the first address it finds while searching in the following order:

1. The personal email address
2. The correspondence email address
3. The corporate email address

an Onboarding (Transitions)-only user can become an Employee-type user in SmartOrg) in various ways. For instance, when an Organization, Location, or Job Function is added to an Onboarding (Transitions)-type user account, the user is transformed automatically into an Employee-type user. (See [SmartOrg User Account Creation When Process Started](#).)

If the assignee is an employee, the system selects the first address it finds while searching in the following order:

1. The corporate email address
2. The correspondence email address
3. The personal email address



# 9 Documents

## Document

Text documents can be added to content pages and message templates while file-based documents can be added to content pages, message templates and PDF tasks.

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 Onboarding (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 Onboarding (Transitions) Center for a candidate's/new hire's process.

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:

- Onboarding (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 {PersonallInfo\_Para.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. *Enabling the text document.*

## Defining the Properties of a Text Document

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

## Configuration > [Onboarding (Transitions)] Administration > Documents

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

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

### Configuration > [Onboarding (Transitions)] Administration > Documents

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

If you are adding paragraphs to a text document that will form a Content Page, and you want the Content Page to display a link to the offer letter and cover page PDF for advanced E-Offers, ensure that the {ContentPage.PersonalizedDocuments} variable is included in one of the paragraphs.

4. Click Select.

The paragraph appears in the Paragraphs section of the document.

## Creating a New Paragraph for a Text Document

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

### Configuration > [Onboarding (Transitions)] Administration > Documents

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.

If you are creating paragraphs for a text document that will form a Content Page, and you want the Content Page to display a link to the offer letter and cover page PDF for advanced E-Offers, be sure to include the {ContentPage.PersonalizedDocuments} variable in one of the paragraphs.

6. Click Save.
7. Enabling the paragraph.

The paragraph appears in the Paragraphs section of the document.

## Reordering Paragraphs in a Text Document

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 > [Onboarding (Transitions)] Administration > Documents**

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

## Previewing a Text Document

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

### **Configuration > [Onboarding (Transitions)] Administration > Documents**

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

## Enabling a Document

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 > [Onboarding (Transitions)] Administration > Documents**

1. Select a document.
2. Click Activate.

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 disabled if no longer needed.



## Documents - Other Configuration Tasks

### Removing a Paragraph Included in a Text Document

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 > [Onboarding (Transitions)] Administration > Documents**

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

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

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 > [Onboarding (Transitions)] Administration > Documents**

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

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

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

**Configuration > [Onboarding (Transitions)] Administration > Documents**

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

3. In the message box:
  - o 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.
  - o Select Link Copy if you want to link the document copy to the original set of paragraphs.
4. Complete the fields.
5. Click Save.

## Disabling a Document

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 > [Onboarding (Transitions)] Administration > Documents

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

The status of the document is now Inactive. Once a document is disabled, 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.

## Disabling a Paragraph

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

### Configuration > [Onboarding (Transitions)] Administration > Paragraphs

1. Click a paragraph.
2. Click Deactivate.

The status of the paragraph is now Inactive. Once a paragraph is disabled, 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

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 > [Onboarding (Transitions)] Administration > Documents

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

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

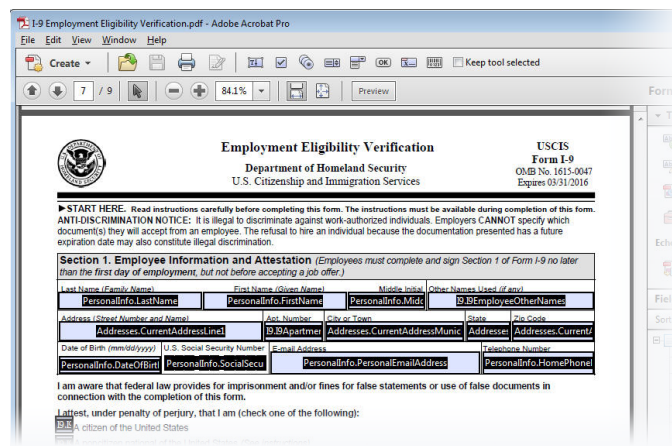
PDF documents are useful for displaying in the form of a formatted page current personalized information about a candidate.

PDF documents are different from forms used for data entry in that new information cannot be typed directly into them. Instead, the Onboarding (Transitions) system is designed to display the most recent information in each field in a PDF at the time the document is opened or exported—information entered by the candidate, new hire or other users on a form that had been assigned to them or information imported into the system using Taleo Connect.

A PDF is sort of a "canvas" or "generic paper", and the values for each new hire/candidate are merged with the PDF to display information on the PDF in the desired places. Candidates/new hires can view their own version of the PDF containing the most recent data stored in the system. This data can be viewed, printed or saved locally by each candidate/new hire and by any user or assignee who has the permission required to access the PDF. The Oracle Taleo system is dynamic: these PDFs will always show the most up-to-date information the moment they are opened or exported.

The Oracle Taleo system is not intended to be a long-term system of record. If the business requires a permanent record of the data as of a certain point in time, each candidate's/new hire's PDFs should be saved manually or exported from the system. Organizations can save the PDF manually to a computer or other storage device or export it through Taleo Connect. Take the case of an electronically-signed employee agreement in the form of a PDF document. Suppose the document included a candidate's name: John Smith. The organization could export the PDF document as is though Taleo Connect for long-term storage. If the candidate or Recruiting Center user later changed the name to Jack Smith, a PDF document generated afterward would display the new name while the organization would also have the older PDF document including "John Smith" in storage.

Onboarding (Transitions) administrators can examine the variables (if present) in PDFs provided they have Adobe Acrobat Pro. The following example shows the variables in an I-9 PDF.



To display such variables in Acrobat Pro, administrators select from the main menu: View > Tools > Forms.

## Creating a File-based Document

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

**Configuration > [Onboarding (Transitions)] Administration > Documents**

1. Click Create a file-based document.
2. Enter a code and a name.
3. Click Browse and select the PDF file that you created and want to add to the Documents library. The PDF can include variables.
4. Enter a description of the PDF file.
5. Click Save.
6. Click Activate.

## Viewing a PDF Attached to a File-based Document

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

The Onboarding (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. Administrators can click the file name of a PDF file in the System Documents section of a document in Onboarding (Transitions) Administration and Adobe Acrobat will display the content of the file.

Variable values are not rendered when the content of the file attachment is displayed in the document library. This is because neither the document, nor the file attachment are assigned to a process in the document library.

### Important Notes

If you plan to use the synchronization tool, keep in mind that PDF files attached to documents in Taleo Legacy Onboarding might contain variables that are inappropriate in a Taleo Onboarding (Transitions) context. In such cases, you should download a copy of the files and make your changes to the variables using Acrobat. Perform synchronization. Afterward, you can attach your modified PDF files to your Onboarding (Transitions) documents.

## Variables in PDF Documents

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

A PDF document containing variables will automatically display the most recent information from Onboarding (Transitions). Take the case of an electronically-signed employee agreement in the form of a PDF document. Suppose the document included a candidate's name: John Smith. The organization could export the PDF document as is through Taleo Connect for long-term storage. If the candidate or Recruiting Center user later changed the name to Jack Smith, a PDF document (containing the variables) generated afterward would display the new name.

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 would automatically extract information from the new hires' candidate file. Instead of offering the new hire or Onboarding (Transitions) users who view the PDF during a process a PDF containing no personalized information, you could offer them a PDF that included the most recent information about the new hire. In other words, the fields in the PDF would be filled in automatically with the most recent corresponding data in the Oracle Taleo system. See [PDF Documents](#) and [Inserting Variables in a PDF Document](#).

## Inserting Variables in a PDF Document

Adobe Acrobat Professional or Adobe Acrobat 3D is required.

The procedure described here assumes the user is using Adobe Acrobat 3D Version 8.0. The procedure may differ somewhat if a different version of Adobe Acrobat Professional is used.

Create a document in Word, leaving an area in which you will create fields, and save the document in PDF format.

In Adobe Acrobat 3D Version 8.0:

### **Tools > Forms > Show Forms Toolbar**

1. Open the PDF document.
2. Click the appropriate field type button.

Clicking the field type button highlights the existing fields of that type and enables you to insert the field type into the document.

3. Double-click the document at the location where you want to insert the field.

When the field is inserted the field properties box displays automatically.

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 Onboarding (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 Onboarding (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.

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

Upload the PDF into the Onboarding (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 enabled. However, business requirements sometimes require a change to the PDF documents within an active process.

One of the methods 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.

## Workflow for Capturing Information to Be Displayed in PDFs

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 Onboarding (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 Onboarding (Transitions) system that can be placed onto a form can also be placed into a PDF document. The only exception is [multi-row fields](#). In the form builder or message template builder, the forward slash "/" used in variables must be replaced by a dot ".". For example, PersonallInfo/LastName must be changed to PersonallInfo.LastName.

Configuring a process to enter data into the system and display the data in a PDF to the candidate:

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

Because a PDF can be displayed in different ways administrators should consider:

- 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.
- Onboarding (Transitions) Center users who have the necessary permissions can view the Process page of any candidate/new hire process, and from there they can associate a PDF from the zone's library to that person in the System Documents section. In this way, the PDF will display all the specific values in the fields for that person and the personalized PDF will be available for export.

## Runtime Use

Each new hire process is composed of a series of steps. Assignees of a PDF task can view the associated PDFs when the task becomes active in the step sequence. Whenever a PDF is viewed within a PDF 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 any 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.
- Onboarding (Transitions) Center users can manually associate any PDF document from the Onboarding (Transitions) list into the System Documents 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 Onboarding (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 System Documents 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. .
- An Onboarding (Transitions) Center user has manually associated the PDF with the person's process.

 **Note:** PDFs associated with a content page in the new hire's process are unavailable 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 Onboarding (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 Onboarding (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 is run for a new hire. For example, if an employee is terminated and rehired later for a job in the organization, some of the fields might be updated on forms in the new process and some of fields might be shared between old and new processes.

## Common Onboarding (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.

Onboarding (Transitions) Field Types and Corresponding Adobe Acrobat Fields

Onboarding (Transitions) Field Type	Corresponding Adobe Acrobat Field	Description	Adobe Form Toolbar Button
<ul style="list-style-type: none"> <li>• Text Input</li> <li>• Text Area</li> <li>• Rich Text Format</li> <li>• URL</li> <li>• Read-only Text</li> </ul>	Text	Values entered into an online form by a task assignee or exist in the database and will display in the PDF document.	
Check Box	Check Box	Create a check box field in the PDF document for every selection choice. Multiple selections are allowed.	



#### Onboarding (Transitions) Field Types and Corresponding Adobe Acrobat Fields

Onboarding (Transitions) Field Type	Corresponding Adobe Acrobat Field	Description	Adobe Form Toolbar Button
Radio Button	Radio Button	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.	

## 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...**



# 10 Content Pages


## 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 an Onboarding (Transitions) process.

Content pages can serve many different purposes within a single Onboarding (Transitions) process. For instance, the main welcome page can explain the Onboarding (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 Onboarding (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 links 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.

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

 **Note:** It is important to configure one content page as the default content page in your organization. Configuring OLF for this page is unnecessary (but you can do so if your organization requires a default content page with OLF). Failure to adhere to this best practice can result in situations where a content page displayed in a task is not the desired one.

## PDF Documents in Content Pages

Content pages can be configured to display two lists of PDF documents: a Personalized Documents list and a General Documents list.

Personalized Documents can contain *variables* that display information about the candidate or employee, and General Documents are generic, containing no variables. Both types of PDF 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 any or all of these PDF documents. The assignee is simply required to click one “Complete” button for the content page to acknowledge that they viewed it. This overall step completion is recorded in the history of the process and is displayed to Onboarding (Transitions) Center users.

Displaying content pages with customized text and general and/or personalized PDF document lists on a Content Page task when candidates or employees reach that step in a process requires some configuration.

1. To display a list of general PDFs on a content page, Onboarding (Transitions) administrators must add the {ContentPage.GeneralDocuments} variable to a paragraph and add the paragraph to the content page. To display a list of personalized PDFs (containing variables) on a content page, they must add the {ContentPage.PersonalizedDocuments} variable in a similar manner. These two variables are unique to Taleo Onboarding (Transitions) (i.e. are not included in Taleo Legacy Onboarding). If the variables are not added to any paragraph of a particular content page, the corresponding lists are not displayed in the task when candidates or employees reach a step in a process that calls that content page.
2. The paragraph is added to a text document.
3. The text document is added to a content page.
4. General and personalized documents are added to the corresponding sections on the content page. Different selections can be made for each content page (provided the content page includes a text document that includes a paragraph with the variables mentioned earlier).
5. Administrators create a task that has the Display Content Page action and they add the content page.
6. The task is added to a step in a process.

This powerful feature enables administrators to create a multitude of content pages that include customized texts and PDF lists. The texts and PDF document lists displayed to candidates and employees at a specific step in a process will vary depending on which content page administrators selected for the task.

## Security Alert when Opening PDF Files from Content Pages

Administrators can select a configuration option that presents an alert to users before opening PDF files. This configuration option enhances security for users when opening PDF files from Content Page tasks, on the Tasks tab in the Career Section, while in an Onboarding process.

If enabled, an alert gets presented to users that they are required to acknowledge before proceeding with opening a PDF file. This alert informs users that when they choose to open a PDF file they are also saving that file in the cache of their local device.

Setting	Description	Default Value	Location
Display confirmation message before storing a cache copy of a PDF or attachment locally on the user’s computer as it may contain sensitive information	As certain user actions require that a copy of the related information be temporarily stored on the user’s computer (ex: printing a candidate file, opening attachments, opening a HTML preview, etc.), and since some of this information can be sensitive, this setting determines if a warning message must first be displayed to the user. This message informs the user of the inherent risk and provides	No (off)	Configuration > [General Configuration] Settings

Setting	Description	Default Value	Location
	the recommendation to delete the information.		

## Content Pages That Target a Candidate or Employee

Onboarding (Transitions) administrators choose between two different configuration methods to ensure that the right content page is viewed by candidates or employees involved in a process.

The first method consists in the creation of a task that contains a specific content page. The Onboarding (Transitions) administrator selects Display a Content Page in the task's Action list. The Onboarding (Transitions) administrator then chooses the appropriate content page. The content page selected acts as the related source of the task, just as a form acts as the related source of a form task. The specific content page will be displayed to everyone who is assigned the task. Organization, Location, and Job Field (OLF) information specified for a content page is not considered.

The second method consists in the creation of a content page task for which no specific content page is specified. The Onboarding (Transitions) administrator still selects "Display a Content Page" but does not select any content page as the related source. In this case, the Onboarding (Transitions) system determines the most appropriate content page to display to each candidate or employee when the person reaches that step in the process. The Onboarding (Transitions) system examines all content pages (that have Active status) and displays the one whose Organization, Location and Job Field (OLF) is the best match with the OLF specified in the requisition.

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

Method 1. Administrator-selected content pages for tasks that always display the same content

Often, business requirements are such that different groups of people need to receive different content based on any information that the Onboarding (Transitions) system can track. For instance, user-defined fields can be used to track distinctions such as hourly vs. salaried workers or campus hires vs. experienced hires. All of the task types in Onboarding (Transitions) can be configured so they target different groups based on conditions configured for transitions that are part of a process. This is also the case for content page tasks. Onboarding (Transitions) administrators can create conditions based on UDFs or standard fields such that a task will be displayed to a subset of candidates or employees. If desired, administrators can also create additional conditions based on the "opposite" values in these fields, to show a different task to all the remaining candidates or employees.

When configuring a content page task so it targets a specific group of candidates or employees, it is best to select a specific content page for the content page task. The Onboarding (Transitions) administrator can assign conditions to the content page task such that the task (and associated content page) is assigned only to candidates or employees who satisfy the conditions. Because these conditions can be configured based on any field in the Onboarding (Transitions) system, these conditions are extremely powerful. If a large number of distinctions require their own content page task, the Onboarding (Transitions) administrator must configure many different conditions, transitions and tasks to specify each content page.

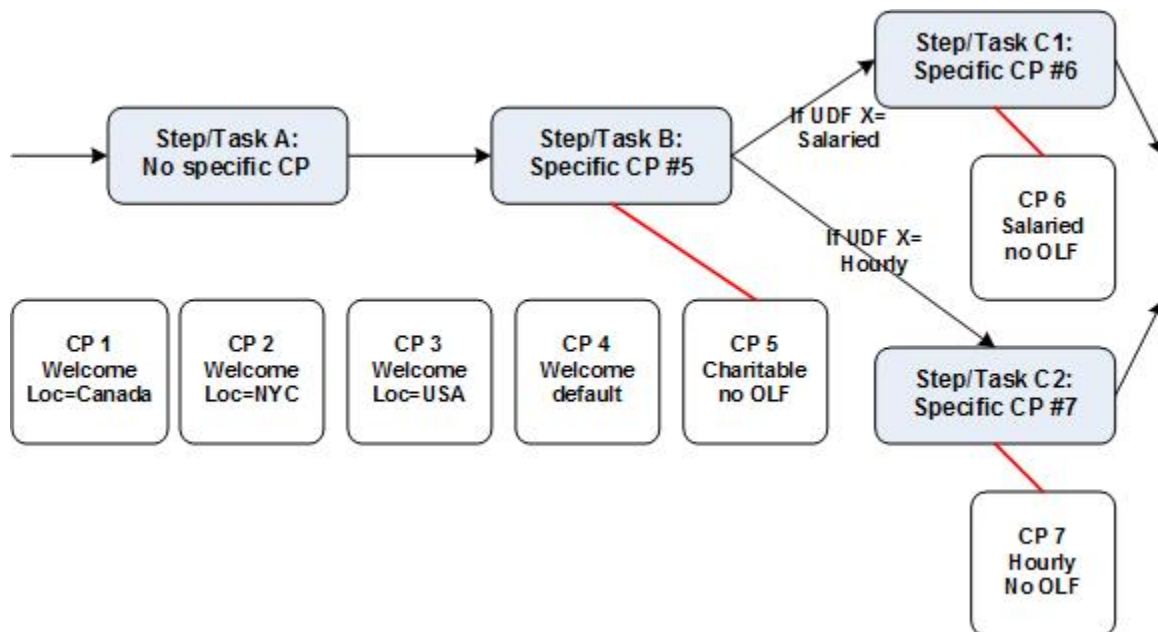
Method 2. Content pages for tasks where the system selects the best content page to display

In other business situations, the determination of the most appropriate content is based on Organization, Location, and/or Job Field values. Maps to a specific location, policies for a specific organization, and success stories for a specific job family are some examples of business requirements.

In these situations, the Onboarding (Transitions) administrator does not specify a particular content page for a content task. When no content page is specified, the system will select the most pertinent content page for each content page task

assignee. The Organization, Location, and Job Field information of each content page (that has Active status) is compared with the OLF specified in the requisition in the current process, or with the OLF of the candidate or employee when no requisition is involved (for example, a process launched by Taleo Connect on the General Profile). Far fewer conditions, transitions, and tasks are needed. Consequently, the Onboarding (Transitions) administrator has a much simpler job to perform and the process preview diagram is simpler.

Because the system selects the content page that best matches the OLF of the requisition or the candidate, it would make the same selection each time it encountered a context-sensitive content page "no specific content page" content page task in the process. In other words, it would display the same content to the candidate or employee each time. For this reason, it is important to ensure that a process does not include more than one "no specific content page" task.



(CP=content page)

The previous diagram illustrates both methods of configuring content pages. Candidates or employees 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 calls the fifth content page as its related source. Later, the process's conditions and transitions ensure that only the salaried people will be assigned Step/Task C1, which calls the salaried content page, whereas only the hourly people will be assigned Step/Task C2, which calls the hourly content page.


In the diagram, no specific content page is associated with Step/Task A. This means that the system must determine the content page that is the best match for each assignee. There are currently seven content pages active in the system. Three of them have no Organization, Location, nor Job Field: content pages 4, 5, 6 and 7. 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. Content page 4 is marked as the default content page; no OLF is required. Three additional content pages have no Organization, Location or Job Field: content pages 5, 6, and 7.


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.
- When a process begins for a requisition in any location other than the United States or Canada, the first task will display the default content page 4. The default flag ensures that this content page will be displayed even though there are other content pages in the system that have no specified location.

To summarize, the most appropriate content page will be displayed while the Onboarding (Transitions) administrator did not have to configure four specific content tasks, four transitions leading into them, and four more conditions and transitions leading out of them.

 **Note:** In cases where a content page is part of a process and neither the OLF of the requisition, nor the OLF of the candidate match the OLF of any content page, when candidates or employees reach the step the system might display any one of the content pages that has no OLF. By configuring a single *default content page*, you can ensure that that content page will be displayed in those situations instead.

 **Note:** If a content page is specifically associated with a content page task (the first method described earlier), any OLF information associated with the content page is not considered. The specific content page is displayed to the task assignee regardless of which OLF is associated with the requisition, the candidate or the employee. If a content task is not associated with any specific content page (the second method described earlier), the system seeks the content page with the best matching OLF; the content page's OLF are taken into account.

## Creating and Configuring a Content Page

### Creating a Content Page

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

#### Configuration > [Onboarding (Transitions)] Administration > Content Pages

1. Click Create.
2. Enter a code and a name.
3. Click the check box next to “Default Content Page” if applicable.  
You should never configure more than one default content page in Taleo Onboarding (Transitions).
4. If you want to invite or require new hires to upload a document to the system, select the check box next to Show file upload section below the content page.
  - a. Click Select.
  - b. Click the radio button next to type of document you want new hires to upload.
  - c. Click Select.

5. To require new hires to upload a file, select the check box next to File upload is mandatory; if the check box is not selected, uploading a file will be optional.
6. Click Save.
7. Next to the Text Document field, click Select.
8. On the HTML Document Selector page, click the radio button next to the text you want add to the content page.
9. Click Select.
10. Click Activate.

The content page can be specifically associated with a task by the Onboarding (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.

Associate any personalized or general PDF documents with this content page if desired.

Associate OLF information with this content page if the page will not be specifically included in any content task.

## Configuring a Default Content Page

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 > [Onboarding (Transitions)] Administration > Content Pages

1. [Create](#) or select [a content page](#).
2. Click the check box next to Default Content Page.

In cases where a content page is part of a process and neither the OLF of the requisition, nor the OLF of the candidate match the OLF of any content page, when candidates or employees reach the step the system will display the default content page.

## Associating Personalized and General Documents with a Content Page

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 > [Onboarding (Transitions)] Administration > Content Pages

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. Optionally, 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 change its status to Active.
5. Use this paragraph in a text document and change its status to Active.
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.

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

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 > [Onboarding (Transitions)] Administration > Content Pages

1. Create or select a content page. (See [Creating a Content Page](#).)
2. Perform one of the following steps:
  - o Click Add next to Organizations if you want to associate organizations with the content page.
  - o Click Add next to Locations if you want to associate locations with the content page.
  - o 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.

If the Onboarding (Transitions) administrator specifically associates this content page with a content task, then these OLF fields have no effect.

If the Onboarding (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

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 > [Onboarding (Transitions)] Administration > Content Pages**

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.

### Enabling a Content Page

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

#### **Configuration > [Onboarding (Transitions)] Administration > Images**

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.

If Onboarding (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 page and its content

will still be displayed, however, to candidates and employees in a process whose status is In Progress when you disable the content page.

## Deleting a Content Page

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 > [Onboarding (Transitions)] Administration > Content Pages**

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.



# 11 Onboarding (Transitions) and Learn

## Onboarding (Transitions) and Learn

An Onboarding (Transitions) process can include a task from which new employees can access the Learning area of their organization's zone.

The employees click the link on an onboarding form in the career section to display the Learning landing page in a new browser window. In the Learning area, employees can access course ware and/or other resources and they can examine and update their completion status for each Learning item.

## Pairing Up Learn with SmartOrg

Each Taleo Learn zone is paired with one Taleo Onboarding (Transitions) zone.

1. The Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (Transitions); the system of record for this information is Taleo Learn. For this reason, any reporting of task completion of Learn tasks in Onboarding (Transitions) processes is the domain of the Learn administrator.

## Configuring the Onboarding (Transitions) Form to Visit Learn

The Onboarding (Transitions) administrator then performs the following tasks.

1. The Onboarding (Transitions) administrator configures a product setting for the Learn URL. See [Specifying the Learn URL](#).
2. The Onboarding (Transitions) administrator creates an Onboarding (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 Onboarding (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: 1) 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. 2) 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 Onboarding (Transitions) form, which includes the Learn variable, can be configured to send a specific notification to its assignee, which brings them to this Onboarding (Transitions) task after they log in.

 **Note:** It is recommended that the Onboarding (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.

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

## Specifying the Learn URL

**Configuration > [Onboarding (Transitions)] Administration > Settings**

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.

 **Note:** Only new hires and employees can access learning plan form tasks. They must be employees in SmartOrg. Though Onboarding (Transitions) Center users can view employees' forms, they cannot access the Taleo Learn link.

The person submits confirmation manually on the onboarding form that he or she completed all the titles in the Learn plan.





# 12 External Services

## External Services

Services, provided by certified third parties that engage users outside of the Oracle Taleo system, can be integrated into Taleo Onboarding (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 an Onboarding (Transitions) process. Once the service is available, users with the **Manage services that are provided by partners** permission can enable and disable services in Onboarding (Transitions) Administration and modify them as needed.

Once a service is enabled, the Onboarding (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 Onboarding (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 Onboarding (Transitions).

In the case where a single message is required, the Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (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 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 Onboarding (Transitions) administrator and associated with each of these events. If any line does not have a message template, the service cannot be enabled 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 Onboarding (Transitions) administrators add custom settings to a service, enabling Onboarding (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 an Onboarding (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 Onboarding (Transitions) administrator selects the ServiceLastRequestResults category, he/she will have access to all fields related to the service providers. If the Onboarding (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 Onboarding (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 [OVI Partner Fields in User-defined Forms](#).

## Configuring External Services

The configuration of external services in Onboarding (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 an Onboarding (Transitions) process. Once the service is deployed, it is displayed on the Onboarding (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 Onboarding (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. [Enabling the external service.](#)

## Granting Permissions to Configure External Services

These permissions are required to use external services.

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

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

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

### Configuration > [Onboarding (Transitions)] Administration > Services

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

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

### Configuration > [Onboarding (Transitions)] Administration > Services

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

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

### Configuration > [Onboarding (Transitions)] Administration > Message Templates

1. Click Create.
2. Enter a code, name, and description.

3. Select the message template format.
4. Complete the To, Cc, Bcc fields.

Email-type variables can be copied and then pasted into these fields. Afterward, whenever a message based on the template is sent to the task assignees, the message will also be sent to the individuals who correspond to the email-type variables. You can also enter specific email addresses in these fields.
5. Complete the Subject field. Variables can be copied and then pasted into 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. You can also use variables. Simply select a variable, then drag and drop it in the desired area.
9. Create a link within the body of the message that the recipient can use to visit the partner's Web site.
  - a. Write some text for the link. 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

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

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

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

### **Configuration > [Onboarding (Transitions)] Administration > Services**

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.

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

## Enabling the External Service

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

The external service must be inactive.

### Configuration > [Onboarding (Transitions)] Administration > Services

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

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

## External Service Properties and Settings

Location	Field	Description
Properties	Name	Name of the specific external service.
Properties	Description	Description of the specific external service.
Properties	Provider Name	Name of the external service.
Properties	Provider Description	Description of the external service.
Properties	Type	This relates to the screening user type permission designation of Taleo partners and is reserved for internal use.
Properties	Status	Once deployed to a zone by Oracle Support, this indicates whether the external service is active and available.
Properties	Code	Unique identifier of the external service.
Settings	Validity Period	<p>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 Onboarding (Transitions) process was restarted.</p> <p>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.</p> <p>There are three possible values:</p> <ul style="list-style-type: none"> <li>• Always Valid: the original results will be reused forever.</li> <li>• Defined by Partner: the partner determines the length of time until a new request is necessary</li> </ul>

Location	Field	Description
		<ul style="list-style-type: none"> <li>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</li> </ul> <p>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 Onboarding (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 link 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 Onboarding (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.
Settings	senderId	Alphanumeric value used to identify the email sender for the external service.
Settings	Delay to wait before timing out a request (in hours)	This setting indicates how long the Onboarding (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.

## Variables to Display External Service Results

Variables are available to display the result values received for new hires from external partners and to provide links 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.

Links are useful when information is accessible only via the partner's site. Sometimes the service providers retain additional details about each new hire and they always retain any PDFs or other files that were generated while performing their services. This information cannot be viewed within Taleo Onboarding (Transitions), however; links can be added to any form, which will bring the form assignees directly to the service provider Web site to access this information. Typically this variable is given the name 'More Details' by the service provider. For information on using links, see [Links in a User-defined Forms](#).

The number and type of variables available is wholly dependent on which services are used in your Onboarding (Transitions) implementation.

## Troubleshooting External Services

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

If an error is due to the Onboarding (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 disabled or never enabled 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.

 **Note:** 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.

## Disabling an External Service

When an external service that was enabled is disabled later, the following will occur:

- The Onboarding (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 Services and Multiple Participants

Partners who provide services that require the participation of multiple participants in different roles, at the right time, can have those services integrated with Taleo Onboarding (Transitions) via Oracle Validated Integration (OVI).

The Partner determines how many participants need to be involved and how many different phases must be completed before the overall Onboarding (Transitions) task is considered completed (has Completed status) thereby enabling the Transactions process to advance. The Oracle Taleo Certification Lab helps the Partner to become certified to support the required invitations and updates. The external service must be configured in the Onboarding (Transitions) zone to align appropriate messages with the people involved in the task. Afterward, the service can then be assigned to tasks in Onboarding (Transitions) processes.

If an external service request task is configured to send notifications regarding the candidate or employee, the email messages are sent to various participants when the task starts. If one of the recipients is the candidate or employee, the person receives the message and the message is also displayed as a task on the Tasks tab in the career section. External service partners can provide updates for all participants in the task while the task activities are being carried out. When the partner determines that the task is complete and sends the results to Oracle Taleo, the task becomes complete and the Onboarding (Transitions) process continues.

If the partner needs the participation of Onboarding (Transitions) Center users in an activity at its site as part of an Onboarding (Transitions) task, the participants receive an email and a task is added to the Tasks section inviting the participants to visit the partner's Web site. The email can contain a link to the site and the recipient can be authenticated using Oracle Taleo credentials provided the process and the partner support this. Once authentication is successful, the participant can complete forms and view the partner's dashboard or other pertinent information. The task's status is In Progress as long as the OVI task (external service task) is ongoing. In other words, the overall Onboarding (Transitions) task is considered completed (has Completed status) when all elements of the OVI task are completed.

If the partner needs the participation of the candidate or employee in an activity as part of an Onboarding (Transitions) task, the person receives an email that includes a link to the Tasks tab in career sections. The tab contains a task that displays the same information found in the email. The invitation email and the Tasks tab task can contain a link to the external service Web site. The candidate or employee can be authenticated at the Web site using Taleo credentials provided the process and the partner support this. Once authentication is successful, the person can complete forms or perform other required activities. The overall Onboarding (Transitions) task is considered completed (has Completed status) when all elements of the task are completed.

### Limitations

- When configuring a process, the Onboarding (Transitions) administrators can assign each of the notifications and invitations for an external service task to only one participant. For this reason, they should not assign this type of task to a role that has more than one participant.
- Invitations from external service requests cannot be reassigned to other participants. The only way to change assignees is by canceling and restarting the Onboarding (Transitions) process.
- Interim notifications can only be sent by Partners.



## External Service Request Tasks and Results in the Onboarding (Transitions) Center

The Onboarding (Transitions) Center displays details of external service request tasks passed to a partner using Oracle Validated Integration (OVI).

An external service request is the whole "conversation" between the Taleo Oracle process and the external service provider, on behalf of a 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 Onboarding (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 Onboarding (Transitions) Center provides information about external service tasks involved in Onboarding (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 Onboarding (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 of the services it offers. Contact your Taleo Onboarding (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.

Request Field Name	Description
Name	Name of the external service provider.
Service	Name of the service.
Status	Any of the predefined statuses for OVI requests used by Oracle Taleo for its partners. These values originate from the Provider status sent to Oracle Taleo in the OVI exchange.
Provider Status	Value passed to Oracle Taleo from the external service involved in the OVI exchange. This value is mapped to the appropriate Oracle Taleo status.
Request Date	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.
Last Activity Date	Date of the most recent communication.
Results Expiration Date	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 Field Name	Description
	request. Instead, the existing results would used, thereby saving money for the customer. 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.
Reference Number (Internal)	A unique identification number used by Oracle Taleo to identify a particular OVI request. Oracle Support typically uses this number in the OVI Console.
Reference Number (External)	A unique identification number used by the service providers to identify a particular OVI request.

### Parameters Used

The Parameters Used section displays parameters configured by the Onboarding (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. Onboarding (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

## OVI Partner Invitation Task

When OVI partners who have access to a special "invitation" mechanism invite Onboarding (Transitions) Center users to provide information or perform an action, a corresponding task is added to the Tasks section of the Onboarding (Transitions) Center. Similarly, if new hires receive such an invitation, a corresponding task is added to their Tasks tab in the career section.

In providing services to Oracle Taleo customers, Oracle Validated Integration (OVI) partners often need to communicate with Onboarding (Transitions) Center users. Partners do this by sending an email message to the Onboarding (Transitions) Center


user via a special "invitation" mechanism. The content of the correspondence, including links it might have, are reproduced in the form of a task assigned automatically to the Onboarding (Transitions) Center user.

Two types of communication are possible through such tasks. Partners can convey information—perhaps a progress report regarding the service being performed for the new hire or perhaps the results of a service that was completed. For example, a partner might want to inform an assignee that E-Verify was completed for a new hire. The other type of communication is an invitation to perform some action. Most often the invitation includes a link that the assignee clicks to access the partner's Web site and provide information. One example is an invitation to complete section 2 of the Form I-9, Employment Eligibility Verification.

Regardless of the type of communication, the task is displayed in the assignee's Tasks section of the Onboarding (Transitions) Center and the task's status is In Progress as long as the OVI task (external service task) is ongoing. Assignees cannot change the status. If the Onboarding (Transitions) Center displays the task view page, the Properties section includes the email message along with any links the latter contained. If the section includes a link to the partner's Web site and the user clicks it, he/she will be redirected to the site automatically.

Upon completion of the OVI "conversation", the task status changes automatically to Completed and the task is no longer displayed in the Tasks section while the My Opened Tasks or All Opened Tasks filters are applied.

Like other tasks, these tasks can be reassigned to any other Onboarding (Transitions) Center user. The new assignee will receive the same email and task (both of which might include a link to the provider's Web site) that the original assignee received.

 **Note:** Access to an OVI partner's Web site via the link is handled by the partner; Oracle Taleo has no control over whether a new assignee will be able to access an OVI partner's Web site via a link extended initially to a different assignee.

OVI partners can communicate with new hires in a similar manner. Provided the task is assigned the New Hire role, two things will happen. The invitation message will be sent to the new hire. Secondly, a task containing the text and links (if any) of the email will be displayed on the new hire's Tasks tab. If the task includes a link to the partner's Web site and the new hire clicks it, he/she will be logged into the site automatically.

## Configuration

To view the content of the task (hence the content of the email message and links (if any), Onboarding (Transitions) Center users require at least one of the following permissions.

Permission	Location
View related sources of tasks assigned to me, to see their forms and documents or View related sources (forms, email correspondence, and documents) related to all tasks	Configuration > SmartOrg (Administration) > User Types > (click a user type code) > Recruiting > Onboarding (Transitions) Edit

If a message template will include a link to an OVI partner's Web site, it recommended that the link be configured to open in a separate window. This will enable Onboarding (Transitions) Center users to visit the Web site while keeping the Onboarding (Transitions) Center session open.

If the link is configured to open in the same window instead, Onboarding (Transitions) Center users who click the link to go to the OVI partner's Web site will be unable to return directly to the Onboarding (Transitions) Center directly afterward.

The same principles apply to correspondence targeting new hires. If "Open in New Window" is selected, this will enable new hires to visit the OVI partner's Web site while keeping their Career Section session open.

If a customer wished to disable both types of communication (email message and task) for a particular situation, the Onboarding (Transitions) administrator could create a fictitious user and assign the task to that "person". Such arrangements require careful consideration particularly if the task requires the assignee to visit the partner's Web site and perform some action there. Because the task is assigned to the fictitious assignee, no one will receive the OVI partner invitation email message and task. Consequently, the task status will remain In Progress and the process will typically be unable to advance to the next step.

## Marking Candidates as Ready to be Exported

Tasks can be created and configured whereby when candidates or employees reach the task in a process, their job submission information at that time is tagged as ready to be exported to an external system.

When candidates or employees reach this task in a process, the task's status changes to Completed and the system marks the candidates or employees as ready to be exported. Afterward, external systems can send export requests to the export service to pull all or a subset of candidates or employees marked as ready to be exported. If a query is run repeatedly, only the people who were marked as ready since the query was last run will be exported. The external systems must query the same export service specified for exportable statuses in the Recruiting Center.

The information that can be exported is job submission information (candidates or employees applied for jobs or were matched to jobs) and information from entities related to job submissions (e.g. First Name, Requisition Title). Though Onboarding (Transitions) processes can be started based on general profiles, information originating from general profiles is not marked as ready for export and consequently cannot be exported using this method.

"Mark as ready to be exported" tasks can be used across any number of running Onboarding (Transitions) processes. All candidates or employees who complete the task within any process are added to the list of people ready to be exported (pulled by the external system).

One example. As a large and disparate number of candidates advance through the same Onboarding (Transitions) process, a subset of the candidates need to provide information before being ready for export to Fusion while another subset needs to provide information from a larger number or different set of data fields for another external system. To achieve this, the process could be configured to present a different form to each subset of people to gather the information. After a form was completed, the person would be ready to be exported. For this reason, a different "Mark as ready to be exported" task would be needed for each branch of the process, all referring to the same external system thereby ensuring that each person gets placed immediately onto the export list as soon as he/she is ready.

A second example. As a large and disparate number of candidates advance through one or more than one Onboarding (Transitions) process running in a zone, multiple external systems might want to pull information about candidates. An HRMS might need data about every newly hired candidate while a different ticketing system might need data about a subset of new hires who are joining a department or location. In this situation, two different "Mark as ready to be exported" tasks would be needed to add the right people to each of the two lists thereby enabling each external system to pull the information when ready.

There is no limit on the number of ready to be exported points (tasks) in a process at which information can be pulled.

The status of the process must be In Process or Completed. In the case of a process that is canceled, delayed or suspended, for example, the corresponding job submission information will be unavailable for export.

A maximum of 8,000 job submissions can be exported through the Onboarding (Transitions) export service. This is to ensure that an export does not adversely affect system performance. A query result in excess of this number will generate an error. It is recommended, therefore, that organizations export job submission information frequently.

Because the Recruiting Center can also include candidates and employees tagged as ready to be exported, there might be cases where individuals are tagged in both systems. In such cases, the candidates and employees will only be exported once.

Note that the external systems are responsible for pulling the information from the Taleo system; Taleo Onboarding (Transitions) does not export the information.

Some fields in the Taleo Recruiting data dictionary do not exist in Taleo Onboarding (Transitions). If a query run by an external system uses any of those fields to exclude certain candidates or employees from the export, those fields will have no effect as filters. Consequently, the export might include candidates or employees that the filters were designed to exclude.

After a "Mark as ready to be exported" task is completed, an entry is recorded in the Onboarding (Transitions) Center, Onboarding (Transitions) process, History section. It includes the name of the candidate, the ID of the external system to which the job submission information is ready to be exported, the requisition title and the ID of the job submission.

The method for exporting job submission information described here is one method; there are others. For more information, see the Fusion-Taleo Integration Taleo Configuration Guide for the version of Taleo Enterprise you are using.

## Configuration

To configure a task whose purpose is to tag a point in a process when data is ready to be pulled by an external system, the Onboarding (Transitions) administrator selects the "Mark as ready to be exported" action and specifies the agreed upon ID of the external system in the External system ID field.

When the task is added to a process later, the Onboarding (Transitions) administrator must select an assignee for the task. The administrator can assign anyone because Taleo Onboarding (Transitions) performs the action automatically and the task is displayed only a few moments in the assignee's Tasks list.

Task Definitions	Location
Mark as ready to be exported	<b>Configuration &gt; [Onboarding (Transitions)] Administration &gt; Task Definitions</b>
External system ID	<b>Configuration &gt; [Onboarding (Transitions)] Administration &gt; Task Definitions</b>

## Creating a Mark as ready to be exported Task

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Fill in the required fields and enter values for the other fields if you wish.
3. In the Actions list, select Mark as ready to be exported.
4. In the External system ID field, enter the value you established beforehand for the external system that will pull the data from the Oracle Taleo system.
5. Click Save.
6. Click Activate.
7. You can configure Notifications and Reminders if you wish.

The task can be added to processes.




# 13 Tasks

## 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 Onboarding (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.

 **Note:** Be sure to read the following sections also regarding external services and OVI partner invitation tasks: [External Services and Multiple Participants](#), [External Service Request Tasks and Results in the Onboarding \(Transitions\) Center](#) and [OVI Partner Invitation Task](#).

### 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.

Type of Action	Description	Related Source
Send Correspondence	An email message is sent to the task assignee(s) and also to any additional recipients that the Onboarding (Transitions) administrator added at the task level or in the message template.	The list of message templates. Typical assignees consist of anyone on the To, CC, BCC lines in the Message Template, along with anyone to whom this task will be assigned when it is included in a process. Additional recipients can only be specific free-form email addresses, not variables that represent roles. An example of an additional recipient would be a mentor. For information about correspondence tasks specific to mentors, see Mentors for New Hires.
Fill user-defined form	Assignees are asked to read and complete a user-defined form.	The list of user-defined forms.
Execute the task manually	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 Onboarding (Transitions) administrator can simply ask an assignee to perform a task and the Onboarding (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.	Not applicable.
Open PDF	A PDF file, that can contain specific variables, gets assigned here by the Onboarding (Transitions)	The Onboarding (Transitions) administrator is presented with a list of PDF documents and can only select one.

Type of Action	Description	Related Source
	administrator to the assignee as a task. The assignee can complete the task simply by opening the PDF. After it is assigned to any participant, Onboarding (Transitions) Center users can access it in the Onboarding (Transitions) Center, on the Process Page for that candidate/new hire. It can also be exported via Taleo Connect.	
System Task	Though this type of task is still displayed in the Action list, it's use is confined to some earlier versions of Taleo Onboarding (Transitions). It serves no purpose in 14A or later versions of Taleo Onboarding (Transitions).	Not applicable.
Request External Service	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.	The Onboarding (Transitions) administrator is presented with new fields relevant to the service. The Onboarding (Transitions) administrator chooses among any enabled external service providers and then he/she can configure any of the Input Fields that are requested or required by that selected partner.
Display Content Page	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.	The Onboarding (Transitions) administrator is presented with a list of content pages and can only select one.
Send E-Offer Response	When a candidate or employee accepts or refuses an advanced E-Offer by submitting a form configured for this purpose, the Offer status is updated automatically to Offer-Accepted or Offer-Refused. If a cover page is selected in the Cover page to display in the offer letter PDF field, when a candidate or employee accepts or refuses an advanced E-Offer, an offer letter and cover page PDF is generated automatically also. The PDF can be included in a Display Content Page task or an Open PDF task such that the PDF will be available to candidates and employees. The PDF will also be available to Onboarding (Transitions) Center and Recruiting Center users.	Not applicable.
Mark as ready to be exported	When candidates or employees reach this task in a process, the task's status changes to Completed and the system marks the candidates or employees as ready to be exported. Afterward, external systems can send export requests to the export service to pull all or a subset of candidates or employees marked as ready to be exported.	Not applicable.

### 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 the nature of the specific task in Onboarding (Transitions).

### Task Priority

Priority is useful for indicating the relative urgency with which a task should be executed: Low, Normal or High. Note that Priority is simply a helpful indicator; it has no direct effect on the system's behavior. It does not control any due dates (driven by the Duration field), affect the timing of task assignments (driven by the links and conditions) or have any effect on any sequence on candidates' 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 Onboarding (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 Onboarding (Transitions) administrator can choose to remove these notifications from every parallel task. The Onboarding (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 Onboarding (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.

## Functional Roles and Tasks

To ensure that anyone from a specific group of people can move a process forward as necessary, Onboarding (Transitions) processes can be configured by the Onboarding (Transitions) administrator such that their respective supervisors are functional roles.

Sometimes it is necessary or desirable to designate a specific person per Organization, Location or Job Field (OLF) to oversee a process; to ensure all of its tasks move forward and prevent bottlenecks from occurring. In these situations, the Onboarding (Transitions) administrator can configure a functional role as the process owner. The system then assigns to each running process the best process owner—the single person in the functional role who is the best-match for the OLF of the requisition associated with the process.

In other business situations it is necessary or desirable to share the responsibility of overseeing a process. In these situations, configuring the functional role as the process owner is not recommended because only the person in the functional role who is the best-match for the OLF of the requisition associated with the process will be selected. Rather, the functional role(s) should be configured as the process's supervisors. Because a process can have multiple supervisors, all of people in the functional role(s) assigned as supervisors and who match the process requisition's OLF will share responsibility for the process.

See also: the "Functional Role as Process Owner" and "Functional Role Assignment" headings in [Process Owner](#).

## Creating a Task

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Enter a code, name and description for the task.  
The description is visible only to the Onboarding (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 assignees pause 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 Onboarding (Transitions) product that results from choosing any value selected in this field.
5. Select a *priority for the task*.  
Priority is an evaluation of the urgency with which a task should be executed. The value selected has no concrete effect on the behavior of the Onboarding (Transitions) product.
6. Select the action the task will perform and, from the list of sources, the related source.
7. Click Save.

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

# 14 Processes

## 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 populations. 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 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.

Onboarding (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 enabled. 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 Onboarding (Transitions). You must associate only one process type to a process.

- **Pre-Hire Validation:** A process used when the organization requires more information from new hires before the latter begin working, or when the organization wants to request paid external third-party services in a configurable, logical flow. A Pre-Hire process can be launched from the Recruiting Center for a candidate on a requisition provided all the right actions and permissions were configured. It can also be launched from Taleo Connect. This type of process is 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 the organization. A New Hire process can be launched from the Recruiting Center for a candidate on a requisition provided all the right actions and permissions were configured. It can also be launched from Taleo Connect. This type of process is 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:** Two E-Offer processes are available. The standard E-Offer process enables candidates to accept or refuse offers. The advanced E-Offer process, which requires Taleo Onboarding (Transitions), enables candidates to accept or refuse offers on line through the organization's career sections and provides additional tasks, forms, electronic signatures, etc. While an offer is being extended to a candidate, the advanced E-Offer process can be launched from the Recruiting Center provided all the right settings and permissions were configured. It can also be launched from Taleo Connect. See [Advanced Electronic Offer](#).
- **Offboarding:** A process designed for situations where employees are leaving an organization. An Offboarding process can only be launched from Taleo Connect, not from the Recruiting Center. Before the offboarding process is run using Taleo Connect, the candidate record must exist in the database or it will have to be imported into Taleo Connect. The employee does not have to be matched to a requisition. Creation of a dedicated Onboarding (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.

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.

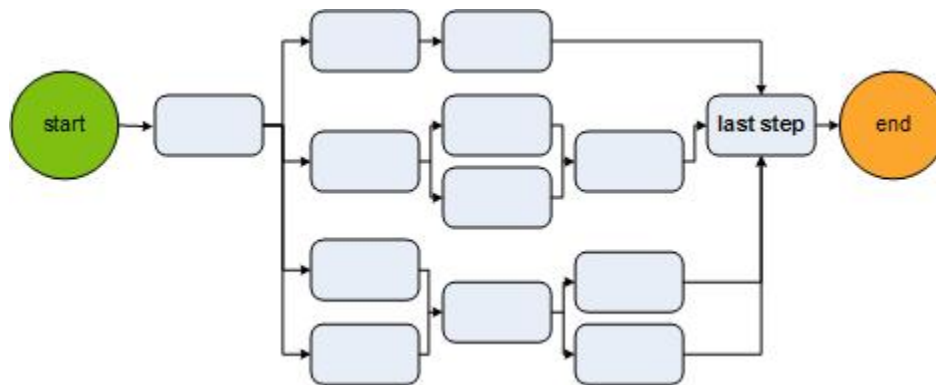
Some organizations may choose to use Taleo Connect to launch their processes, triggering them automatically from an HRMS system or some other system rather than relying on recruiters to launch processes from the Recruiting Center.

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

### Processes Require A Single, Final Step

In Taleo Onboarding (Transitions), administrators must ensure that the processes they configure have a single, final step.

A process can include branches and "tasks in parallel" but all must ultimately lead to a single, final step from which no further steps are possible. If the process is viewed in "Preview" mode, a single, last step must have an arrow leading to the "End" circle and there must be exactly one "End" circle, as illustrated below.



This design ensures more accurate calculation of the "percentage-complete" number as a candidate or employee progresses through the process. When the single, last step is completed, the process reaches 100% completion and the process status changes to Complete.

If a process is created in Taleo Onboarding (Transitions) 13A or later and includes more than one final step, the process cannot be enabled (assigned Active status). If a process created prior to 13A includes more than one final step, and has Active status, the status can be kept as is, however, Active status cannot be granted to any duplicate of the process.

Routing steps are useful for designing processes so they have a single, final step. Where the branches of a process differ significantly and paths are mutually exclusive, Onboarding (Transitions) administrators can insert a routing step that contains no task or other action as the final step. Such routing steps serve only to converge divergent steps before the process ends. For example, a process might include a path that culminates in successful completion of a 6-month-long onboarding process while another path in the same process might be short, designed to exit from the process candidates who fail a background check or a work-eligibility check. The final routing step, containing no task or other action, could be configured to execute "when one, and only one, of the preceding steps has been completed".

## 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 a single individual is responsible for moving a process forward toward completion when task assignees are tardy in completing their tasks. With the appropriate permissions, process owners can view and manage all the tasks in their respective processes regardless of who is assigned to each task. The process owner can execute or reassign any task in a process they own to a different person to avoid or resolve bottlenecks while the process is in progress. Also, a process can be configured such that the process owner's name and contact information are displayed to candidates and employees who might have questions.

To execute or reassign tasks within their processes, process owners require at least the "minimum" permissions for both processes and tasks, i.e. "View processes I own or supervise, or that have been shared with me" and "View and execute tasks assigned to me". These permissions enable process owners to view their processes on the Onboarding (Transitions) Center main page, click into each process, and click into each of the process steps to access the corresponding task. Process owners can access the "Execute" and "Reassign" links for each task, and their name is displayed as the "Task Owner" of each task in the processes they own.

Note that if process owners have the permission to view their processes but do not have the permission to view and execute tasks, they can view their processes and each step within them but they cannot access or execute the task in each step.

### Functional Role as Process Owner

Onboarding (Transitions) processes can be configured by the Onboarding (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). When an Onboarding (Transitions) process is started for a specific candidate/employee, the "best-match" person in the functional role is chosen as the process owner.

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 an OLF, only one of them will be designated the process owner when processes are started.

### Functional Role Assignment

When an Onboarding task is assigned to a functional role, the assignees are resolved at run time 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 will be assigned to the user(s) who have the highest score when their role OLF data is compared with the target values. If no user is a suitable match for 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 score to 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 difference.

Suppose the requisition information is:

- Org1 > Org11 > Org112
- Job3 > Job32 > Job325
- United States > Pennsylvania > Philadelphia

If a user has all three exact matches, the person will obtain  $100 + 100 + 100 = 300$  points. Anyone else who has exact matches will obtain 300 points and will also be assigned because they share the top score.

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  $100 + 100 + 99 = 299$  points because their location is 1 level higher than the target value. User B gets  $99 + 99 + 100 = 298$  points so only user A will be assigned to the task.

If user C happens to have Org1 > Org11 > Org112, Job3 > Job32 > Job325, but no location information at all, the individual would obtain  $100 + 100 + 97 = 297$  points. 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 information, so  $99 + 99 + 97 = 295$  points. User B has the required values Job123 and Manhattan but no Organization information. The score will be  $100 + 100 + 93 = 293$  points because not having organization positions the user 7 levels away from the requirement. This means that user A will be assigned even though user B is a better match for 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 into one consolidated list.

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

If the same user happens to be assigned to both roles, and obtains the highest 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 will be assigned to users A, B, and D.

So if user A was the only match for 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 counter intuitive 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 thereby further ensuring that a process is completed.

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 task assignees cause delays in completion of a process.

Someone can become a supervisor of a process in two ways:

- The Onboarding (Transitions) administrator designated the individual (by name) as supervisor in the process or assigned a functional role as supervisor and the individual has the functional role when the process is launched. This type of responsibility cannot be removed.
- Someone shared the process with the individual while the process was in progress. The sharing, and consequently the supervisor role, can be ended using the Revoke Sharing action.

To view how their processes are progressing, supervisors require the "View processes I own or supervise, or that have been shared with me" permission. This allows them to see their processes on the main page of the Onboarding (Transitions) Center and to click into each one to view the corresponding steps. This permission is insufficient for executing tasks within these processes.

To execute or reassign tasks within their processes, supervisors require at least three permissions: "View processes I own or supervise, or that have been shared with me", "View and execute tasks assigned to me" and "Manage processes for which I am the supervisor (same capabilities as the owner)". These permissions enable supervisors to view their processes on the Onboarding (Transitions) Center main page, click into each process, and click into each of the process steps to access the corresponding task. For each of these tasks the supervisors can access the "Execute" and "Reassign" links, and their name is displayed in the "Supervised by" area.

## 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 Onboarding (Transitions) administrator needs to select a type of step.

Step Type	Description
Task	The step will consist of a task selected from a defined list of tasks which are available in the Tasks library in the Onboarding (Transitions) Administration.
Sub-process	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 enabled. However, when a sub-process gets incorporated into a larger "parent" process, then any later adjustments to the definition of the "child" sub-process do not have an effect on this larger "parent" process.
Routing	The step brings together multiple parallel tasks. 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 need to be brought together. Standard tasks can also be used to handle branching and reconnecting, if their transitions are built to do so. See <a href="#">Understanding Routing Steps</a> .

### Step Execution

For each step defined in a process, the Onboarding (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 person's Onboarding (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 Onboarding (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 step:

- The Onboarding (Transitions) administrator explicitly selects two or more individual users of the system.
- The Onboarding (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 candidate/new hire. This situation should be avoided, because the Onboarding (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 Onboarding (Transitions) Center's list of In Progress processes.

### Form Snapshots in Steps that Contain a Fill User-Defined Form Tasks

Form snapshots secure the contents from important forms filled out by New Hires as they go through an Onboarding process. Enabling this feature allows Administrators the ability to create a "snapshot" in time of a form that can be viewed, printed, or exported and that will remain unaffected by future changes in the data.

Onboarding steps consisting of a "fill user-defined form" task can be configured such that submitting the corresponding form will also collect a snapshot of that form. All the snapshots will be tracked within the Onboarding process itself and will be available in the New Hire's Onboarding process details. Snapshots are generated when New Hires click Submit. Snapshots will be saved in the language in which the form data was originally entered. All snapshots can be exported using TCC.

When the new Save a Point-in-time snapshot of the form and contents at time of completion setting is enabled, snapshots are created in HTML and contain all the instructions, field labels and data. However, branding, images and other styling is not captured. While images are not captured, information relating to images such as their approximate location in the file, size and name can be included in the Snapshot by enabling the new PIT Snapshot setting. The Snapshot is supplemented with all the relevant information regarding the form and corresponding process, including:

- Candidate Name and ID
- Requisition Name and ID
- Process Name and Code
- Step, Task, Form Name and Code
- Submitted by, Date and Language

## Understanding Step Execution

The options available for executing steps enable the Onboarding (Transitions) administrators 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.

Once included in a process, each step has an Execute Step property that administrators can configure to specify when the process can advance to the step.

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.

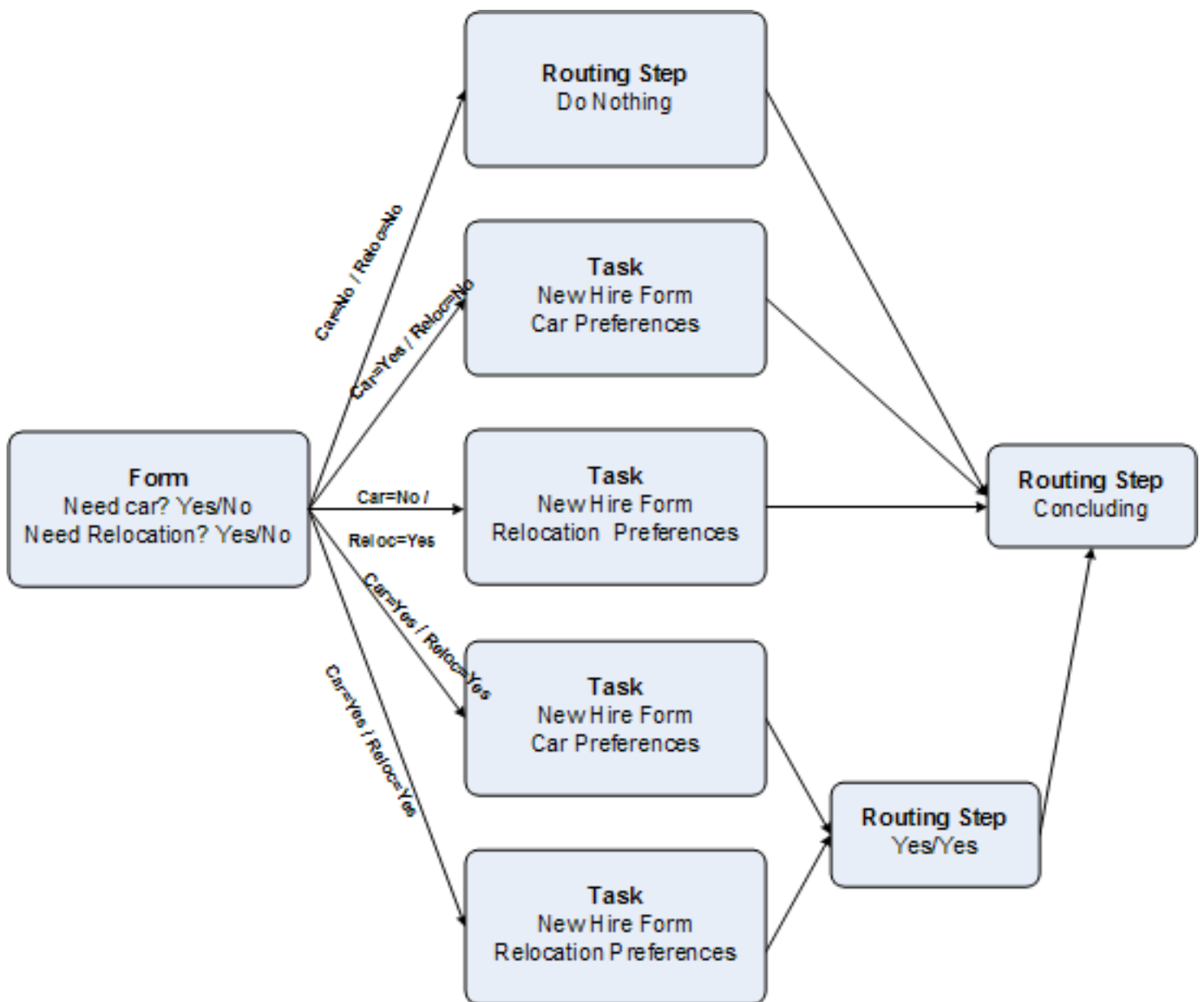
Be sure to view step execution options in isolation. While repeating a step may not impact the relationship between it and the previous step that triggered it, it could have unwanted downstream implications for repeating other tasks.

The default value of a second property, After step execution, should be left as is (Execute all subsequent steps). Selecting Execute one of the subsequent steps can produce unexpected results and is therefore not recommended.

More predictable control can be obtained by using conditions on the transitions that lead to subsequent steps. As a candidate or new hire advances through the process, steps whose conditions are met will be assigned while steps whose conditions are not met will not be assigned. This method of control always be used rather than the After step execution value: Execute one of the subsequent steps.

## 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 Onboarding (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 Onboarding (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. Example:
  - o Does the new hire need a car?: Yes, No, Yes No
  - o Does the new hire need relocation reimbursement? No, Yes, Yes, No
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 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 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.

While configuring an Onboarding (Transitions) process, keep in mind that a process having more than one end-point cannot be enabled and used. 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 the result is positive, the process should continue to advance assigning tasks to various assignees until the new hire is considered as being ready to begin working. If this partner's response is negative, the process might need to assign only a handful of concluding steps. Even in this situation the process must be configured to have only one end-point. This can be achieved by configuring the process to have a routing step as the final step. In the process illustrated earlier in this section, both main paths—the long one for qualified employees and the short one for candidates who are ultimately unsuitable—can lead to a single routing step. This routing step must be configured to be triggered "when one and only one of the prior steps is complete". This works because a 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 bring 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 Onboarding (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 to sort the list based on these items. This enables the Onboarding (Transitions) administrator to view all the steps together which feed into a step, or to view all the steps that flow out of a 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.

The information listed for each transition in the collapsed state is described in the following table:

Column	Description
Name	The name of the transition as a transition to the Connection page.
From Step	The originating step when entering the transition.
To Step	The landing step when leaving the transition.
Conditions	Possible entries: <ul style="list-style-type: none"> <li>• 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.</li> <li>• No</li> </ul>
Required	Possible entries: <ul style="list-style-type: none"> <li>• All-All conditions must be valid.</li> <li>• One-At least one of the conditions must be valid.</li> </ul>
Actions	Deletes the transition.

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:

Row	Description
Assignees	The name or role of the assignee(s).
Task	The name of the task as a transition to the Task Definition page, if any (no tasks are associated to Routing Steps).
Execute Step	Description of when the step will be executed.
After step execution	Description of what will occur after the step is executed.

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 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 task is assigned only if two or more elements are true, the Onboarding (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 transition 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

Operator	Description
Contains	<p>The element, word, or number entered in the Value field must be found somewhere in the field. For example:</p> <p>Field: TransitionsProcess/ProcessName</p> <p>Operator: Contains</p> <p>Value: Computer Setup</p> <p>The name of the Onboarding (Transitions) process must contain the words "Computer Setup."</p>
Is	<p>The element, word, or number entered in the Value field must be exact match for the whole field. For example:</p> <p>Field: AssignmentOffer/Annual Bonus</p> <p>Operator: Is</p> <p>Value: 10%</p> <p>The following task will only be reached if the annual bonus in the offer for this new hire is exactly 10%.</p>
Is null	Value field is empty
Is not null	Value field is not empty
Is equal to	The resulting information must be equal to the numerical value entered in the Value field.
Is not equal to	The resulting information must not be equal to the value entered in the Value field.
Is less than	The resulting information must be less than the value entered in the Value field.
Is greater than	The resulting information must be greater than the value entered in the Value field.
Is less than or equal to	The resulting information must be less than or equal to the value entered in the Value field.
Is greater than or equal to	The resulting information must be greater than or equal to the value entered in the Value field.
<p>Below examples are conditions used for the following fields:</p> <ul style="list-style-type: none"> <li>• NewHireDemographicDescriptorForCondition / LicenceLocation</li> <li>• NewHireLegalIdentifierForCondition / Residency</li> <li>• PositionForCondition / JobField</li> <li>• PositionForCondition / Location</li> <li>• PositionForCondition / Organization</li> </ul>	
Is	Returns true if Variable is one of the elements in the Collection. For example: User.city IS {Montreal, Toronto} would return true if User.city was Montreal or Toronto and false otherwise.
Is in	Returns true if Variable is in one of the elements in the Collection. For example:

Operator	Description
	<p>User.city IS_IN {Canada, USA} would return true if user.city was Montreal but false if it was Paris.</p> <p>Note that the IS_IN operator does not behave like the IS operator when the operand is one of the Collection member. For example: Salesman.region IS_IN {Ontario, Alberta} would return false if Salesman.region was Ontario.</p> <p>To express both the IS or IS_IN operators use the IS_OR_IS_IN operator.</p>
Contains	<p>Returns true if Variable contains one or more of the elements in the Collection. For example: Salesman.region CONTAINS {Toronto, Montreal} would return true if Salesman.region was Ontario, Quebec or Canada.</p>
Contains all	<p>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.</p>
Is or is in	<p>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.</p>
Is or contains	<p>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.</p>
Is or contains all	<p>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.</p>
Is not	<p>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.</p>
Is not in	Returns the negation of Is in.
Does not contain	Returns the negation of Contains.
Does not contain any	Returns the negation of Contains all.
Is not and is not in	Returns the negation of Is or is in.
Is not and does not contain	Returns the negation of Is or contains.
Is not and does not contain any	Returns the negation of Is or contains all.

## Date Based Condition

Date 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:

- Operator: Is less than or equal to
- Value: -4

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 Onboarding (Transitions). However, `Start Date` changes are immediately transferred from Recruiting into Onboarding (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.

 **Note:** See also: [Evaluation of Conditions on Partner Update](#)

## Evaluation of Conditions on Partner Update

When an update is received from an OVI partner, Onboarding (Transitions) reevaluates conditions automatically thereby enabling the process to proceed to the next step as quickly as possible.

In prior releases, Onboarding (Transitions) customers sometimes created processes designed to advance to a certain step and then "wait" until an OVI partner sent an update (either a status change or a value stored in a field) before continuing. Customers accomplished this by creating a "loop" using a date-based condition that reevaluated if the appropriate condition had been reached. Reevaluations were performed only once per day (unless other actions triggered reevaluations of the condition). See [Date Based Condition](#) Consequently, many hours might elapse between the moment when a partner update was received and when the reevaluation occurred.

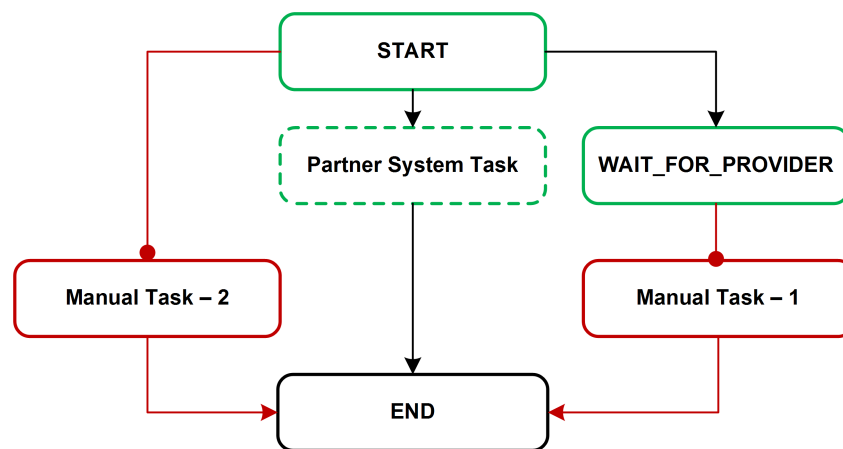
Three situations could "wake up" such a process causing the latter to reevaluate all conditions on transitions and thereby determine if any of the transitions could be executed:

- Completing any task in the process.
- Stopping and resuming the process.
- A date-based condition (on a transition) whose value changed to True (i.e. can be executed).

A fourth situation can trigger a process to reevaluate all conditions on transitions: receiving an update from an OVI partner. (The one exception where conditions will not be reevaluated is described in the following paragraph.) This enhancement renders date-based conditions on transitions unnecessary in many cases. When a process is designed to "wait" for a specific value to be provided by a partner, the process will automatically "wake up" when a partner update is received, reevaluate the condition and if the value is the one waited for, the process will proceed to the next step.

When designing such processes, administrators can use very effectively the case where a step has multiple outgoing transitions with a condition and none of those transitions has been executed. In such cases, the process will reevaluate the condition of the outgoing transitions. Likewise, if a step has multiple outgoing transitions with a condition and at least one of the transitions was executed, the process will not reevaluate any of those transitions.

Consider the following greatly simplified process including an OVI partner system task and two manual tasks.

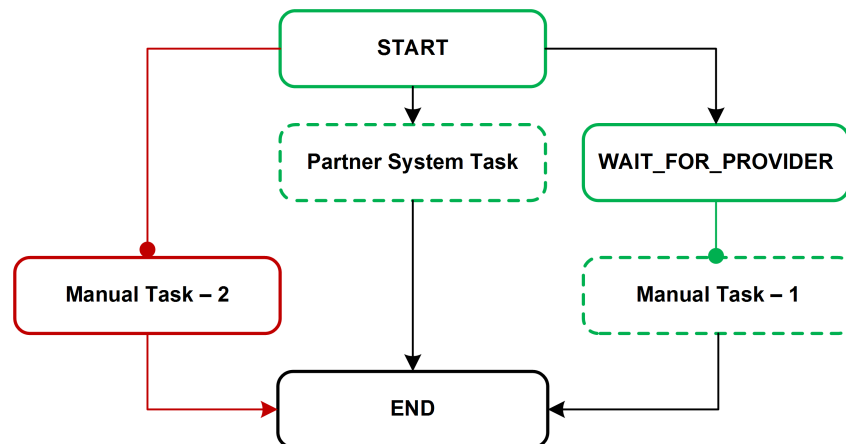


Suppose that the manual tasks can only be executed when a specific value is received from the partner. The router at the beginning of the process has three outgoing transitions:

- To Manual Task - 2 if condition "Provider Status=Pending Employer" (condition currently "false"; transition not executed).
- To Partner System Task (no condition; executed right away).
- To WAIT\_FOR\_PROVIDER (no condition; executed right away), which in turn has a "Provider Status=Pending Employer" condition to Manual Task - 1 (condition currently "false"; transition not executed).

The process cannot advance (it "waits") because the conditions were "false" when evaluated and there are no date-based conditions that might become "true" at some point.

Whenever an update is received from the partner, the "Provider Status" is set to "Pending Employer", the process "wakes up" and reevaluates the relevant conditions as depicted in the following illustration.



The transition to Manual Task - 2 is not reevaluated. This is because Start has multiple outgoing transitions and the WAIT\_FOR\_PROVIDER and Partner System Task transitions were executed immediately, before Manual Task - 2. The "Provider Status=Pending Employer" condition associated with the transition to Manual Task - 1 is reevaluated because no outgoing transition associated with WAIT\_FOR\_PROVIDER was executed. And because the value is now true, Manual Task - 1 can be executed and the process can continue.

#### OVI Partner System Tasks

Customers should ensure that listening to partner statuses does not trigger parallel workflows (branches) or otherwise modify user interactions included in the OVI partner system tasks. All user interactions should be confined to the system task.

#### LastPreviousStepEndDate Field

(The information provided in this section is not new.)

When date-based conditions are still required in processes, administrators might use the LastPreviousStepEndDate field sometimes to force a process to wait until a certain field contains a value (that would typically be provided by an OVI partner).

Take the case of a "loop" in a process where a transition with a "LastPreviousStepEndDate is less than or equal to 1" condition, combined with a routing step that verifies if a particular value is found in a specific field. If the transition with the date-based condition is executed and the value is not yet present, the process will wait until LastPreviousStepEndDate is less than or equal to 1.

Use of the LastPreviousStepEndDate field can sometimes produce waiting periods longer than expected for a number of reasons.

- LastPreviousStepEndDate does not represent the number of days that have elapsed since the immediately preceding task was completed; it represents the number of days that have elapsed since any other task in the process was completed.
- If a process includes multiple branches, a task in one branch of the process, once completed, will change the LastPreviousStepEndDate value, affecting the condition in another branch that uses the field.
  - In such cases, conditions such as "LastPreviousStepEndDate is less than or equal to 1" will not necessarily become "true" when the immediately preceding task was completed one day ago if another task in the process was completed more recently (the process would have to wait an additional day before reevaluating this condition).

- The LastPreviousStepEndDate field considers only steps of the main (root) process. A step completed in a subprocess does not affect the LastPreviousStepEndDate field. Even if used in a condition of a subprocess, the value considered is the one from the main process.
- If the system considers a time zone when executing a date-based condition, and the candidate is the person who completed the task that triggered the condition, the time zone of the candidate's computer is the one that is used. If a Transitions backend user (typically a Recruiting Center user) completed the task, the time zone specified in the person's user preferences is used, and if no time zone is specified there, the time zone of the customer is used.

For all of the reasons mentioned previously, date-based conditions that use the LastPreviousStepEndDate field should always be combined with another condition such that whenever one of the two conditions is met, the process will advance. For example, a transition could be configured to have two conditions: "LastPreviousStepEndDate is less than or equal to 1" and the value of ProviderStatus is equal to "Pending Employer". The transition could then be configured to be complete whenever at least one of the conditions was "true". This approach is recommended to ensure that processes created prior to 15A do not "wait" unnecessarily. In 15A and later releases, these conditions will be reevaluated as soon as an update is received from the OVI partner and the process will advance to the next step.

## Conditions Based on Null Values

Taleo Onboarding (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 Onboarding (Transitions) can then move forward through the process according to whether or not there is a value in the condition field.

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.

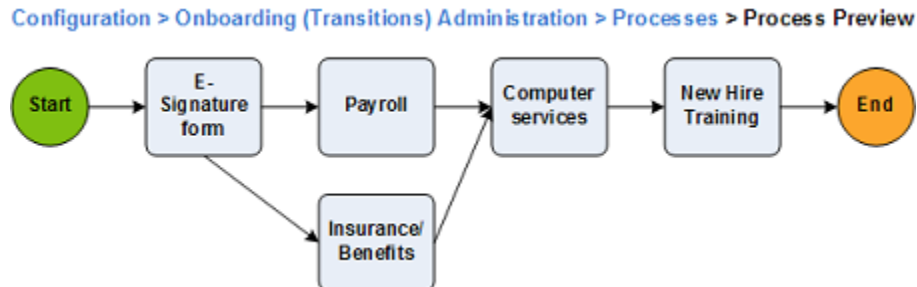
## Preview Process

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.

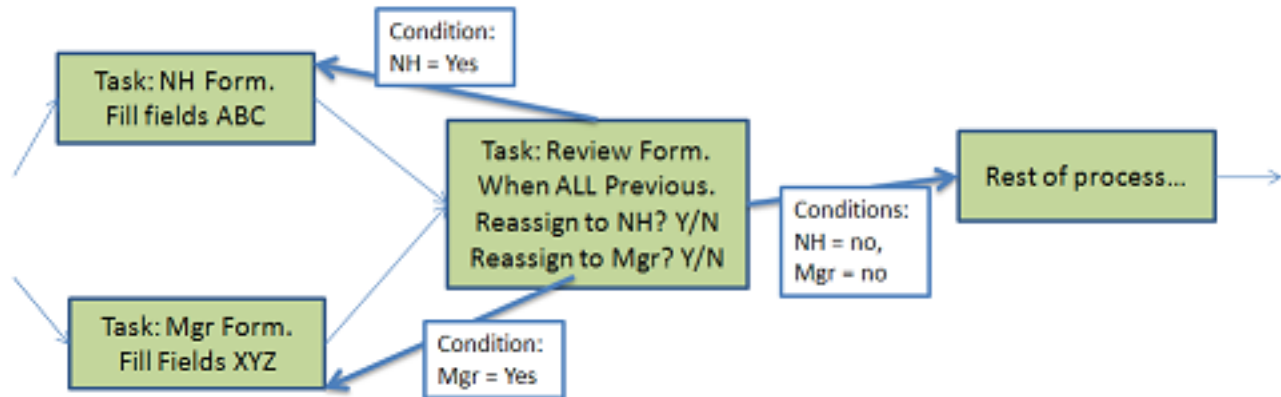
## Revisiting Tasks by Looping

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 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.

**LOOPING: to review and correct errors before continuing a process**



In the previous diagram, 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, looping is unnecessary. However, if the reviewer can only view the information and must therefore work with the new hire or manager to make changes, the workflow can anticipate this and include a "loop back".

If the reviewer decides that a change is necessary either from the new hire or the manager, the reviewer will fill in two UDFs 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 outgoing transition is triggered and the reviewer has another chance to review the newly corrected data. In this way the loop is completed and the process appears to "return to a prior step" while still following the normal rules.

## Dynamic Condition Evaluation (DCE)

Dynamic Condition Evaluation (DCE) allows Onboarding processes to react to changing data in Recruiting.

When a supported field's value is entered or updated in Recruiting, the system checks to see whether this data is used in a waiting condition in an active Onboarding process. If so, the waiting conditions are re-evaluated according to that new information.

As an example, a customer's Onboarding process has a business requirement to only proceed beyond a certain point once the new hire's Social Security Number (SSN) is entered into the system. This SSN value is populated after the process has been started.

Up through 15B.7, administrators had to configure a loop in the process, by which the process checks once a day to see whether the SSN field is still null, or whether it is has a value. (The administrator would use the condition "LastPreviousStepEndDate " and several routing steps to configure such a loop). Only when the field is no longer null, could the process continue. While this meets the business requirement, it creates the situation where processes are delayed a day or more after a field is populated before the process can continue.

With DCE such a loop configuration which checks for data is no longer needed. The administrator can configure a transition with a condition of “SSN is not null.” When the prior task completes, this transition and condition will attempt to be fulfilled. In our example, the SSN is still null, and therefore, the transition does not execute and does not invoke subsequent steps. (Up through 15B.7, this would be a dead end in the process, and therefore an invalid configuration).

Next, in our example, the SSN becomes known, and is populated. At that moment, all transitions with conditions which are in such a waiting status are re-evaluated. This transition which had a previous failed attempt is again attempted. In this case, the transition had a condition of “SSN is not null.” Since there is now a SSN, the condition can be fulfilled. The transition executes, and the balance of the process continues.

Also, with DCE enabled, future dated tasks will recalculate when they should execute if the date populated in the field changes in Recruiting. Those future dated tasks may have conditions which reference date format fields such as Start Date, Offer Accept Date and Offer Date UDFs.

Setting	Description	Default Value	Location
Proactive update of waiting conditions	Evaluate waiting conditions when corresponding trigger information is provided or updated.	No (off)	Configuration > [Onboarding (Transitions)] Settings

Field Category	Field Name	Entity Extension Information
Addresses_WF	CurrentAddressLine1	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#address
Addresses_WF	CurrentAddressLine2	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#address2
Addresses_WF	CurrentAddressMunicipality	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#city
Addresses_WF	CurrentAddressZipPostalCode	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#zipCode
PersonallInfo_WF	CellularNumber	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#mobilePhone
PersonallInfo_WF	DateOfBirth	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#birthday
PersonallInfo_WF	FirstName	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#firstName
PersonallInfo_WF	HomePhoneNumber	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#homePhone
PersonallInfo_WF	LastName	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#lastName
PersonallInfo_WF	PersonalEmailAddress	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#emailAddress
PersonallInfo_WF	Prefix	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#prefixName
PersonallInfo_WF	SocialSecurityNumber	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#socialSecurityNumber
PersonallInfo_WF	Suffix	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#suffixName
PersonallInfo_WF	WorkPhoneNumber	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#workPhone
PersonallInfo_WF	UDF	com.taleo.functionalcomponent.talent.entity.candidate.CSUser#UDF
Offer_WF	AcceptanceDate	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#acceptedDate
Offer_WF	AnnualBonus	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#annualBonus
Offer_WF	Approved	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#approvedDate

Field Category	Field Name	Entity Extension Information
Offer_WF	CarAllowance	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#carAllowance
Offer_WF	Comission	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#commissionAmount
Offer_WF	CreatedOn	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#captureDate
Offer_WF	DaysAWeek	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#daysPerWeek
Offer_WF	ExpenseAccount	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#expenseAccount
Offer_WF	ExpirationDate	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#expirationDate
Offer_WF	Extended	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#extendDate
Offer_WF	HoursADay	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#hoursPerDay
Offer_WF	Notes	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#notes
Offer_WF	Options	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#stockOption
Offer_WF	OtherBonus	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#otherBonus
Offer_WF	OtherCompensation	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#otherCompensation
Offer_WF	RefusedDate	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#refusedDate
Offer_WF	RelocationAmount	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#relocationAmount
Offer_WF	Salary	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#salary
Offer_WF	SalaryPayBasis	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#payValue
Offer_WF	SignOnBonus	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#signOnBonus
Offer_WF	StartDate	com.taleo.functionalcomponent.recruiting.entity.offer.Offer#actualStartDate
Offer_WF	Stock	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#stockAmount
Offer_WF	Vacation	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#vacation
Offer_WF	UDF	com.taleo.functionalcomponent.recruiting.entity.offer.AbstractOffer#UDF

## Launching an Onboarding (Transitions) Process for Candidates/ Employees with no Email Address

To launch an Onboarding (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. Customers can configure Taleo Onboarding (Transitions) such that Onboarding (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 Onboarding (Transitions) processes can be launched. A setting is available for that feature.



Setting	Description	Default Value	Location
Email Address for Onboarding (Transitions) Process	To run an Onboarding (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 Onboarding (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).	Blank value, no email address entered.	Configuration > [Onboarding (Transitions)] Settings

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, OVI-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 shows 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).

	Correspondence tasks	OVI-triggered invitations/ messages	Notifications of assigned tasks	Reminders of upcoming/ overdue tasks
Candidates/employees with a fallback email address	Tasks tab	Tasks tab	None	None
Candidates/employees with an email address	Tasks tab	Tasks tab	Email	Email
	Email	Email		

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 "Onboarding (Transitions)" gets created automatically by the system when an Onboarding (Transitions) process gets launched for a candidate with no preexisting SmartOrg user account.

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

## Important Notes

Customers may want to set up a "dead-letter email address" to receive any stray email messages and ignore these communications. For example, Do\_Not\_Reply@company.com.

# 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. *Enabling the process.*

## Analyzing Your Process

Before creating a process in Onboarding (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.

 **Note:** 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 would not 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 build it in Onboarding (Transitions) Administration.

## Defining the Properties of a Process

### Configuration > [Onboarding (Transitions)] Administration > Processes

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 enabled in your organization.*
4. *Enabling the user-defined form.*

## Creating Message Templates for Onboarding (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. *Enabling the message template.*

## Creating a Task

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Enter a code, name and description for the task.

The description is visible only to the Onboarding (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 assignees pause 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 Onboarding (Transitions) product that results from choosing any value selected in this field.

5. Select a *priority for the task*.

Priority is an evaluation of the urgency with which a task should be executed. The value selected has no concrete effect on the behavior of the Onboarding (Transitions) product.

6. Select the action the task will perform and, from the list of sources, the related source.

7. Click Save.

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

## Creating a Step

The process must be in Draft status.

### Configuration > [Onboarding (Transitions)] Administration > Processes

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 Onboarding (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.

## Enabling Form Snapshots within a Step

The step must contain a Fill User-Defined Form task.

## Configuration - [Onboarding (Transitions)] Administration - Processes

### Configuration - [Onboarding (Transitions)] Administration - Settings

1. Select the process that you want to use Form Snapshots with.
2. Select the step that you want to use Form Snapshots with from the Steps tab.
3. Click Edit next to Properties.
4. Select the checkbox next to the Save a Point-in-time snapshot of the form and contents at time of completion setting.
5. Click Finish.

The ability to include image information in the Snapshots is available, but disabled at upgrade. To enable including image information in the Snapshots:

- a. Click Configuration.
- b. Click Settings in the Onboarding (Transitions) section.
- c. You may refine your search results by Keyword and entering image.
- d. Click the Image in PIT Snapshot setting.
- e. Click Edit.
- f. Select Yes under Value.
- g. Save.

## Creating a Transition

### Configuration > [Onboarding (Transitions)] Administration > Processes

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.

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

The process must have Draft status.

### Configuration > [Onboarding (Transitions)] Administration > Processes

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.

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

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

### Configuration > [Onboarding (Transitions)] Administration > Processes

You can associate only one process type to a process.

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

### Configuration > [Onboarding (Transitions)] Administration > Processes

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.

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

### Configuration > [Onboarding (Transitions)] Administration > Processes

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

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

## Enabling a Process

### Configuration > [Onboarding (Transitions)] Administration > Processes

1. In the process you just created, click Activate.

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 enabled, the Onboarding (Transitions) administrator cannot make any further substantive changes to the process, its steps, its links, nor its conditions. This is because Taleo Onboarding (Transitions) is designed to ensure consistency among all candidates/new hires who travel through a 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

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 [Onboarding \(Transitions\) Settings](#).

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

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 expressed in days (not time of day) before or after the task's due date.
5. Select a notification message.
6. Click Save.

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

**Configuration > [Onboarding (Transitions)] Administration > Task Definitions**

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.

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

**Configuration > [Onboarding (Transitions)] Administration > Task Definitions**

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

**Configuration > [Onboarding (Transitions)] Administration > Task Definitions**

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

## Disabling a Process

**Configuration > [Onboarding (Transitions)] Administration > Processes**

1. Click a process.
2. Click Deactivate.

The process status is now Inactive.



## Deleting a Draft Process

The process must be in Draft status.

### Configuration > [Onboarding (Transitions)] Administration > Processes

1. Click Delete.

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 Onboarding (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 Onboarding (Transitions) Processes** is a setting that the Onboarding (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 Onboarding (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 enabled, 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.


Setting	Description	Location
Automatically Delete Old Onboarding (Transitions) Processes	Automatically executes a permanent deletion of new hires' Onboarding (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.	Configuration > [Onboarding (Transitions)] Settings

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 Onboarding (Transitions) processes in any status whether In Progress, Canceled, Completed or even Suspended.

The Onboarding (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 Onboarding (Transitions) administrator can configure the **Automatically Delete Old Onboarding (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 Onboarding (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 Onboarding (Transitions) deletion mechanism. The Recruiting deletion mechanism is required to truly wipe out the data pertaining to the candidates/new hires themselves.

 **Note:** Any manual deletion of candidates in Recruiting will also be unsuccessful if the candidate has an associated Onboarding (Transitions) process of any status.

## Deleting a Task

**Configuration > [Onboarding (Transitions)] Administration > Task Definitions**

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

## Deleting a Step

**Configuration > [Onboarding (Transitions)] Administration > Processes**

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

## Deleting a Transition

**Configuration > [Onboarding (Transitions)] Administration > Processes**

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

# Processes in the Recruiting Center and Onboarding (Transitions) Center

## Launching and Canceling Onboarding (Transitions) Processes in the Recruiting Center

Candidate Selection Workflows can be configured such that users who have the necessary permissions can start or cancel Onboarding (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 Onboarding (Transitions) Pre-Hire Process
- Start Onboarding (Transitions) New Hire Process
- Cancel Onboarding (Transitions) Pre-Hire Process
- Cancel Onboarding (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 Onboarding (Transitions) Pre-Hire Process** and the **Start Onboarding (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:

User Type Permission	Location
Initiate a pre-hire process for a candidate	Configuration > SmartOrg Administration > Users > User Types > select a user type > Recruiting > Other
Cancel a pre-hire process in progress	Configuration > SmartOrg Administration > Users > User Types > select a user type > Recruiting > Other
Initiate a new hire process for a new resource	Configuration > SmartOrg Administration > Users > User Types > select a user type > Recruiting > Other
Cancel a new hire process in progress	Configuration > SmartOrg Administration > Users > User Types > select a user type > Recruiting > Other

## 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 the following permissions to users so they can view the channels:

Channel	User Type Permission	Location
Pre-Hire and New Hire channels	<p>One of the following permissions:</p> <ul style="list-style-type: none"> <li>• View processes I own or supervise, or that have been shared with me</li> <li>• View all processes</li> </ul> <p>And one of the following permissions:</p> <ul style="list-style-type: none"> <li>• Initiate a pre-hire process for a candidate</li> <li>• Initiate a new hire process for a new resource</li> <li>• Cancel a pre-hire process in progress</li> <li>• Cancel a new hire process in progress</li> </ul>	<p>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Transitions</p> <p>Configuration &gt; [SmartOrg] Administration &gt; [Users] User Types &gt; Recruiting &gt; Other</p>

## Restarting a Process from the Recruiting Center and Onboarding (Transitions) Center


Sometimes an error is made during an Onboarding (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 Onboarding (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 Onboarding (Transitions), it uses the most up-to-date information. If a process is restarted, it 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 almost 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 designed to store their data uniquely per process (e.g. E-Signature): 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. Rather, they retain the most recently updated information about the candidate, from any source (an onboarding form, a career section, Taleo Recruiting or Taleo Connect). Remember that it is impossible to update information about the requisition or the offer inside an onboarding form: these must be edited following the normal business logic in the Recruiting Center.

Provided users have the required permissions, they can restart a process using the following methods:

- 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 Onboarding (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 Onboarding \(Transitions\) 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.

If a process is canceled, tasks whose status is In Progress are terminated/canceled.

 **Note:** If the Onboarding (Transitions) process is disabled by the Onboarding (Transitions) administrator, users will not be able to restart the same process. By design, only active processes can be launched for new candidates/employees. For example, if a 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. 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 Onboarding (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 Onboarding (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

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

### Recruiting > Candidates

1. Click the name of a new hire.
2. In the More Actions menu, select Cancel Onboarding (Transitions) Pre-Hire Process or Cancel Onboarding (Transitions) New Hire Process.
3. In the More Actions menu, select Start Onboarding (Transitions) Pre-Hire Process or Start Onboarding (Transitions) New Hire Process.
4. From the drop-down list, select the exact same process.
5. Click Done.

## Restarting a Process from the Onboarding (Transitions) Center

This method works for all running process types.

### Onboarding (Transitions) > Onboarding (Transitions) Center

1. In the Processes section, click a candidate/employee.
2. Click Restart.

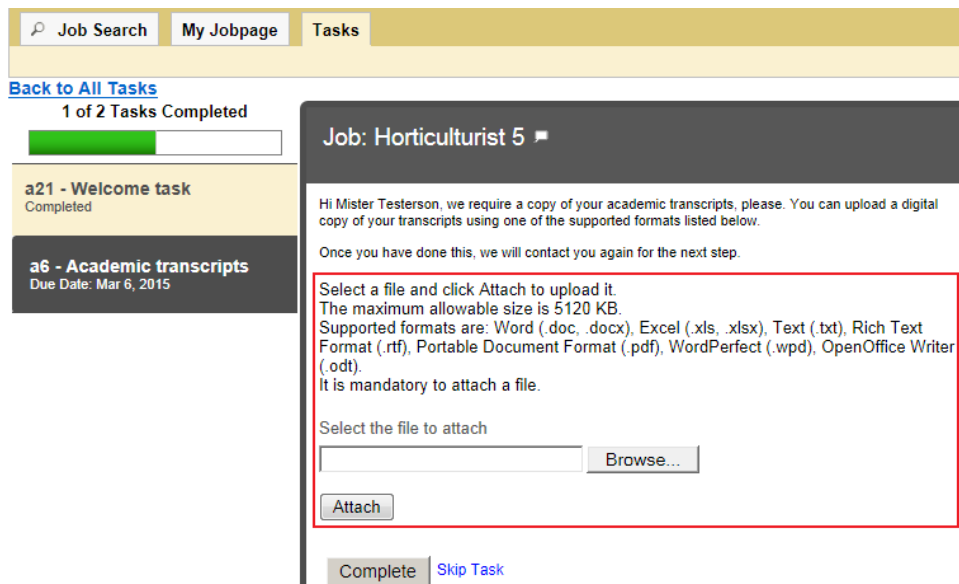
## Files Uploaded from Tasks Tab Available in Onboarding (Transitions) Center

Organizations can invite or require new hires to submit files through the Career Section Tasks tab as part of their Onboarding (Transitions) processes and the uploaded files will be available in the Onboarding (Transitions) Center.

Tasks on the Career Section Tasks tab can be used to invite or require new hires to upload files. A driver's license, social security card, and academic transcripts are a few examples of documents that some organizations might want new hires to submit in digital form as part of an Onboarding (Transitions) process.

### Career Section Tasks Tab

When new hires are involved in a process that includes a content page configured for file uploading, the corresponding task is displayed on the Career Section Tasks tab. The following screenshot is an example of how the task might be displayed on the Tasks tab to new hires.



The new hires locate and attach the file they want to upload to complete the task. They can select a different file from the one they initially selected provided they have not yet clicked Complete. Once they click Complete, the file is uploaded immediately and usually cannot be changed afterward.

Files are scanned for viruses before they are uploaded to the Oracle Taleo system.

What if the task was completed and it was necessary to replace the file with another version of the same file or with a different file altogether? There are two possibilities.

- The Onboarding (Transitions) administrator could configure a loop (in the process) triggered by some other data parameter (such as a UDF submitted on a form) to assign the same content page task a second time. The same paragraphs would be displayed on the content page. A file uploaded through the content page task displayed the first time would be replaced by a file uploaded through the same content page task displayed later.
- The Onboarding (Transitions) administrator could include a second content page task later in the process, a task assigned the same file category. The file uploaded first would be replaced by the file uploaded later.

New hires can upload a single file via a content page. If organizations want to request multiple files, the process requires multiple content pages and each content page in the process must have a unique file category.

### Onboarding (Transitions) Center

In the Onboarding (Transitions) Center, the uploaded files associated with a process are displayed in the Candidate Files section on the process page, whether the process's status is In Progress or Completed. To display or download an uploaded file, users click the corresponding link.

**System Documents** | [Add](#) [Batch Print](#)

1-1 out of 1 | 1

<input type="checkbox"/>	Name ▲	Code	Size	Delete
<input type="checkbox"/>	<a href="#">a3 cover page</a>	a3 cover page	13 KB	<a href="#">Delete</a>

1-1 out of 1 | 1

**Candidate Files**

1-2 out of 2 | 1

Name ▲	Category	Date	Size	Delete
<a href="#">HillcrestCollege.pdf</a>	High school diploma	Mar 16, 2015, 2:25:17 PM	6 KB	<a href="#">Delete</a>
<a href="#">SCarolinaDriversLicense.docx</a>	Driver's license	Mar 16, 2015, 2:24:57 PM	14 KB	<a href="#">Delete</a>

1-2 out of 2 | 1

Each file in the Candidate Files section includes a category. How is a category useful? The files might not have names that accurately indicate their content. Onboarding (Transitions) Center users would be unlikely to form an accurate idea of the content of a file named Reg-2468 helix.docx. If the file category was "High school diploma", however, users would understand immediately the type of information the file contained.

**System Documents** | [Add](#) [Batch Print](#)

1-1 out of 1 | 1

<input type="checkbox"/>	Name ▲	Code	Size	Delete
<input type="checkbox"/>	<a href="#">a3 cover page</a>	a3 cover page	13 KB	<a href="#">Delete</a>

1-1 out of 1 | 1

**Candidate Files**

1-3 out of 3 | 1

Name ▲	Category	Date	Size	Delete
<a href="#">Basic1.pdf</a>	Driver's license	Feb 2, 2015, 11:52:42 AM	1681 KB	<a href="#">Delete</a>
<a href="#">Req-2468 helix.docx</a>	High school diploma	Feb 2, 2015, 11:55:30 AM	55 KB	<a href="#">Delete</a>
<a href="#">SeanR_photo.docx</a>	New hire photo	Feb 2, 2015, 12:02:04 PM	14 KB	<a href="#">Delete</a>

Onboarding (Transitions) Center users can delete file attachments from the Candidate Files section but they cannot upload file attachments to it. A deleted file cannot be restored. The dates and times displayed in the Candidate Files section are the dates and times when the uploads occurred and might differ from the dates and times when the new hires completed the tasks.



## Configuration


To create a task enabling new hires to upload a file as part of an onboarding process, Onboarding (Transitions) administrators need to create file categories, configure a content page that includes the file upload section, and then create a content page-based task that includes the content page.

1. Administrators [create a file category](#) for the type of document they plan to ask new hires to upload as part of an onboarding process. Perhaps a category for PDFs of university transcripts, or one for new hire photos, or another for a list of references and so forth.
2. Administrators create or edit a content page, add the file category they created in the previous step, and designate a file upload mandatory or optional.
3. Administrators create a content page-based task that contains the content page.


### File Category

File categories are created in an operation separate from the creation of content pages. See [Creating a file category](#). Only file categories whose status is Draft can be deleted; categories whose status is Active can be disabled at any time.

Though the same file category can be assigned to multiple content pages, a 1:1 relationship is far more typical.

 **Note:** Take the case of a process that included two content pages having the same file category. The file uploaded through the first content page would be replaced by the file uploaded through the second content page. In most cases, this would not be desirable. On the other hand, this method could be used effectively to overwrite a file with a more recent version. One example is a process including a content page requesting new hires to upload a scanned document. A subsequent task in the process might require a recruiter to verify if the quality of the scanned document was adequate. In the event that the document was deemed to be too blurry, the process could be routed to a second content page requesting new hires to upload a clearer scan of the document. When the new hire performed this task, the new file would overwrite the older one because only one file can be associated with a file category.


The following file category codes are used by the system and therefore cannot be used by Onboarding (Transitions) administrators: candidate, CONTACT, default, FLIPBOOK, GOAL, MESSAGE\_SENT, MESSAGE\_TEMPLATE, OFFER, OTHER, recruiter, REQUISITION, RESUME, REVIEW, TALENTUSER. Because these internal codes are case sensitive, administrators could use words as file category codes provided a different case is used.

 **Note:** File categories have only a code; no name or description. Consequently, file categories cannot be translated into other languages at the present time. Take the case of an organization that enabled English, Japanese and Spanish and an administrator who created a category whose code was "Employer References". In a process that included a content page with the category, "Employer References" would be displayed in the Category column of the Onboarding (Transitions) Center for all users regardless of the language they were using in the product.

### Content Page - File Upload Section

While creating or editing a content page, Onboarding (Transitions) administrators can add a file upload section, assign a category relevant to the type of file that new hires will be requested to upload, and specify whether uploading a file is mandatory or optional. If the action is mandatory, new hires will be unable to complete the task until they upload a file.

A content page can include only one file category and new hires can upload a single file via a content page. If organizations want to request multiple files, they can create as many categories and content pages as their needs require.

 **Note:** The fact that content pages can be created and configured for specific organizations, locations and job fields (OLF) can be used to great effect. Suppose a transportation company wanted new hires based in New Zealand to provide a photocopy of a driver's license for that country. The administrator could create a specific content page to include a driver's license file category and the country location, New Zealand, in the OLF.

Permission required to create and configure file categories	Location
---	----------


Manage task definitions, related sources, content pages, images, and file categories	Configuration > [SmartOrg] Administration > User Types > (select a user type) > Recruiting > [Onboarding (Transitions)] Edit
--	--

Permission required to view, download and delete candidates files in Onboarding (Transitions) Center	Location
--	----------

View, add, print, and delete System Documents (PDFs), and view and delete Candidate Files	Configuration > [SmartOrg] Administration > User Types > (select a user type) > Recruiting > [Onboarding (Transitions)] Edit
---	--

Setting Name	Location
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Attached File Maximum Number	Configuration > [General Configuration] Settings
Attached File Maximum Size	Configuration > [General Configuration] Settings
Attachments Format Filter	Configuration > [General Configuration] Settings

 **Note:** The Attached File Maximum Number and Attached File Maximum Size settings are shared with other Oracle Taleo products but are considered separately for each product. "Considered separately" in the sense that if Attached File Maximum Number was set to 5, a candidate could upload up to 5 files for a job submission and later, as a new hire, upload up to 5 more files during an onboarding process. "Shared" in the sense that if the setting value is changed to 2, the new maximum of 2 files applies to all products.

New Content Page Properties	Location
-----------------------------	----------

Show file upload section below the content page	Configuration > [Onboarding (Transitions)] Administration > Content Pages
File upload is mandatory	Configuration > [Onboarding Transitions] Administration > Content Pages > (click content page)

## Creating a File Category

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

### Configuration > [Onboarding (Transitions)] Administration > File Categories

1. Click Create.
2. Type a code in the Code field.

The following file category codes are used by the system and therefore cannot be used by Onboarding (Transitions) administrators: candidate, CONTACT, default, FLIPBOOK, GOAL, MESSAGE\_SENT, MESSAGE\_TEMPLATE, OFFER, OTHER, recruiter, REQUISITION, RESUME, REVIEW, TALENT, USER. Because these internal codes are case sensitive, administrators could use words as file category codes provided a different case is used.

3. Click Save.

The file category is created but it cannot be added to content pages until you change its status to Active. See [Enabling a File Category](#).

## Enabling a File Category

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

The file category's status must be Draft or Inactive.

### Configuration > [Onboarding (Transitions)] Administration > File Categories

1. Perform one of the following steps.
  - o Locate the file category in the list and click the corresponding Activate.
  - o Click the file category code in the list and click Activate.

In the Files Categories list, Status column, the file category's status is Active.

## 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 Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (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.

# 15 E-Offer Process

## Advanced Electronic Offer

Recruiting Center users have the ability to extend offers electronically so that candidates can 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 Onboarding (Transitions).

### Standard Electronic Offer

For a full explanation of standard electronic offers, please see the Oracle Taleo Recruiting Configuration Guide.

### Advanced Electronic Offer using Taleo Onboarding (Transitions)

Customers who have more complex electronic offer requirements can configure Onboarding (Transitions)-based advanced electronic offer workflows for use in Taleo Recruiting. Some customers might require additional E-Signatures, notifications extended to include additional people, calls to external service providers, different tasks for executives. Customers like those who have more complex requirements might consider using the "Onboarding (Transitions) version" of electronic offers because offer workflows in this version can be configured to accommodate a wide variety of needs.

### Typical Sequence of Events


The advanced E-Offer process can be started as soon as an offer is ready to be extended by way of the Recruiting Center. This can be done when the offer status is Approved (if an approval cycle is needed) or Draft (if an approval cycle is not needed or is configured to be skipped). Recruiting Center users click More Actions > Extend Offer > Extend in writing > E-Offer.

Once the E-Offer process is started, the system begins assigning the tasks configured for the process. The offer letter is typically displayed on the Tasks tab of all the Taleo-based career sections the candidates might visit because a form was configured containing the offer letter. Candidates receive an email message if the Onboarding (Transitions) process was configured that way inviting them to go to a secure career section portal to view the offer on line. When candidates click the URL link in the message, they are directed to the career section portal where they log in. They can examine the offer (but cannot modify it) and provide new information or update existing information on the form as necessary. They can print the offer details from the Tasks tab and if the OfferLetterAttachments variable was added to the E-Offer letter form, they can print offer letter attachments. The form can include fields, such as an electronic signature, that can be configured as optional or mandatory. Candidates accept or refuse the offer by providing a value for a field configured for that purpose (the field should therefore be mandatory). If the form contains E-Signature fields, these are validated by the system.

As soon as candidates submit their decision, Recruiting Center users and Onboarding (Transitions) Center users are informed automatically by way of an email message (provided this was configured). The message, which originates from a configurable message template, includes the candidates' response and can provide other information and be sent to additional recipients such as a hiring manager.

When candidates submit their decision using the form, an (appropriately configured) Send E-Offer response task updates the offer status to Offer-Accepted or Offer-Refused in the candidate selection workflow. This task can also be configured to create a PDF consisting of the offer letter, the candidates' offer status and the cover page. The PDF will be available in

the Onboarding (Transitions) Center and the users will be able to view and print the PDF. More importantly, the PDF will be available for export through Taleo Connect. A task can be configured to display the PDF on the candidates' or employees' Tasks tab at an appropriate moment in the process. For a full explanation of this feature, see [Viewing E-Offer Letter PDFs with the Advanced E-Offer Process](#).

 **Note:** No offer letter and cover page PDF is created if a Recruiting Center user manually captures a candidate's decision—thereby changing the step status to Offer – Accepted or to Offer - Refused. Instead, the candidates must submit the form including their decision through an advanced E-Offer step.

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

Question	Standard E-Offer (Recruiting)	Advanced E-Offer (Onboarding (Transitions))
Configuration required?	No, the two standard E-Offers and the workflow cannot be configured.	Yes, you configure related forms, email messages and the workflow.
E-Offer is displayed on which tab?	Offer tab (which includes other offers if any).	Tasks tab (which includes tasks from the E-Offer process and (typically) tasks from other processes).
When is offer sent electronically?	As soon as E-Offer is extended.	Wherever you have configured this action in the E-Offer process.
Can multiple E-Signatures be captured?	Two on a single form (candidate)	Unlimited including E-Signatures required from candidate or others (e.g. manager) for the offer and any attachments.
Are E-Signatures validated?	E-Signatures are mandatory, not validated.	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.
Can OLF be used to send different notifications or tasks?	No.	Yes, using "branching" (routing) logic in E-Offer process.
Can reminders be sent?	No.	Yes, for candidate E-Offer forms or any overdue tasks.
When is the status updated in the candidate selection workflow?	When candidate submits an E-Offer form on a career section.	Whenever it is configured to be updated, using the "system task".
Can a recruiter still capture a response manually?	Yes, the candidate selection workflow is updated accordingly and candidate cannot respond on the E-Offer page.	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).
Is auto-progression in the candidate selection workflow available?	No.	No.
Is the offer still displayed after a candidate declines an E-Offer?	No.	Yes, in read-only format for duration of E-Offer process.
Is the offer still displayed after a candidate accepts an E-Offer?	Yes, displayed until candidate/offer info is archived or purged, or until offer is rescinded or the candidate or employee reneges after accepting.	Yes, displayed in read-only format for duration of E-Offer process.
Who can access the PDF of the most recent e-signed offer letter?	Recruiting Center users and Taleo Connect users.	Onboarding (Transitions) Center users, candidates, and Taleo Connect users.

Question	Standard E-Offer (Recruiting)	Advanced E-Offer (Onboarding (Transitions))
Can PDFs of older e-signed offer letters be viewed or exported?	Yes, PDFs of past offers, accepted or refused, are available provided the organization is using 12C or a later version.	No, the complete PDF is only available for the current offer, not for a rescinded or renege offer.
Which data fields are added to the offer letter in the PDF?	The candidate's name, decision, IP address, and date/time-stamp appear at the end of offer letter.	The candidate's name, decision, and date/time-stamp appear at end of offer letter as well as any fields that were added to the cover page.
Can more fields be added to the PDF?	No.	Fields can be added to cover pages and a cover page can be configured to be part of the PDF). Also, administrators can create multiple cover pages, configuring them to include different sets of fields. Each cover page can target a different audience within the same process.
Security to control who can view the PDF?	Whether a user can view an offer and cover letter PDF is governed by three factors: the security level selected for the "Letter Used" offer field (General, Restricted or Confidential); the security level selected for the Security level for offers (in view mode) permission; the selections made for the View offers permission.	Whether a user can view offer and cover letter PDFs is governed by Onboarding (Transitions) permissions: <ul style="list-style-type: none"> <li>• View all processes</li> <li>• View processes I own or supervise, or that have been shared with me</li> <li>• View, add, and print attached files (PDFs)</li> </ul>

The following table shows some of the ways in which advanced electronic offer PDFs differ from standard electronic offer PDFs.

Question	Standard E-Offer (Recruiting)	Advanced E-Offer (Onboarding (Transitions))
Who has access to the current electronically signed E-Offer letter PDF?	Recruiting Center and Taleo Connect users.	Onboarding (Transitions) Center and Taleo Connect users, the candidate or employee.
Can earlier electronically signed E-Offer letter PDFs be viewed or exported?	Yes, PDFs are available for all standard E-Offer letters, accepted or refused, as far back as (and including) 12C.	No, only the current E-Offer letter and cover page are available in the form of a PDF and only as long as the offer is not rescinded and the candidate does not renege.
Which fields are included automatically in the E-Offer letter portion of the PDF?	Candidate's name, decision, IP address, date and time of decision are displayed at end of offer letter.	Candidate's name, decision, date and time of the decision are all displayed at end of offer letter in addition to any additional fields the Onboarding (Transitions) administrator added to cover page, which is displayed before or after the offer letter.
Can the administrator add other fields to the PDF?	No.	Onboarding (Transitions) administrators can add fields to cover pages. Also note that they can create different cover pages, each one with its own set of fields. This makes possible cover pages that target different audiences within the same process.
Who can view and print a PDF?	The "Security level for offers" permission can be set to "General", "Restricted" or "Confidential". The permission is used to specify who can view and print offers and this on different subsets of requisitions.	Ability to view and print a PDF is controlled through the View, add, and print attached files (PDFs) permission, this for two subsets of Onboarding (Transitions) processes.

Advanced electronic offers using Onboarding (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

An advanced E-Offer process can be started in the Recruiting Center in two ways. The same type of process can also be started through Taleo Connect.

- While changing the offer status to Extended in the Recruiting Center, 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 Onboarding (Transitions) E-Offer process.
- After an offer is extended through the Recruiting Center, there is always the Send option in the More Actions menu that recruiters can select to communicate the same offer 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 Onboarding (Transitions) E-Offer process.
- An advanced E-Offer process can be started through Taleo Connect for candidates who have made a job submission whose offer status is Extended. An advanced E-Offer process can also be canceled using Taleo Connect.

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 Onboarding (Transitions) process, and one of these tasks is to view and respond to the offer letter.

## Responding to the Advanced Electronic Offer

Candidates typically receive an email notifying them of the advanced electronic offer and indicating how to respond. This email notification typically contains a link that leads the candidates to the career section.

The candidates need to log into the career section to see the advanced E-Offer process; the confidential details of the offer are not included in the email.

The advanced electronic offer is displayed on the career section Tasks tab much like any other task in an Onboarding (Transitions) process. (An electronic offer sent using the standard electronic offer method is displayed on the career section Offers tab.) The Tasks tab appears in every career section to which the candidates have access, not only in the career section where they applied for the job.

The advanced E-Offer tasks on the career section Tasks tab are displayed as soon as the candidates are assigned any task, for example, as soon as the advanced E-Offer form reaches "In Progress" status. In other words, if the process is configured



to gather additional information or E-Signatures from managers before the advanced E-Offer is displayed to the candidates, the latter will be unaware of these tasks.

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

After the candidates submit their response to the advanced E-Offer and provide all E-Signatures that might be required on the offer form, their Onboarding (Transitions) process is typically configured to move forward. Just like any onboarding form in a process whose status is In Progress, the submitted offer form is displayed on the candidates' Tasks tab in read-only format.

Tasks can be configured such that candidates who have accepted or refused an offer originating from an advanced E-Offer process can view and print a PDF that includes the offer letter, a cover page, their full name, their acceptance or refusal, and the date their decision was submitted. They can view and print the PDF as long as there are uncompleted tasks in the process, whether the tasks are assigned to the candidates or other participants. In addition, Onboarding (Transitions) Center users can also view and print the most recent advanced E-Offer letter and cover page PDF by accessing the System Documents section of the candidates' Onboarding (Transitions) process.

As soon as the overall process reaches 100% completion, the process, the offer letter, and the offer letter and cover page PDF are no longer displayed in the career sections.


Depending on the configuration of the advanced E-Offer process, if the candidates refuse the offer, further tasks will be assigned or the process may end in which case all tasks related to the process, including the offer letter task and the offer letter and cover page PDF task will no longer be displayed in the career sections.

## Receiving the Candidate's Response to the Offer

As soon as candidates respond to the advanced E-Offer, the "Send E-Offer response" 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 Onboarding (Transitions) process can continue automatically in parallel.

Even if an advanced E-Offer has been extended, 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 advanced E-Offer, he can do so. Note however that rescinding the advanced E-Offer causes the Onboarding (Transitions) advanced E-Offer process to be immediately canceled.

 **Note:** 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 Onboarding (Transitions) process. So when the Onboarding (Transitions) process reaches the "Send E-Offer response" 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 Onboarding (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 advanced E-Offer process in the Onboarding (Transitions) Center. They can also view their current tasks regarding an advanced E-Offer process in the Onboarding (Transitions) Center.

## Updating the Offer Once the Advanced E-Offer Process is Running

After recruiters have extended an advanced E-Offer, the Onboarding (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

As is the case for any Onboarding (Transitions) process, participants such as hiring managers or HR coordinators might be involved in the candidate's advanced E-Offer process. These participants might be assigned certain actions provided they have the necessary permissions.

- They can execute any tasks that the process has assigned to them such as reviewing the e-offer information.
- They can open and view the completed E-Offer forms and/or PDFs if they have the permission to view the related sources 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 the list to view only the E-Offer-type processes or use other filters to view processes that their permissions permit them to see.
- If the process was configured to create a PDF containing the offer letter and cover page, the candidate's decision and perhaps other information, users can view and print the PDF.

Any participants who have the "View and execute my tasks in the Response Center (do not combine with other permissions)" permission can see and complete their currently-assigned tasks on the Response Center's simple Web pages. For example, a Response Center task might involve reviewing E-Offer information. Response Center users cannot view related sources or track overall progress towards process completion.

## Starting and Canceling the Advanced E-Offer Process with the Recruiting Center and Taleo Connect

The advanced E-Offer process can be started and canceled 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 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.

Onboarding (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 Onboarding (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 Onboarding (Transitions) process. Most customers will configure at least a few similar steps, as follows. Candidates can receive an email notification inviting them to access a secure career section portal to view the offer online. Those candidates click the URL link in the email notification and are directed to the career section portal where they are required to log in. The Tasks tab is displayed and the candidates can view and print the offer details and, provided the OfferLetterAttachments variable was added to the E-Offer letter form, offer letter attachments, if any. Candidates then accept or refuse the offer and 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 Onboarding (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 Onboarding (Transitions) advanced E-Offer process does not take the expiration date into consideration when updating the candidate's status. Instead, the advanced E-Offer "Send E-Offer response" task verifies that the status is still Offer-Extended and then it updates it to Offer-Accepted or Offer-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 task that updates the status 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 cases where something in the process was not properly configured, or the recruiter manually entered a different response for the offer before the candidate submitted the form, or Taleo Connect imported a different response before the candidate submitted the form, there is the possibility that the response from the form and the actual status will be out of sync.

 **Note:** To account for such situations, it is important that administrators use the {Offer\_Para.CandidateOfferResponse} and {Offer\_Para.StatusDescription} variables differently. Administrators should include the {Offer\_Para.CandidateOfferResponse} variable only on onboarding forms whose purpose is to capture candidates' response. Only the {Offer\_Para.StatusDescription} variable (not the {Offer\_Para.CandidateOfferResponse} variable) should be included on forms that follow later in a process because this variable displays the true 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 Onboarding (Transitions) form, to ensure that it cannot be submitted without confirming the assignee's identity.

### Understanding the "Send E-Offer response" Task

The task whose action is "Send E-Offer response" 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 task will update the Offer status automatically in the candidate selection

workflow to Offer - Accepted or Offer - Refused but the task requires an assignee. It is recommended to use a "dummy" assignee (it is best not to use the candidate or 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 enabled 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 enable 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 disable the old advanced E-Offer process.

## Configuring the Advanced Electronic Offer

The configuration of advanced electronic offers for Onboarding (Transitions) consists of the steps listed in this section. Other steps can be added depending on your requirements and process. Only one advanced E-Offer type process can be active in the zone at one time. Consequently, the process must be designed such that it is appropriate for every person in every location and for every job. It can be designed with as many different possibilities as needed.

1. *Enabling the Advanced Electronic Offer setting.*
2. *Granting the permission to extend offers electronically.*
3. *Creating the message inviting the candidates to view the offer on line.*
4. *Creating the message informing the recruiter about the candidate's response to the offer.*
5. *Configuring the E-Signature validation method used to capture the candidate response to the offer.*
6. *Creating the form that will enable the candidate to respond to the offer.*
7. *Creating a task to update candidate's offer status and generate offer letter PDF.*
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 that includes the tasks you created in the earlier steps.*

 **Note:** To configure an advanced E-Offer process designed to create a PDF document consisting of the offer letter, a cover page and candidates' decision accepting or refusing the offer, see also [Viewing E-Offer Letter PDFs with the Advanced E-Offer Process](#) and perform the additional steps described in

## Enabling the Advanced Electronic Offer Setting

### Configuration > [Recruiting] Settings

1. Use the Refine by filter such that the Electronic Offers setting is displayed in the list.

Try "electronic offers" (without the quotation marks) using the Keyword category.

2. Click Electronic Offers in the Settings list.
3. Click Edit.
4. Click the radio button next to Advanced Electronic Offer.
5. Click Save.

When sending offers to candidates, Recruiting Center users who have the Extend offers electronically permission will have a third option, E-Offer, in addition to Printer Letter and E-mail.

## Granting the Permission to Extend Offers Electronically

### **Configuration > [SmartOrg] Administration > [Users] User Types**

1. Select a user type.
2. Click Recruiting.
3. Next to Offers, click Edit.
4. Click the radio button next to Extend offers electronically.
5. Click Save.

Provided the Electronic Offers setting is selected for the organization, users who are granted Extend offers electronically permission will be able to select the E-Offer option when extending offers to candidates.

## Creating the Message Inviting Candidates to View the Offer On Line

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

### **Configuration > [Onboarding (Transitions)] Administration > Message Templates**

1. Click Create.
2. Enter a code, name, and description.
3. Select the message template format.
4. Complete the To, Reply to, Cc and Bcc fields.

Email-type variables can be copied and then pasted into these fields. Afterward, whenever a message based on the template is sent to the task assignees, the message will also be sent to the individuals who correspond to the email-type variables. You can also enter specific email addresses in these fields.

5. Complete the Subject field. Variables can be copied and then pasted into 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. You can also use variables.

It is important to include the {TransitionsURLs\_Para.TaskAccessURL} variable: it is the variable for the link that will bring candidates to a secure career section portal.

9. Click Save.
10. Click Activate.

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's Response to the Offer

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

### **Configuration > [Onboarding (Transitions)] Administration > Message Templates**

1. Click Create.
2. Enter a code, name, and description in the corresponding fields.
3. Select the message template format.
4. Complete the To, Cc, Bcc fields.

Email-type variables can be copied and then pasted into these fields. Afterward, whenever a message based on the template is sent to the task assignees, the message will also be sent to the individuals who correspond to the email-type variables. You can also enter specific email addresses in these fields.

5. Complete the Subject field. Variables can be copied and then pasted into the field.  
If you want to display the candidate's response in the subject line, include 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. You can also use variables. It is important to include the {Offer\_Para.StatusDescription} variable: it will display in the message the current offer status: Accepted or Refused.
9. Click Save.
10. Click Activate.

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

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

### **Configuration > [Onboarding (Transitions)] Administration > User-defined Electronic Signatures**

1. Click EOffer signature.
2. Select the validation method that will be used when the form assignee signs the onboarding form that includes the E-Signature field.
3. Enter a new name for the signature if desired.
4. Click Save.
5. Configure other E-Signatures as needed.

Your business needs might require, for example, that the E-Signature of other participants or separate E-Signatures from the candidate for various parts of the offer be captured. In such cases, additional E-Signatures should be configured (and later added to the form).

The electronic signature can be added to the form the candidate completes in responding to the offer.

## Creating a Form for the Candidate to Respond to the Offer

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

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

1. Click Create.
2. Provide a code, a name, and a page name in the corresponding fields.
3. To add a section, position your cursor in an existing section, click the Insert a Section icon. 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 the Default section title and make your changes in the [Selected Element Properties](#) section.
5. To add a table, position your cursor in the appropriate section of the form and click the Insert a Table icon. A table containing two columns and five rows is inserted in the form.
6. To add or remove rows and columns, use the corresponding tools in the Toolbox.
7. To add text, position your cursor in a cell and click the Insert Text icon to place a text area on the form. In the Selected Element Properties section, in the Value field, use the rich text editor to add formatting, graphics, links, etc.
8. To add fields, select a category in the drop-down list, select a field in the updated list and 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 the variables listed in this step. To add variables, select a category in the drop-down list, select a field in the updated list, and drag and drop the field in the desired section.
  - o Category: Offer; Variable: 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.
  - o Category: Offer; Variable: OfferLetterBody: This is the content of the offer letter.
  - o Category: ESignature; Variable: EOfferSignature: To capture the validated electronic signature of the candidate. Make the field mandatory.
  - o Category: Offer; Variable: OfferLetterAttachments: If this variable is placed on a form, it will display the names of all files attached to the offer letter in the Recruiting Center. If there were no attachments, nothing will be displayed on the form. Please note that if a label is provided for this variable, the label 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. Enable the form by clicking the corresponding Activate in the User-defined Forms list.

This form must be incorporated into a task so that it can be used in the advanced E-Offer process.

## Creating a Task to Update Candidate's Offer Status and Generate Offer Letter PDF

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Enter a code, name and description for the task.



3. Select Send E-Offer response in the Action field.
4. If you want the system to generate a PDF containing the offer letter and the cover page: click Select, click the radio button next to the cover you want to display in the PDF and click Select.  
If no cover page is specified, the system will still update the offer status but no PDF document will be created and hence no PDF will be available for export to external systems.
5. If you selected a cover page in the previous step, specify whether you want it to be displayed at the beginning or end of the PDF by clicking the corresponding radio button.
6. Click Save.
7. Click Activate.

If the task is later included in a process, and candidates or employees in the process respond to the offer displayed on the Tasks tab: the status of the offer will be updated to Offer-Accepted or Offer-Refused. If a cover page is specified, Onboarding (Transitions) Center users as well as the candidates or employees will be able to view and print a PDF containing the offer letter and cover page. External systems specified will be able to pull the PDFs.

Add this task to the advanced E-Offer process.

## Creating a Task to Send the Message to Candidates

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

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 task.
5. Select a *priority* for the task.
6. In the Action field, select Send correspondence.
7. In the Related Source field, select the message you created to invite candidates to view the offer on line.
8. Click Save.
9. Click Activate.

Incorporate this task into the advanced E-Offer process.

## Creating a Task to Send the Message to the Recruiter/Participants

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines (optional).
4. Select a *type of task*.  
Specifying the type is useful if you plan to generate reports by type of task.
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.

Incorporate this task into the advanced E-Offer process.

## Creating a Task to Provide a Form to Respond to the Offer

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

1. Click Create.
2. Enter a code, name and description for the task.
3. Enter guidelines (optional).
4. Select a *type of task*.  
Specifying the type is useful if you plan to generate reports by type of task.
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.

Incorporate this task into the advanced E-Offer process.

## Creating the E-Offer Process

### Configuration > [Onboarding (Transitions)] Administration > Processes

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 on the Steps tab.
  - b. Select Task as the type of step you want to create and click Continue.
  - c. Click the Search button, select the radio button next to one of the tasks you created earlier and click Select.
  - d. Click Continue.
  - e. You can provide a description if you wish.
  - f. If you are configuring the offer form step, it is important to enter a value of 1 in the Sequence field. If you are configuring the content page step, it is equally important to enter a value of 2 in the Sequence field. No value is required in that field for the other steps in the advanced E-offer process.
  - g. In the *Duration* field, enter the number of days required to perform the step. This field will be used in the calculation of the due date of each task for its assignee(s).
  - h. 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.

- i. From the Execute Step list, select when the task is to be performed. See [Understanding Step Execution](#).
    - j. Click Finish.
    - k. 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.

## Viewing E-Offer Letter PDF with the Advanced E-Offer Process

Candidates and employees can view and print PDFs of standard and advanced E-Offer letters they accepted or refused. Onboarding (Transitions) Center users can view and print the PDFs as well.

Electronically signed advanced E-Offer letter PDFs can include the offer letter, a cover page, the candidate's or employee's full name, the person's acceptance or refusal, and the date the decision was submitted.

### Standard E-Offer Letter PDF

Recruiting Center users can view and print PDFs of standard E-Offers. For a full description of this feature, see the Oracle Taleo Recruiting Configuration Guide.


### Advanced E-Offer Letter PDF

Candidates and employees who have accepted or refused an offer originating from an advanced E-Offer process can view and print a PDF that includes the offer letter and a cover page. The offer letter portion of the PDF includes the candidate's or employee's full name, his/her decision, and the date and time the decision was submitted. The cover page can contain text, images, variables and branding. Onboarding (Transitions) Center users can also view and print the most recent advanced E-Offer letter and cover page PDF including the candidate's or employee's decision by accessing the System Documents section of the candidate's or employee's Onboarding (Transitions) process. All documents available in the System Documents section can be exported via Taleo Connect to a long-term system of record.


### Typical Sequence of Events

After a Recruiting Center user extends an advanced E-Offer, the offer letter is typically displayed within a form on the Tasks tab of all the Taleo-based career sections the candidate might visit. The candidate examines the offer (but cannot modify it), provides new information or updates existing information on the form as necessary, and accepts or refuses the offer. If

the form contains E-Signature fields, these are validated by the system. When the candidate submits his/her decision using the form, an (appropriately configured) Send E-Offer response task updates the offer status to Offer-Accepted or Offer-Refused in the candidate selection workflow. This task can also be configured to create a PDF consisting of the offer letter, the candidate's offer status and the cover page. The PDF will be available in the Onboarding (Transitions) Center and the users will be able to view and print the PDF. More importantly, the PDF will be available for export through Taleo Connect. A task can be configured to display the PDF on the candidate's or employee's Tasks tab at an appropriate moment in the process.

 **Note:** No offer letter and cover page PDF is created if a Recruiting Center user manually captures a candidate's decision—thereby changing the step status to Offer – Accepted or to Offer - Refused. Instead, the candidates must submit the form including their decision through an advanced E-Offer step.

The Onboarding (Transitions) administrator usually will have created a task whose purpose is to render the PDF available to candidates or employees who can then view and print the offer letter and cover page. There are two ways to do this. The administrator may have created a task whose action is Open PDF. If this is the case, a task will be displayed on the Tasks tab and the candidate can click a link in the task to display the PDF. If the administrator created and configured a task whose action is Display Content Page instead, a content page task will be displayed on the Tasks tab. The content page typically contains a link to the PDF, perhaps links to other documents, text, the organization's logo and other images, variables and branding. Onboarding (Transitions) Center users who have access to the candidate's process and who have the required permissions can also view and print the PDF by clicking the corresponding link in the System Documents section of the candidate's process. As mentioned earlier, all documents available in the System Documents section can be exported via Taleo Connect to a long-term system of record.

 **Note:** If an offer is rescinded or if the candidate reneges after accepting the offer, the offer letter will no longer be displayed in the PDF, only the cover page. For this reason, it is recommended to routinely export the PDFs with Taleo Connect to an HRMS or other system as soon as possible.

As long as the status of the process is In Progress, the candidate can click the link to open the PDF containing the offer letter and cover page. Once the process is completed, none of the associated tasks or documents are displayed on the Tasks tab.

The following table shows some of the ways in which advanced electronic offer PDFs differ from standard electronic offer PDFs.

Question	Standard E-Offer (Recruiting)	Advanced E-Offer (Onboarding (Transitions))
Who has access to the current electronically signed E-Offer letter PDF?	Recruiting Center and Taleo Connect users.	Onboarding (Transitions) Center and Taleo Connect users, the candidate or employee.
Can earlier electronically signed E-Offer letter PDFs be viewed or exported?	Yes, PDFs are available for all standard E-Offer letters, accepted or refused, as far back as (and including) 12C.	No, only the current E-Offer letter and cover page are available in the form of a PDF and only as long as the offer is not rescinded and the candidate does not renege.
Which fields are included automatically in the E-Offer letter portion of the PDF?	Candidate's name, decision, IP address, date and time of decision are displayed at end of offer letter.	Candidate's name, decision, date and time of the decision are all displayed at end of offer letter in addition to any additional fields the Onboarding (Transitions) administrator added to cover page, which is displayed before or after the offer letter.
Can the administrator add other fields to the PDF?	No.	Onboarding (Transitions) administrators can add fields to cover pages. Also note that they can create different cover pages, each one with its own set of fields. This makes possible cover pages that target different audiences within the same process.


Question	Standard E-Offer (Recruiting)	Advanced E-Offer (Onboarding (Transitions))
Who can view and print a PDF?	The "Security level for offers" permission can be set to "General", "Restricted" or "Confidential". The permission is used to specify who can view and print offers and this on different subsets of requisitions.	Ability to view and print a PDF is controlled through the "View, add, and print attached files (PDFs)" Onboarding (Transitions) permission, this for two subsets of Onboarding (Transitions) processes.

Advanced electronic offers using Onboarding (Transitions) are explained in more detail in the following pages. For information on standard electronic offers, please refer to the Oracle Taleo Recruiting Configuration Guide.


## Configuration

Detailed configuration steps are located in the ["Configuring an Advanced Electronic Offer Letter PDF" section and following sections.](#)

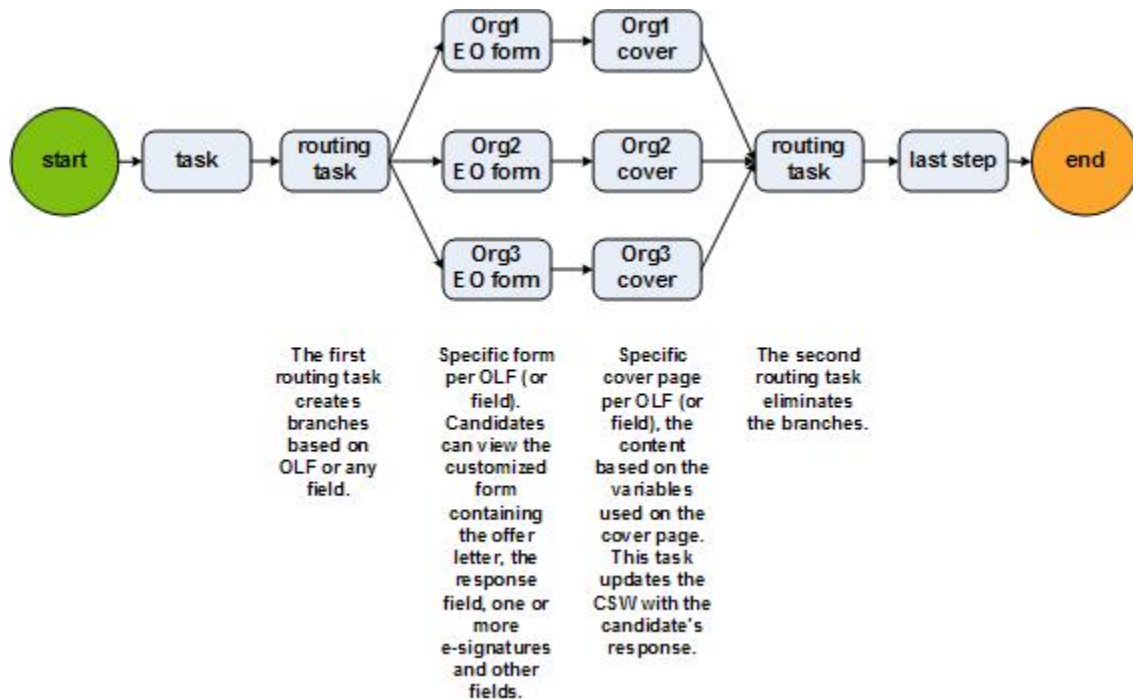
To create the PDF, the administrator must create a task whose action is Send E-Offer response and includes a cover page. When candidates and employees later reach this task in a process, the offer letter and cover page will be generated automatically.

 **Note:** If the administrator does not select a cover page, no PDF will be created. However, Taleo Onboarding (Transitions) will still update the Candidate Selection Workflow to Offer-Accepted or Offer-Refused after candidates submit their decision.

If an organization wanted an advanced E-Offer letter PDF to be created but didn't want it to have a cover page for some reason, a solution would be to create a one-page PDF containing no information, select it as the cover page to display, and select the radio button next to "At the end".

 **Note:** In designing an advanced E-Offer process that includes a PDF of the offer letter and cover page, Onboarding (Transitions) administrators must ensure that the task that captures the candidate's decision (i.e. the one whose action is "Send E-Offer response") precedes the task whose action is "Display Content Page" or "Open PDF". This is because the content of the PDF requires the information gathered by the first task.

The ability to configure branches (in a process) for multiple forms, each branch with its own "Send E-Offer response" task, and the ability to assign a different cover page to each advanced "Send E-Offer response" task can be used effectively to deliver customized cover pages to specific audiences. The following (greatly simplified) process illustrates how cover pages could target specific groups of candidates.



## Configuring an Advanced Electronic Offer Letter PDF

An advanced E-Offer process can be configured to create a PDF that includes the offer letter, a cover page and the candidate's decision to accept or refuse the offer.

If all of the following steps are performed by the Onboarding (Transitions) administrator, in addition to the steps for configuring an advanced E-Offer and described in

["Configuring the Advanced Electronic Offer"](#), candidates as well as Recruiting Center users and Onboarding (Transitions) Center users (who have the required permissions) will be able to view and print the resulting PDF.

### Configuration

1. Creating the cover page PDF (typically using Acrobat Professional). Although the candidate's full name, his/her decision, and the date and time when the candidate submitted his/her decision are added automatically to the offer letter section of the PDF, most organizations will want to add the `ESignature.EOfferSignature` variable and similar variables to the cover page. In addition, Onboarding (Transitions) administrators can add text, images (for example, the organization's logo) and branding that serve to personalize the text of the cover page. The cover page can be configured for display either before or after the letter.
2. [Adding the cover page PDF to the Documents library.](#)
3. [Creating a text document that includes the `{ContentPage.PersonalizedDocuments}` variable for use in the Content Page.](#) (This step is required only if you plan to include a Content Page task including a link to the offer letter and cover page PDF.)

4. *Creating a Content Page that includes the text document and {ContentPage.PersonalizedDocuments} variable.* . (This step is required only if you plan to include in the process a Content Page task with a link to the offer letter and cover page PDF.)
5. *Creating a task to display the Content Page* (task whose action is Display Content Page) or *a task to display a link to the PDF* (task whose action is Open PDF). In the first case, the PDF will be displayed afterward as a link on the Content Page and the Content Page task will be displayed on the Tasks tab. The task will include all links, text, images and branding that the administrator configured for the content page. In the second case, the PDF will be displayed afterward as a simple link in a task on the Tasks tab.
6. Add the task to the advanced E-Offer process in the most suitable position. Remember that the task that captures the candidate's decision (i.e. the one whose action is "Send E-Offer response") must precede this task (the one whose action is "Display Content Page" or "Open PDF"). This is because the content of the PDF requires the information gathered by the first task.

## Creating a File-based Document

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

**Configuration > [Onboarding (Transitions)] Administration > Documents**

1. Click Create a file-based document.
2. Enter a code and a name.
3. Click Browse and select the PDF file that you created and want to add to the Documents library. The PDF can include variables.
4. Enter a description of the PDF file.
5. Click Save.
6. Click Activate.

## Creating a Text Document

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

**Configuration > [Onboarding] Administration > Documents**

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

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

## Creating a Content Page

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

### Configuration > [Onboarding (Transitions)] Administration > Content Pages

1. Click Create.
2. Enter a code and a name.
3. Click the check box next to “Default Content Page” if applicable.  
You should never configure more than one default content page in Taleo Onboarding (Transitions).
4. If you want to invite or require new hires to upload a document to the system, select the check box next to Show file upload section below the content page.
  - a. Click Select.
  - b. Click the radio button next to type of document you want new hires to upload.
  - c. Click Select.
5. To require new hires to upload a file, select the check box next to File upload is mandatory; if the check box is not selected, uploading a file will be optional.
6. Click Save.
7. Next to the Text Document field, click Select.
8. On the HTML Document Selector page, click the radio button next to the text you want add to the content page.
9. Click Select.
10. Click Activate.

The content page can be specifically associated with a task by the Onboarding (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.

Associate any personalized or general PDF documents with this content page if desired.

Associate OLF information with this content page if the page will not be specifically included in any content task.

## Creating Content Page Task or Open PDF Task

### Configuration > [Onboarding (Transitions)] Administration > Task Definitions

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 task.
5. Select a *priority* for the task.
6. Perform one of the following series of steps.
  - o In the Action field, select Display content page. In the Display Content Page field, select the content page you created that contains the personalized document list {{ContentPage.PersonalizedDocuments} variable.



- In the Action field, select Open PDF. In the Related Source field, select the cover page you created earlier.


7. Click Save.
8. Click Activate.

Incorporate this task into the advanced E-Offer process.

## Exporting E-Offer Letter PDFs using Taleo Connect

Using Taleo Connect, standard and advanced E-Offer letter PDFs can be exported to an external system for storage for audit and legal purposes. Taleo Consulting Services frequently build integrations from Taleo to export PDFs.

Both standard and advanced E-Offer letter PDFs can be exported like any other PDFs.

 **Note:** If an advanced E-Offer is rescinded or if the candidate reneges after accepting the offer, the offer letter will no longer be available in the advanced E-Offer letter PDF. See [Viewing E-Offer Letter PDFs with the Advanced E-Offer Process](#). For this reason, it is recommended that advanced E-Offer letter PDFs be exported as soon as they become available.

A second reason for exporting the PDFs as soon as they become available: information in the system can change—a candidate's or an employee's name, the organization's logo, etc.—and that information can be updated instantly throughout the product.



# 16 Taleo Connect

## Taleo Connect and Taleo Onboarding (Transitions)

It is possible to launch all four types of processes using Taleo Connect: Pre-Hire Validation, New Hire, Offboarding and (advanced) E-Offer.

## Templates for Exporting Onboarding (Transitions) Data Via Taleo Connect

Templates are available in Taleo Connect to assist customers in exporting the data stored in Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (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

Onboarding (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 Onboarding (Transitions) (CSV)

Template used to export the information pertaining to each candidate's offer and E-Offer electronic 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 Onboarding (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 electronic 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, 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 Onboarding (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.


# 17 Synchronization of Onboarding (Transitions) With Onboarding


## Onboarding (Transitions) Synchronization

The synchronization tool in Onboarding (Transitions) Administration copies most administrative objects from Legacy Onboarding to Taleo Onboarding (Transitions) in an automated manner.

For Legacy Onboarding customers who do not want to reproduce all of their data and processes in Taleo Onboarding (Transitions) manually, Onboarding (Transitions) synchronization (referred to sometimes as the "sync tool") available with 13B and later versions of Taleo Enterprise enables them to copy almost all existing Legacy Onboarding information into Taleo Onboarding (Transitions) automatically: Legacy 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). OVI-based tasks, reporting and Taleo Connect integrations saw more extensive development efforts in Taleo Onboarding (Transitions) so they require the intervention of the Onboarding (Transitions) administrator. Though New Hire Portal does not exist in name in Taleo Onboarding (Transitions), Onboarding (Transitions) content pages can be created and configured for this purpose if desired.

After reviewing (and modifying if you wish) the processes copied into Taleo Onboarding (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.

 **Note:** Activation of Taleo Onboarding (Transitions) and synchronization does not modify in any way new hire and candidate data in Legacy Onboarding. Running processes in Legacy Onboarding are not copied to Taleo Onboarding (Transitions) at all; they continue to run in Legacy Onboarding following synchronization and remain separate from Taleo Onboarding (Transitions) processes. Legacy Onboarding WebTop users can view only (running and completed) Legacy Onboarding processes and perform only Legacy Onboarding tasks. Similarly, Onboarding (Transitions) Center users can view only (running and completed) Onboarding (Transitions) processes and perform only Onboarding (Transitions) tasks.

 **Note:** Processes, tasks, forms, templates, documents, E-Signature and UDFs created in Legacy Onboarding remain "as is" in Legacy Onboarding if you run the sync tool and later make changes to the corresponding objects in Taleo Onboarding (Transitions).

The sync tool compares the code of administrative objects in Legacy Onboarding with the code of objects in Onboarding (Transitions) (in the case for UDFs, the Onboarding (Transitions) code is compared with object names in Taleo Recruiting). Where a match is identified, the object is "skipped", not copied to Taleo Onboarding (Transitions). Where there is no match, the object is copied to Taleo Onboarding (Transitions). An object's status in Legacy Onboarding is also copied during synchronization with the exception of processes. Following synchronization, the default status of all processes in Taleo Onboarding (Transitions) is Draft.

In cases where a message template, text document or paragraph in Legacy Onboarding does not have a value in the Code field, synchronization generates a value for the field in the copied object in Taleo Onboarding (Transitions).

Every time synchronization is performed, a report is generated indicating whether each object in Legacy Onboarding examined by the sync tool was copied to Taleo Onboarding (Transitions) (because it was new to Taleo Onboarding (Transitions)) or "skipped" (because it was found in Taleo Onboarding (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 Legacy Onboarding tasks are copied to Taleo Onboarding (Transitions) as manual tasks and this information is duly noted in the report. Examining the report, the Onboarding (Transitions) administrator can easily identify those tasks and will typically replace them in Taleo Onboarding (Transitions) with redesigned ones. The object list can be filtered 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 Onboarding (Transitions) administrators to know the total number of rows in the report and to keep track of which rows they 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, administrators can click "...(more)" to view all of the recommendations for that object. Administrators 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. Customers will then enable their Onboarding (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. The sync tool can be run any number of times. Recall that the sync tool compares the code of administrative objects in Legacy Onboarding with the code of objects in Taleo Onboarding (Transitions) (in the case for UDFs, the Onboarding (Transitions) code is compared with object names in Taleo Recruiting). Where a match is identified, the object is "skipped", not copied to Taleo Onboarding (Transitions); where there is no match, the object is copied to Taleo Onboarding (Transitions). Modifying Legacy Onboarding elements between synchronizations might produce undesirable results in some situations. Suppose, for example, that you used the sync tool, copying forms, tasks, processes and so forth from Legacy Onboarding to Taleo Onboarding (Transitions). Later, in Legacy 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 Onboarding (Transitions) and would "skip" the task, not copy it. As a result, the task in Taleo Onboarding (Transitions) would not be updated to include the new form associated with the corresponding task in Legacy Onboarding. A second example involves a Legacy Onboarding message template and the template copied to Taleo Onboarding (Transitions). Suppose the Legacy Onboarding administrator later added or removed fields from the Legacy Onboarding template. If synchronization was performed again, the sync tool would determine that both message templates had the same code so it would not copy the updated Legacy Onboarding message template to Taleo Onboarding (Transitions). To summarize:

- The sync tool does not compare the contents of administrative objects; it compares their codes.
- If you need to run the sync tool more than once, avoid making changes to Legacy Onboarding objects until after you have no further need to synchronize.

The Onboarding (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 (Legacy Onboarding 12C to Legacy Onboarding 13A).

Recall that Taleo Recruiting and the new Taleo Onboarding (Transitions) product share almost all database information originating from fields common to both products. In addition, Taleo Onboarding (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 Onboarding (Transitions) synchronization tool from **Configuration > [Onboarding (Transitions)] Administration > Synchronization Tool** provided:

- Legacy Onboarding is enabled in the zone.
- System administrators have the user permissions listed in the following table.

User Type Permission	Location
Manage user-defined forms to display and collect data	<b>Configuration &gt; [SmartOrg] Administration &gt; User Types &gt; (click user type) &gt; Recruiting &gt; Onboarding (Transitions)</b>
Manage text documents and paragraphs for use in content pages and message templates	
Manage user-defined fields, E-Signatures, and user-defined reporting	
Manage task definitions, related sources, content pages, and images	
Manage Onboarding (Transitions) processes of all types	

## 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 Onboarding (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 Onboarding (Transitions), it will require all the UDF ingredients to be available for Taleo Onboarding (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 Onboarding (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 Onboarding (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 Onboarding (Transitions) forms.
- In certain cases, the synchronization will match an Onboarding UDF by creating a new UDF in the Onboarding (Transitions)-specific UDF area. These Onboarding (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 Onboarding (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 Onboarding (Transitions) will use.

During synchronization, certain categories of UDF are copied to Taleo Recruiting (Configuration > [Recruiting] Administration > Candidate > Show Fields).

Onboarding UDFs available in these categories...	... become available in these Recruiting UDFs categories
Assignment	Submission
Education	Education
Job Application	Submission
Offer	Submission
Talent Master File	Personal Information
Work Experience	Work Experience

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 Onboarding (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 Onboarding (Transitions).
- Conditions: Any Onboarding condition that included them will be synchronized to use the Text Placeholder UDF in Taleo Onboarding (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 Onboarding (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 Onboarding (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 an Onboarding (Transitions) boolean UDF, now the synchronized onboarding 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 Onboarding (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 Onboarding (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 Onboarding (Transitions) . However, the Onboarding references fields that have counterparts will be synchronized into appropriate Onboarding (Transitions) fields. For example, these Onboarding fields have counterparts in Onboarding (Transitions): Organization, Location, Phone Number, First Name, Last Name, Email Address.

 **Note:** During synchronization, the following two fields of UDFs are not populated in the base language (which is English in many cases): Help text displayed in Career Section and Short Label (used in lists).

Some organizations might have enabled 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 Legacy Onboarding and will transform them into Recruiting UDFs where needed, it is also necessary for the synchronization process to consider all the UDS in Legacy Onboarding and to transform these into Recruiting UDS for use within those new Recruiting UDFs.

The Legacy 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 Legacy 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 Legacy Onboarding exceeds the number, the sync tool creates a LUDS in Recruiting.

Legacy Onboarding UDSs could be defined to permit multiple selections for a UDF, by a Legacy Onboarding form assignee. The sync tool will preserve this capability in the newly-created onboarding forms which rely upon these newly-created UDFs and UDSs. So any Legacy 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 Legacy Onboarding UDS as a Recruiting SUDS.

Some organizations might have enabled and provided corresponding values for more languages in Recruiting than in Legacy Onboarding. Consequently, when UDFs are copied from Legacy Onboarding to Onboarding (Transitions), UDFs in Recruiting will have the corresponding value for languages supported by Legacy Onboarding while the same fields will have no value for languages not supported by Legacy Onboarding. Take the case where Recruiting included a language not supported by Legacy Onboarding. Following synchronization, an Onboarding (Transitions) process was run. The process included a form that included a LUDS. In Onboarding (Transitions), the LUDS and its elements would display correctly in languages supported by Legacy Onboarding. On the other hand, in the language not supported by Legacy Onboarding, the LUDS would not be displayed in Onboarding (Transitions).

A user-defined selection in Legacy Onboarding must have at least one element if it is to be synchronized from Legacy Onboarding into Recruiting so that they can be used in Onboarding (Transitions).

If synchronization identifies user-defined selections in Legacy Onboarding that are already in Recruiting, these are not copied to Recruiting.

## E-Signatures - Synchronization

The Onboarding (Transitions) sync tool copies all 50 generic E-Signatures in Legacy Onboarding to Onboarding (Transitions).

If a name is changed in Legacy Onboarding, the change is reflected in Taleo Onboarding (Transitions) following synchronization and recorded in the synchronization report. In the rare case where an Onboarding (Transitions) administrator modified an E-Signature configuration manually in Taleo Onboarding (Transitions) for any reason and then ran the sync tool a second time, the E-Signature configuration in Legacy Onboarding would overwrite the changes he/she made in Taleo Onboarding (Transitions).


Running the sync tool does not affect the four additional E-Signatures available in Taleo Onboarding (Transitions): three intended for use with I-9 forms and the fourth intended for use with E-Offers.

## Images - Synchronization

Though synchronization copies Legacy Onboarding image files to Onboarding (Transitions), Onboarding (Transitions) administrators must update manually all URLs in forms and message templates copied to Taleo Onboarding (Transitions) that point to images.

During synchronization, the code of each image in Taleo Onboarding (Transitions) is compared with the code of all the images in Taleo Legacy Onboarding. The sync tool copies only images whose code is not found in Taleo Onboarding (Transitions) (and that have a URL) and it adds a new Onboarding (Transitions) URL automatically to each copied image.

The Legacy Onboarding administrator should avoid modifying an image file after it has been copied to Taleo Onboarding (Transitions). If they modify the file and later perform synchronization again, the new Legacy Onboarding content will not be reproduced in Taleo Onboarding (Transitions): the sync tool will determine that the image code is already in Taleo Onboarding (Transitions) and will "skip" (not copy) the file.

 **Note:** Synchronization copies Legacy Onboarding forms and message templates to Taleo Onboarding (Transitions) but it does not update any Legacy Onboarding URLs to images they might include. To display the images in Onboarding (Transitions) tasks, Onboarding (Transitions) administrators must therefore replace the Legacy Onboarding URLs in forms and message templates copied to Taleo Onboarding (Transitions) with the corresponding Onboarding (Transitions) URLs.

## Documents and Paragraphs - Synchronization

The Onboarding (Transitions) sync tool copies documents in Taleo Legacy Onboarding to Taleo Onboarding (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 Legacy Onboarding, not to PDF files created with Acrobat or other products.

Paragraphs not included in any document are not copied to Taleo Onboarding (Transitions).

If documents in Taleo Legacy Onboarding contain variables, the documents copied to Taleo Onboarding (Transitions) typically include the variables updated to the corresponding Taleo Recruiting variables that Taleo Onboarding (Transitions) recognizes. If the sync tool does not recognize a variable, it replaces the variable with a placeholder in the document in Taleo Onboarding (Transitions). This makes it easy for Onboarding (Transitions) administrators to identify locations in Taleo Onboarding (Transitions) documents where they will want to replace the placeholders with the desired correct variables that are relevant in Onboarding (Transitions).

If the languages enabled in Taleo Legacy Onboarding and Taleo Onboarding (Transitions) are exactly the same, all the language versions of HTML-based documents and paragraphs created in Taleo Legacy Onboarding are copied to Taleo Onboarding (Transitions). On the other hand, if some languages are enabled ("activated") in Taleo Legacy Onboarding and not in Taleo Onboarding (Transitions), versions of documents and paragraphs in those languages are unavailable in Taleo Onboarding (Transitions).

## PDF-type Documents - Synchronization

Onboarding (Transitions) synchronization copies the properties of each PDF-type document from Taleo Legacy Onboarding to Taleo Onboarding (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 Onboarding (Transitions).

The Onboarding (Transitions) administrator can download the PDF files from Taleo Legacy Onboarding, manually replace placeholders added by the sync tool with variables used by Taleo Onboarding (Transitions), and add the updated files to the appropriate Onboarding (Transitions) documents. Replacing placeholders with Onboarding (Transitions) variables can be done using the variable's name from the onboarding 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 Onboarding (Transitions) Configuration Guide.

Please note that for multilingual zones, several different PDF files might be associated with a Legacy 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 Onboarding (Transitions). The Onboarding (Transitions) administrator then needs to upload the associated PDF files for each language after manually inserting the same Onboarding (Transitions) variables for all languages.

## Forms - Synchronization

The Onboarding (Transitions) synchronization tool copies forms from Taleo Legacy Onboarding to Taleo Onboarding (Transitions).

In most cases, the copied forms require no intervention from the Onboarding (Transitions) administrator. If there are cases where fields on a form require intervention from the administrator, they are listed in the synchronization report.

During synchronization, all forms in Taleo Legacy Onboarding whose code is not found in Taleo Onboarding (Transitions) are copied to Taleo Onboarding (Transitions). The onboarding forms have the same form name, code, status, page names, images, text and formatting as the corresponding Legacy Onboarding forms. These forms are listed in the synchronization report as “Missing” and “Added”.

Almost every field in these Legacy Onboarding forms is transformed into an equivalent field in Taleo Onboarding (Transitions). Most fields are easy to synchronize: most standard fields from Taleo Legacy Onboarding have an obvious equivalent field in Taleo Recruiting, and most of the UDFs from Taleo Legacy Onboarding have been matched to 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 Onboarding (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 Legacy Onboarding forms with the code of all onboarding forms. If no matching onboarding form code is found for a Legacy Onboarding form code, the sync tool copies that form into Taleo Onboarding (Transitions) as faithfully as possible. The synchronization report lists this form as “Missing” and “Added” to Taleo Onboarding (Transitions). If the tool does find a matching Onboarding (Transitions) form code, it takes no action: the form is not copied and the synchronization report lists this form as “Existing” and “Skipped”. This matching onboarding form could exist due to a prior run of the sync tool, which was intentionally created on the Onboarding (Transitions) side.

Regardless of the cause, whenever a Legacy Onboarding form code matches an Onboarding (Transitions) form code, the sync tool does not examine the content of the forms. This means that if two forms have the same code but their pages and/or fields differ, they will not be synchronized. In other words, after the initial sync if the sync is run again, any changes made directly in the Legacy Onboarding form will not be updated into the onboarding form, and any changes made directly in the onboarding form will not be overwritten by the Legacy Onboarding form.

It is possible to enable languages in Taleo Legacy Onboarding that differ from those in Taleo Recruiting, and it is possible to enable different languages in Taleo Onboarding (Transitions) as well. If Legacy Onboarding and Onboarding (Transitions) have the same list of active languages, then everything is synchronized: each form is copied along with each of its language versions. If Legacy Onboarding has more languages enabled, however, the form will not appear in those languages in Onboarding (Transitions) following synchronization.

## Forms - Synchronization - Exceptions

There are several exceptions with regard to the synchronization of forms and it is the responsibility of the system administrator to examine the synchronization report and remedy these exceptions where necessary.

Each time an exception arises, the sync tool creates an entry in the synchronization report. Entries can include specific details.

### Check box UDFs and Date-Time UDFs

Boolean UDFs are supported in Taleo Legacy Onboarding but not in Taleo Recruiting. For this reason, synchronization creates a Recruiting UDF for each Boolean UDF. When a Legacy Onboarding form containing Boolean UDFs is synchronized, the corresponding onboarding form displays a list containing “Yes” and “No” values in place of each Boolean UDF. Similarly, Legacy Onboarding Date-and-Time UDFs are not supported in Taleo Recruiting. These UDFs are synchronized into Onboarding (Transitions) forms to display as Date UDFs from Recruiting.

These substitutions are listed in the synchronization report. The Onboarding (Transitions) administrator does not need to make any adjustments.

### Requisition and Offer Fields Cannot be Edited

Taleo Legacy Onboarding had its own independent copy of many requisition and offer fields, whose values were updated via Legacy Onboarding forms. Unlike Taleo Legacy Onboarding, Taleo Onboarding (Transitions) shares the fields with Taleo Recruiting, which means that updates to these fields in Taleo Recruiting are immediately reflected in Taleo Onboarding (Transitions). In addition, the fields can only be updated through Taleo Recruiting—not via onboarding forms. Consequently, if these requisition and offer fields are editable on Legacy Onboarding forms, they are read-only on the corresponding Onboarding (Transitions) forms following synchronization.

These changes are listed on the synchronization report. The system administrator does not need to make any adjustments.

### Empty Pages from Obsolete Fields

A few groups of Legacy Onboarding fields are obsolete in Taleo Onboarding (Transitions). Fields that handle E-Verify in Taleo Legacy Onboarding are not supported in onboarding forms, nor are fields in the areas of competencies, evaluations, assets, hiring process steps/job submission history. If a page in a Legacy Onboarding form contains even one of these fields, synchronization renders the page as an empty page in Taleo Onboarding (Transitions) containing only the name, code, status, page name(s) etc. of the form.

Such empty pages are listed in the synchronization report. The Onboarding (Transitions) administrator has two options.

- If the page is not complex, the administrator can simply recreate the page in Taleo Onboarding (Transitions) using supported fields.
- If removing the obsolete fields from the Legacy Onboarding form is feasible, the administrator can substitute them with supported fields, change the value of the Legacy Onboarding form's Code field and perform a new synchronization. The sync tool will then copy the form with the supported fields to Taleo Onboarding (Transitions) as a new form.

### Placeholders from Demographic and Biographical Fields

Taleo Recruiting can capture many fields for tracking diversity and EEO information. Taleo Legacy Onboarding possesses its own independent version of these fields, which can be updated on Legacy Onboarding forms. Taleo Onboarding (Transitions) cannot copy these fields, however, which means the fields cannot be updated or displayed in onboarding forms. Wherever

one of these fields appears in a Legacy Onboarding form, the sync tool replaces it with the newly-created UDF placeholder in the onboarding form:

- A single Recruiting Candidate UDF named “UDF\_TEXT\_PlaceHolder” replaces all Legacy Onboarding text fields such as Citizenship, Maiden Name, Military Status, and Ethnicity.
- A single Recruiting Candidate UDF named “UDF\_DATE\_PlaceHolder” replaces all Legacy Onboarding date fields such as Visa Valid From and Visa Valid To.
- A single Recruiting Candidate UDF named “UDF\_NUMBER\_PlaceHolder” replaces all Legacy Onboarding numeric fields such as Age, Height, and Weight.
- A single Recruiting Candidate UDF named “UDF\_LIST\_PlaceHolder” replaces all Legacy Onboarding list-based fields such as Marital Status, Height Unit of Measure, and Weight Unit of Measure.

All such replacements are listed in the synchronization report. The Onboarding (Transitions) administrator replaces these temporary placeholders with the correct fields or removes the placeholders from the onboarding forms. Because a single placeholder can be substituted for multiple different obsolete fields, it is important to replace or remove the placeholders when the synchronization process is finished. If a placeholder is left as is and a single field is updated once in an onboarding form, the value will be reproduced in every other place the placeholder is used, where different field values would be expected.

#### Placeholders for Address Fields

Taleo Legacy Onboarding can capture many current address fields including the two multi-row tables named “Secondary Addresses” and “Previous Addresses”. Taleo Recruiting supports only the current address and one multi-row table named “Address Book History”. For this reason, the synchronization process replaces any unsupported Legacy Onboarding address fields in forms copied to Taleo Onboarding (Transitions) with placeholders.

- In the current address area, the single Recruiting UDF named “UDF\_TEXT\_PlaceHolder” replaces Legacy Onboarding fields such as PostOfficeBox and Unit.
- In the current address area, the single Recruiting UDF named “UDF\_DATE\_PlaceHolder” replaces Legacy Onboarding fields such as CurrentAddressFromDate and CurrentAddressToDate.
- In the Secondary Addresses and Previous Addresses tables, the single Recruiting field “StreetAddressLine2” replaces Legacy Onboarding fields such as PostOfficeBox and Unit. This field retains its normal meaning, and also used like a placeholder here.

All such replacements are listed in the synchronization report. The Onboarding (Transitions) administrator replaces these temporary placeholders with the correct fields or removes the placeholders from the onboarding forms. Because a single placeholder can be substituted for multiple different obsolete fields, it is important to replace or remove the placeholders when the synchronization process is finished. If a placeholder is left as is and a single field is updated once in an onboarding form, the value will be reproduced in every other place the placeholder is used, where different field values would be expected. Furthermore, the Onboarding (Transitions) administrator should reconsider the new storage of address tables.

#### Errors from Old Forms

In rare cases, the sync tool can generate an error: the process status changes from “Running” to “ERROR” and the tool stops working. An error can occur when a Legacy Onboarding form is too old to be processed correctly or when a form was created in a very old version of Legacy Onboarding and was not modified until now.

The name of the form is included in the error message. The system administrator can resolve the situation as follows:

- In Taleo Legacy Onboarding Administration, open the Legacy Onboarding form causing the error.
- Revise the form by removing a column from each multi-row table on the form.
- Save the form using the same name and code.

- In Taleo Onboarding (Transitions), start a new synchronization.

Four new forms have been provided in Taleo Onboarding (Transitions) for the sole purpose of avoiding this type of error. The four forms are in Draft status and their codes match the codes of four Legacy Onboarding forms that are very likely to be unchanged since an old version of Legacy Onboarding. Because the codes of the four Legacy Onboarding forms match the codes of the new forms, the sync tool skips them thus avoiding the error.

These four "built-in" onboarding forms are not listed in the synchronization report. It is recommended that the Onboarding (Transitions) administrator take action in some way:

- If any of the "built-in" forms will be used in Taleo Onboarding (Transitions), the Onboarding (Transitions) administrator can change their corresponding status from Draft to Active.
- If any of the "built-in" forms were customized in Taleo Legacy Onboarding, the changes will not be reproduced in Taleo Onboarding (Transitions) because the forms will be deliberately skipped during synchronization. The system administrator can manually customize a "built-in form" in Onboarding (Transitions) and then change its status from Draft to Active.
- If none of the "built-in" forms will be used in Taleo Onboarding (Transitions), the Onboarding (Transitions) administrator can delete them because they have Draft status. This can be done only after the last synchronization is performed; otherwise the error mentioned earlier will occur when the synchronization is run again.

## Message Templates - Synchronization

The Onboarding (Transitions) sync tool copies message templates and their file attachments in Taleo Legacy Onboarding to Taleo Onboarding (Transitions).

All the message templates originally created and configured in Taleo Legacy Onboarding are also in Taleo Onboarding (Transitions) following synchronization. The formatting, graphics and text in any Taleo Legacy Onboarding template are identical to those in the corresponding template in Taleo Onboarding (Transitions). A template's status in Taleo Onboarding (Transitions) following synchronization is the same as the status in the other product.

The synchronization process reproduces perfectly the majority of Taleo Legacy Onboarding variables in Taleo Onboarding (Transitions). This means that after Legacy Onboarding message templates that include variables are copied, the corresponding Taleo Onboarding (Transitions) templates include variables for Recruiting's candidate, offer, requisition and user-defined fields. A few Legacy Onboarding variables are not supported in Onboarding (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 Onboarding (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 Legacy Onboarding message templates. If Legacy Onboarding administrators changed the default color, font, size, etc. of text for variables, the equivalent Onboarding (Transitions) variables are not produced in the corresponding Taleo Onboarding (Transitions) message templates. Consequently, the variable values will not be displayed in Onboarding (Transitions) messages that include such variables. If an organization had Legacy Onboarding message templates that included formatted variables, it is important that Onboarding

(Transitions) administrators examine the corresponding Onboarding (Transitions) message templates following synchronization and manually replace any remaining Legacy Onboarding variables with the correct Onboarding (Transitions) variables.

The following message templates are in Taleo Onboarding (Transitions) by default so the corresponding templates in Taleo Legacy Onboarding are not copied to Taleo Onboarding (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 Legacy Onboarding and wish to reproduce your changes in Taleo Onboarding (Transitions), you will have to edit the corresponding templates in Taleo Onboarding (Transitions).

The following message templates are copied to Taleo Onboarding (Transitions) but because they contain the URL that leads to the New Hire Portal in Legacy Onboarding they have no useful purpose and you should assign them Inactive status in Taleo Onboarding (Transitions).

The following message templates in Legacy Onboarding were used to help new hires manage their Legacy Onboarding passwords. These message templates contained variables that are not supported in Taleo Onboarding (Transitions), which uses candidates' career section passwords instead. The Legacy Onboarding message templates are copied to Taleo Onboarding (Transitions) only because certain tasks in processes might depend on them. It is the Onboarding (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 Onboarding (Transitions) synchronization tool copies tasks in Taleo Legacy Onboarding to Taleo Onboarding (Transitions).

All tasks originally configured in Taleo Legacy Onboarding also exist in Taleo Onboarding (Transitions) after synchronization. The code, guidelines, status, notifications, and reminders related to each Legacy Onboarding task are recreated in the corresponding Onboarding (Transitions) task. Usually the name, action type, and related source of each Legacy Onboarding task are also preserved in Onboarding (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](#).

## Tasks - Synchronization - Exceptions

During synchronization, exceptions can occur regarding external service tasks and E-Verify system tasks.

External Service Tasks



External service tasks communicate with third-party service providers known as Oracle Validated Integration (OVI) partners (formerly referred to as Passport partners). Whenever the synchronization process encounters a Taleo Legacy Onboarding external service task, it creates a placeholder task in Taleo Onboarding (Transitions) and adds an entry to the synchronization report. This is because Taleo Onboarding (Transitions) partners need to be validated differently from Taleo Legacy Onboarding partners and tasks might require quite different configurations. No automated synchronization process can convert a Legacy Onboarding partner to an Onboarding (Transitions) partner.

All external service tasks in Taleo Legacy Onboarding are replaced by a placeholder task named “Placeholder Manual Task” in Taleo Onboarding (Transitions). This placeholder task has Draft status. The Onboarding (Transitions) administrator examines the whole area of third-party services following synchronization to determine which partners are wanted and available, and then configures the corresponding tasks. The placeholder task can be deleted after these decisions are made.

#### Obsolete System Tasks for E-Verify

Taleo Legacy Onboarding no longer supports the U.S. E-Verify process (although several external service partners currently support it within Taleo Legacy Onboarding and Taleo Onboarding (Transitions)). Consequently, synchronization does not copy Legacy Onboarding system tasks in this area to Taleo Onboarding (Transitions). Instead, such tasks are converted into a single placeholder task named “Placeholder Manual Task” in Taleo Onboarding (Transitions). This is a manual task and has Draft status.

This manual task is listed in the synchronization report. The Onboarding (Transitions) administrator examines the whole area of U.S. I-9 and E-Verify following synchronization to determine the appropriate actions to take. The manual task can be deleted after the actions are taken.

## Processes - Synchronization

The Taleo Onboarding (Transitions) synchronization tool copies processes from Taleo Legacy Onboarding to Taleo Onboarding (Transitions).

All processes that exist in Taleo Legacy Onboarding get automatically synchronized into Taleo Onboarding (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 Legacy Onboarding to Taleo Onboarding (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 Legacy Onboarding user types today have been granted the equivalent Onboarding (Transitions) user types, especially if Onboarding (Transitions) is not yet rolled out across the organization. Yet these same users are being copied from Legacy Onboarding task assignees to become Onboarding (Transitions) task assignees. (The user interface of Onboarding (Transitions) Administration does not permit selecting assignees who lack Onboarding (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 Onboarding (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 Legacy Onboarding and Taleo Onboarding (Transitions). If the sync tool encounters an Onboarding (Transitions) process with the same code as a Legacy Onboarding process, that process is considered “Existing” and it gets “Skipped” and not created in Taleo Onboarding (Transitions). If the sync tool identifies that no existing Onboarding (Transitions) processes have the

same code as a Legacy Onboarding process, that process is considered “Missing” and it gets “Added” in Taleo Onboarding (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 an Onboarding (Transitions) sub-process with a code will prevent the synchronization of a Legacy 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 Onboarding (Transitions) in the Draft status, regardless of their original status in Taleo Legacy 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 enabling the processes.
- Any unneeded processes can be deleted from Taleo Onboarding (Transitions), for instance if the Legacy 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 Onboarding (Transitions) process. This field does not exist in Taleo Legacy Onboarding, but in Taleo Onboarding (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 Onboarding (Transitions) Administrators

Though the Onboarding (Transitions) synchronization tool automates most tasks necessary to replicating Taleo Legacy Onboarding administrative objects in Taleo Onboarding (Transitions), Onboarding (Transitions) administrators have to perform other tasks themselves.

- *New Hire Portal*
- *External Services (OVI Partners)*
- *Custom Reports*
- *Integrations*

### New Hire Portal

Onboarding (Transitions) administrators create content pages—tasks that contain content that typically targets specific audiences and purposes.

The New Hire Portal, familiar to Taleo Legacy Onboarding customers, new hires and candidates, is not part of Taleo Onboarding (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 Legacy 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 Onboarding (Transitions) offers all of these possibilities and more. They are managed differently in Taleo Onboarding (Transitions), however, so they are not handled automatically by the sync tool: the Onboarding (Transitions) administrator recreates these elements.

### Branding

Career Section administrators already know how to configure branding, logos and color schemes. Because the Onboarding (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 Legacy Onboarding is not copied to Taleo Onboarding (Transitions).

### Welcome Information

Paragraphs and images are presented in the form of Content Pages in Taleo Onboarding (Transitions). The content pages are configured in Taleo Onboarding (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 Legacy Onboarding's New Hire Portal are not copied to Taleo Onboarding (Transitions).

### General and Personalized Documents

Each Legacy 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 Onboarding (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 Onboarding (Transitions) Content Pages.

### Links to Other Resources

Each Legacy Onboarding New Hire Portal contained a single "Links" section composed of URLs (links) that pointed to Web sites. In Taleo Onboarding (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 Onboarding (Transitions).

### Single Sign-on (SSO)

Single Sign-on (SSO) is not supported by the Legacy Onboarding New Hire Portal but it is supported by Taleo Career Section. Because the Onboarding (Transitions) Tasks tab is an integral part of career sections, if SSO is enabled in the customer's zone, employees who are already logged into a Taleo Enterprise product can access their pre-hire, onboarding, offboarding tasks, etc. in the career section without performing a second login procedure.

## External Services (OVI Partners)

Oracle Validated Integrations (OVI) partners offer a variety of services, including background check services, for Taleo Onboarding (Transitions).

Oracle Validated Integration (OVI) is a mechanism by which third-party vendors integrated their specialized services into Taleo Legacy Onboarding. OVI-enabled partners' Web pages and activities to exchange data fields related to tasks in each candidate's or new hire's Legacy Onboarding processes.

With regard to onboarding, 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 onboarding processes. The service categories available for Taleo Onboarding (Transitions) include three that were available for Taleo Legacy Onboarding:

- U.S. tax forms
- U.S. I-9 and EVerify
- U.S. WOTC and incentives management

A fourth category is available only for Taleo Onboarding (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.

Legacy Onboarding zones might have partners in the area named "Services" and Legacy Onboarding processes might have been configured to include external service tasks which "call" the services of the partners. The synchronization process does not recognize these services or any external service tasks originating from them.

For this reason, the Onboarding (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 Legacy Onboarding also desired for Taleo Onboarding (Transitions)? If the answer is "Yes", is the vendor an OVI partner for Onboarding (Transitions)? If the vendor is not an OVI partner for Onboarding (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 Onboarding (Transitions). Even if the vendor was the Taleo Legacy 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 Onboarding (Transitions)-specific service.

Once the service is available for Onboarding (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 Onboarding (Transitions) Configuration Guide. Such configurations are not copied by the sync tool (even if the Legacy Onboarding partner is also an OVI partner for Onboarding (Transitions)).

When the sync tool is run, any external service tasks in Taleo Legacy Onboarding are represented in Taleo Onboarding (Transitions) by placeholder tasks. These are "manual tasks", which are not related in any real sense with services from any OVI partner. The Onboarding (Transitions) administrator removes these manual tasks and creates and configures new external system tasks for OVI partner services for use in Onboarding (Transitions) processes. Please refer to the "Request External Service" section of the Onboarding (Transitions) Configuration Guide.

Occasionally a Legacy 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 a Legacy 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 Onboarding (Transitions), they are copied during synchronization and must be removed manually from the Onboarding (Transitions) processes that include them. Afterward, invitations and updates can be created in Onboarding (Transitions) using the new "Invitations" area. Please refer to the "Correspondence Versus Invitations" section in [External Services](#).

## Custom Reports

Full support for Taleo Onboarding (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 Onboarding (Transitions). Full OBI reporting support for Onboarding (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 Onboarding (Transitions) task completions and process statuses.

Until OBI becomes available, most candidate information in the Onboarding (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 Onboarding (Transitions). Consequently, the Business Objects solution for Taleo Recruiting can now encompass this aspect of Onboarding (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 Onboarding (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 Legacy Onboarding integration scripts for use with Taleo Onboarding (Transitions).

Importing and exporting data from the Taleo Legacy Onboarding has always been highly configurable using the powerful features in Taleo Connect Client (TCC) and Taleo Connect Broker (TCB). With the new Taleo Onboarding (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 Legacy Onboarding integration scripts so that they work with Taleo Onboarding (Transitions).

The following information should be considered before adapting any existing Legacy Onboarding integration scripts for use with Taleo Onboarding (Transitions):

- Where Taleo Legacy Onboarding managed a separate copy of many candidate, requisition and offer fields, Taleo Onboarding (Transitions) shares this information with Taleo Recruiting.
- Where Taleo Legacy Onboarding had no effect on the records in SmartOrg's list of users, Taleo Onboarding (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 Legacy 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

Legacy Onboarding after gathering additional data from Legacy Onboarding forms. With Taleo Onboarding (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 an Onboarding (Transitions) process is running.

Due to the automatic creation of Onboarding (Transitions)-type users in SmartOrg (See [SmartOrg Onboarding \(Transitions\) User Account Administration](#)), 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 customer configuration, and it can be explored with a consulting engagement with Oracle Taleo services.

# 18 Product Resource Administration

## Resource Administration

The Resource Administration feature allows system administrators to display the ID associated to text appearing on pages of Oracle Talent Acquisition Cloud (OTAC) products 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 Legacy Onboarding New Hire Portal, each 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>.

Product	Administration Menu
Career Section Administration	Career Section Administration Menu
Career Section	Career Section Administration Menu
Central Configuration	SmartOrg Administration Menu
Legacy Onboarding Administration	Legacy Onboarding Administration Menu
Legacy Onboarding WebTop	Legacy Onboarding Administration Menu
Onboarding (Transitions) Administration	Onboarding (Transitions) Administration Menu
Onboarding (Transitions) Center	Onboarding (Transitions) Administration Menu
Performance Administration	Performance Administration Menu
Performance	Performance Administration Menu
Recruiting Administration	Recruiting Administration Menu
Recruiting Center	Recruiting Administration Menu
SmartOrg	SmartOrg Administration Menu

## Configuration

User Type Permission	Description	Location
Manage resources	Provides users the ability to refresh resource values, to block resource value refresh, and to force the refresh of resource values.	Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management
Display resource identifiers	Provides users the ability to display resource IDs using the Show Identifier button in the Resource Administration page.	Configuration > [SmartOrg] Administration > User Types > Functional Domains > Configuration > Resource Management

 **Note:** To modify resource values for a specific product, user type permissions specific to the product are also required in some cases. To modify Onboarding (Transitions) resource values, for example, users require the permissions described in the previous table and at least one Onboarding (Transitions) permission, for example, "Manage Onboarding (Transitions) processes of all types".

## Displaying Resource Identifiers

The Display Resource Identifiers user type permission is required.

### **Configuration > [Product] Administration > Resource Administration**

1. Click Show Identifiers.
2. Close this window.

Starting with the next page that is displayed, resource IDs will be displayed in front of each element of the application.

## Hiding Resource Identifiers

Resource Identifiers must be displayed.

The Display Resource Identifiers user type permission is required.

### **Configuration > [Product] Administration > Resource Administration**

1. Click Hide Identifiers.
2. Close this window.

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

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

### **Configuration > [Product] Administration > Resource Administration**

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 TexTool application.

4. Click Refresh Values.
5. Close the window.

The latest value of the resources is displayed.

## Blocking Resource Value Refresh

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

### **Configuration > [Product] Administration > Resource Administration**

1. Click Block Refresh.
2. Add a comment.
3. Click Save.
4. Close the window.

It will no longer be possible to have the application reflect any changes applied to a value.

## Unblocking Resource Value Refresh

Two user type permissions are required: Manage Resources and Display Resource Identifiers.

### **Configuration > [Product] Administration > Resource Administration**

1. Click Unblock Refresh.
2. Close the window.

Any changes applied to resource values will be reflected in the application when refreshing the values.

